

VERSION CONTROL

A system of version control is useful for documents which are likely to be revised and redrafted and where you might need to keep a record of how the document changed over time. It is important that the system is applied systematically and consistently, particularly when a document is updated by different people and at different times. Version Control is usually beneficial for documents such as policies, procedures or regulations.

Benefits of Version Control

Using a system of Version Control means that:

- There is an 'audit trail' of how a document developed during the drafting process.
- You can be confident that you have the most up to date version of a document
- You can prove which documents were 'in force' at a particular date – this might be crucial for appeals processes, for example.
- You can confidently delete draft or redundant versions of documents.

Recommended Version Control System

The recommended version control system simply gives a number to each version of a document. For example:

'Strategic Plan Version 0.1.doc' 'Strategic Plan Version 0.2.doc'	Draft Versions
'Strategic Plan Version 1.0.doc'	First finalised version. At this stage the document has often been 'issued' for consultation (e.g. taken to a Committee)
'Strategic Plan Version 1.1.doc' 'Strategic Plan Version 1.2.doc'	Subsequent amendments to the first 'issued' version. These changes are often the result of consultation
'Strategic Plan Version 2.0.doc'	This indicates a major revamp. It could be when a document is being reviewed after a period of time, for example.

Version Control Tables

Some documents will require a Version Control table, which should be inserted at the beginning of the document. This approach may be necessary for documents where there are legal or regulatory reasons for having a clear audit trail of changes. It is also good practice for all policy documents.

For example:

Version	Date	Author	Changes
0.1	16/12/05	A. Jones	-
0.2	12/01/06	A. Jones	Comments of working group added
0.3	22/03/06	F. Brown	Amended to include change in procedure at section 2.1
1.0	03/04/06	B. Smith	Final draft approved by Committee

Managing Version Control Systems

Whichever type of system is adopted, it is important to follow some good practice rules to ensure it works effectively:-

- Remember that each time you redraft the document, you will need to copy it and then rename it with the appropriate version number. Be careful not to write over the previous version!
- As well as putting the version number or code at the end of the document title as you save it, you could also put the document name and file path as a footer on each page of the document.
- Once the document has been finalised, you may wish to set it as 'read-only' so that it cannot easily be altered. To do this, navigate to the document and then right-click on the name. Select 'Properties' and on the 'General' tab check the 'Read-only' box. Select 'Apply' and then 'OK'.
- When asking for comments on a document, consider sending colleagues the file path to the document rather than e-mailing it. This will help to prevent duplicate copies of the document being created and altered. To do this, simply cut and paste the file path into the text of the e-mail (e.g. Z://Policies/Strategic Plan 0.1.doc). This will only work if colleagues have the relevant permissions to access your shared area.

Keeping Drafts and Final Versions of Documents

Once you have finalised a document, a decision should be made on whether the drafts now need to be kept or whether they can be deleted.

Deleting Drafts

In the majority of cases it should be possible to delete drafts once the final version of a document has been agreed. This will help to reduce the confusion caused by the duplication of documents and means that there is less danger of earlier versions being

accidentally made available (or having to be provided under the Freedom of Information Act).

Keeping Drafts

You should keep drafts if you think it is necessary to preserve a record of the process of developing the document. This may be, for example to maintain a record of why particular changes were made or to help when the document is redeveloped at some future date.

Further Links

Further information can be found at:

<http://www.jiscinfonet.ac.uk/records-management/guide-for-administrators>

<http://www.recordsmanagement.ed.ac.uk/InfoStaff/RMstaff/VersionControl/VersionControl.htm>