



Records Management Guidance: Version Control

Why is version control important?

- Many documents will go through a number of different revisions before the final version is approved, and even after this, approved documents can also be regularly reviewed.
- It can be difficult to identify which is the most recent draft, especially if more than one person is working on the document or if you are sharing the document with others.
- The easiest way to control this is to allocate a unique version number to each revision.
- The version number should be in the file title that the document is saved as, and also on the document itself. A good place to put it is in the header or footer so that it appears on each page; you can also use this space on the document to add in the date of approval.

How to name documents

- The version number of a record should be indicated in its file name by the inclusion of 'V' followed by the 2 digit version number and, where applicable, 'Draft'.
- When numbering documents it is advisable to use a two part number to distinguish between drafts and final versions. For example 0.1 is the first draft version, 0.2 the second, and so on. Use 1.0 as the first version of the final document; once reviewed this would become 2.0. It also helps to add 'draft' or 'final' to the end of the file title.

e.g. 'University Retention Schedule v0.2 draft'

'University Retention Schedule v1.0 final'

'University Retention Schedule v1.1 draft'

- By using consistent file names across all versions of a document, efficient version control will be achieved. Consistent file names and structures across shared drives and paper filing will also facilitate access to information for all users.



How to monitor versions

- Once you have finished working on a version of a document it is advised that you make it read only. If someone else edits the document they will need to save it under a new title and as a new version. You can do this by left clicking on the document on the shared drive, going to properties, and then ticking 'read only'.
- Once you have created a final version it is recommended you save this as a pdf as this will prevent others from tampering with the document.
- Draft versions of documents should be kept for as long as is suggested in the [University Retention Schedule](#).
- Keep all the drafts together and ensure they are deleted at the correct time.
- It is also advisable to use a 'draft' watermark on all draft documents you are working on so that it is easy for other people viewing the document to identify it is not a final version.
- Good version control and naming will avoid duplication and will lead to master versions being kept clean and safe.

Storing and creating versions

- Be aware of any versions of documents that contain any personal or sensitive information – if they do, ensure access to them is restricted.
- Ensure information is stored in the correct location to avoid multiple versions of a document being produced. This will enable documents to be easily found by all users who need to access the information contained within them.

Having agreed policies on who is authorised to create files will ensure that only guidelines which are needed to facilitate work processes and procedures are formed. It will also prevent policies being formed with duplicated guidelines