

Good Practice Guidance

Version Control

What is version control?

Version control is the process by which different drafts and versions of a document or record are managed. It is a tool which tracks a series of draft documents, culminating in a final version. It provides an audit trail for the revision and update of these finalised versions.

Why do we need version control?

When drafting a new policy, new procedures, or a new publication (or updating an existing one) version control clearly identifies the development of the document. For example, it allows you to retain and identify the first draft that was submitted to a group for comment, the draft which was generated as a result of these comments, the versions that went back and forth for further comment, and the final version which was endorsed by the Senior Management Group, signed off by Head of Department, or made available to the public. This tool is also useful when working on a document with others; with version control, changes made by different individuals at different times can be clearly identified.

Having such versions identified and easily accessible allows the development of the document to be easily understood. It allows a return to previous versions to determine when decisions on content were made.

This is essential particularly when dealing with University policies and procedures and with communications with the public (guidance notes, application forms, etc). We can be sure of which procedure, application form or guidance note is in force at a particular time. Copies of older versions can be destroyed, which will save space and help avoid confusion.

How do I use version control?

Version control should be used where more than one version of a document exists, or where this is likely to be the case in the future.

Version control can be achieved by adding a number at the end of a file title. Each successive draft of a document is numbered sequentially from 0.1, 0.2, 0.3... until a finalised version is complete. This would be titled version 1.0. If version 1.0 is to be revised, drafts would be numbered as 1.1, 1.2, etc. until version 2.0 is complete.

In addition to adding the version number to the end of the file title, it should also be displayed within the document. The version number should appear on any document title page, and also in the header or footer of each page.

To ensure against the accidental loss of final versions of records, a read-only tag can also be applied. Should any changes to this document be made, the user will be prompted to save the file with a new title.

To add a read-only tag:

- In Windows Explorer or My Computer, right click on the document and select 'Properties';
- On the 'General' tab check the 'Read-only' box;
- Click 'Apply' and 'OK'.

Version control table

In some cases it may also be appropriate to use a version control table. This provides further details of what changes were made to a document, when, and by whom. A version control table is only required with formal University procedures, policies, strategies and project documentation. It can be added at the beginning or end of the document itself, or created as a separate document, and stored in the paper or electronic folder.

The version control table (see example below) must be updated each time a change is made to the document. It details:

- The new version number;
- The purpose of the change or the change itself;
- The person making the change;
- The date of the change.

Version Number	Purpose/Change	Author	Date
0.1	Initial draft – to line manager	James Smith, Personnel Officer	01/08/2006
0.2	Consultation draft – to working group	James Smith, Personnel Officer	25/08/2006
0.3	Second consultation draft – to working group	James Smith, Personnel Officer	19/09/2006
1.0	Final version – approved by CMT	James Smith, Personnel Officer	18/10/2006
1.1	Revision of paragraph 12 to clarify procedure	Elaine Brown, Personnel Officer	15/12/2006
1.2	Update of contact details	Mark Campbell, Personnel Assistant	01/03/2007

Microsoft Versioning Tool

Microsoft Word also offers a versioning tool. However, it is not advisable to use this function as it substantially increases the size of your document, which in turn wastes valuable server space.

Further advice

For further advice on version control or records and information management issues please contact the:

Records & Information Management Service

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