



Document Version Control – Good Practice Guidance

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CEGUI002

NHS Shetland Document Development Coversheet*

Name of document	Document Version Control – Good Practice Guidance		
Registration Reference Number	CEGUI002	New or Review?	New
Author	Sam Collier, Information Governance Officer		
Executive Lead	Chief Executive		

Proposed groups to present document to:		
IMWG	IGSG	eISG
CE	Corporate Services	IG Team

Date	Version	Group	Reason	Outcome
17/10/19	0.1	IG Team	Professional Opinion	MR
30/10/19	0.2	IMWG	C/S	n/a
05/11/19	0.2	IGSG	PO	PRO
21/11/19	0.2	eISG	FA	A

Examples of reasons for presenting to the group	Examples of outcomes following meeting
<ul style="list-style-type: none"> Professional input required re: content (PI) 	<ul style="list-style-type: none"> Significant changes to content required – refer to Executive Lead for guidance (SC)
<ul style="list-style-type: none"> Professional opinion on content (PO) 	<ul style="list-style-type: none"> To amend content & re-submit to group (AC&R)
<ul style="list-style-type: none"> General comments/suggestions (C/S) 	<ul style="list-style-type: none"> For minor revisions (e.g. format/layout) – no need to re-submit to group (MR)
<ul style="list-style-type: none"> For information only (FIO) 	<ul style="list-style-type: none"> Recommend proceeding to next stage (PRO)
<ul style="list-style-type: none"> For proofing/formatting (PF) 	<ul style="list-style-type: none"> For upload to Intranet (INT)
<ul style="list-style-type: none"> Final Approval (FA) 	<ul style="list-style-type: none"> Approved (A) or Not Approved, revisions required (NARR)

***To be attached to the document under development/review and presented to the relevant group**

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1. Introduction – 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.

2. Why do we need version control?

When drafting new NHS Shetland official documents and publications (or updating existing ones) 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 review and comment, the draft which was generated as a result of this review, 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. Version control is also useful when working on a document with others, as changes made by different individuals at different times can be clearly identified.

Having such versions identified and accessible allows for easier understanding of the development of the document. If previous versions are saved, correctly managed version control will show when decisions on content were made and will allow a return to any previous version of the document.

This is essential particularly when referencing NHS Shetland policies and procedures in communications with the public. We can be sure of which policy, procedure, application form, etc. was in force at any given time. Copies of older versions can be archived separately to help avoid confusion while remaining available if required.

This document should be read in conjunction with the most recent version of the Framework for Document Development.

3. 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. This will be the case for nearly all official NHS Shetland documents.

The version of any document is indicated by adding a number at the end of a file title. The numbering starts at 0.1 for the first draft and continues 0.2, 0.3, etc. until a final version is complete and approved; this final version would be numbered as version 1.0. If revisions are made to version 1.0, the drafts would be numbered as 1.1, 1.2, etc. until version 2.0 is complete and approved.

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 the document's title page and also in the footer of each page.

To protect against the accidental loss of final, approved versions of documents, a read-only tag can also be applied to the file. Should any changes to this document be made, the user would then 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'

4. Document Development Coversheet and Document Change Table

Document Development Coversheet

All NHS Shetland official documents should include a Document Development Coversheet (Appendix 1) from the very start of their development.

The coversheet is used to record the groups to which the document is presented, as well as the outcome of meetings or decisions made regarding the document:

Proposed groups to present document to:				

Date	Version	Group	Reason	Outcome

Figure 1 – Section of the Document Development Coversheet

Document Change Table

The second section of the Document Development Coversheet is the Document Change Table, shown below:

Please record details of any changes made to the document in the table below

Date	Record of changes made to document

Figure 2 – Section of the Document Change Table

This table should contain details of the changes made with each new version of the document. Each entry in the table should include the date of the changes, the old and new version numbers, a summary of the specific changes made and the job title / team or department name of those responsible for the changes.

5. Note on Microsoft versioning tool

Some versions of Microsoft Word offer a versioning tool. However, it is not advisable to use this function as:

- a) It is not available in some of the versions of Microsoft Word that are used in NHS Shetland.
- b) The function also substantially increases the size of your document, which in turn wastes valuable server space.

Appendix 1 – Document Development Coversheet

Name of document			
Registration Reference Number		New or Review?	
Author			
Executive Lead			

Proposed groups to present document to:		

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