Snippet #151
Document Version Control

Many hands may make light work, but they can also may make a snarly mess when lots of people put their hands on the same document. Group documents must be handled differently than individual documents.

A document that is only going to be used by one person is open to any type of styles or formatting. Special paragraph styles? Enjoy. Wacky margins? Have fun! So long as no one else ever has to do anything with your document, there's no problem.

Group documents – that is, documents that pass through several hands while on the journey from draft to "final" or those that are updated regularly (like bylaws and policies) – are vulnerable to little gremlins that wreak havoc with everyone who touches the document. Have you ever seen several spaces in odd places? That's space bar syndrome – the art of making it "look" right while injecting a nasty mess below the surface, because someone didn't understand how the document was styled or how to use the tab key.

Think of a document in process as a journey. We start with the first draft, which we label version 1.0. It doesn't matter how many versions we use along the way, our goal is to get input from others and arrive at the "final" version. (But we never use the word "final" because there's always something that crops up and then the most recent version becomes final1, final2, final-final, and really-truly-final.) Along that road, we pick up changes.

The person who holds version control keeps the process going forward in a straight line so that it doesn't branch off into two or more documents with different changes applied. No one else changes the version number on the document. This methodology also allows for a complete trail of edits, because all of the individual changes are identified. When the edits are collected, the person with version control applies the suggested changes and creates a new document with a new version number. For example, when the change is very minor, it might only go up by one tenth – such as from version 2.0 to 2.1. The number signals the significance of the change. When more significant edits have been made, the version number moves up by one, such as from version 3.0 to version 4.0. This allows for acceptance of any changes, thus starting from a clean document, and preserves the trail that the document has blazed to reach that point. Later, if you want to find out where a change came from, you can check the versions to see.

Another important part of version control is the filename. Setting up a filename protocol is important when working with group documents. If you want to be able to sort your files by date, you have to put the year first: 160701 stands for July 1, 2016. If you put the month first, January will be followed by October: 01, 10, 11, 12, 02, 03 and so on up to 09. Once the filename has been generated, subsequent reviewers should *not* change it, except to add their initials at the end (EMW edits) when they return the draft with their edits. By the same token, if there is an email string that has been started to circulate the document, use that subject line only for that purpose; don't send other emails that are not part of the chain. They will be nasty to file and difficult to find later.

Watch out for group backtracking – just because someone suggested an edit doesn't mean the group has accepted it. Each version starts with the accepted changes; a conference call with screen sharing should be held to accept or reject suggestions by individuals.

Using simple file and email naming protocols and making one person the version controller will maintain document integrity, prevent loss of accepted changes, and save hours of time trying to untangle the mess that many hands can make.