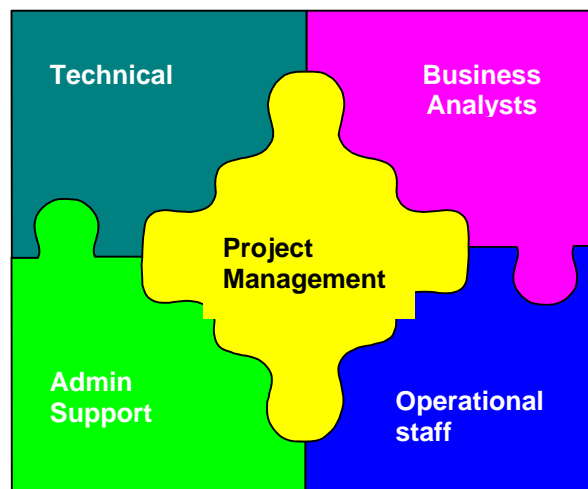


# **Group Working**

## Office Standards



**MIS Development Unit**

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**Document Control**

**Change Record**

Date	Author	Version	Change Reference
6/7/2002	Louise Rayner	V01	
9/12/2002	Gill Ferrell	V02	Updated 4.1 current directories

## **Standards for Group Working**

### **Overview**

The Group Working office standard applies to naming shared files, copying files, assigning version numbers to files, and saving files in the most appropriate location. The standard also applies to group working in Word, and includes notes on using the Track Changes function in Word. All files on the network drive are defined as 'shared files'. The access rights define who shares a file.

All project related data should be stored on the network drive in no circumstances should data be saved to C: drives as in the event of machine failure this material will not be backed up.

Documents and other materials for circulation e.g. Powerpoint presentations should generally follow the house style - Arial 10pt typeface, numbered pages and section headings. Templates exist for most types of document and presentation (S:\Admin Templates). Should you identify a need for additional templates please contact the Project Administrator.

All files should contain the full filename and path in the document footer to enable easy identification of printed versions.

### **1. Naming Files**

#### **1.1 Electronic Files relating to time specific and recurring events.**

Specifically meetings, events, transactional system reports, file back-ups occurring on a daily, weekly, monthly or similar basis

Convention: [yyyy mm dd] [Event/Description]

NB. This allows files to be displayed chronologically whereas date formats such as May 2002 will not display chronologically e.g. December 2002 will appear before May.

#### **Example**

A. Notes from an IT committee meeting and HR Briefing

Filename: 2000 10 13 IT Committee Meeting

Filename 2000 10 13 HR Briefing

If the directory specifies the meeting or event type then only the date in the format yyyy mm dd is required. eg. 2000 10 13

B. Report showing snapshot from the finance system of project finances

Filename: 2000 10 13 Cost Centre Report 100394

Exceptionally for some transactional reports it may be necessary to include the time.

C. File back ups

Filename: 2000 10 12 S drive back up

#### **1.2 Electronic files relating to infrequently recurring events**

Specifically including budget preparation, academic programme/year events, plans/strategies

Convention [Description][Year]

#### **Example**

D. Annual MIS Development budget

Filename: Budget 99-00

### 1.3 Naming Conventions for All Electronic Files

Existing agreed principles are 'Filing by subject rather than file type or personal name and directory structures of no more than 2-3 layers with greater reliance on meaningful file names to identify data'. This means we will not have files named John1, John2 etc

Therefore do:

- 4 Give a good description of the file subject (up to 255 characters long).
- 4 Use the title of a report/document where appropriate.
- 4 Ensure the filename is included in the document/spreadsheet footer.
- 4 Type the filename using title case.
- 5 Avoid including the name of a permanent directory in the filename.
- 5 Avoid including initials, abbreviation or any code.
- 5 Avoid using the word 'draft' as the first word of the filename.  
Example use ITT draft rather than Draft ITT as there are many draft files.
- 5 Avoid overwriting filenames or using very similar names to existing files.

## 2. Copying Files

*Scenario:* A copy is needed to back up a project critical file, or access rights prevent adequate sharing.

*Solution:* The Project Administrator will create frequent back ups to CD on request, create a temporary (state period required) sub directory in working files with the necessary access restrictions, or review overall access rights if sharing continues to be a problem.

**Only in exceptional cases would an exact copy need to be made of a file.**

Convention: [File subject] [version] – Copy [2 digit copy number]

Example

E. Creating the first exact copy of version 44 of the budget 2000/2001

Filename: Budget 00-01 v44 - Copy 01

## 3. Versioning Files

Versioning files is recommended for important files or where an iterative process is necessary.

Convention: [Subject] v [two digit version number]

Example

F. Naming version 3 of the Assets spreadsheet

Filename: Assets v03

NB. For versions 0 to 9 the zero is important in maintaining chronological order in file listings and easier identification of most up to date version. For files with more than 99 iterations, delete or archive the first 50 versions, and continue numbering.

#### 4. Saving Files

Ensure the file is saved in the most appropriate location by referring to the description of directory locations listed. Where files need to be saved to locations with read only access e-mail the Project Administrator with the current and intended locations. The Project Administrator should also be contacted when files have no appropriate location.

##### 4.1 Description of current directory locations.

###### Working Files

Administration	<i>Mainly used by Project Support. Useful procedures and desktop support info</i>
Communication	<i>Briefings, presentations and material for public information</i>
Controls	<i>Issues, Risks, Changes, Acceptance, Proj Mgt procedures &amp; resource tracking</i>
Finance	<i>Mainly used by Project Support</i>
Meetings	<i>All regular groups &amp; committees as well as important ad hoc meetings</i>
Planning	<i>Project plans and detailed workplans</i>
Quality	<i>Evaluation and audits</i>
Related Projects	<i>External projects - completed &amp; ongoing</i>
Staff	<i>Recruitment info, induction &amp; training materials and holiday and absence records</i>
Technical	<i>Team files</i>
Templates	<i>Admin templates</i>
Web Site Development	<i>MISDU website material</i>

#### 5. Making comments/Suggesting Changes in Word documents

Using the Tracking Option function in Word is the standard for highlighting comments and changes suggested by different team members.

Avoid using tracking options for documents circulated outside of the project team.

**If tracking has been enabled on a document for external distribution the document text must be cut and pasted into a new file.** *Failure to do this will enable anyone receiving the document or accessing via the web site to review the original document and all subsequent changes whether accepted or rejected by the author.*

For documents on the web site, please confirm to the web site developer that the document is suitable for publication.

## **5.1 Notes on using Track Changes options in Word**

### **5.1.1 Routing documents for comment**

Select File/Send To/Routing Recipient

Add names of recipients.

Select whether receive in order specified or at same time.

Select Route

The recipient will receive the following message:

[your message]

The attached document has a routing slip. When you are done reviewing this document, choose Next Routing Recipient from the Microsoft Word Send To menu on the File menu to continue the routing.

Additional recipients can be added during routing

The router will receive the following status report via e-mail

[Name] routed the document [Filename] to [Name]

### **5.1.2 To suggest changes to a document received**

Select Tools/Track Changes/Highlight Changes

Select Track Changes while editing

Select OK

Type changes including insertion and deletion of text.

### **5.1.3 To accept/reject changes to a document.**

Select Tools/Track Changes/Accept or Reject Changes ...

Select find.

Select Accept or Reject by change or Accept or Reject All Changes

Different authors are indicated by different text colour. Hovering the mouse over the change indicates the author, date/time and type of change

To add text without highlights

Select Tools/Track Changes/Highlight Changes

Deselect Track Changes while editing

### **5.1.4 To insert a comment without changing text**

Select Insert/Comment

Type comment. Select Close.

The text at the comment insertion point will be highlighted. Comments can be read by hovering the mouse over the highlighted text. Right click to edit or delete comment.