1.   **Control of Documents**

The group has a number of documents such as Policies which define what the Group does.

These documents are revised regularly and the latest versions are posted to the website where they can be seen by the public.

These documents should be **controlled** ie there should be a procedure for reviewing, editing and publishing so that:

    a) The latest version is revised
    b) The revisions are approved by the Trustees
    c) Documents posted to the website have a consistent format

The roles that are involved are:

- Document Originator/Editor – provides the words – can be any Trustee
- Document Manager – controls the document appearance, version and filing – currently JRM
- Webmaster – controls the publication of the document on the website – currently Jenni Preston

2.   **Control Mechanisms**

Documents may be originated or edited by any of the current Trustees. A document is originated and edited as a Word document. The document is finally reviewed and formally accepted by the Trustees.

The approved document is passed to the Document Manager who makes cosmetic changes to ensure the format of the document conforms to the current standard. This includes the choice of font, margins, punctuation, headers and footers etc

The Document Manager files the final version to the website where it is saved in a source control package (it is proposed to use folders   of files distinguished by a version number in the filename). Previous versions may be retrieved from the package if required.

The Document Manager converts the final version to a PDF format and passes it to the Webmaster for publication.

When a document is to be revised the Trustees appoint a Document Editor (usually the Originator of the document) and the Document Manager provides the latest version as a Word file. It is important that the Document Editor does not use a version that is already in their possession.

3.   **Document Editing**

The document should be edited in such a way that the Trustees, who will proofread and approve the document, can see what has been changed.

Where small changes are involved then the Document Editor should switch on Review->Track Changes in the Word program.

Where changes are greater then the replacement paragraph could be highlighted in a different colour.

Where the whole document changes then the Document Editor should inform the Trustees that the document is a replacement for the previous version and that the whole document should be read.

4.   Source Control

Documents can be transferred backwards and forwards by the cPanel File Manager or by a third party FTP application.

Documents are held on the HSP Group server in a dedicated directory

 \ Documents

The Documents directories store only .docx Word files.

Each document has its own subdirectory to hold the versions of the document eg:

 \ Documents \ Policies-Expenses \ HSP-Policies-Expenses-vn5.docx

Access to the Documents directory is limited to those who have access to the website cPanel (access codes are lodged with the Secretary).

The Document Manager has the responsibility to recover the latest document on request.

On receipt of a new approved document the Document Manager ensures the appropriate format is applied and saves the document with the next version number eg:

 \ Documents \ Policies-Expenses \ HSP-Policies-Expenses-**vn6**.docx

The Document Manager then converts the document to the PDF format and passes it to the Webmaster for posting on the website for public access.

[End of Document]

Next review: 2023