

Records Management in Museums – version control

If you are working on a document over time and possibly with the involvement of other people, you will need to distinguish between different versions. This will ensure that:

- Everyone can identify which document is the latest version
- Significant changes to the document are recorded, and its development can be tracked
- You can revert to a previous version if needed

Version control options

For most working documents, simply using **version numbers** in file names and headers or footers will be sufficient to identify different iterations. Depending on your museum's naming conventions:

- when the document is in draft form, add 'Draft' to its file name, eg. '**CaptionGuidelinesDraft.doc**'.
- when the document is finalised, remove 'Draft' and add '**V01**'. Subsequent changes will be recorded as '**V01Updated**', '**..V02Draft**', '**..V02**', '**..V02Updated**', '**..V03Draft**' etc.

Minor corrections and updates will be '**...Updated**'

Major revisions to policy and procedure will be the next **version**

For **high level** and **strategic** documents such as museum-wide policies, you may wish to use a **version control table** (example below) at the end of your document, to record more detail on why changes were made.

Version Number	Purpose / Changes	Author	Date
Draft	For approval by Senior Management Team	Bob Knight	01/08/2010
V01	Approved by Senior Management Team with minor corrections to spelling / layout	Bob Knight	15/09/2010
V02Draft	For approval by Senior Management Team – major revision of Section 3: HR procedure	Sue Davis	1/11/2010
V02	Approved by Senior Management Team	Sue Davis	17/11/2010
V02Updated	Minor changes: shared drive document links	Bob Knight	14/01/2011

What to do next

Read the fact sheets **Records Management in Museums – naming your files and folders** and **Records Management in Museums – what to keep?** for related guidance.

Find out if there is someone in your museum with responsibility for records management, or if someone is doing work in that area. Talk to them and other colleagues about good version control practice you can build on, and things that need improving.

Visit www.museuminfo-records.org.uk for more detailed guidance on records management in museums, interactive training and other resources to adapt and use in your museum free of charge.