

Version Control

Intro

It's important that some documents are version controlled, but the traditional MS Office method and the Google Workspace method are vastly different. This guide will show you how to do version control the GW way.

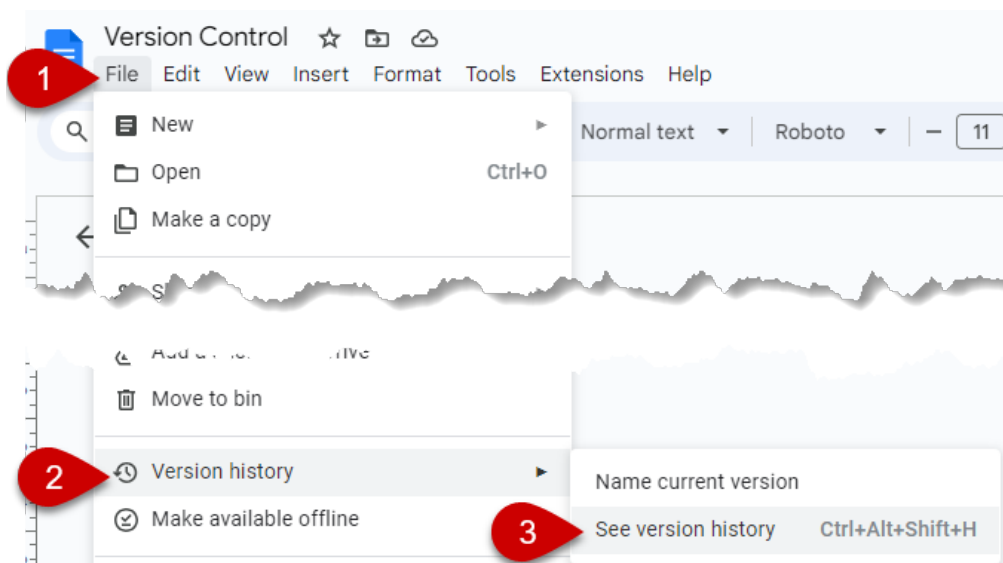
Why change?

In traditional MS Office, when a new version is required, you take a copy of the original and rename it. You repeat this each time a new version is required and over time, a lot of versions build up. Sometimes the version you finally issue needs to have no version number in the title, so you remove it, and that can lead to confusion, with people mistaking the final version for the first draft. Unlikely? It happened to us during the CIO conversion process and caused a flurry of 'excitement'.

Versions - the GW way

From the moment a document is created, every editing session is tracked and every change is recorded. This is automatic - nothing needs to be set. This means that you can view the document at any stage of its lifecycle, you can restore that earlier version or you can extract a copy of how it was at that point in time should you need to. If you restore an earlier version but change your mind, you can restore the version just before the abortive restore. Finally you can assign a name to any version

View the version history



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Available actions

1. Editing sessions are group together by date and time and you can expand a group using this symbol to see the individual restore points that are available
2. Click on a restore point and the changes made during that session will be highlighted in the document. Clicking the 3 dot menu will reveal these options:
3. **Restore this version** does exactly that. This version will be restored and the previous live version will become a restore point
4. **Name this version**, allows you to assign a name to a significant version. E.g. 'First Public Draft' or 'Version 1'
5. **Make a copy** allows you to extract a copy should you need to do so

There is no limit to the number of versions you can have for a single document.

For example, the Marketing & Comms group has a document where they gather content for upcoming newsletters. Content is added and removed continuously by team members. The document is three years old and they could look at any of the hundreds of versions there have been. We could produce hundreds of individual documents instead but that would be a much harder way to work

The screenshot shows a 'Version history' interface. At the top, there is a dropdown menu labeled 'All versions' with a red callout '6' pointing to it. Below this, a section titled 'TODAY' contains a list of versions. The first version is '29 August, 13:07' with a red callout '1' pointing to a dropdown arrow. Below it, the text 'Current version' and 'Paul Barrett' is shown. The second version is '29 August, 13:05' with a red callout '2' pointing to a three-dot menu icon. A context menu is open over this version, with three options: 'Restore this version' (callout '3'), 'Name this version' (callout '4'), and 'Make a copy' (callout '5'). Below this, several other versions are listed, each with a red callout '5' pointing to the three-dot menu icon. The versions listed are: '29 August, 13:02', '29 August, 13:02', '29 August, 13:01', '29 August, 13:00', '29 August, 12:58', '29 August, 12:54', and '29 August, 12:52', all attributed to 'Paul Barrett'.

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Creating a document of record

GW versioning is powerful and flexible but you may feel the need to produce a master copy of key versions for audit purposes. The simple solution to that is to download a PDF of the relevant version. You can then embed the version number in the filename with impunity, because this is a static version - a snapshot at a moment in time

Merging external content

Occasionally we will encounter situations where an external party cannot or will not use GW to access and edit a document. They insist on having their own version in MS Office. One such situation was with solicitors and the CIO Constitution

At that point, you will have to download an MS Office version docx, xlsx, etc to share with them. Once that has been done you need to decide what to do with the current GW version. There is little point making further edits to it so it would be prudent to make sure it's moved to a non editable space such as My Drive

But what do you do when you receive a modified version back from the external party?

The answer is very simple

1. Open the **MS Office** document, select everything and copy it (Ctrl+A followed by Ctrl+C)
2. Open the **GW version** of the document, select everything and paste the MS Office version into it (Ctrl+A followed by Ctrl+V)
3. The previous GW version will become a previous version and the pasted MS Office version will become the current version.
4. Now name the incoming version
5. If appropriate, move the document back to a shared space so internal collaboration can begin again.

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