

## Document Control Procedure

The simple document control procedure for Knellwood is as follows:

- The author produces a draft document in Word (i.e. with the file extension .docx).
- It is sent out for review to **all** appropriate people. This fixes typos, grammatical errors and formatting problems, and avoids using precious time, e.g. in meetings to check spelling mistakes.
- Comments are sent to the author, (by a specified date), who updates the document accordingly.
- When all updates have been completed, the Word document is converted to pdf format and uploaded to the portal as an authorised version.
- If any further changes are discovered subsequently, these are incorporated, and the updated file will replace the original version on the portal.

This means that only the *latest authorised* versions of all documents are on the portal (except Board meeting minutes – see below\*).

Documents cannot be authorised until they have been reviewed by the appropriate people, and all agreed changes have been made.

Excel files will be uploaded with .xlsx or .xlsm extensions.

If further updates are required to Excel files, ***the version on the portal*** must be copied to a local area before changes are made, and then submitted for review and authorisation. Files must not be edited from a copy in someone's local area, as this will probably not be the latest version.

(The exception to this is the Knellwood letterhead, which can be downloaded and held locally for use on all formal documents and letters. It must appear in the top left corner of the first page only, and can be re-sized as required.)

The person in charge of uploads will have the latest Word versions of all pdf documents, so if changes are made, he/she can update the correct version of the file before replacing it on the portal as a pdf.

### **\*Board Meeting Minutes**

These have a slightly different procedure from other documents.

They are produced, reviewed by the Chair and uploaded to the portal in draft (pdf) format. An email is then sent to all Board members informing them that the file is on the website, and requesting any further review comments to be sent to the author within 14 days. If no comments are received, it will be assumed that the minutes are correct. Once all agreed changes have been made, the updated version will replace the draft.