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Version Control Guidelines

Version Control is a cornerstone of effective document and software management. It is a system that allows multiple users to manage, track, and make changes to a set of documents or software code over time. It is critical for ensuring that modifications are organized, and that changes can be tracked, compared, and reverted if necessary. Lets review the 3 sources I have found that describes guidelines for version control.   
Source 1:  
[5 Document Version Control Best Practices for 2025](https://www.imageapi.com/blog/version-control)  
This one discusses best practices for document version control focusing on keeping files organized and improving collaboration in a digital environment. It touches on 5 key practices:  
Adopt a version control system- helps keep track of changes reducing errors and providing simplification.  
Use meaningful versioning-proper naming making it easy to identify different versions of a document.

Implement access control-secure control over who can make changes to docs ensures the integrity of versioning  
Maintain detailed change log- record all changes providing transparency and accountability.  
Regularly review and consolidate version- this avoids cluttering the system with unnecessary version and keeps it streamlined.  
The blog emphasizes that these practices help prevent common pitfalls in managing document revisions, which can otherwise lead to confusion, errors, or security breaches in collaborative environments.

Source 2:

[Document Version Control: Examples and Best Practices | PM Study Circle](https://pmstudycircle.com/document-version-control/)  
This article introduces the concept of document version control within the project management domain, focusing on the process of systematically tracking changes in documents, such as project plans and reports.   
Key points:

Versioning process- Explains tag versions and how each doc revision should be recorded and labeled with a unique version number.

Importance of proper storage- Documents should be stored in secure, easily accessible locations allowing all to track changes.

Collaboration and communication- Version control tools enhances teamwork by keeping everyone informed of the latest changes and revisions.

Audit trail- Complete version history to verify authenticity of documents and track changes made over time.

This method ensures that every version of a document is traceable and can be referenced or reverted if needed, improving transparency in project management.

Source 3:  
[The Complete Guide to PowerBI Version Control: Master Your BI Development](https://www.ebiexperts.com/the-complete-guide-to-powerbi-version-control/)  
This guide to version control in Power BI, crucial for managing business intelligence (BI) reports and ensuring data integrity across organizations.  
Key points:

Centralized repository- Store all power BI reports in a shared version control system to facilitate easy tracking.

Environment management- Suggests using different environments for development, testing, and production to manage report versions better.

Track report changes- Maintain log of modifications so everyone is up to date.   
Automation of deployment-Automation helps streamline deployment of new versions of reports and ensures updates are consistent amongst peers.  
Collaboration- The articles stresses collaboration tools in Power BI for keeping multiple team members synchronized so no one is overwriting.

Key Differences

Focus Area: ImageAPI and PM Study Circle focus on general document version control, while EbiExperts specifically applies the concept to Power BI reports.

Automation: EbiExperts introduces automation as a significant factor in version control for BI tools, which is not mentioned in the other two sources.

Version Review: ImageAPI emphasizes the importance of reviewing older versions and consolidating them, while PM Study Circle focuses more on the audit trail for tracking changes.  
Guidelines That May Not Be Relevant Today

Overemphasis on Manual Versioning: PM Study Circle's focus on manual version tagging (e.g., v1.0, v1.1) may seem less relevant today, given the rise of automated version control systems (e.g., Git, integrated versioning tools in Power BI).

Traditional Document Storage: While storing documents securely remains important, advancements in cloud-based solutions and collaborative platforms (e.g., Google Docs, Microsoft Teams) make this guideline less critical if the tools already handle security and versioning automatically.

My List of Important Guidelines for Version Control

Centralized Repository  
A centralized version control system ensures that all documents or code are stored in one location, accessible by all collaborators, making version tracking easier and more organized.

Meaningful Versioning/ Automation

Clear, meaningful version numbers make it easy to identify the status of documents or projects. Automation tools also help streamline versioning processes, reducing human error and ensuring consistency across environments.

Change Logs and Audit Trails  
Documenting the history of changes helps trace problems back to their source, providing transparency and accountability.

Access Control and Permissions

By restricting who can make changes to documents, you ensure the integrity of the version control system and avoid unauthorized modifications that could disrupt workflows.

Collaboration Tools  
As remote work and team collaboration grow, version control systems integrated with collaboration tools (e.g., GitHub, Microsoft Teams, Power BI collaboration features) allow multiple users to work on the same documents without overwriting each other’s work.

Environment Management  
In specialized fields like Power BI, managing different environments (development, testing, production) ensures that only stable versions are released, reducing the risk of errors in final reports or products.

These guidelines are selected because they reflect modern trends in version control, including the importance of automated systems, centralized management, and enhanced collaboration tools, all of which improve efficiency and reduce errors in today’s work environments.