**Privacy Technologies for Financial Intelligence**

**Guidelines for Effectively Storing Project Information**

1. Organize information into clear sections.
   * Break up the document into logical sections such as:
     + Project Overview
     + Goals & Objectives
     + Team Roles & Responsibilities
     + Technical Architecture
     + Research Findings
     + Progress Updates
   * Use descriptive headers for each section so information is easy to find at a glance.
2. Provide a table of contents with links.
   * Include a table of contents at the beginning of the document.
   * Make each item in the table of contents a clickable link that jumps directly to that section.
   * This allows stakeholders to quickly navigate to the information most relevant to them.
3. Use consistent formatting throughout
   * Establish a consistent look and feel with fonts, colors, heading styles, etc.
   * Use the same font face and size for all body text, the same heading sizes, and colors for each level of header, consistent margins and spacing, etc.
   * Consistently formatted documents appear more professional and are easier to read.
4. Include visuals like diagrams and charts.
   * Incorporate visual elements to convey complex information in an easy-to-understand way.
   * Diagrams of system architecture, process flows, organizational charts, and so on can enhance stakeholders' understanding.
   * Ensure all visuals have clear titles, axis labels, legends, etc. so they are self-explanatory.
5. Write clear, concise text.
   * Keep text brief and to-the-point. Favour short paragraphs and bullet points over long blocks of text.
   * Avoid jargon and acronyms as much as possible. When technical terms are necessary, include a brief definition or explanation.
   * Proofread carefully for typos and grammatical errors before sharing.
6. Provide links to external resources.
   * If referencing other documents, include direct links to them for easy access.
   * Linking to resources like Trello boards, GitHub repositories, shared Google Drive folders, and so on makes it simple for stakeholders to find all relevant project information.
7. Make the document searchable.
   * Ensure the PDF is saved with searchable text, not as an image scan.
   * This allows stakeholders to search the document for keywords to find the details they need quickly.
8. Keep a changelog.
   * Note what updates are made to the document over time.
   * Include the date of each change, the name of the person who made the change, and a summary of what was changed.
   * Tracking document changes in a changelog helps show the evolution of project information.
9. Follow GitHub best practices.
   * Use a consistent branching strategy:
     + The main branch should always contain production-ready code.
     + Create new branches for each feature, bug fix, or research topic after getting approval from admin.
     + Use descriptive branch names (e.g., feature/homomorphic-encryption, research/differential-privacy).
     + The 'data-science' branch is typically used for pushing project-related changes.
   * Make changes via pull requests:
     + Keep branches up to date with the latest changes from the main branch before creating a PR.
     + Fill out the PR template with a clear description of changes and relevant issue numbers.
     + Assign at least one team member to review the PR.
   * Conduct code reviews:
     + Every PR must be reviewed by at least one other team member before merging.
     + Reviewers should provide constructive feedback and ensure code quality and adherence to guidelines.
     + Address feedback and requested changes before the PR is approved and merged.
   * Maintain clear and up-to-date documentation:
     + Include README files in each subdirectory explaining the purpose, usage, and dependencies.
     + Use clear and concise language, making docs accessible to both technical and non-technical readers.
   * Use GitHub Issues to track tasks, bugs, and research topics:
     + Assign appropriate labels to categorize issues (e.g., research, bug, enhancement).
     + Provide detailed descriptions and relevant information when creating issues.
10. Collaborate and communicate effectively.
    * Make small, focused commits with clear and descriptive messages.
    * Use GitHub features like mentions, assignees, and comments to collaborate with team members.
    * Engage in respectful and constructive discussions within issues and pull requests.
    * Keep communication channels open and responsive to ensure smooth progress.
11. Prioritize security and privacy.
    * Be mindful of sensitive information and ensure it is not exposed in the repository.
    * Follow security best practices, such as avoiding committing secrets or personal data.
12. Foster continuous learning
    * Stay updated with the latest advancements and research in privacy technologies relevant to the PTFI project.
    * Share knowledge, insights, and resources with team members to encourage continuous learning and improvement.

By following these guidelines, the Privacy Technologies for Financial Intelligence team can collate key project information into a professional, easy-to-navigate PDF document. This living document can be continually updated over the course of the project to keep all stakeholders at DataBytes informed about the current project status, research findings, next steps and more. Storing need-to-know information in one central place streamlines knowledge sharing and keeps everyone aligned as we work towards our mission.