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Version control guidelines are how you keep documents and code changes in line. Without guidelines, we’d have no standard of how to properly track changes across the project/backlog, resulting in communication/coding errors and wasted overhead. But it’s important to clearly define these guidelines, as different articles/sources/printed materials may use different wording, which may confuse developers.

There are three articles on DocuWare (“The Ultimate Guide to Document Version Control”), FOLDERIT (“Best Practices for Document Version Control in a Document Management System”), and PlanRadar (“7 best practices for document version control in engineering projects”) that offer detailed explanations on version control, and they share similar guidelines with similar descriptions. First of all, the articles stress the importance of clear and consistent naming conventions to avoid confusion, noting the use of descriptive terms and standardized file names to indicate the content of the document; the articles also suggest a version numbering system to track the changes applied to projects over time. Another guideline the articles go in-depth in is centralized storage and access; documents need to be stored in a central shared drive or cloud for all authorized persons to access, and access controls need to be implemented to ensure that unauthorized personnel cannot change/access those documents. The last guideline the articles share is archiving and retention; regular backup and archiving can not only ensure that outdated information is not accidentally used, but it can hold safely net over critical systems and data should an emergency arise.

Even though they share emphasis on these topics, this is where they begin to separate in wording and coverage.

“The Ultimate Guide to Document Version Control” on DocuWare is a more general guide, listing the basics of version control and nine best practices to keep in mind. The one practice that stands out is creating and enforcing SOPs to cover all guidelines, regularly updating and communicating the SOPs to all developers. This article also devotes an entire section to supporting effective collaboration. When so many colleagues edit documents all at once, chaos will ensue. That’s why establishing a document management system with robust version control is extremely important, so you can weed out potential duplicates and coordinate changes across the team.

“Best Practices for Document Version Control in a Document Management System” On FOLDERIT discusses its seven guidelines in the context of a document management system. It describes the importance of version control, as well as outlines the best practices for version control. It advertises FOLDERIT’s DMS system, and it boasts its edit history which can track who made changes and when, but beyond that, the article doesn’t do much else.

“7 best practices for document version control in engineering projects” on PlanRadar might be the most detailed article, offering explanations, examples, and solutions to implementing the seven guidelines it chose to cover. But only this article discusses document review and approval, document check-out and check-in, and revision history. The article suggests implementing a system to lock a document to one user for editing (checking out), then releasing it back into the system for review/storage (check-in). The criteria needed to review and approve a document must be clearly defined, as well as the timeline and personnel to review. Once the review is complete and changes are approved, it will be logged into the system, and a comprehensive revision history will be needed to track all changes.

My personal list of guidelines would be a mix of everything discussed in these three articles. At the top of the list would be naming conventions, mixing in a combination of descriptive and standardized terms, and version numbering. The next item would be storage and access control, making sure we have one dedicated server/cloud with secure access controls. Within that server, there should be a system for audit logs and edit history, with an emphasis on comments and annotations to describe why those changes were made, and routine backup and archival capabilities to revert to an earlier version should something go wrong. Next would be a procedure for periodic review of the SOPs for version control documentation. Lastly would be team collaboration and communication; this would be singled out with its own section because I believe it is the one thing that makes version control run smoothly.

Version control practices are just as important as having consistent guidelines and a universal standard that all developers can adhere to. By establishing this baseline, companies will be better equipped to handle version control and make collaboration and communication run smoothly.

**Works Cited**

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