

COMPUTER DOCUMENT CONTROL PROCEDURES

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COMPUTER DOCUMENT CONTROL PROCEDURES

1.0 Working File Storage

- 1.1 All business-related documents will be stored in the “DATA” folder on the hard drive of the employee’s computer.
- 1.2 Personal files or other non-business-related documents will be stored in the “My Documents” folder on the desktop of the employee’s computer.

2.0 Long-Term File Storage

- 2.1 The Palatine File Server (PFS) will be used to store all project-related and proposal-related files.
- 2.2 Proposals and Costings
 - 2.2.1 Proposals and Costings prior to contract award will be saved on the PFS under “Project Work Folders/Proposal Folders/”.
 - 2.2.2 Proposals and Costings will be uploaded to the PFS immediately after the proposal is submitted to the potential client.
 - 2.2.3 Updated or revised proposal/costings will be transferred to the PFS as they are submitted.
- 2.3 Project Files
 - 2.3.1 Project related files will be saved on the PFS under “Project Work Folders/Project Folders/”.
 - 2.3.2 Project related files will be uploaded to the PFS according to the following timelines:
 - 2.3.2.1 General Correspondence (i.e., packing lists, letters to clients, job plans, invoices, etc.) – upon creation.
 - 2.3.2.2 Protocols – upon submittal to client.
 - 2.3.2.3 Reports – upon submittal to client.

3.0 Document Back-Up

- 3.1 The “DATA” folder of every desktop computer will be automatically backed-up using a tape back-up system on a daily basis.
- 3.2 The “DATA” folder on laptop computers should be backed-up on a daily basis whenever the computer is in the office. This is done by connecting the computer to the network and allowing the daily tape back-up system to save the data that night.
- 3.3 When away from the office, the “DATA” folder on laptop computers should be backed-up onto CD at least once a week. At a minimum, the folder should be backed-up prior to transport of the computer back to the office.

4.0 File Naming Conventions

- 4.1 File naming structure will be consistent with that currently used on the Palatine File Server.
- 4.2 Proposals
 - 4.2.1 All proposal-related filenames will be preceded with the proposal number.
 - 4.2.2 Proposal document names will have the following format:
pppppQ-project description.doc, where ppppp = proposal number
 - 4.2.3 Costing spreadsheet names will have the following format:
ppppp\$-project description.xls, where ppppp = proposal number
- 4.3 Reports
 - 4.3.1 All report-related filenames will be preceded with the job number.
 - 4.3.2 The report document name will have the following format:
jjjj-project name, where jjjj = job number, project name = description of client, project, etc.
 - 4.3.3 Spreadsheet names will have the following format:
jjjj-description, where jjjj = job number, description = description of workbook.
- 4.4 Invoices
 - 4.4.1 All invoices will have the following format:
nnnnn-jjjj-dd, where nnnnn = invoice number, jjjj = job number, dd = department number.
 - 4.4.2 Filenames for all other invoice-related documents will be preceded with the job number.
- 4.5 Other Correspondence
 - 4.5.1 All project-related general correspondence filenames will be preceded with the job number.
 - 4.5.2 Filenames of all other correspondence such as job plans, letters, FAX covers, packing lists, etc. will be of the following format:
jjjj-description, where jjjj = job number, description = appropriate description of document.

5.0 File Sharing

- 5.1 Each office computer will have one folder set up for sharing with other network computers.
- 5.2 The sharing folder will be named "DROP FOLDER", and will be located within the "DATA" folder on the hard drive.

6.0 E-Mail Document Tracking

- 6.1 All internal and external emails that pertain to a project or proposal will be sent to the corporate 4D Database for purposes of document control.
- 6.2 The procedure for email forwarding to 4D is as follows:
 - 6.2.1 Place the job or proposal number, whichever is applicable, in the beginning of the subject line of the email.
 - 6.2.2 If the email pertains to a proposal (prior to becoming a job), blind copy (bcc) the mail to the Proposals address.
 - 6.2.3 If the email pertains to an existing project, blind copy (bcc) the mail to the Projects address.

7.0 Revision History

Version	Date Created or Modified	Author	Comments
September 2001-A	September 20, 2001	Jim Wright	Original Version
October 2001-A	October 3, 2001	Jim Wright	1) Sections 2.2 & 2.3 - Clarified location of file storage on Palatine Server. 2) Section 4.4 - Modified invoice naming convention to match Palatine Source format. 3) Section 7.0 – Added Revision History