

Document Management & Naming Conventions:

PURPOSE: This primer covers protocols and best practices for ensuring the management and security of proposal documents drafted and reviewed by multiple parties. Following these guidelines will ensure that up- to-date versions are not lost or otherwise mishandled.

DOCUMENT FILE NAMING CONVENTIONS:

File naming conventions should be consistent for all proposal documents. The following document naming system has been used successfully in our experience, but the most important thing is to choose a system that the proposal team will use consistently. To name a file that you create/own, mirror the name of proposal section and indicate your initials and the draft version number, (e.g., **Narrative_mg_v1.doc**). When reviewing and revising documents that someone else has created, always make a new version of the file when ANY edits have been made in the document (however small). Simply, “save as” and rename the document with your initials after the original file name draft version number (e.g., **Narrative_mg_v1_kpl.doc**). These recommendations allow the file-creator/owner to readily assess who has reviewed/revised documents that they have posted. Only document owners should change the version draft numbers (“v#”) of files after incorporating reviewer’s comments (e.g. **Narrative_mg_v2.doc**).

ARCHIVING – SAVING PAST VERSIONS: Always move past versions to the Archive folder. Consistent archiving protects older versions, if and when they are needed as reference.

REVIEWER PROTOCOLS: The PI is responsible for the master copy of the proposal document. They may choose their preferred method of soliciting and integrating comments from reviewers. Optimally, comments are solicited **sequentially** so that the PI can integrate comments prior to sending on to subsequent reviewers. Alternatively, PIs may solicit comments **simultaneously** and integrate comments from multiple reviewers into a new master version.

REVIEWER IDENTIFICATION: Reviewers should identify themselves with their initials when using the *track change* and *comment* functions. Sometimes the computer fails to automatically insert initials in the review/ track changes/ change user name toolbar.