



DOCUMENT CONTROL

Introduction

The main storage place for our documents is the media library that is part of the U3A web site.

It is based on the standard version of WordPress and only provides very basic document control functions. If a document is replaced by a newer version the old document is simply replaced by the new document without any reference to the old document. The document still has a status value in the media library, and it is recommended the value is changed to passive if a document is replaced by a later version.

This means that the main way of document control is based on:

- Information in the document itself,
- The document name
- Ways of working, e.g working in a structured way following existing procedures.

Document Naming

The following is recommended document naming

U3A Identifier + Document Title + Date + Draft/Final

U3A Identifier: U3A-HBW or U3A Hobson Bay /Williamstown. U3A-HBW is shorter and would be most used.

Document Title: Describes the document. E.g Minutes, Agenda , Policy Etc. CTTE is a commonly used abbreviation for Committee documents.

Date: The recommended format is YYYYMMDD. E.g 20231114. This is as per the ISO 8601 date format.

Draft/Final: Most documents would start as a draft sent for review. Once the document is approved the word Final shall be used.

An example of a document name would be

U3A-HBW-Code-of Conduct-20231114- Final



Document Format

Most documents are written in word and converted to pdf when completed. PDF is the preferred document type for documents that all members can access.

Storage and backup

The main storage location of our documents is the media library that is part of the U3A HBW web site. It is regularly backed up by the Internet Service Provider (Ventra IP). The Secretary saves the document on his/her Computer (With Cloud backup). The Treasurer also is obliged to do the same.

The Author of a document is responsible for storage of the word document on his/her own computer.

Note there are free services to convert a PDF document to a Word document.

<https://www.ilovepdf.com>

Templates

Document templates are available on the web. The templates are in word and conform to the recommended document rules.

<https://u3ahbwilli.org.au/policies-and-procedures/>

Document review

Part of document control is to ensure all documents are kept up to date and relevant. Of importance for Policies and Procedures and Internal Committee documents.

<https://u3ahbwilli.org.au/policies-and-procedures/>

<https://u3ahbwilli.org.au/committee-documents/>

See table of key documents below.

Table of Key U3A HBW documents

Item	Created / Reviewed date	To be reviewed 2024
U3A-HBW-DOCUMENT-CONTROL	12 August 2024	No
Activity Proposal Form	October 2023	
COVID-19 Safety Plan 9 Mar 22	17 Nov 2022	
Code of conduct	17 Nov 2022 and reviewed 2023	
Committee – Key Processes	April 2024	NO
Committee – Key Contacts	April 2024	NO
Committee – Key Responsibilities	17 Nov 2022 and reviewed 2023	
Enrolment Policy	May 2023 and reviewed NOV 2023	
Expenditure Policy	April 2024	NO
Grievance Policy	17 Nov 2022 and updated NOV 2023	
Incident Report Procedure	2021 and reviewed?	
Incident Report Form	2021 and reviewed?	
Key Functions by Member name	April 2024	NO
Life Membership	July 2024	NO
Model Rules for U3A Bay Williamstown	April 2024	NO
Privacy policy	2019 and reviewed 2023	
Risk assessment and mitigation plan approved NOV 2021	Nov 2021 and reviewed 2024	NO
Volunteer Non-Disclosure Agreement	?	
Web Fundamentals	July 2024	NO
Welcome letter	August 2024	NO



Document Table

Field	Guidelines	MS Word Reference	Responsible
Name	It is recommended that most documents adhere to the naming: U3A Identifier + Document Title + Date + Draft/Final		Author
Header	All formal documents shall have the U3A Hobson Bay/Williamstown logo. There is a small size or a larger size log to choose from.	Insert/Header	Author
Footer	All documents shall have a footer	Insert/Footer/Edit Footer	Author
Review	It is recommended that for word documents review tracking is used.	Review *	Author and reviewers
Date	The document shall contain the date it was written. It can be either at the start or end and part of the footer.		Author
Page Number	It is recommended that all documents except single page documents shall have Page Numbers at the bottom of the pages	Insert/Page Number/Bottom of page	Author
	Change the status of a replaced document in the media library.	Change from active to passive	Web administrator
	Use media category to classify all documents stored in the media library		Web administrator

(*) Once a document is sent out for review the author set Review/Track Changes/for everyone. Once the author receives comments from the reviewers and accepts the comments the author set Review/Accept Changes. If the author wants to stop further tracking can use Review/Accept all Changes and stop tracking.