

# SHARPFUTURES ONLINE FILING PROCEDURES

## FILE NAMING AND VERSION CONTROL

### Archive Folders

Each Folder will have an archive. This is where ALL the current filing will be moved to so that you can easily find documents that you have previously worked on. However after IT D-Day (scheduled for December 21<sup>st</sup> 2016) if you open ANY document from the archive you must 'save as' and re-save it into the correct folder, with the correct name using the correct procedure as outlined.

So as an example, say you need to modify a document, you open the old document in the archive folder. You would not 'close' this document once opened you would go to 'save as' and re-save it the new filing system, following the processes below. The aim is that all documents that are in use will naturally then be moved to the new system as we go along and any documents that don't need to be opened or referred to will stay in archive forever.

### DRAFT DOCUMENTS

All documents created are to be started in the draft folder within your department so that if you are away or unexpectedly off sick someone else in your department can pick up exactly where you left off. There is only one draft folder in each department with the exception of studio, where each "studio project" folder has a draft folder within it.

### NAMING A FILE

Documents should be name by

- type
- subject
- date
- author and version (always initials and V and number of version e.g. RMV1 )

So for example a proposal to new client :

ProposalVinciDec16RMV2

Or the copy for a flyer:

## **FINAL DOCUMENTS**

When the document is final save it to where it will be permanently saved and name the final version as the MASTER. If it is an internal document, keep the same name and add MASTER as opposed to the version number so for example:

FlyerSchoolsToursJan17MASTER

But if it is an external facing document you will need to preclude this with SharpFutures for easy ref at the client end e.g.

SharpFuturesProposalVinciDec16MASTER

## **ALL DOCUMENT INCLUDING FINALS**

All documents, draft or otherwise must have the document filename in the footer of the document, which can be used to search for where the document is held on the system.

To add the filename of the document to the footer: Select the footer, then DOCUMENT INFO > FIELD > FileName

This will then update automatically should the filename change.

## **S DRIVE:**

When you open the S drive you will see this menu (or something similar dependent on your access):

1. **Archive**
2. **Directors**
3. **General**
4. **HR Confidential** – this folder is accessed by HR and Directors only
5. **Management** – this folder is accessed by all managers of departments
6. **Media** this folder holds information about where to find relevant media and is accessible by all
7. **POD** – this folder is accessed by the POD and general office team only as well as managers
8. **SAGE** – finance team and directors only

9. **SCANS** – full access for temporary download scans

10. **SDP** – full access but only to be used with support of 8 networks

To follow shows each folder, who has access and what the sub-folders are for each folder:

## 1. ARCHIVE

This archive is pre 2016 NOT to be confused with the new archive each department has in their folders. This folder is rarely used but it is where historical filing is held.

## 2. DIRECTORS

Access – RM/LS/AR

This folder is for director's info only.

ARCHIVE (pre 2016)

Archive 2017

PROPOSALS

ARCHIVE

CURRENT

BOARD

BOARD

ANNUAL ACCOUNTS

BOARD MEETINGS

AGENDA

COMPANIES HOUSE

ANNUAL RETURNS

COMPANY REGISTER FILING

CONSTITUTION

Certificate of Incorporation

MEM & ARTS

DIRECTORS

EXEC

NON EXEC

FINANCIAL

BANK

PROJECT BUDGETS & PLANNING

PROJECTIONS

- CASH FLOW & P&L
- MONTHLY REPORTS
- MISC
  - COPY INVOICES
  - CREDIT CONTROL
- LLOYD PIGGOTT
- PETTY CASH AND EXPENSES
- SAGE BACKUPS

#### GENERAL OFFICE

- MISC ADMIN
- PROCEDURES
- IT

#### LEGAL

- COMPLIANCE
- CONTRACTS AND AGREEMENTS
  - GRANTS
  - SERVICES
- SUPPLIER AGREEMENTS

### 3. GENERAL DRIVE -

#### Access - All Employees, Placements, Apprentices

This is the main folder which most employees will use daily

#### ARCHIVE

On 21<sup>st</sup> December the current folder 'General' and all its sub-folders will be moved, exactly as they are into this archive.

#### DISCOVER

- CLIENTS
  - EDUCATION
    - SCHOOLS
    - COLLEGES
    - UNIVERSITY
  - OTHER
    - HOUSING ASSOCIATIONS

- DRAFTS

PROPOSALS

BUDGETS  
FUNDING  
PRESENTATIONS

MEDIA

DIRECTORY AND SHORT CUTS  
EDITED

RESEARCH

SERVICES

BOOKINGS  
EVENTS  
EXPERIENCES  
WORKSHOPS  
TOURS

ENGAGE

CLIENTS  
DRAFTS  
EVENTS  
MEDIA

DIRECTORY AND SHORTCUTS  
EDITED

PROPOSALS

BUDGETS  
PRESENTATIONS  
QUOTES

RESEARCH

SERVICES

FRAMED

CLIENTS  
DRAFTS  
MEDIA

DIRECTORY *(of where to find Media files)*  
EDITED

PROPOSALS

BUDGETS  
PRESENTATIONS  
QUOTES

RESEARCH

WORKSHOPS AND DELIVERY

## PERSONAL

These folders are where people should keep their own information e.g. apprenticeship work they are working on or documents that are not for anyone else's use. These have permissions so that only the person named and they're managers may access the folder.

As an example, this is where you would keep a record of your timesheet ahead of sending the final to "office"

### APPRENTICES

Name by initial and surname e.g.:

S HUKIN

### POD MEMBERS

C KELLY

### STAFF

J Boryczko

## GENERAL OFFICE

### ACCOUNTS ADMIN

INVOICES AND RECEIPTS

SF INVOICE TEMPLATES

PETTY CASH

EXPENSES FORM

### COMPANY HANDBOOK

COMPANY POLICY

LEGAL POLICY

### COMPANY ASSETS

LETTERHEAD TEMPLATES

### IT AND SYSTEMS

PHONES

8 NETWORKS

### OFFICE ADMIN

SUPPLIERS

### PROCEDURES

## MCDA

### THE SHARP PROJECT

BOARD REPORTS

OTHER REPORTS

CAMPUS

MEMBERS

- EVENTS
- TSP MARKETING
  - BRAND ASSETS
  - COMMS & GUIDELINES
  - SOCIAL MEDIA
- PRESS
  - PRESS CALL
  - PRESS CUTTINGS
  - PRESS RELEASE
- MANAGEMENT
  - MGMT MAILOUTS

## THE SPACE PROJECT

- BOARD REPORTS
- OTHER REPORTS
- EVENTS
- SPACE MARKETING
  - BRAND ASSETS
  - COMMS & GUIDELINES
  - SOCIAL MEDIA
- PRESS
  - PRESS CALL
  - PRESS CUTTINGS
  - PRESS RELEASE
- MANAGEMENT
  - MGMT MAILOUTS

## GROUP

- BOARD REPORTS
- OTHER REPORTS

## MEDIA

- DIRECTORY (*of where to find Media files*)
- EDITED

## PR & MARKETING

- DRAFTS
- PR

- COMMUNICATIONS
  - DRAFT
  - APPROVED COMMS

PRESS

PRESS CALL  
PRESS CUTTINGS  
PRESS RELEASE

GENERAL PR

EVENTS

MEDIA  
CLIENT LISTINGS/CONTACTS  
EVENTS ARCHIVE  
HEALTH AND SAFETY/RISK ASSESSMENT  
LIVE EVENTS  
GRADUATION 2017  
STATUS

MARKETING

ASSETS  
BRAND GUIDELINES  
DRAFTS

MEDIA

DIRECTORY (*of where to find Media files*)  
EDITED (for photos that have received post production work)

PRESENTATIONS

APPLICATIONS  
PITCHES

SOCIAL MEDIA

ACCOUNTS  
REPORTS  
WEB DESIGN  
WEB STATS

WEBSITE

SHARPFUTURES  
ASSETS  
DOMAIN REGISTRATION  
SITE BACKUP  
SITE MAP  
FRAMED  
ASSETS  
DOMAIN REGISTRATION  
SITE BACKUP  
SITE MAP

STUDIO

MEDIA DIRECTORY

PROCESSES  
STUDIO JOBS  
PROJECT 001  
DRAFTS

**4. HR CONFIDENTIAL**

**Access – Directors, Jayne, Sophie, Angela**

This is where confidential HR info is held only including disclosures, all contracts, disciplinary etc etc

Although the draft may be used to create docs e.g. employee handbook – the approved versions should be saved as appropriate in general or in managers.

**ARCHIVE**

**CONTRACTS OF EMPLOYMENT**

APPRENTICES

APPRENTICE CONTRACT TEMPLATE  
ARCHIVED  
CURRENT  
PAST

ASSOCIATES

ASSOCIATE CONTRACT TEMPLATE  
CURRENT  
PAST

EMPLOYEES

CURRENT  
PAST  
EMPLOYEE CONTRACT TEMPLATE

MANAGERS

CURRENT  
PAST  
MANAGER CONTRACT TEMPLATE

POD

CURRENT  
PAST  
POD CONTRACT TEMPLATE

**HOLIDAY RECORD**

**LEARNING & DEVELOPMENT**

SUPPLIERS

TRAINING PROVIDERS

PROJECTS

**LEGISLATION**

PAYROLL

BACKUPS  
JOURNALS  
NEW STARTER FORMS  
SAGE MONTHLY REPORTS

LLOYD PIGGOTT CORRESPONDENCE  
TIMESHEET SUMMARY DOCS  
RATE CARDS  
P60'S  
P45'S  
PENSION

## 5. MANAGEMENT DRIVE -

**Access - All Directors & Managers**

### MEETINGS

COMPANY MEETINGS  
MANAGEMENT MEETINGS  
GROWING PAINS

### EMPLOYEE ACHIEVEMENTS

EMPLOYEE MONTHLY UPDATE

### ORGANISATION CHARTS

### PENSION PLANNING

### RESEARCH

LEVY  
GRANTS  
UNIVERSAL CREDIT

### STAFF FOLDERS

Initial and surname e.g. R Mcguinness  
STATUS

### TALENT MANAGER HANDBOOK

### TALENT MANAGER LEARNING & DEVELOPMENT

## 6. Media

**Access - All**

This folder holds information about where to find relevant media and is accessible by all. There is a separate DRIVE for media and a separate procedures document will follow.

## 7. POD

**Access - All Directors, Managers, Jay and Sophie**

### ADMIN

POD BOOKING LOG  
POD PROCESSES  
POD INVOICING SHEETS

CLIENTS  
DRAFTS  
MARKETING  
MEDIA  
    Directory  
    Edited  
POD MEMBERS  
    CURRENT  
    TRAINING  
PROPOSALS  
    BOOKING FORMS  
    CLIENT REQUESTS  
RECRUITMENT