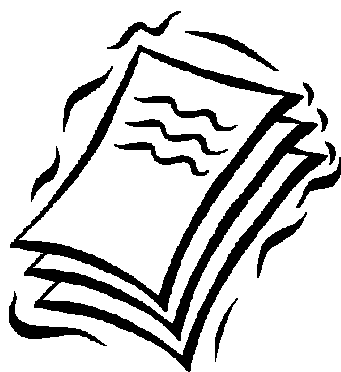


# Versioneer



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# THANK YOU

Thank you for your recent purchase of Versioneer. Managing versions of documents produced has never been more important. In large projects it is a critical component of change control and document management. With Versioneer, you can readily organize the naming and storage of documents that move through approval processes. As a result, you bring quality and consistency to the handling of your documents, which translates into improved document control.

Versioneer is implemented using Microsoft Word global templates and Excel and PowerPoint Add-Ins, so no new macros are introduced to your documents. Since the macros are held outside the document, there is no possibility that a document cannot be e-mailed because of mail system virus checking.

## FILE NAMING

With Versioneer, you can readily identify the version of any Microsoft Word, Excel and PowerPoint documents. Documents are easily named according to their release status. For example “Versioneer SPD V1.2-3” might identify that the first major version of the document has been released. The number two indicates that the document has been updated for review two times. The number three shows that there have been three editing changes to the document during review.

## DOCUMENT PROPERTIES

Versioneer updates two document properties (if they exist) each time it saves the document. Versioneer stores the document version number and the date the document was saved in document properties. These properties can then be used in a document management system, or as fields in your work.

The “Date completed” is set to the current date. The value of the “Version” property is taken from the filename.

Name	Value	Type
Version	1.0-1	Text
Date completed	1/20/2001	Date
Disposition	Draft	Text
Department	Customer Support	Text
Status	Released	Text



## RECORD OF CHANGES

Versioneer searches documents for a table containing a Record of Changes. A row is added to the table each time a new Major or Minor version is saved. Versioneer also asks for a description to enter into the record as well. If a new edit version is saved, Versioneer just updates the Revision number and issue date.

RECORD OF CHANGES		
Revision	Description	Issue Date
1.1-2	Original working release	September 10, 2000
1.2-2	Incorporates changes from review.	September 16, 2000
2.0-1	Public Release	October 3, 2000

## SPECIAL FEATURES

Versioneer treats each document type in a special way. This is fully described later. In Word documents, Versioneer looks for fields in the document and updates them. In Excel, Versioneer looks for a separate worksheet that holds the record of changes. In PowerPoint and Excel, Versioneer checks the document headers and footers for either the version number or the full filename and updates them with the new name or version.

## NEW FEATURES

Version 1.3 of Versioneer improved the order questions were asked for determining the release number of a document. The order was changed from Major, Minor then Edit to Edit, Minor then Major to match more closely with the types of changes that are made to documents. This version also included better checking to determine if a document conformed to Versioneer naming standard.

Version 1.4 introduces the ability to omit the Edit number in a document name. Documents can now end with Vm.n and Versioneer will happily update the version information.

Version 1.5 updates the headers and footers of Excel in addition to PowerPoint. Headers and footers are checked for the version number only. In this way, any text can be included in these areas. Support for Macintosh is included.

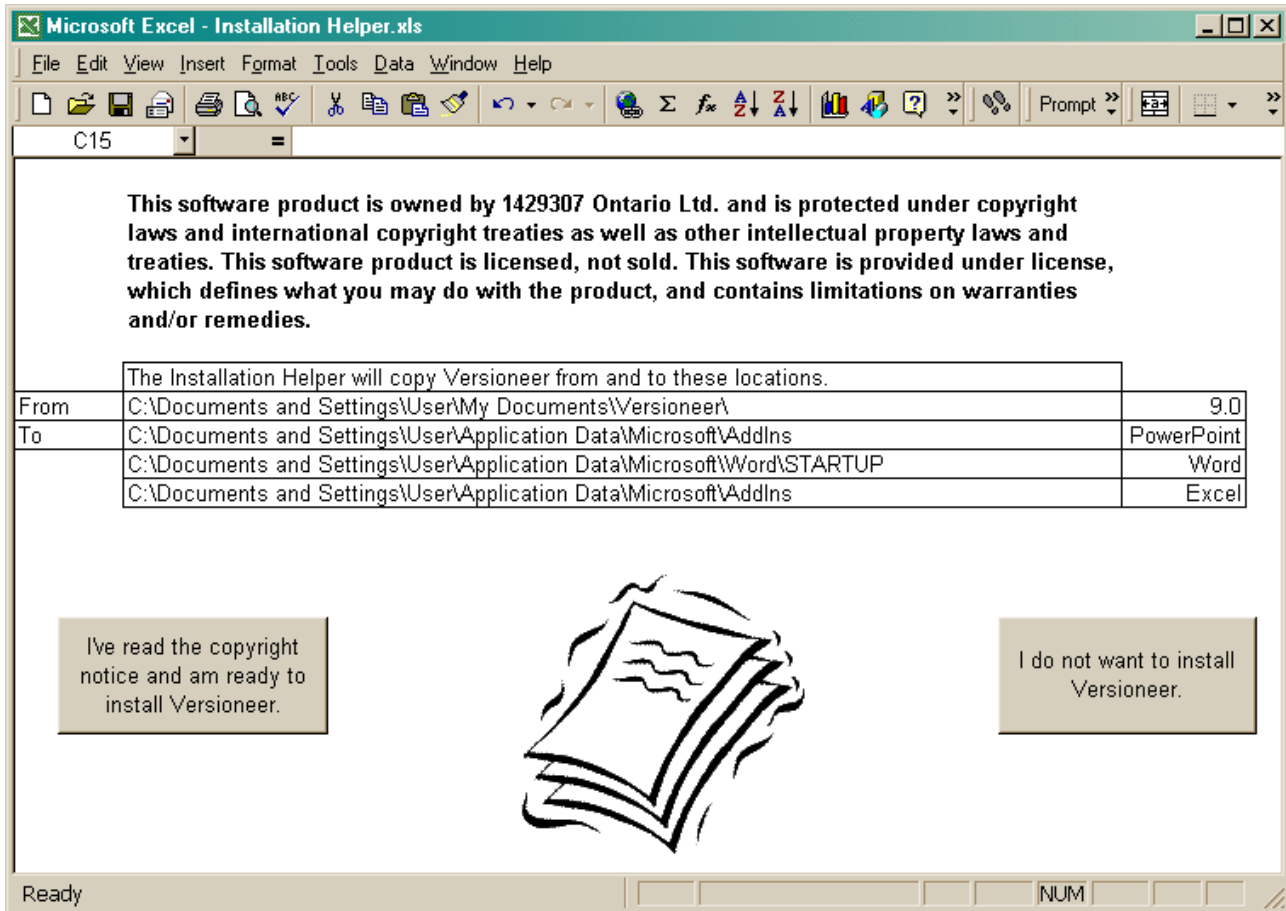
Version 1.6 accepts many more titles for the Record of Changes.

Version 1.7 includes even more title choices for the Record of changes and accepts a variety of separators between the file name and version number. A move to a major or minor version now sets the edit number to zero, meaning that no changes have been made. This version can also add version control to a document while saving it for the first time.



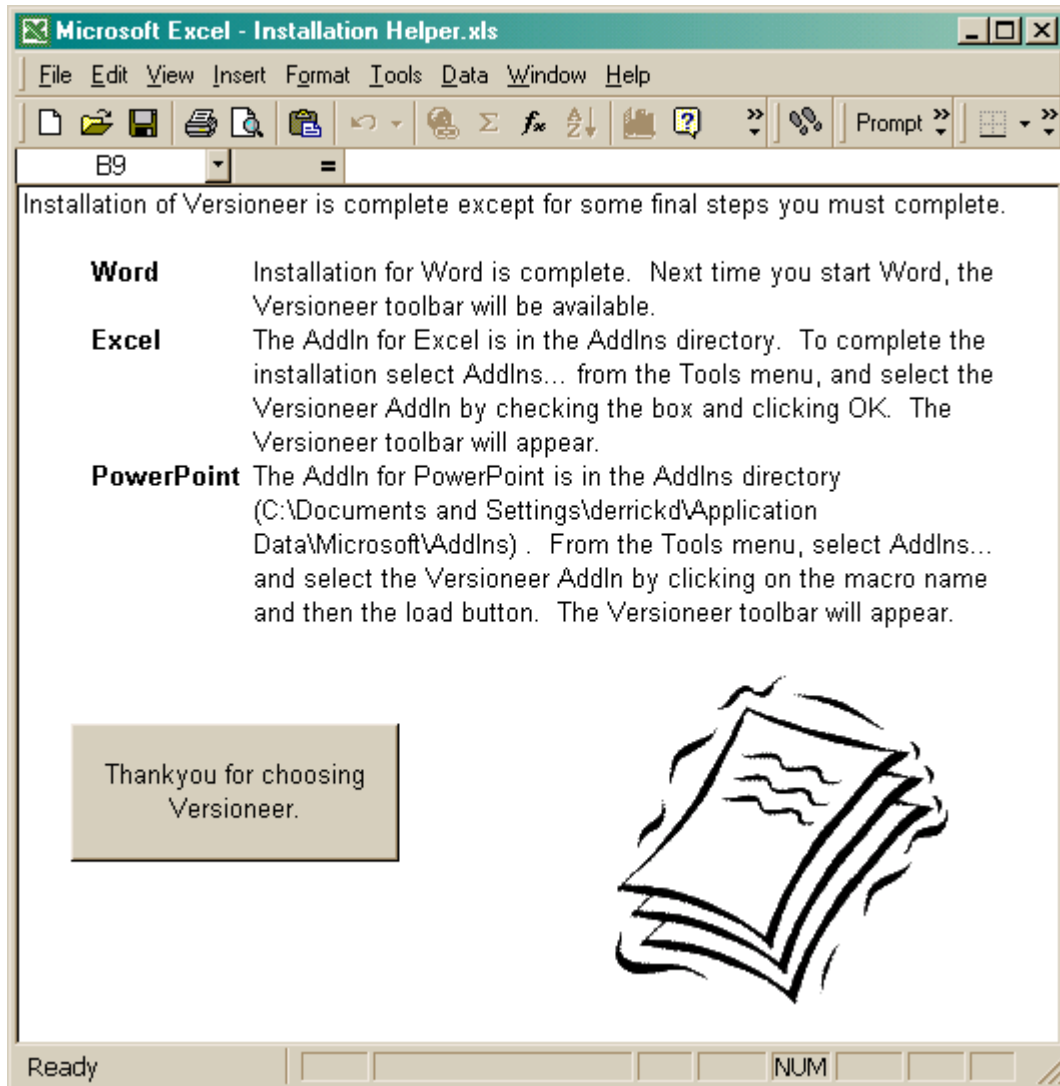
# INSTALLING VERSIONEER

Five files make up the Versioneer product, one for each of Microsoft Word, Excel, two for PowerPoint and an Installation Helper that uses an Excel macro. There are separate versions of the PowerPoint Add-In for Office 97 and Office 2000.



To start the installation process, open the Installation Helper spreadsheet, and if asked, enable macros. If you do not accept the licence terms and choose not to install Versioneer, click the button on the right. The Installation Helper will close, and you can return Versioneer for a refund.

After having read the copyright notice, click on the button on the left hand side of the Versioneer logo to proceed with the installation. The Installation Helper will copy the correct files to the correct locations for the version of Microsoft office you are using.



After the Installation Helper moves the Add-Ins and templates to the correct location, a final screen is displayed that identifies the tasks that must be completed manually.

**Word.** No further steps are required to install the Versioneer global template. Word accesses the template each time it starts. To prevent the template from loading, it must be moved from the directory shown.

**Excel.** The Excel Add-In is not automatically loaded after installation or when Excel is started. Follow the instructions to load Versioneer and make the Add-In available while you work with Excel. Once the Add-In is loaded, it will be available each time Excel starts until it is explicitly unloaded.

**PowerPoint.** As with Excel, the PowerPoint Add-In is not automatically loaded after installation. With PowerPoint 97, you must locate the Add-In in the directory shown. With PowerPoint 2000, the correct directory will be located when the load function is selected.



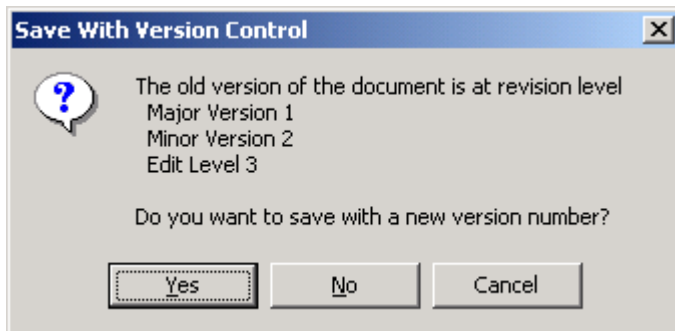
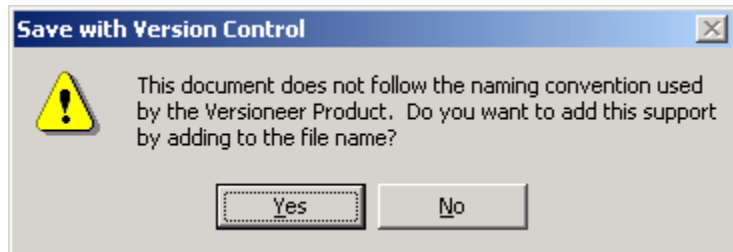


# USING VERSIONEER



Using Versioneer is as easy as clicking on a toolbar button. When you click on the Versioneer button, you will be asked a series of questions that determine the new version number and so the new filename that your document will be saved with.

If the file has never been saved with Versioneer, or does not have the correct format for the version number in the filename, the first matter that must be dealt with is whether or not to add the version number to the file name. If No is selected, then Versioneer returns to the document without saving it. Selecting Yes lets Versioneer know that it can ask the rest of the questions necessary to determine how to name the file for the first time. The version number will be one of V0.0-1, V0.1-1 or V1.0-1.

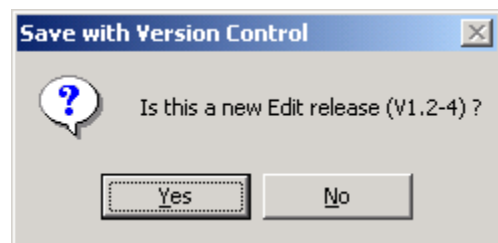


If the version can be appended to the filename, or if the filename has the version number at the end and it is formatted correctly, then Versioneer checks if the version number should be updated.

Three options are presented. If Cancel is selected, Versioneer returns to the document without saving it. Choosing No tells Versioneer to just save the file with the same filename that it currently has. Choosing Yes tells Versioneer to check how the version number should be incremented.

to the document without saving it. Choosing No tells Versioneer to just save the file with the same filename that it currently has. Choosing Yes tells Versioneer to check how the version number should be incremented.

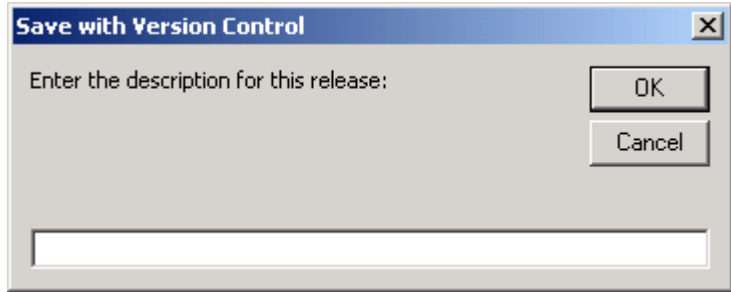
The first choice offered is to save the file with a new edit number. This increases the right most number by one. If you answer yes, Versioneer saves the file with a new filename with the new version number at the end of the filename. If you answer no, Versioneer goes on to ask about the minor version number. Versioneer asks about the edit release first because edit releases tend to happen more often. Edit numbers are optional. If you have a file already ending in Vm.n, Versioneer will not ask for a new edit number.



The minor release works the same way as an edit release. Choosing Yes tells Versioneer to save the file with an increased minor version number. Choosing No tells Versioneer to move to the Major version. The major version works in the same way. Major and minor versions also mean that you may have to answer one extra question.



The last question asked gives you a chance to add a note about why the new version of the document was created.



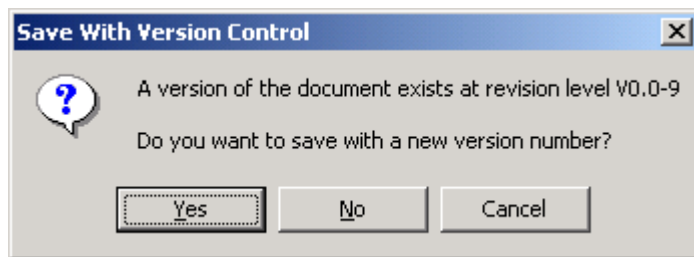
The description can be up to 255 characters and used to update a record of changes. With PowerPoint 97, Versioneer stores the description in the Comments property and always asks it. The current document Comments are displayed and if you change the comments and click OK, the Comments are updated. Clicking Cancel or leaving the properties as is prevents Versioneer from updating the comments.

With PowerPoint 2000, Word and Excel, Versioneer uses the description to update a record of changes located in the document (if it exists). The record of changes is a table with three columns and headings as shown below. If Versioneer can't find the table, it won't ask for

RECORD OF CHANGES		
Revision	Description	Issue Date
1.1-2	Original working release	September 10, 2000
1.2-2	Incorporates changes from review.	September 16, 2000
2.0-1	Public Release	October 3, 2000

the description. When Major and Minor version are saved, Versioneer adds a new row to hold the change information. With an edit release, Versioneer updates the last row in the table with the revision (version) number and updates the issue date with the current date on your computer.

In PowerPoint 2000 and Word, the table can be located anywhere in the document. In Excel, Versioneer looks for a worksheet with the name record of changes. Versioneer adds an entry to record of changes regardless of whether OK or Cancel is clicked as long as the description is not blank.



Versioneer checks to see that it will not overwrite a newer version of the document. If it finds a document with the version number that has been suggested, it gives you the option of moving to a new version number higher than the one just tried. Answering Yes takes you back to the edit number question, No just saves the document with the original name and version, and Cancel stops the process.

After answering the final question, Versioneer looks for two custom document properties. If the property "Version" exists, it is updated with the version number that is included in the filename. If the property "Date completed" exists, it is updated with the date that the file is saved. The date comes from the clock in your computer.



# SETTING UP YOUR DOCUMENT

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Setting up your document for Versioneer can be as involve as little or as much work as you would like to do. All that is required for Versioneer to help you is the addition of version information to the filename and Versioneer can help you with that!

Versioneer treats Word, Excel and PowerPoint file types with some common features.

## FILENAMES

Versioneer works by adding the version number of the document to the filename. The version number is in the format V1.2-3. The letter V is the start of the version number. Versioneer uses the rest of the numbers to help you keep track of which version of the file has been saved. This is the only piece of information Versioneer needs. When a new version of your document is saved, Versioneer checks the filename for the old version number and increments in according to your requirements.

Versioneer will add the version number to the end of the filename automatically. When Versioneer does this, the format is V1.2-3. When new versions are saved, Versioneer always asks about Edit, Minor and Major version numbers. Optionally, you can add the version number before using Versioneer for the first time. When you add the version number, you can choose between the formats V1.2-3 with edit numbers, and V1.2 without edit numbers. If the edit number is not in the filename, Versioneer will not add it and will not ask about edit releases.

While Versioneer adds the single letter V to filenames when adding version numbers, it can accept a variety of existing separators. The case is not important and the text can have spaces before or after the separator. Valid separators are V, VER, VERS, and VERSION.

## DOCUMENT PROPERTIES

Versioneer checks for two document properties. These properties are maintained as a convenience and are not used by Versioneer. If the custom property exists, Versioneer updates it. The property names are not case sensitive.

The first property is “Version”. It stored as text and is updated based on the version number in the filename. The property can be used in document management systems or simply displayed inside the document.

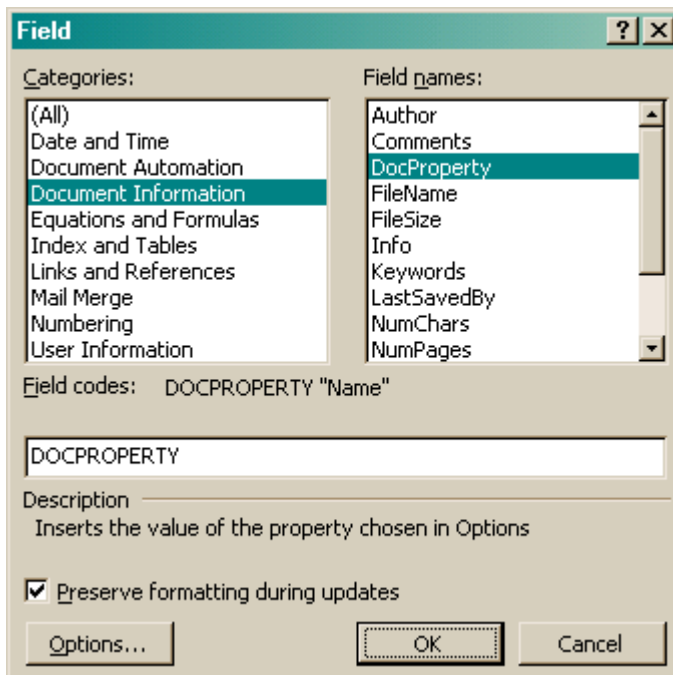
The other property Versioneer will update is the “Date Completed”. This value is stored as a date value. The date stored is the date that Versioneer saves the document and comes from the computer’s clock. Again, the property is available for your use. Because the date is stored as a date value, you can format it any way you want in the document.



## WORD FEATURES

When Versioneer saves the document, it updates the version and date completed custom document properties (if they exist). These properties can be inserted into your document as fields.

To insert a custom field such as “Version”, select the menu option Insert > Field and then select Documents Information and DocProperty as the field name. The Options button allows you to select the document property to insert. The field will be of the form { DOCPROPERTY "Version" \\* MERGEFORMAT }. “Version” is the property being inserted.



Just before Versioneer saves the document, it updates document fields. Versioneer looks at all of the fields and checks what type they are before updating them, Versioneer will not update following field types: Table of Authorities, Table of Contents, Hyperlinks, Page references, and References.

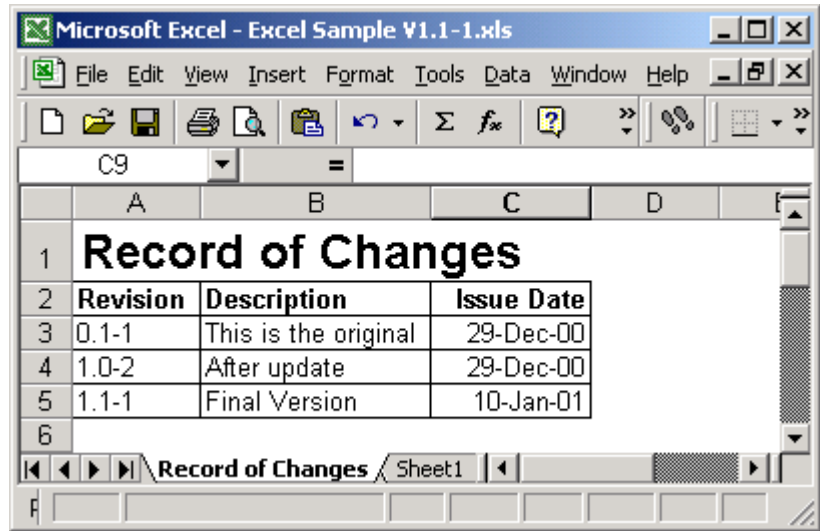
The fields can be located at any point in the document and are especially useful in headers and footers.

Versioneer User Documentation May 28, 2001	Version 1.6-1 Page 8
Sample Page Footer	



## EXCEL FEATURES

When Versioneer saves an Excel workbook, it looks for a worksheet with the name Record of Changes. If the worksheet exists and there is information formatted as shown in the figure below, Versioneer adds a row for new major or minor information. You can use information in the record of changes in other location in your workbook.



The screenshot shows the Microsoft Excel interface with a worksheet titled 'Record of Changes'. The table contains the following data:

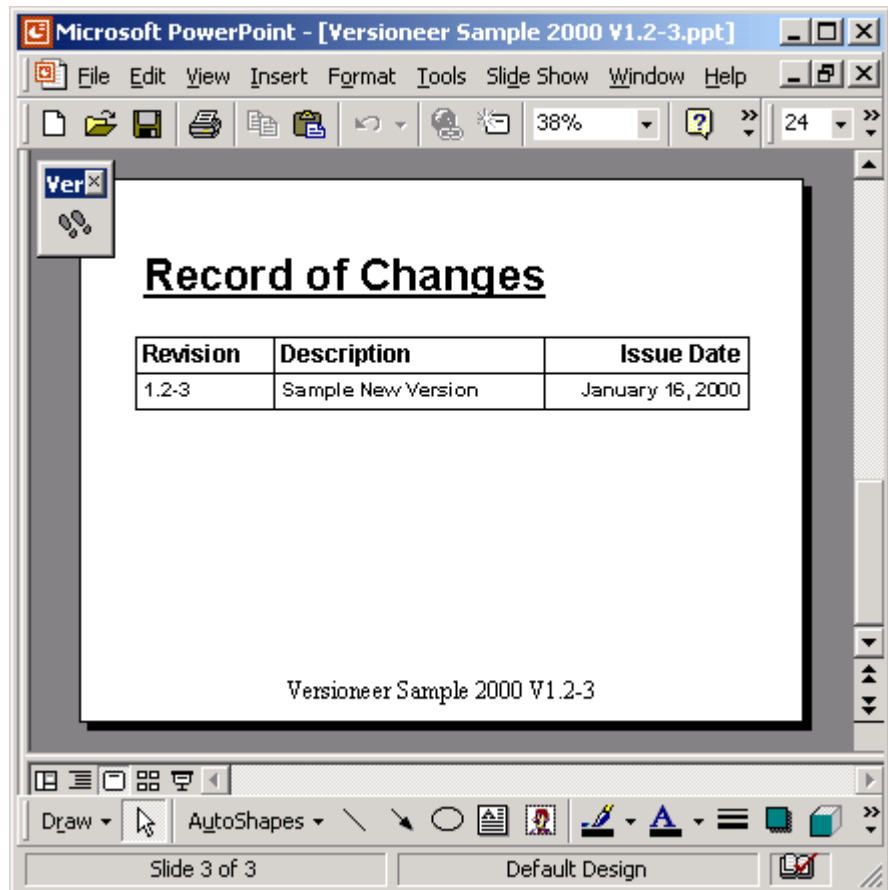
Revision	Description	Issue Date
0.1-1	This is the original	29-Dec-00
1.0-2	After update	29-Dec-00
1.1-1	Final Version	10-Jan-01

Versioneer also check the headers and footers of each sheet in the workbook. If Versioneer can find the version number, it replaces it with the new version number.

## POWERPOINT FEATURES

With PowerPoint, Versioneer looks in the Handout Master, Notes Master, Slide Master Title Master footers and Handout Master and Notes Master header for the document version number. If it is found in any of these locations, Versioneer updates the header or footer. Versioneer then check each slide in the same way.

PowerPoint 97 does not directly support tables. (Tables in PowerPoint 97 are embedded Word objects that hold the tables.) Because of the lack of table



The screenshot shows the Microsoft PowerPoint interface with a slide titled 'Record of Changes'. The table contains the following data:

Revision	Description	Issue Date
1.2-3	Sample New Version	January 16, 2000

At the bottom of the slide, the footer text reads: 'Versioneer Sample 2000 V1.2-3'.

support, Versioneer stores the release description in the Comments property on the summary tab of the document. The current document Comments are displayed and if you change the comments and click OK, the Comments are updated. Clicking Cancel or leaving the properties as is will prevent Versioneer from updating the comments. PowerPoint 97 is the only product that Versioneer updates the comments.

In PowerPoint 2000, tables can be added directly to a slide without having to embed a Word document. Versioneer takes advantage of this and checks each slide for a table structured to hold a record of changes. If the table exists, Versioneer updates it as described in the section on Using Versioneer.

## RECORD OF CHANGES

The Record of changes is a table in the document. If the table exists, Versioneer asks for a description of the change and then updates the table accordingly. The table can have any of the following headings (which are not case sensitive) in any column order:

<b>RECORD OF CHANGES</b>			
<b>Revision</b>	<b>Description</b>	<b>Issue Date</b>	<b>Author</b>
revision	description	issue date	author
revision number	comment	issued	authors
version	comments	issued on	who
version number	change	updated	whom
versions	changes	updated on	contributor
		date	contributors
		date issued	
		date updated	
		dates	

## SAMPLES

Sample files are provided for Word, Excel and two versions for PowerPoint. These documents contain sample records of changes, headers and footers. You're free to use any of these design elements in your own documents.



# Notes

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## **Versioneer**