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VIVA! Communications – Filing & versioning Guide

The following information is designed as a guide when filing and versioning documents for VIVA! Communications.

Filing

In order to maintain an uncluttered digital filing system on the P Drive, here are a few tips to follow when sorting your documents and info.

- The responsibility of creating a new client folder lies with the person managing that account (and should be done as part of a wider checklist including adding programme activity as a project in Zoho etc)
- A client folder should initially be divided into folders by what is listed in the budget estimate for that particular client. Below is an example of a budget estimate converted into folders

Activity

Galaxy Research survey

Develop questions in consultation with PGA, brief & coordinate national Galaxy

Research survey on influenza vaccination in pharmacy

Collate & analyse Galaxy Research survey data & develop a compelling news story

National pharmacy + consumer news media kit + media relations / announcement

Develop national pharmacy media kit (fully referenced)

(incl. ntl media release, influenza backgrounder, pharmacist profiles, relevant images)

Develop national consumer news launch media kit (fully referenced)

(incl. ntl media alert, ntl media release + State-specific releases, consumerised influenza backgrounder, pharmacist profiles nation-wide, patient case studies nation-wide, relevant images)

Develop & host digital consumer news media kit (link directly to PGA website)

Shoot, edit video news release (VNR) in 2x East Coast locations & distribute via satellite feed to TV stations nation-wide

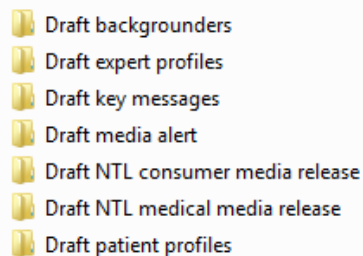
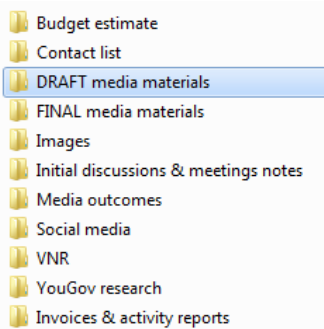
Develop series of social media (SoMe) messages + images for PGA to leverage via digital channels in the lead up to, during & post- campaign



- Budget estimate
- Contact list
- DRAFT media materials
- FINAL media materials
- Images
- Initial discussions & meetings notes
- Media outcomes
- Social media
- VNR
- YouGov research
- Invoices & activity reports

- There may be some folders to create that aren't in the budget estimate e.g. the folder 'contact list' for all expert and patient spokespeople involved in a campaign
- There shouldn't usually be any loose documents in a client folder. If there are definitely no appropriate umbrella folders to file it under, a new folder can be created separately
- Please use lower case for folder titles unless you are differentiating between two similar names e.g. DRAFT media materials and FINAL media materials
- To further organise the info in client folders, use sub folders. **The goal is to have most documents and images categorised and filed neatly, but without having to go through 7 folders to find something.** Below is an example of the sub folder system.

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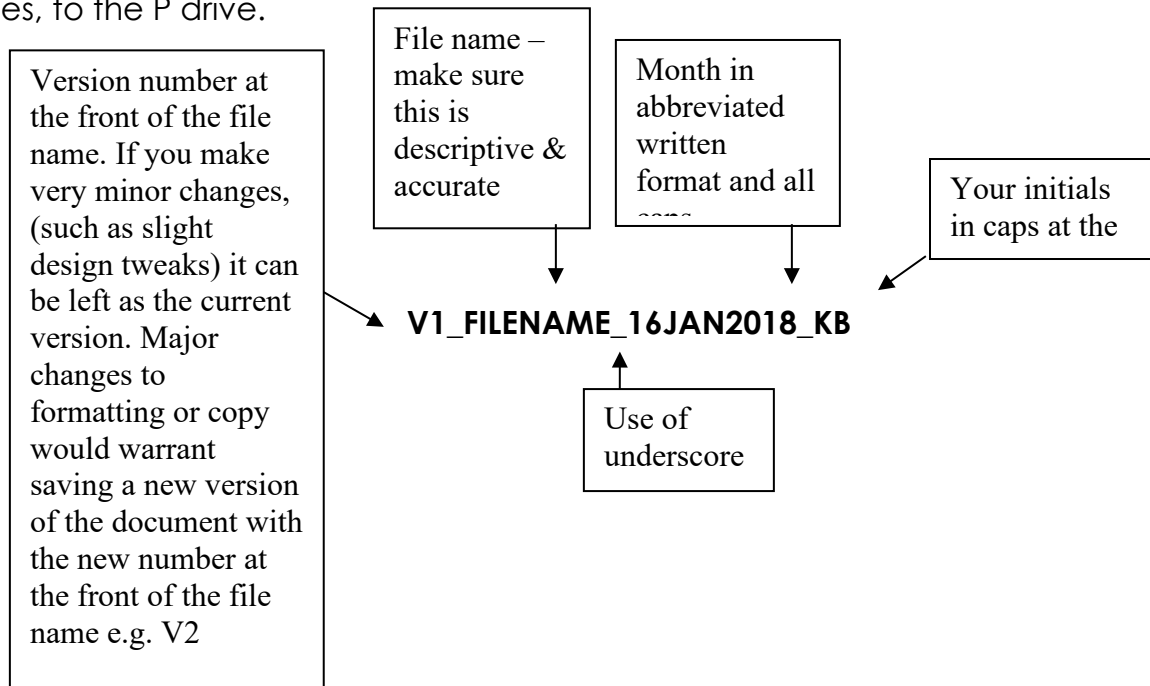
- If you are saving a document that isn't related to a specific client, please also take care where this is being saved. There are folders on the P Drive for VIVA! and LIV platforms, as well as general company admin.

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Versioning

Versioning a document allows the team to effectively work cooperatively on one document and reduces the chance of accidental deletion or a document being overwritten.

Below is the system we have agreed upon when saving all original files, and subsequent changes, to the P drive.



When you are emailing a colleague with a document, be sure to include the link to where it is saved on the P Drive.

Finally...

If you aren't sure, just ask! Any of your senior VIVA! colleagues are always on hand to provide guidance in this area to make sure we get all of our processes just right.