Title – Trading Protocol Instruction: Creating New Documents

Purpose – To explain how to create new folders and name new documents

Method:

* If the document is a new type of document, create an acronym for it of the form “TXX”, (T = Trading). Add the acronym to the acronym list in the glossary folder and create a new top level folder called TXX
* Create a folder a level below TXX called “TXXyyy Title of Document”, with “yyy” being the chronologically appropriate number.
* Paste the folders “Draft”, “Complete” and “Superseded” from the top level folder called “folders”.
* Create your new document in the draft folder, titled “TXXyyy- Title of Document”. The “-“ indicates that this is the first occurrence of the document; it does not supersede any document.
* Create an entry in the TXX Summary spreadsheet for the document.