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Documentation Best Practices

Purpose: This document shows information about documentation.

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Policy and Process Log

- Technical Writer keeps track of the documents she works on in Policy and Process Log.
- The “Queue” tab of Policy & Process Log lists upcoming new documents and upcoming new sections of old documents.
 - IF a document is listed under the “Queue” tab, that means that Technical Writer has not received a draft of that content yet but will soon.
 - Each entry on the tab contains the following information:
 - When the draft is due (“Status”)
 - The SME
 - The document’s title
- The “Draft” tab of Policy & Process Log lists each document and revision that is currently being drafted.
 - Each entry on the tab contains the following information:
 - Whether the draft is in progress, pending a SME, pending time, or has another status
 - The SME
 - The document’s title

- The location of the original draft
 - The revision's title, if it is a revision
 - IF the revision is a revision, an addition, a deletion, or an overhaul
 - The date the draft was submitted
 - The date the draft will be published, if that is known
 - What teams and/or Vendors should receive an emailed alert about the draft's publication
 - Any applicable notes
- The "Documentation Health" tab of Policy & Process Log lists all documents that:
 - Have been published
 - Will be published eventually
 - Will be written eventually
 - Each entry on the tab contains the following information:
 - IF the document is completely published, published with some sections missing, being drafted, in the queue, or backlogged
 - The SME
 - The document's title
 - The location of the published draft, if it has been published
 - The date the 1st draft of the document was submitted to Technical Writer
 - The date the 1st version of the document was published
 - The simple description of the document as it appears on Production TOC
 - The number of pages that the document contains
 - Any applicable notes
 - Any dead links to sections that will be made in future that are in the document: after publishing a new document or section, check the list of dead links and see if those links can be linked to the new document or section
 - What sections have not yet been added to the document that will be published in the future
 - What module(s) the document applies to
- All completed revisions are listed under the "Published Revisions" tab in Policy & Process Log.
- All completed archives are listed under the "Archived" tab in Policy & Process Log.

Drives

- Google Drive and the public drive all contain the following sub-folders:
 - **Archived:** For archived documents
 - In Google Drive, all archived documents have a filename that begins with “ARCHIVE –“
 - **Brands & Categories:** For documents involving Brand & Category Strategy Team
 - **Contacts:** For documents involving Contacts Team
 - **Data Intake:** For documents involving Data Intake Team
 - **Documentation Toolkit:** For documents involving Documentation
 - **Edit:** For documents involving Editorial Team
 - **Inventory:** For documents involving Inventory Team
 - **Operations:** For documents involving HR rules that affect Production Department
 - **Quality:** For documents involving Quality Team
 - **References:** For documents involving all of Production Department
 - **Vendor Management:** For documents involving Vendor Management Team
- On the public drive but NOT on the Google Drive are several revision log appendixes which contain old revisions for certain documents. Once a year, Technical Writer checks for excess revisions on any documents and updates the appendixes accordingly.

Expectations

- Technical Writer is not expected to know about the content of document drafts before writing a document. Technical Writer learns what she needs to know as she works on the document through meetings and job shadowing.

Process: Writing A Document

1. Technical Writer receives a draft from SME.
2. Technical Writer opens either the word document, Documentation Process Template, or the word document, Documentation Policy Template, from the public drive depending on whether the document is process or policy.
3. Technical Writer copies and pastes the contents from the template into a new Word document.
4. Technical Writer saves the new Word document with the document name that SME emailed to Technical Writer.
5. Technical Writer positions the new Word document on the left computer screen and the draft that SME emailed on the right computer screen.

6. Technical Writer copies and pastes the emailed draft into the new document.
 - a. It is helpful to copy and paste chunks of text that use the same letter, number, or bullet at once.
 - i. For example, if a document lists Steps 1., 2., 3., 4., 4.a., 4.b., 4.c., copy and paste Steps 1. through 4. and then copy and paste Steps 4.a. through 4.c.
 - ii. IF the spacing of the bullets or numbers and letters gets out of order, finish copying and pasting and then reformat the bullets and number spacing at the end.
 - iii. Similarly, when adding in figures, place the images into tables with the correct headings as you run into figures, but wait until the end to give the figures the correct borders, shading, and font colors and styles.
 - b. This task requires little thinking, unlike most other tasks that Technical Writer does. Listening to music or podcasts is great for this task.
 - i. This task can be relaxing but also tedious if done often. Keep that in mind when thinking about what time of day in which to do this task.
 - c. This task is best done in the office at Technical Writer's own desk as opposed to on a WFH day or in a phone booth because having 2 computer screens makes it much easier.
7. Technical Writer reads through the document and inserts comments next to specific questions she has.
 - a. IF you think you know the answer to a question, write down that answer in the comment and ask if it's correct.
 - i. Unlike Step 6., this task requires a lot of critical thinking skills. Consider that when thinking about what time of day to do this task.
8. Technical Writer checks SME's calendar.
9. Technical Writer reserves a conference room for a half hour at a time when SME is free.
10. Technical Writer emails SME, telling him which time the meeting is scheduled for and requests that SME either accept the meeting invitation or suggests a different meeting time.
11. Technical Writer sends the email and invites SME to the meeting **within the same 10 seconds**.
12. Before meeting with SME, Technical Writer must determine if she understands the gist of the document and has specific questions or if she DOES NOT understand the document much at all.

- a. IF Technical Writer understands the gist of the document, go through the questions that Technical Writer came up with in Step 7.
 - b. IF Technical Writer DOES NOT understand the gist of the document, ask SME to explain the basic purpose of this document.
13. IF it would be helpful, set up a time to job shadow with SME or a member of SME's team.
- a. A good alternative to job shadowing is playing around with a beta version of the applicable tool. This is often best done with a process document or with a policy document involving an unfamiliar tool.
 - i. IF a beta version is not available, see if there are old, out of date issues to work with on the tool or old, out of date tags to look through or something similar.
14. Technical Writer continues writing down questions as she comes up with them.
15. Figure out which questions can be answered via email and which are best to answer in meetings with SME.
16. Continue meeting and emailing until all questions are answered.
17. Think about how to write a draft in the best way, even if that is different from what SME originally wrote. Maybe some steps would be better suited in a table. Maybe some policy bullets are actually process steps.
18. Once Technical Writer has finished writing a document, wait a day or so and then do a developmental edit.
- a. First, check the document's content against what was written in the SME's original draft.
 - b. Next, check the document's content against the actual process described. Do the process described if you can.
19. Wait another day or so and copyedit the document

Proofreading Tips and Tricks

- Wait a few hours in between working on a document and proofreading it.
 - It helps to work on a document before a lunch hour and proofread after the lunch hour.
 - If you work on a document after a lunch hour, waiting until the next business day to proofread it also works.
- Print it out and use a pen or pencil on the physical page.
- Sit in a different physical location from where you normally work.

- Read aloud as much as you can without disturbing others.
- Read back to front, especially with big documents.
- Read more than once, especially with big documents

Checklist for Proofreading Documents

- **Text:**
 - The relevant personnel and tools should be listed alphabetically on the Purpose sheet.
 - Nowhere on the document should it say the name of Vendors except in rare instances that have been discussed with Senior Project Manager.
 - In those rare instances where a document names the Vendors, the purpose sheet should contain a red note saying, “**NOTE: MediaRadar DOES NOT share this document with Vendors because it has the name of Vendors on it.**”
 - Position titles should be capitalized.
 - Text should be in the present tense unless there is a clear reason why something will happen in the future or did happen in the past.
 - The word “click” should be used when Operator is asked to click something and the word “select” should be used when there are multiple selections to choose from. The word “press” should not be used.
 - There should be correct dates in the appropriate places on revision sheets and the revision log.
- **Figures & Tables:**
 - Figures should be referenced as (see Figure X) unless there is a good reason otherwise.
 - All figures should be in tables with no borders and 10% shading with a caption in bold font that says, “Figure” and then a number.
 - Tables should be shaded with 10% shading.
- **Bullets/Steps:**
 - Bullets, numbers, and sentences should be consistently aligned.
 - Every time there is a reference to a step, that reference should be correct.
- **Links:**
 - Links should lead readers to the appropriate webpage or section of the documents.
 - Email addresses must be linked.

Checklist for Proofreading Glossary Entries

- IF the entry has full sentences in it, it should end with a period.
- IF the entry is a fragment, it should not end with a period.
- IF a definition contains a word that is defined elsewhere on the glossary, that word in the definition should be hyperlinked to its respective definition.
- IF a definition contains the same word twice and that word is defined elsewhere on the glossary, the word inside the definition should only be hyperlinked once.
 - For example, the definition for “Batch” reads “**Batch**: A set of Events that are delivered within one Master Sheet to a Client on a specific date. Each time a master sheet is refreshed, it is considered a new batch. This term is used to prioritize assignments.” The term “master sheet” is used twice in the definition. Only hyperlink the word “master sheet” the 1st time it is used.

Checklist for Flowcharts and Decision Trees

- Is all the main box font Calibri bold of the same size?
- Are all the box numbers Calibri 8 non-bolded?
- Are all the Yes’s and No’s on lines Calibri 12 bold?
- Are the box numbers correct?
- Do all the lines have arrows pointing the correct direction?
- Are all the arrowheads medium size?
- Are there any repetitive boxes? If so, can you get rid of repetition or must it stay that way?
- Are all the boxes correctly colored?
- Are the lines correct in being either diagonal or dented depending on the style guide rules?

Communication: Tips and Tricks

- The more you work with each SME, the more you can learn their individual communication style.
- Ask yourself if the questions you have about a document would be best answered via email, at an in person meeting, by walking up to their desk, or via Google Hangout.
- Ask yourself if the SME you’re working with works best in writing or by talking.

Alerts

- When a new document or a revision is written, email alerts are sent to various groups of people.

- IF Vendor is being alerted, separate emails are sent to Vendor and Production Teams and the email is sent out on a Friday.
- SME's must think carefully if they want to email anyone on the 9th floor and they must draft a carefully worded email alert specifically for 9th floor employees.

Email Template for Asking SMEs for More Work

[SME],

I'm ready for content.

Please choose to either send me new content or to re-review and give me a revision based on anything that needs to be changed.

If you want to give me new content, then please select from one of the sections listed below and let me know your timeline:

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Thanks,
Lauren

Feedback

- When SMEs give feedback, they can track changes or make comments or both.
 - When SMEs change the document directly, themselves, they must track changes.
 - IF SMEs would rather have Technical Writer make changes, they must mention that in the comments.
- SMEs should write comments in full sentences. It's difficult to decipher what SMEs mean when they write comments using a few words. Do they want me to capitalize something or replace a word? Specifically express what you want Technical Writer to change.
- SMEs can highlight text in neon colors like yellow.
- DO NOT highlight in dark colors. That's difficult to read.
 - SMEs can use highlights to draw attention to certain sentences or words.
 - SMEs can also highlight several different sentences or words that have the exact same problem and make a comment that mentions that problem regarding the highlighted sentences.

- Be aware that comments can cover up some of highlights, though.
- DO NOT make fonts into different colors. Fonts already are in different colors depending on if they're links and this will mess up the color system.

F9 and Bugs

- When there are many images with figure numbers and references to those figures, it's important to click F9 on the keyboard to make the figures and figure references match up.
- Pressing F9 and also making a word document into a PDF can create lots of errors on documents such as Glossary and Ad Tagging Policy because those documents have many cross reference links. When clicking F9 on those documents or republishing them after you make changes to them, make sure to look them over for unexpected errors. Also check if the page number suddenly increased without warning. That can mean that things got buggy.

Revision Log

Name	Section Revised	Description	Date
Lauren Conrad	Entire Document	I wrote the entire document.	12/11/17
Lauren Conrad	Process: Writing a Document	I added more steps about copyediting and doing a developmental edit.	5/21/18
Lauren Conrad	Communication: Tips and Tricks	I wrote this new section.	5/21/18
Lauren Conrad	Email Template for Asking SMEs for More Work	I edited this section.	6/12/18
Lauren Conrad	Feedback	I added this section	6/12/18
Lauren Conrad	Feedback	I edited this section	6/14/18
Lauren Conrad	Checklist for	I wrote this new section.	7/10/18

	Flowcharts and Decision Trees		
Lauren Conrad	Alerts	I wrote this new section.	7/16/18
Lauren Conrad	Drives	I added more information to this section.	7/16/18
Lauren Conrad	F9 and Bugs	I wrote this new section.	8/16/18