Become the Policy Management Guru for Your Organization

Policies and Procedures Best Practices

Cheryl Landes, Tabby Cat Communications

MadCap Software Webinar

Tuesday, July 26, 2016

Introduction

- Five best practices

- Five cool Doc-To-Help features

Agenda

▶ Best Practice 1

Understand the difference between a policy and a procedure.

- Policy—What the company does

- Procedure—How the company does it

Best Practice 1: Understand the difference between a policy and a procedure.

Sample policy:

Only employees who are trained in proper cash handling procedures are allowed to accept cash and process customer transactions.

Best Practice 1: Understand the difference between a policy and a procedure.

Sample procedure (excerpt):

- All cash transactions will be conducted at the cash register.

- Clerks will not deposit bills into the register drawer until they have given change to the customer.

- Clerks will deposit the cash in the register drawer immediately after each transaction is completed.

- The manager on duty balances the receipts after each shift.

Best Practice 1: Understand the difference between a policy and a procedure.

Sample procedure with steps:

To change your password:

1. Press **CTRL + ALT + DELETE**.

2. Select **Change a Password**.

3. In the field under your username, enter your old password.

4. In the field under your old password, enter your new password.

5. Retype your new password.

6. Click the arrow button to save your new password.

Best Practice 1: Understand the difference between a policy and a procedure.

- Best Practice 2

Focus on only one policy and its corresponding procedure in each section of the document.

- Eliminates confusion

- Enhances readability

Best Practice 2: Focus on only one policy and its corresponding procedure in each section of the document.

- Best Practice 3

Organize each policy and procedure logically.

- Go from general to specific.
  - Start with the policy, followed by the procedure.

Best Practice 3: Organize each policy and procedure logically.

- Best Practice 4

Write clearly and concisely.

- Write short sentences.

- Avoid jargon whenever possible.

- Don't use convoluted corporate language.

- Use active voice.

- Limit the page length of each policy and procedure.

Best Practice 4: Write clearly and concisely.

▶ Best Practice 5

Create a policy and procedures template that's easy to use.

- Use a simple layout.

- Use paragraph and character styles for consistency.

- Train anyone creating policies and procedures on how to use the template.

Best Practice 5: Create a policy and procedures template that's easy to use.

- Doc-To-Help Cool Feature 1

Use existing Word documents.

- Import Word documents into Doc-To-Help.
  - Select the primary target.
  - Import from your computer, a network folder, or SharePoint.
  - Import multiple Word documents into the same Doc-To-Help project.
  - Continue working with your Word documents in Word and Doc-To-Help.

Cool feature 1:
Use existing Word documents.

Take advantage of Doc-To-Help features in Word!
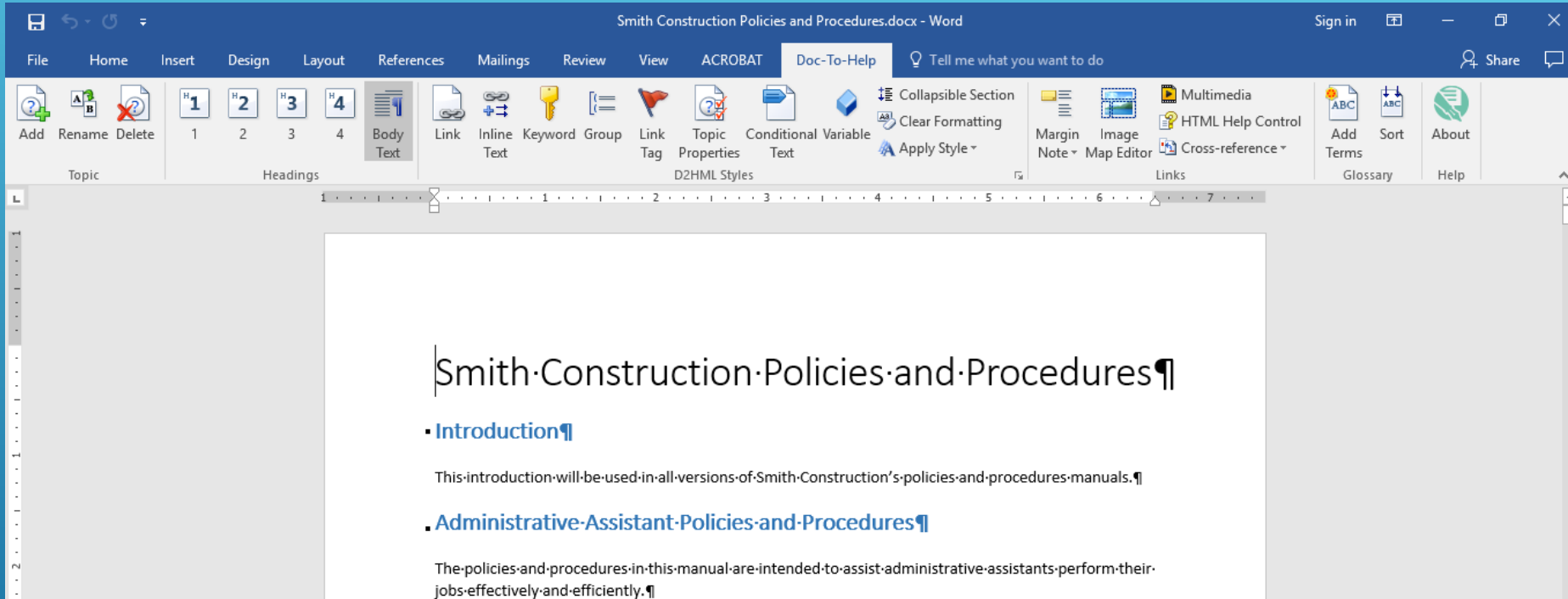
Cool feature 1:
Use existing Word documents.

- Doc-To-Help Cool Feature 2

Choose from a variety of outputs (targets).

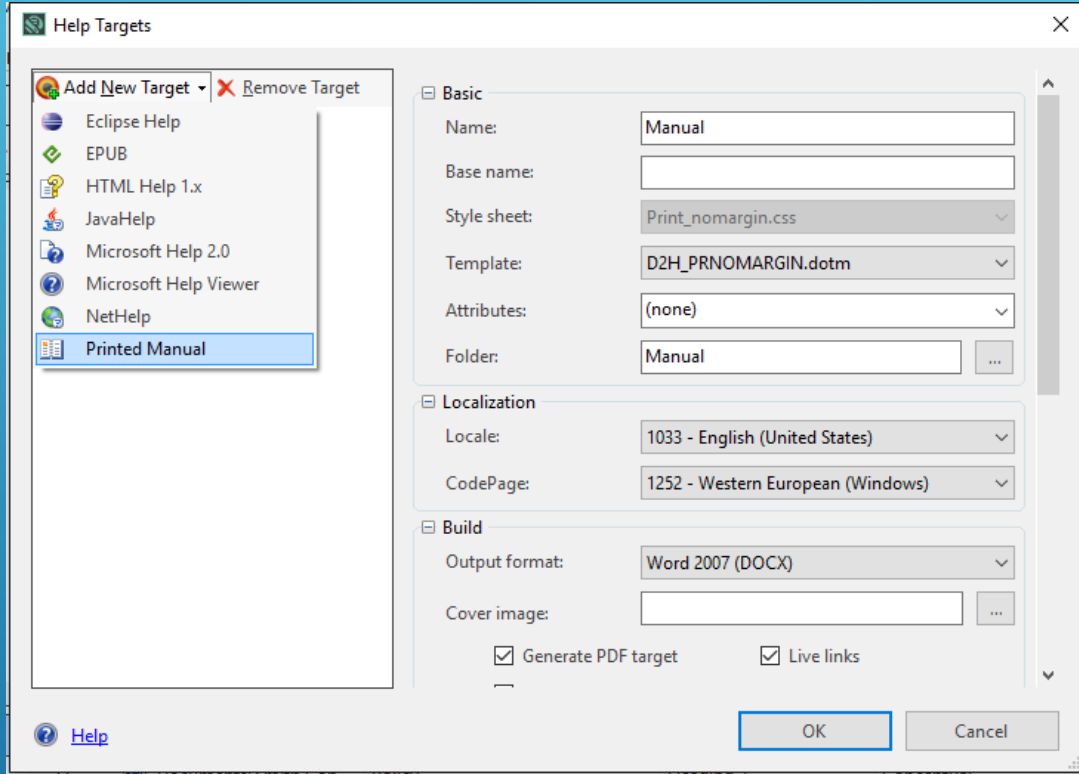Generate help content, EPUB, and print documents.
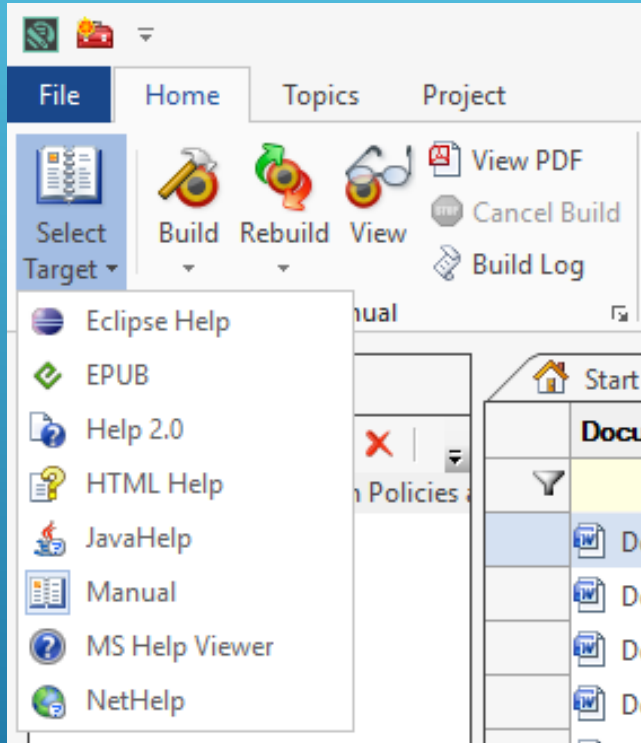
Cool feature 2:
Choose from a variety of outputs (targets).

Also create multiple targets. First, click this button in the Home tab.
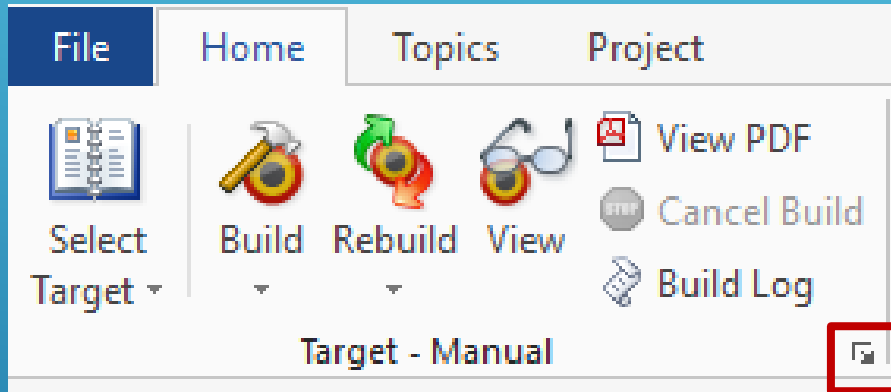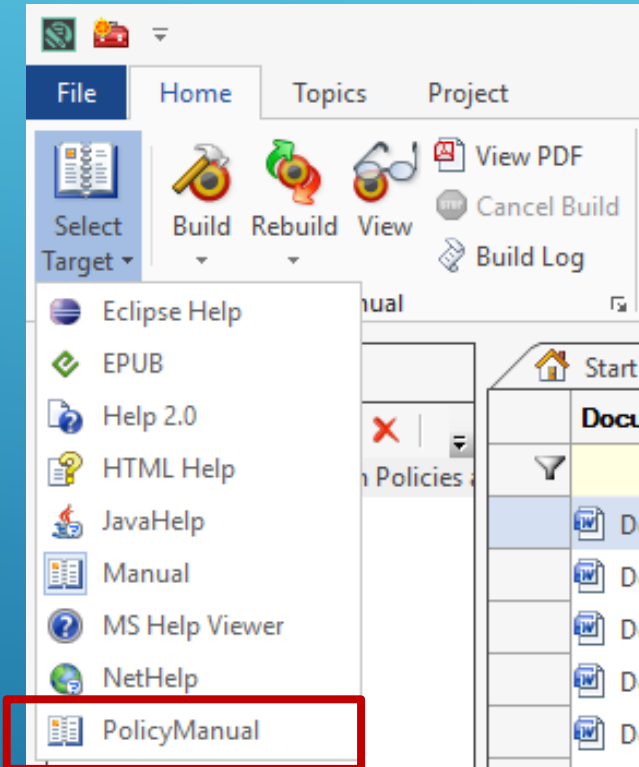
Cool feature 2:
Choose from a variety of outputs (targets).

Next, create the new target.
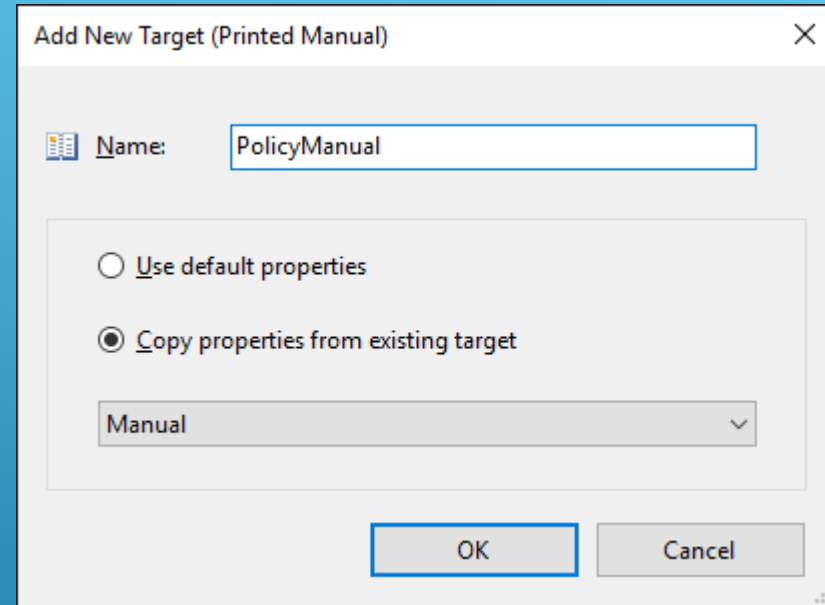
Cool feature 2:
Choose from a variety of outputs (targets).

Now the new target is in your target list.

Cool feature 2:
Choose from a variety of outputs (targets).

- Doc-To-Help Cool Feature 3

Create multiple versions of documents from the same target.

Set attributes and values to your topics to output different versions of your documents.
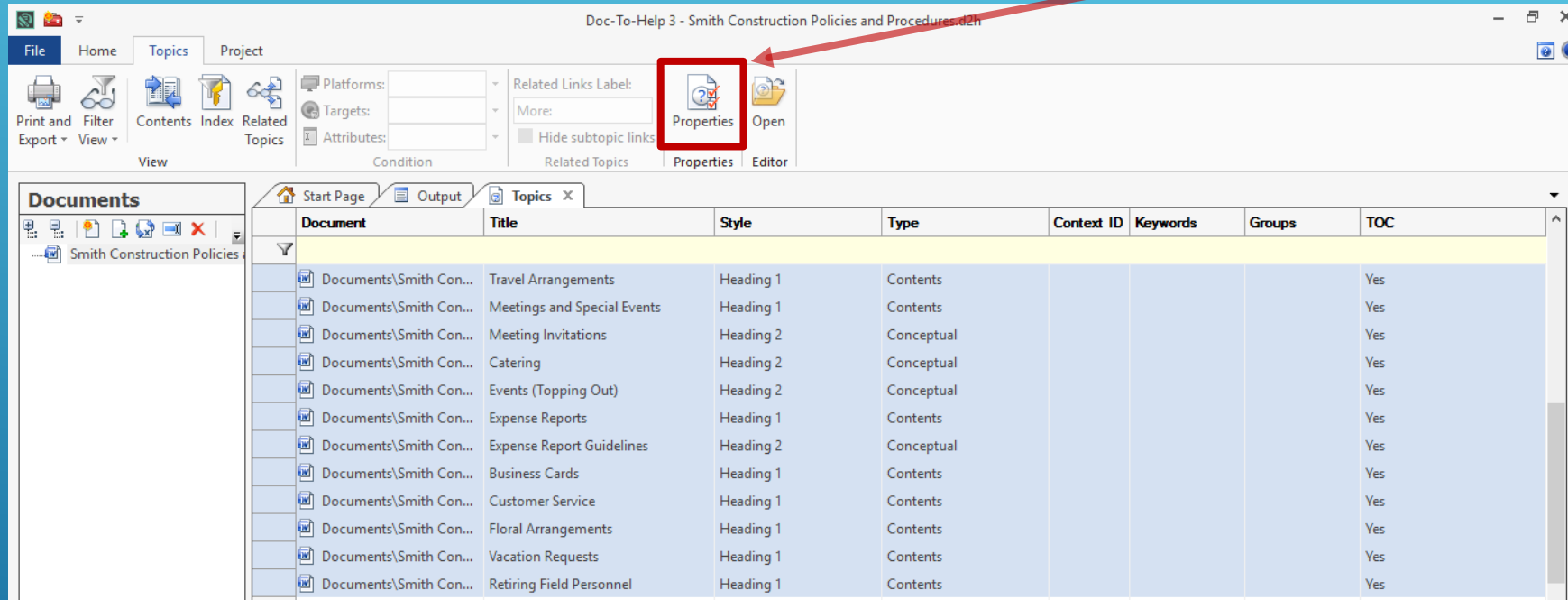
In the Project tab, click Attributes.
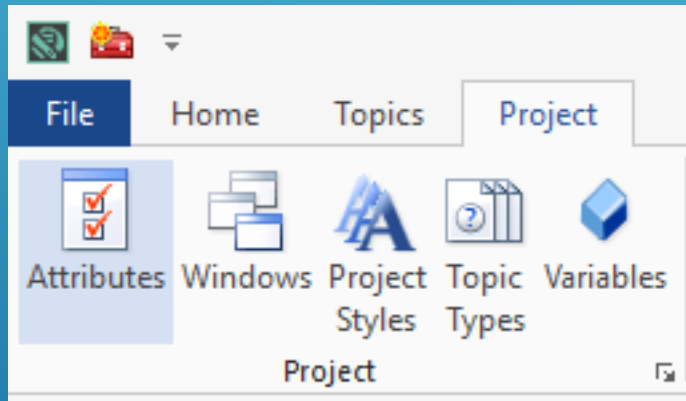
Cool feature 3: Create multiple versions of documents from the same target.

Click Add New Attribute to create an attribute.
Then add your values.
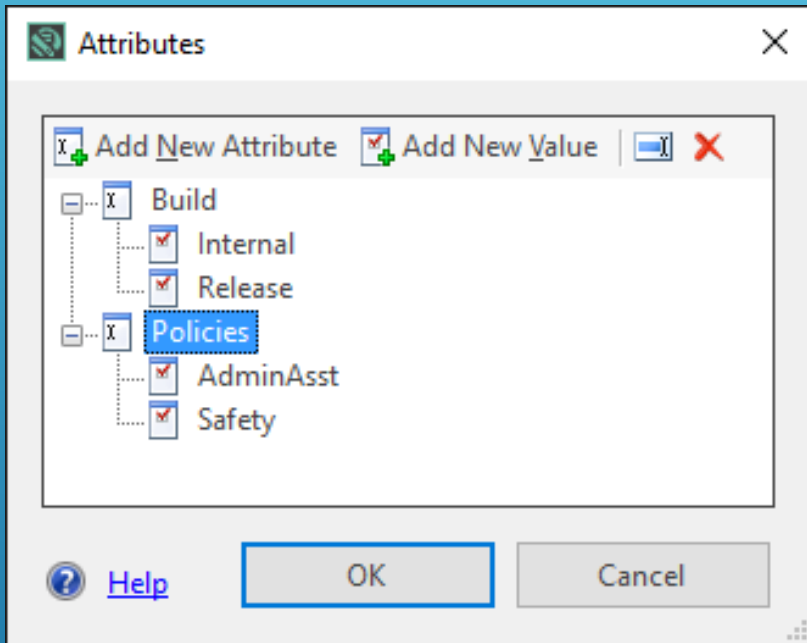
Cool feature 3: Create multiple versions of documents from the same target.

Assign attributes to the topics.
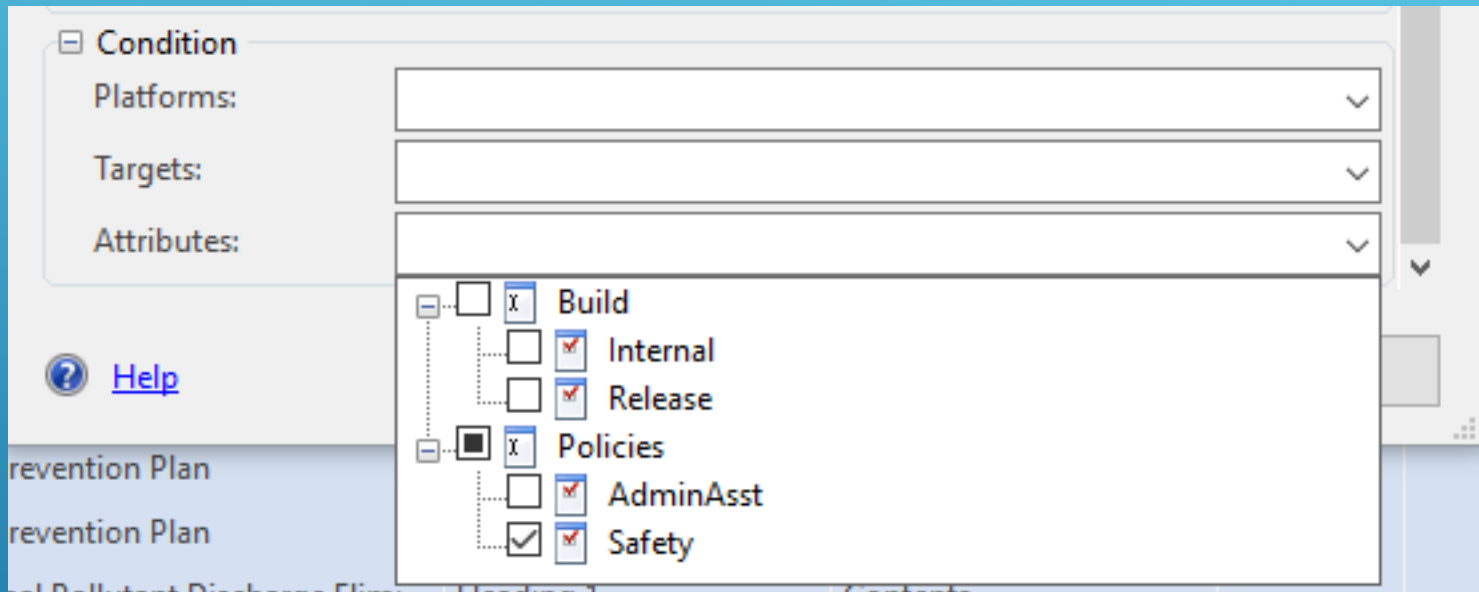Select the topics, and in the Topics tab, click Properties.

Cool feature 3: Create multiple versions of documents from the same target.

Select the attribute, and click OK twice to apply to the topics.

Cool feature 3:
Create multiple versions of documents from the same target.
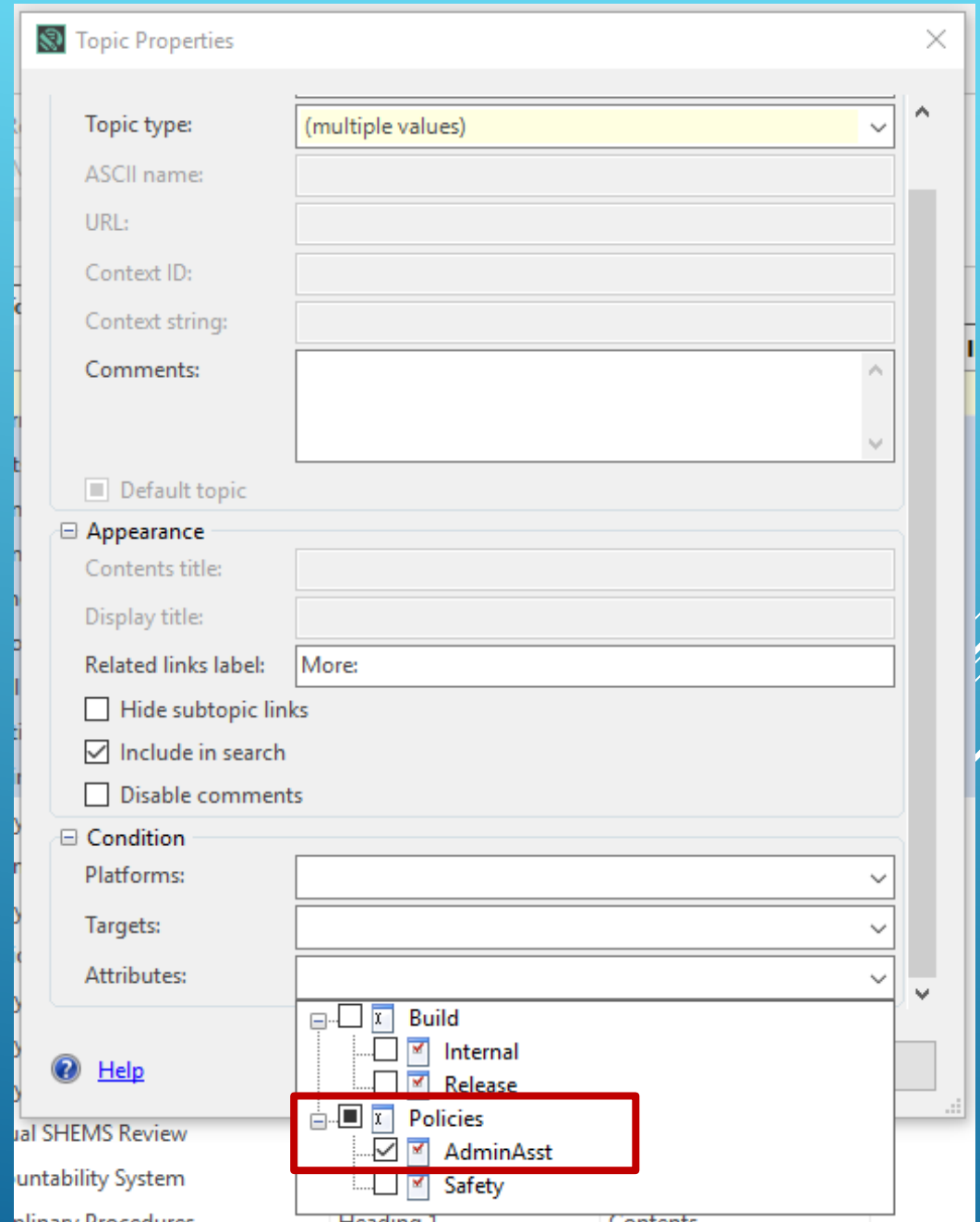
Repeat the steps to assign topics to another attribute.

Cool feature 3: Create multiple versions of documents from the same target.

- Logic for assigning attributes to targets:
  - Assign attributes to only the topics to be included in a specific version of a document.
  - Topics appearing in every version of a document don't need specific attributes assigned.

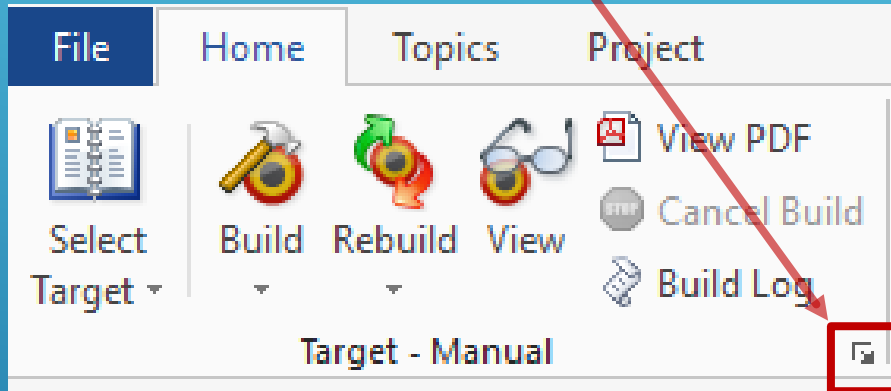# Cool feature 3: Create multiple versions of documents from the same target.

To output a specific version of a document, select your target.
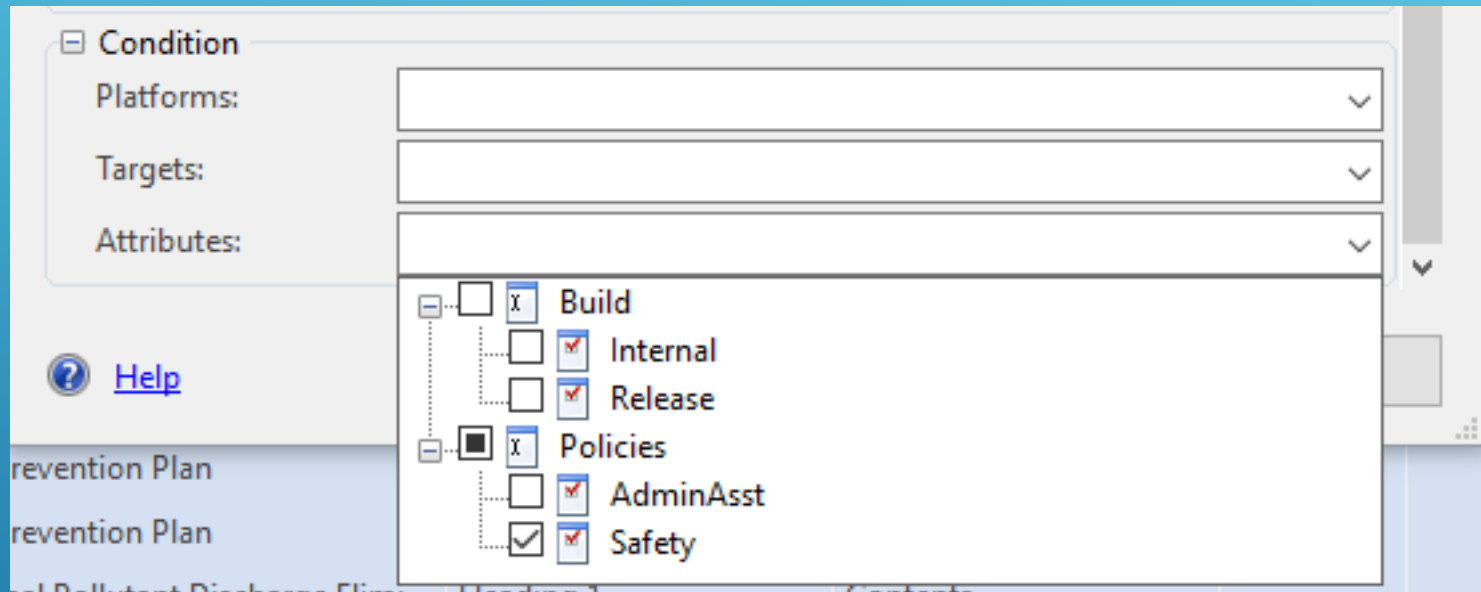
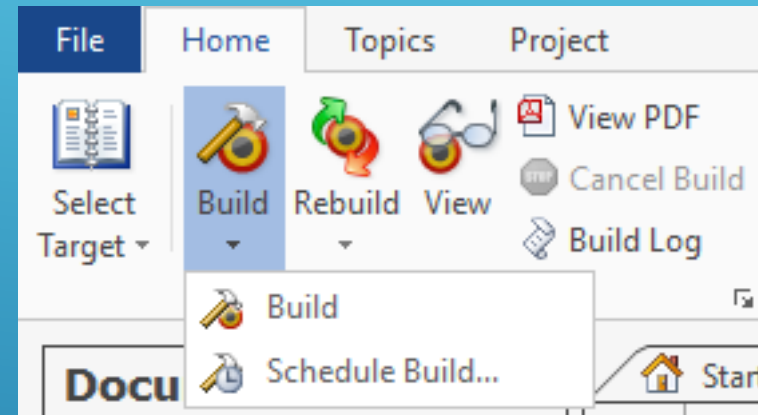Cool feature 3: Create multiple versions of documents from the same target.
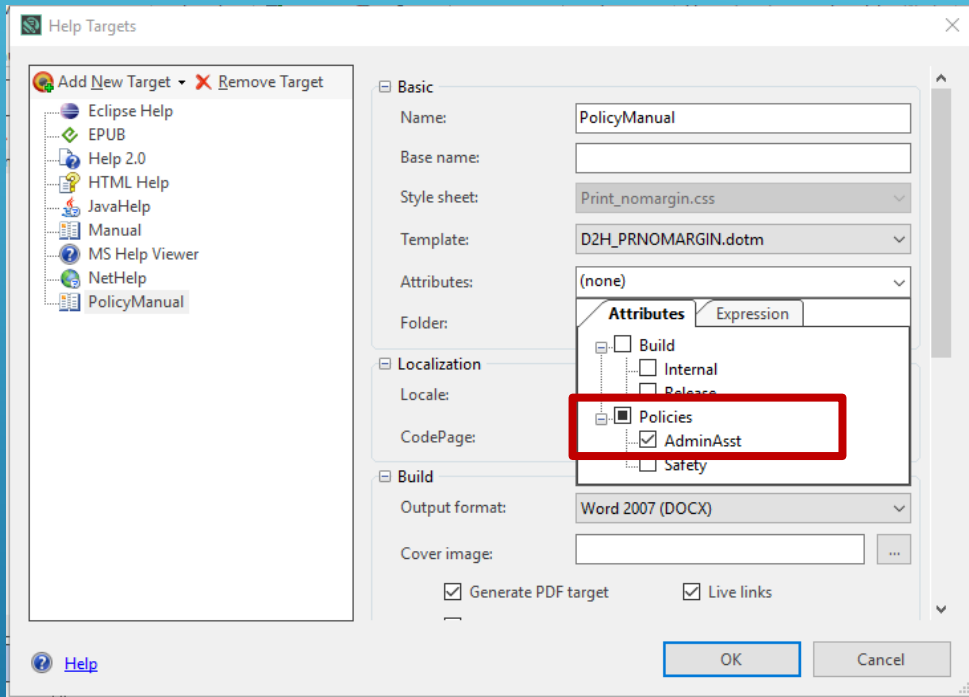
To output a specific version of a document, select your target. Then click this button in the Home tab.

Cool feature 3: Create multiple versions of documents from the same target.

Select the attribute for the version of the document you want to create, click OK twice, and build the document.

Cool feature 3: Create multiple versions of documents from the same target.

- Doc-To-Help Cool Feature 4

Easily create tables of contents.

Set heading styles in your Word document.

Cool Feature 4:
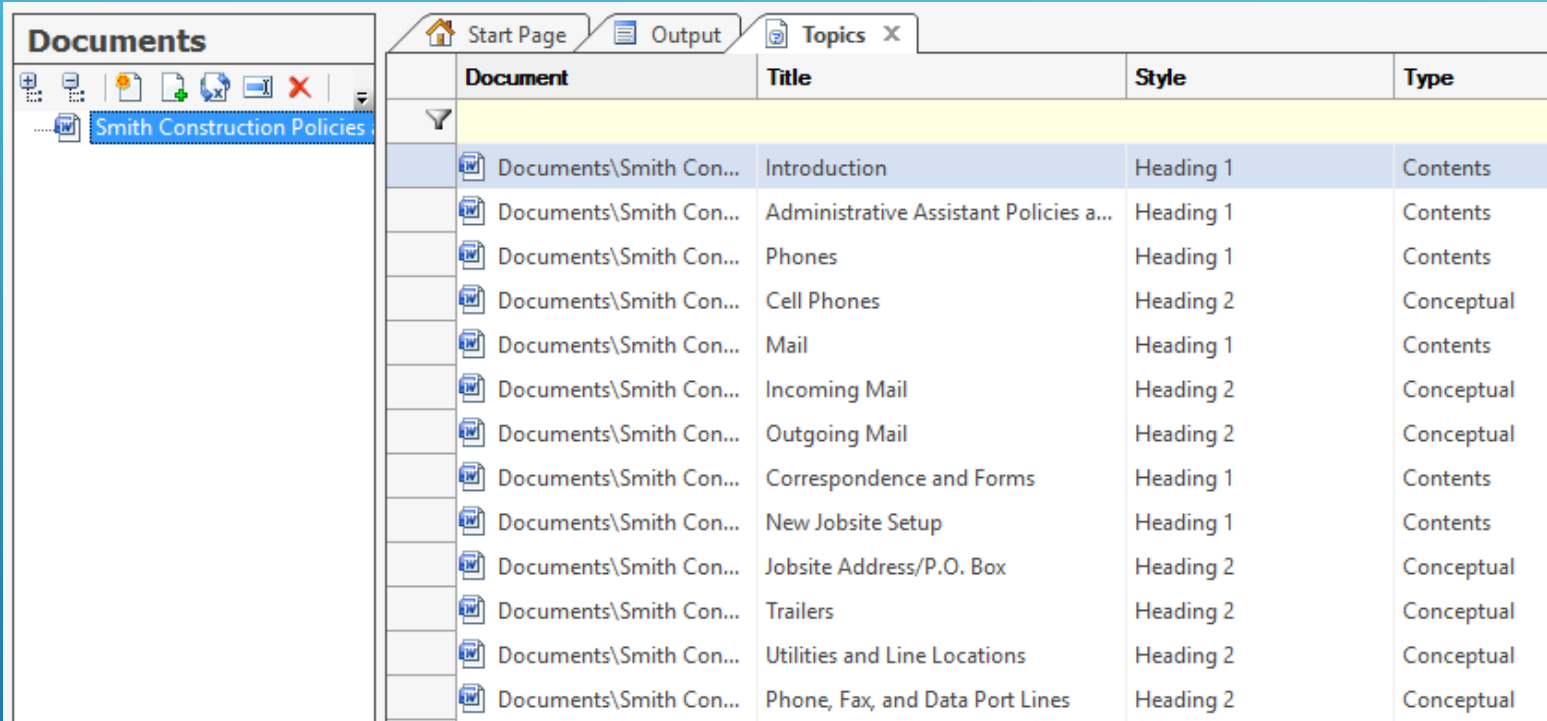Easily create tables of contents.

Import your Word document into your Doc-To-Help project.
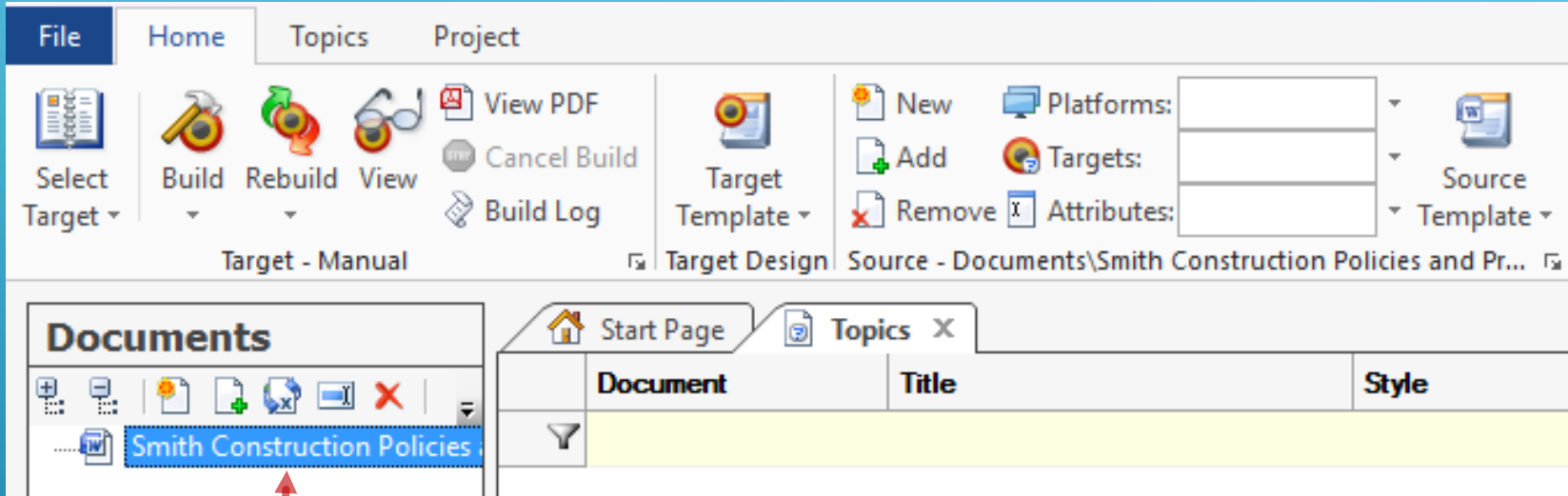
Imported Word doc

Cool Feature 4:
Easily create tables of contents.

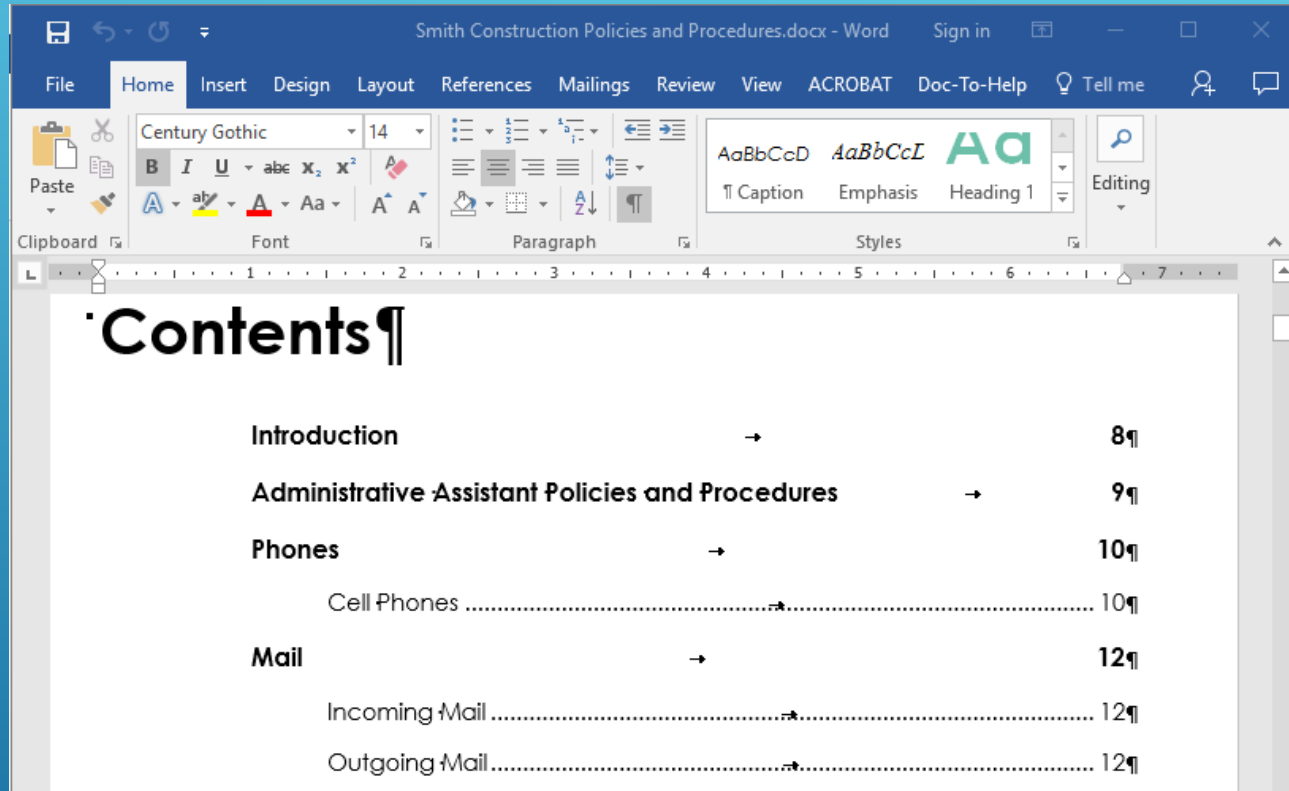Build your project in Doc-To-Help. Doc-To-Help creates topics automatically.

Cool Feature 4:
Easily create tables of contents.

Doc-To-Help automatically generates your table of contents!

Cool Feature 4:
Easily create tables of contents.

- Need to add more content?

  Do it in Word, rebuild, and Doc-To-Help creates and updates topics automatically—along with your TOC.

Cool Feature 4:
Easily create tables of contents.

- Doc-To-Help Cool Feature 5

Rebuild outputs quickly and cleanly.
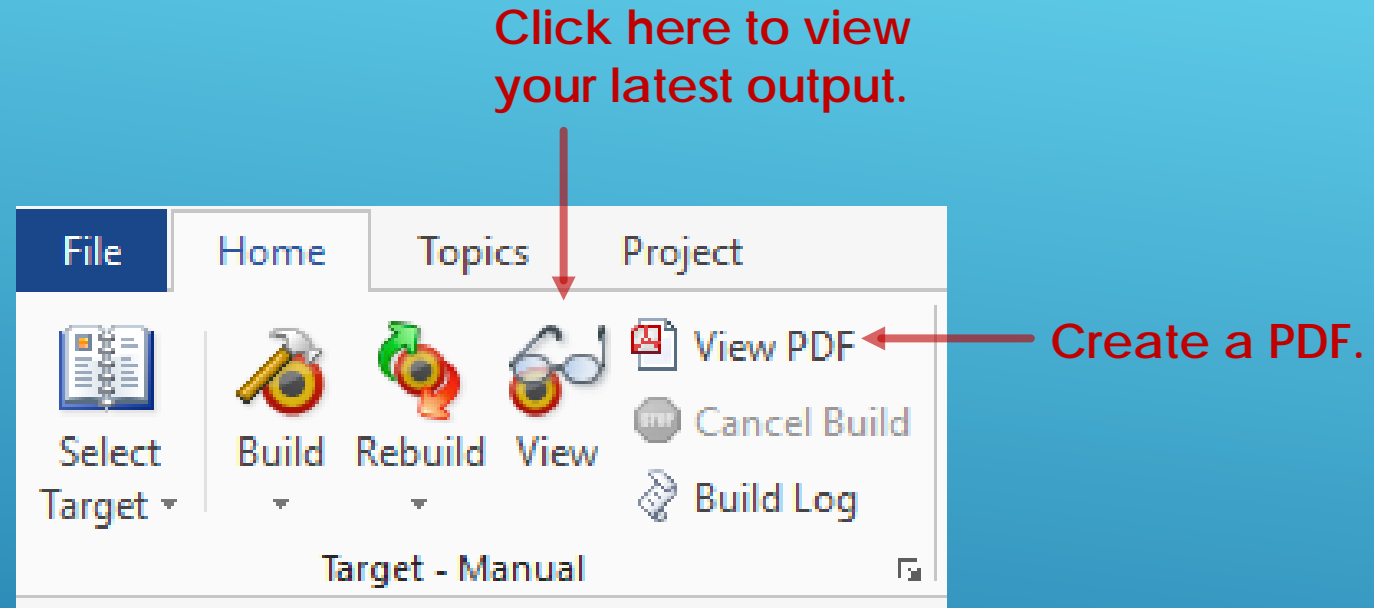
Rebuild in two clicks!
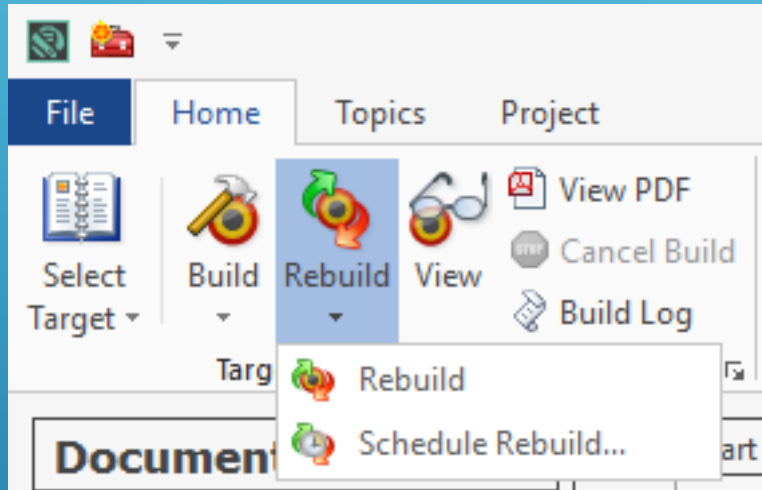
Cool Feature 5:
Rebuild outputs quickly and cleanly.

▶ Bonus Doc-To-Help Cool Features

Click here to view your latest output.

Create a PDF.

Create a PDF and view your latest output in one click.

1. Understand the difference between a policy and a procedure.

2. Focus on only one policy and its corresponding procedure in each section of the document.

3. Organize each policy and procedure logically.

4. Write clearly and concisely.

5. Create a policy and procedures template that's easy to use.

Summary: Five Best Practices

1. Use existing Word documents.

2. Choose from a variety of outputs (targets).

3. Create multiple versions of documents from the same target.

4. Easily create tables of contents.

5. Rebuild outputs quickly and cleanly.

Summary: Five Cool Doc-To-Help Features

Contact Information

Cheryl Landes

Tabby Cat Communications

tabbycatco.com

clandes@tabbycatco.com

TAKE ADVANTAGE OF CERTIFIED TRAINING

As a webinar attendee, receive **$100 OFF** your next advanced training course.

MadCap Flare Responsive HTML5
August 23-24, 2016 (web-based)
MadCap Flare Project Management/Team Authoring
August 25-26, 2016 (web-based)

For more details, click here or email sales@madcapsoftware.com

Note: Courses subject to change. Availability based on student registration. Certain restrictions apply; cannot be combined with any other offer or promotion. Not valid on courses already purchased.