

# Become the Policy Management Guru for Your Organization

Policies and Procedures Best Practices

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MadCap Software Webinar

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# Introduction



- ▶ Five best practices
- ▶ Five cool Doc-To-Help features

# Agenda

▶ Best Practice 1

Understand the difference between a policy and a procedure.

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- ▶ 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.

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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.

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- ▶ Eliminates confusion
- ▶ Enhances readability

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

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▶ Best Practice 3

Organize each policy and procedure logically.

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- ▶ 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.

A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

- ▶ 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.

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- ▶ 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.

A decorative graphic consisting of several parallel white lines of varying lengths, slanted diagonally from the bottom right towards the top right, set against a solid blue background.




▶ Doc-To-Help Cool Feature 1

Use existing Word documents.

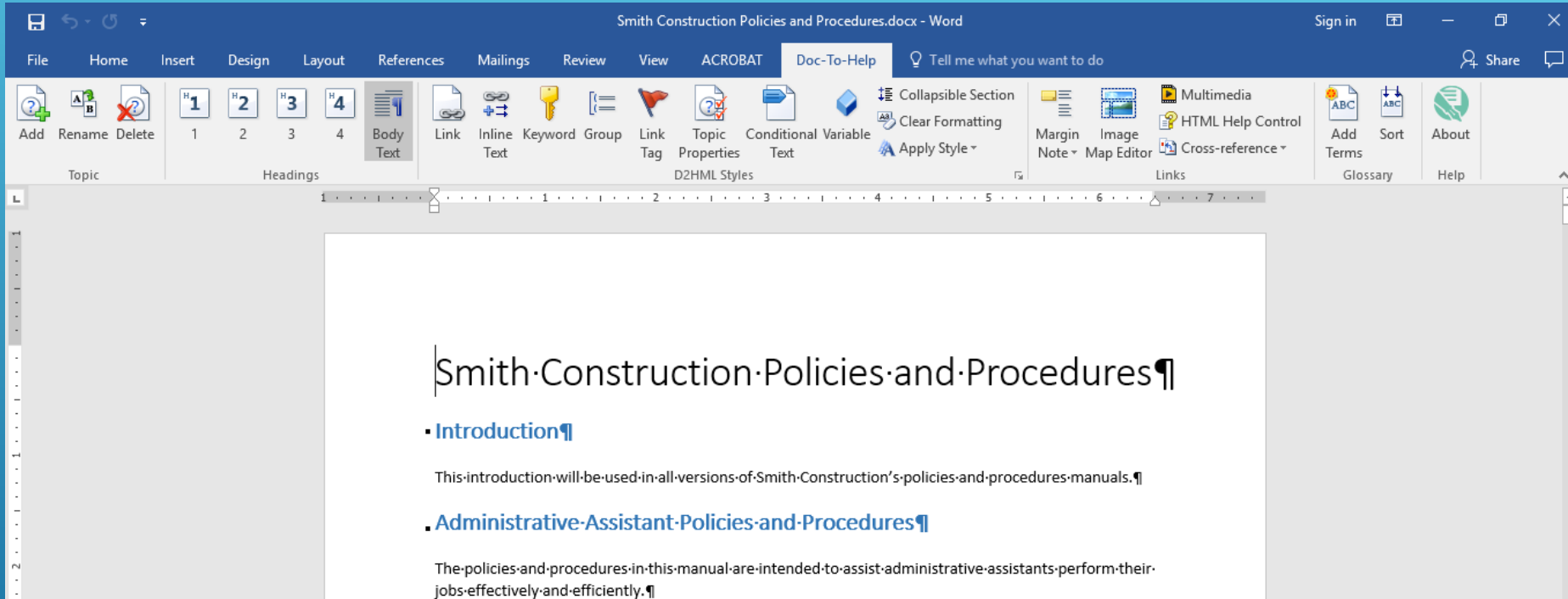
A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

- ▶ 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!



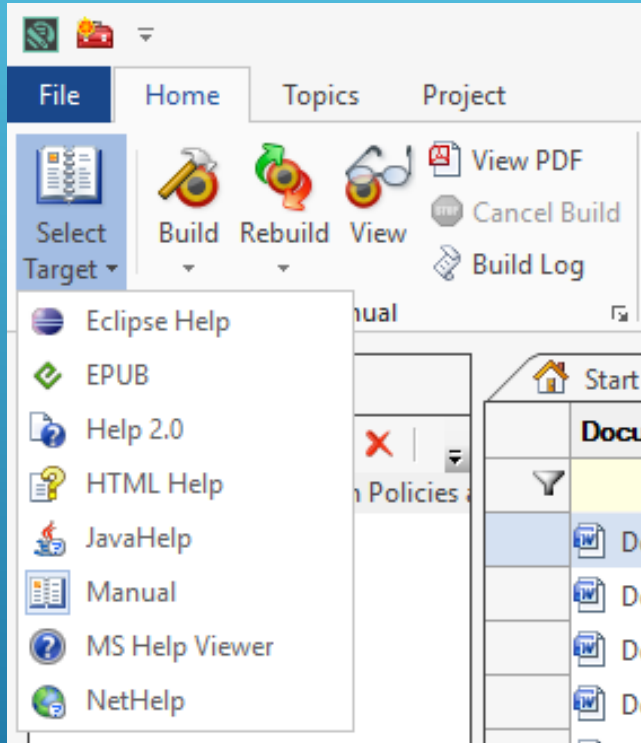
Cool feature 1:  
Use existing Word documents.

▶ Doc-To-Help Cool Feature 2

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

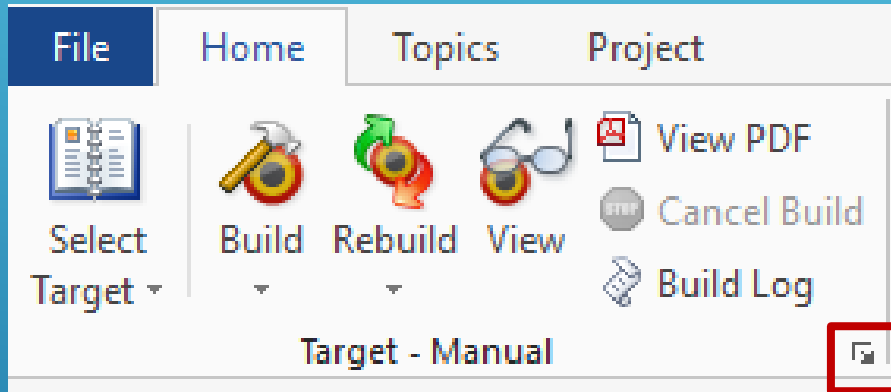
A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

Generate help content, EPUB, and print documents.



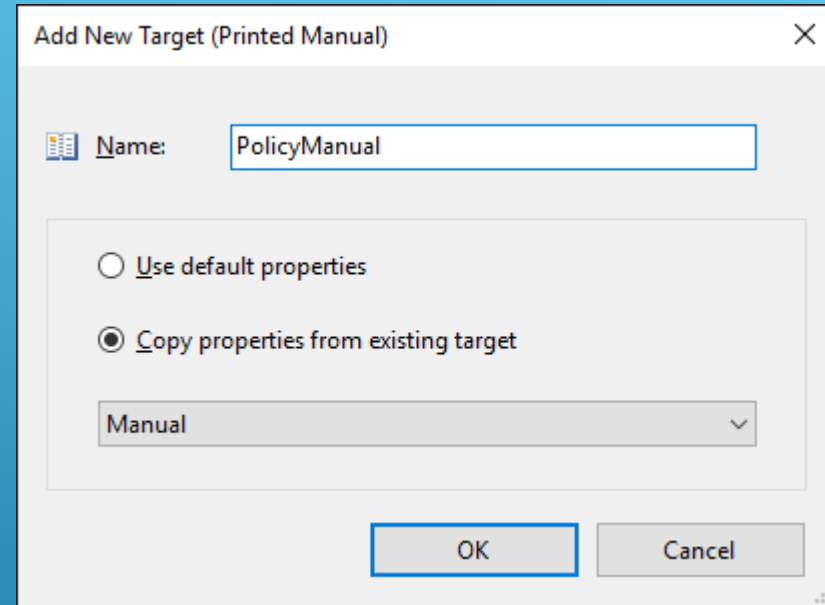
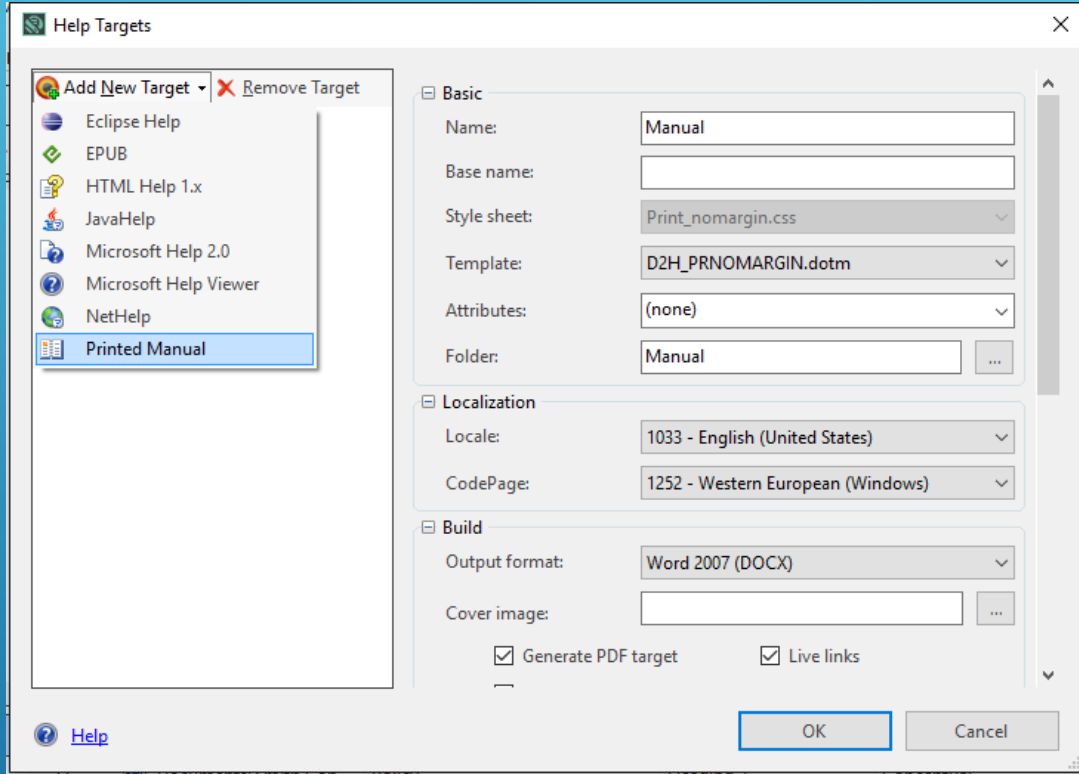
Cool feature 2:  
Choose from a variety of outputs (targets).

Also create multiple targets. First, click this button in the Home tab.



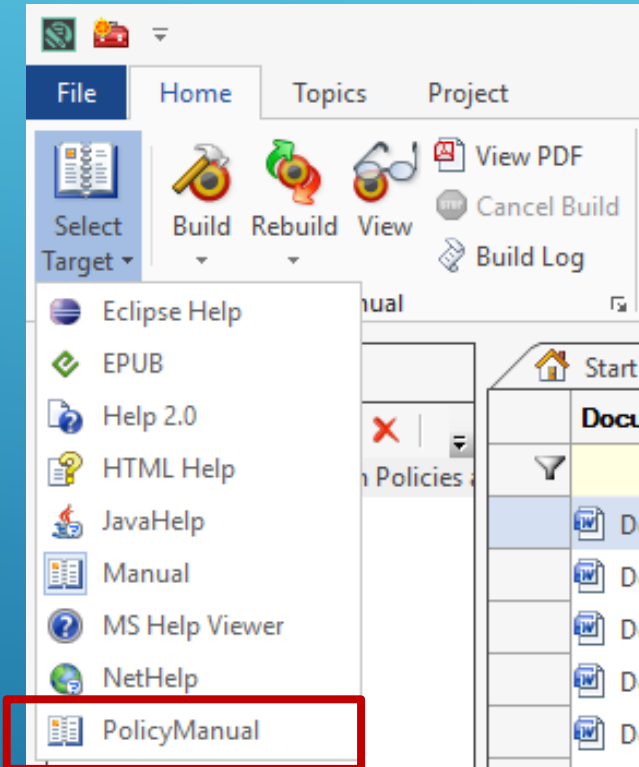
Cool feature 2:  
Choose from a variety of outputs (targets).

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).



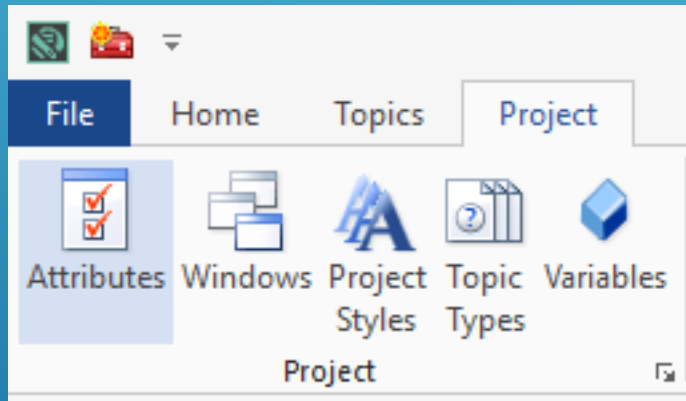
► Doc-To-Help Cool Feature 3

Create multiple versions of documents from the same target.

A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

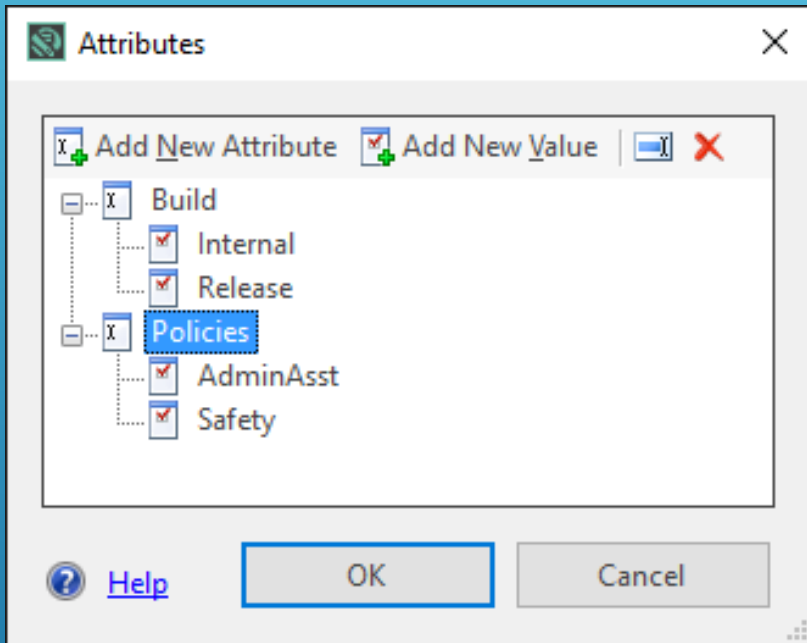
Set attributes and values to your topics to output different versions of your documents.

In the Project tab, click Attributes.



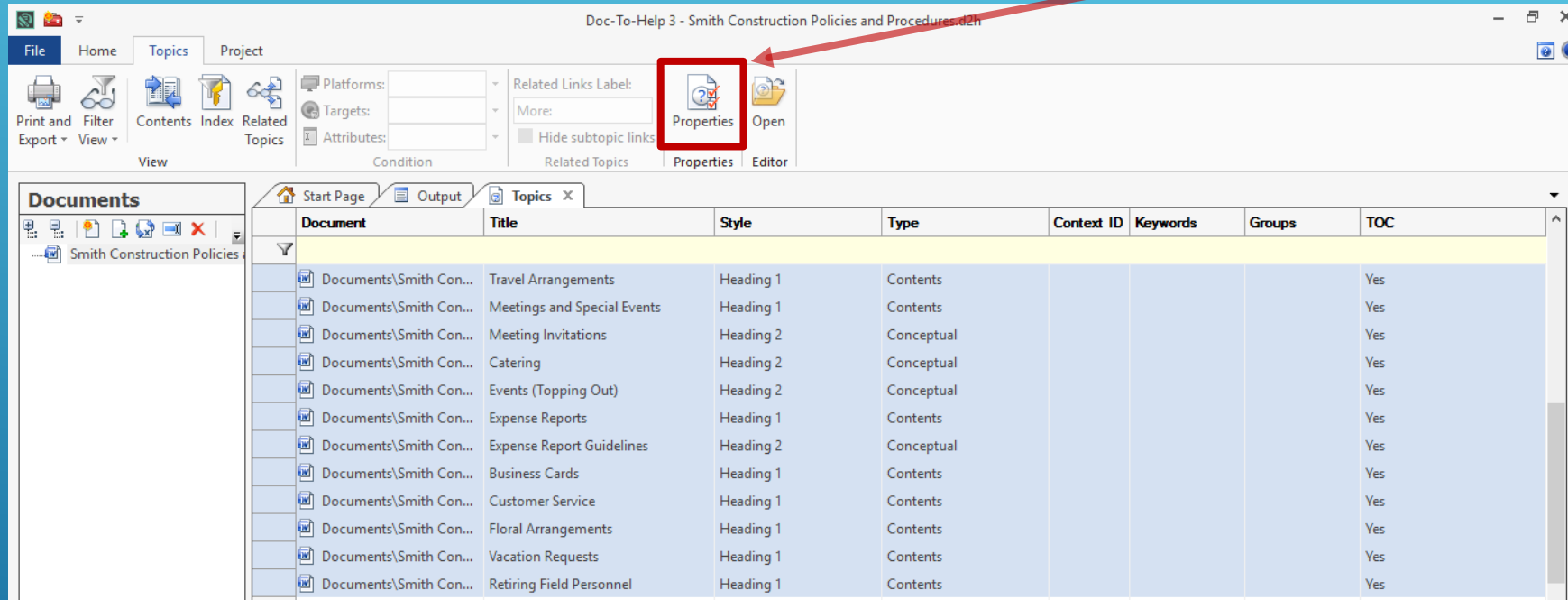
Cool feature 3: Create multiple versions of documents from the same target.

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.



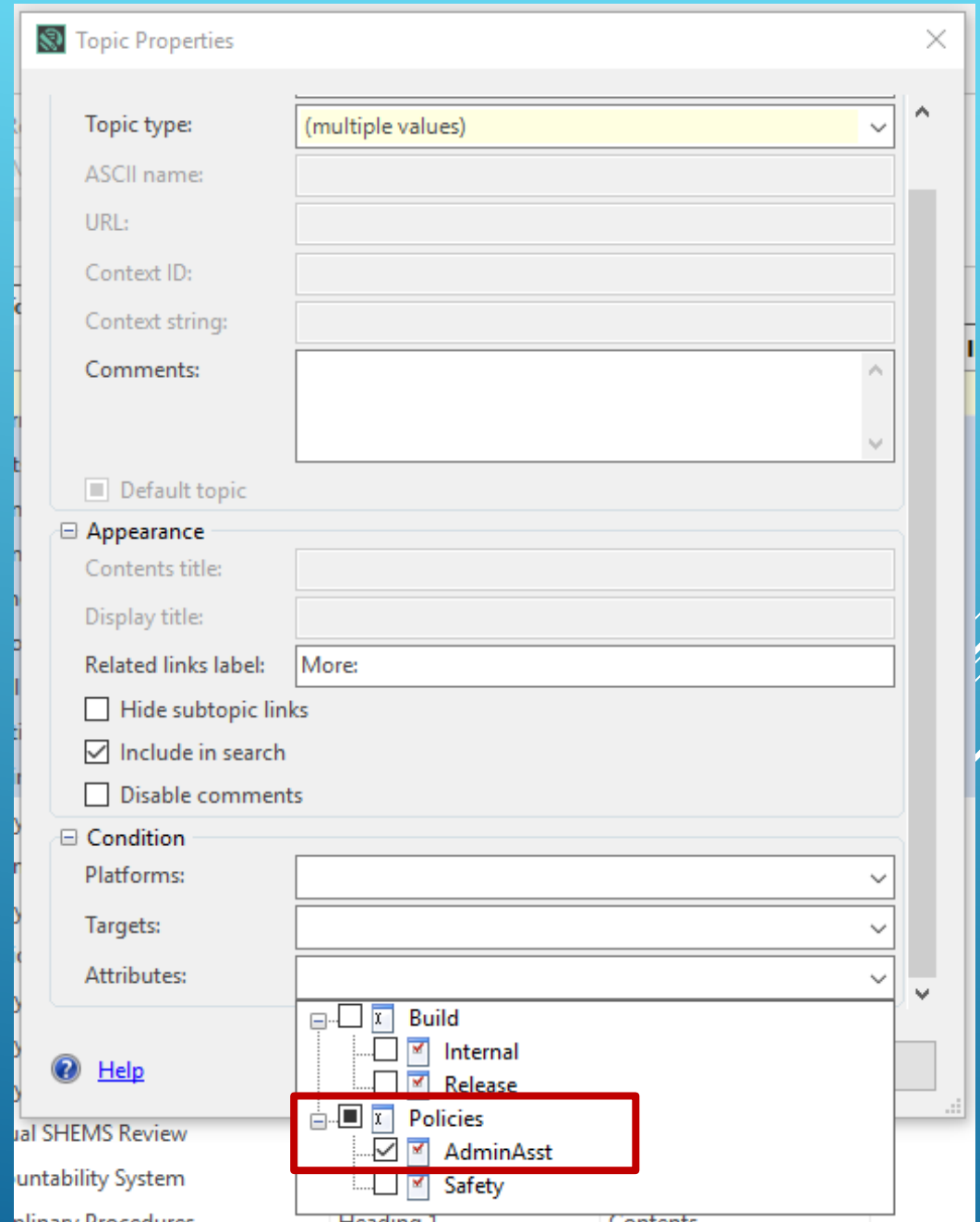
The screenshot shows the Doc-To-Help 3 software interface. The window title is "Doc-To-Help 3 - Smith Construction Policies and Procedures.d2h". The "Topics" tab is active, and the "Properties" button is highlighted with a red box and a red arrow. The main area displays a table of topics with columns for Document, Title, Style, Type, Context ID, Keywords, Groups, and TOC.

Document	Title	Style	Type	Context ID	Keywords	Groups	TOC
Documents\Smith Con...	Travel Arrangements	Heading 1	Contents				Yes
Documents\Smith Con...	Meetings and Special Events	Heading 1	Contents				Yes
Documents\Smith Con...	Meeting Invitations	Heading 2	Conceptual				Yes
Documents\Smith Con...	Catering	Heading 2	Conceptual				Yes
Documents\Smith Con...	Events (Topping Out)	Heading 2	Conceptual				Yes
Documents\Smith Con...	Expense Reports	Heading 1	Contents				Yes
Documents\Smith Con...	Expense Report Guidelines	Heading 2	Conceptual				Yes
Documents\Smith Con...	Business Cards	Heading 1	Contents				Yes
Documents\Smith Con...	Customer Service	Heading 1	Contents				Yes
Documents\Smith Con...	Floral Arrangements	Heading 1	Contents				Yes
Documents\Smith Con...	Vacation Requests	Heading 1	Contents				Yes
Documents\Smith Con...	Retiring Field Personnel	Heading 1	Contents				Yes

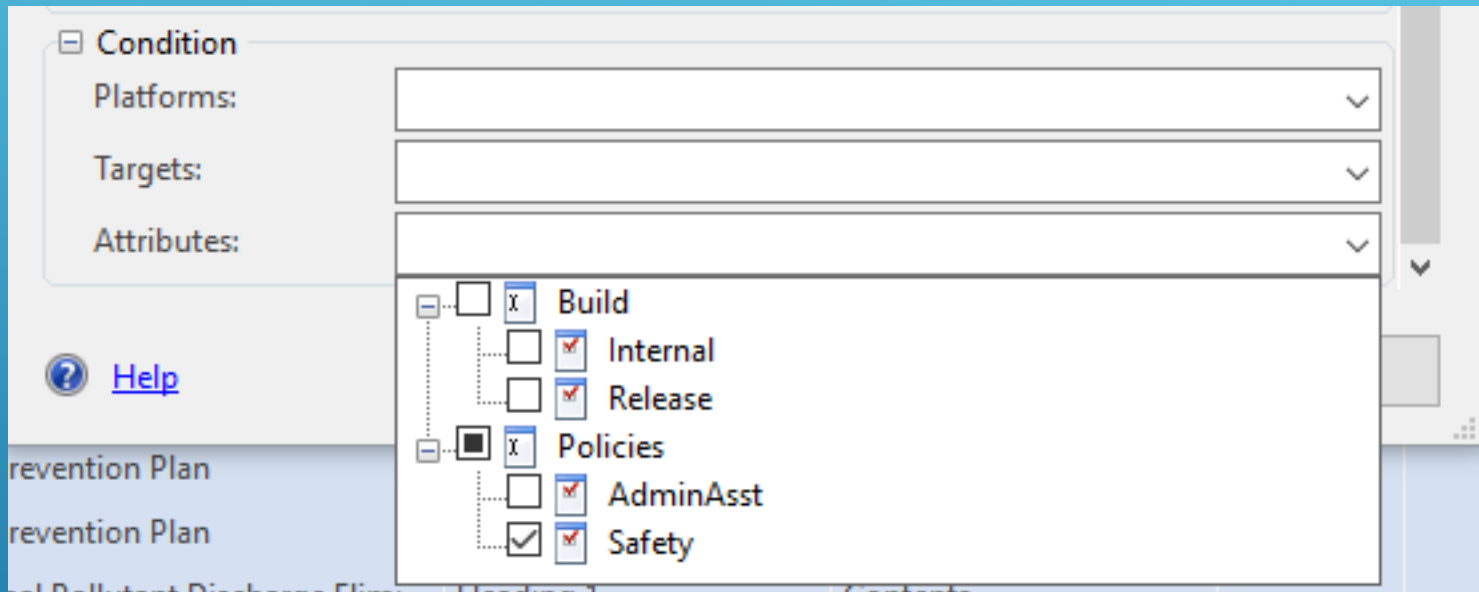
Cool feature 3: Create multiple versions of documents from the same target.

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.



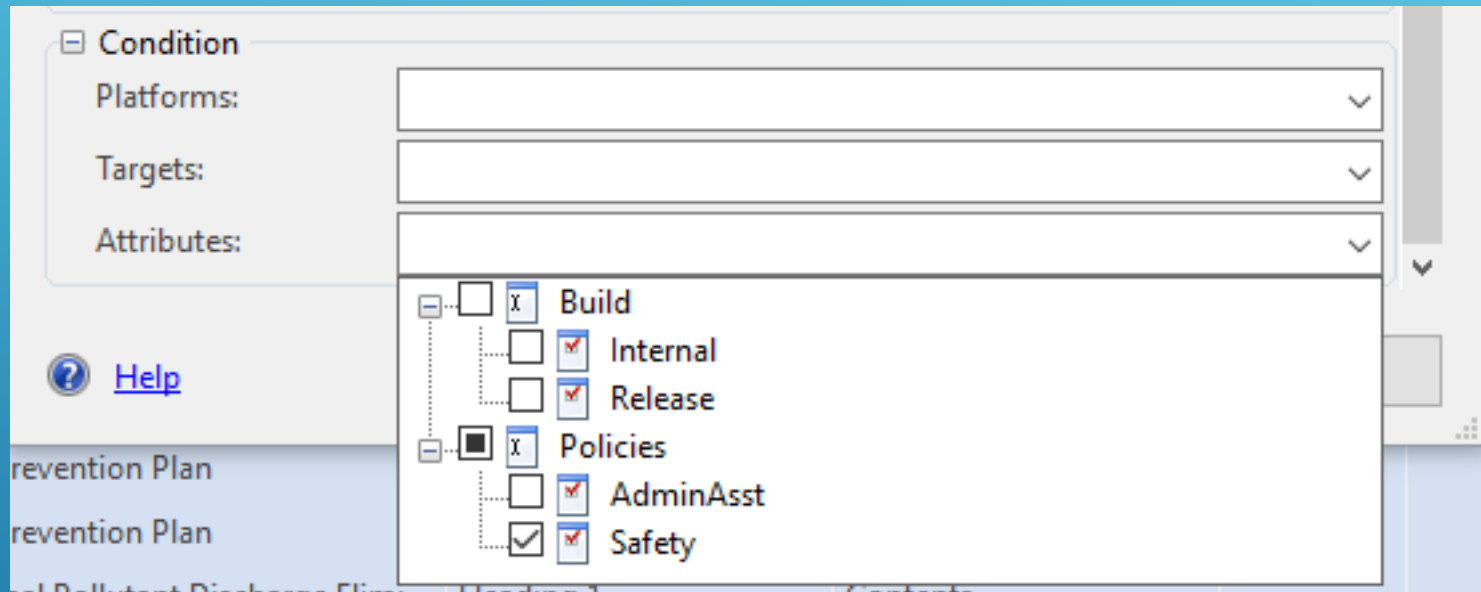
Cool feature 3: Create multiple versions of documents from the same target.

- ▶ 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.



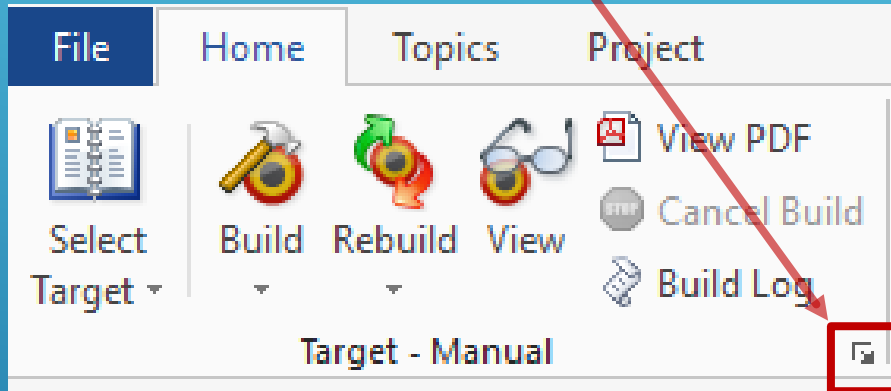
To output a specific version of a document, select your target.



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

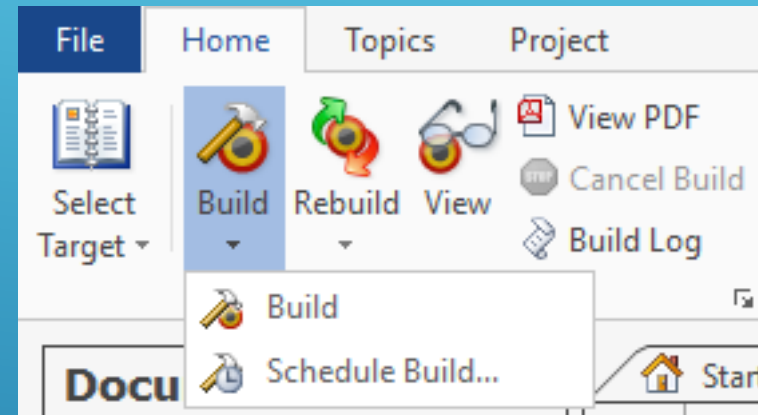
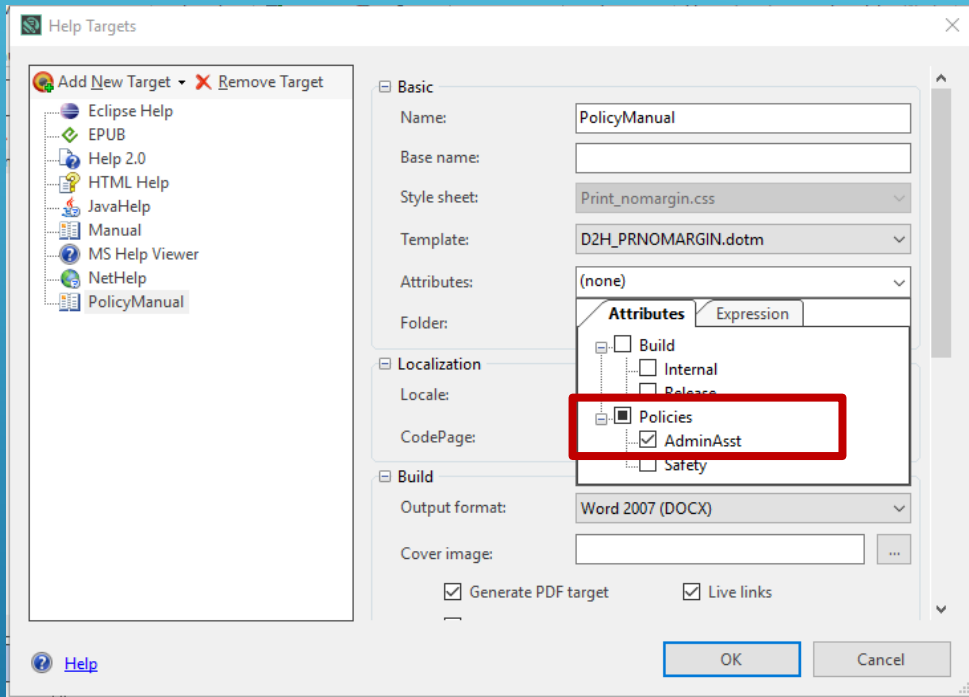


To output a specific version of a document, select your target. Then click this button in the Home tab.



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.

A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

Set heading styles in your Word document.

## Safety-Steering-Team ¶ ← Heading 1

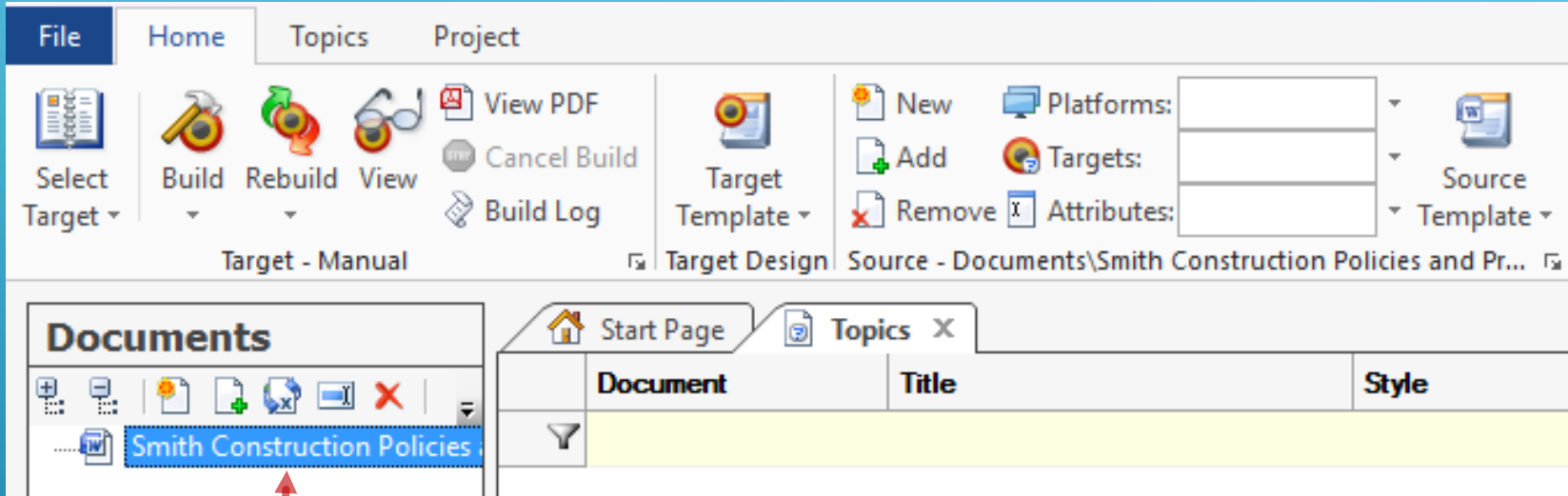
The purpose of the Safety-Steering-Team (SST) is to serve as a senior management oversight function in matters relating to our SHEMS. The Team will meet regularly to review safety metrics, results of incident or regulatory investigations, and to ensure management decisions remain aligned with our overall safety goals/policy and commitment. ¶

## Annual-SHEMS-Review ¶ ← Heading 2

Annually the SST will review the results of the prior year's safety results based on the current SHEMS and establish a strategic plan, with an associated action plan, to define and guide the maintenance and continuous improvement of the SHEMS. At the conclusion of the review, the SST will make decisions, give direction, and commit resources to implement the strategic plan elements. ¶

Cool Feature 4:  
Easily create tables of contents.

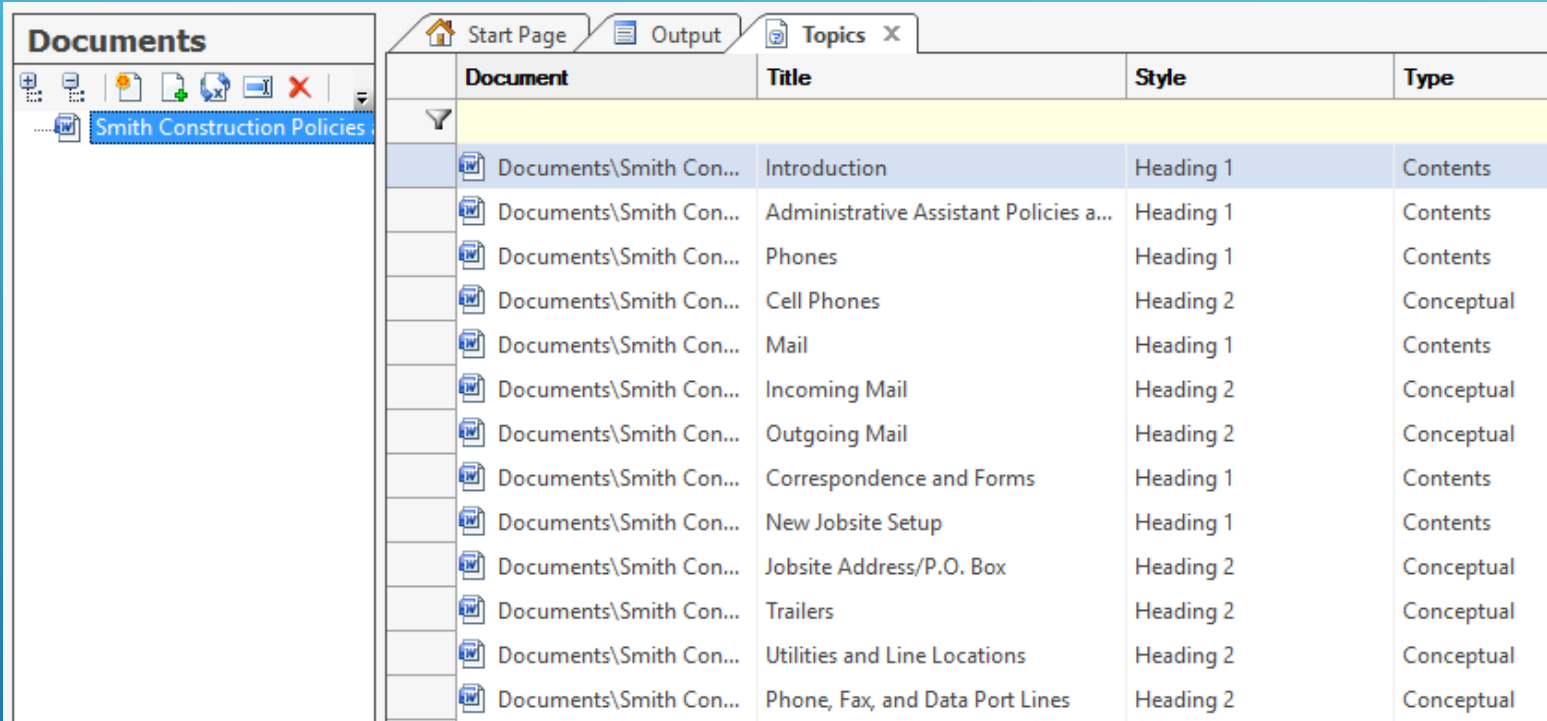
Import your Word document into your Doc-To-Help project.



Imported Word doc

Cool Feature 4:  
Easily create tables of contents.

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

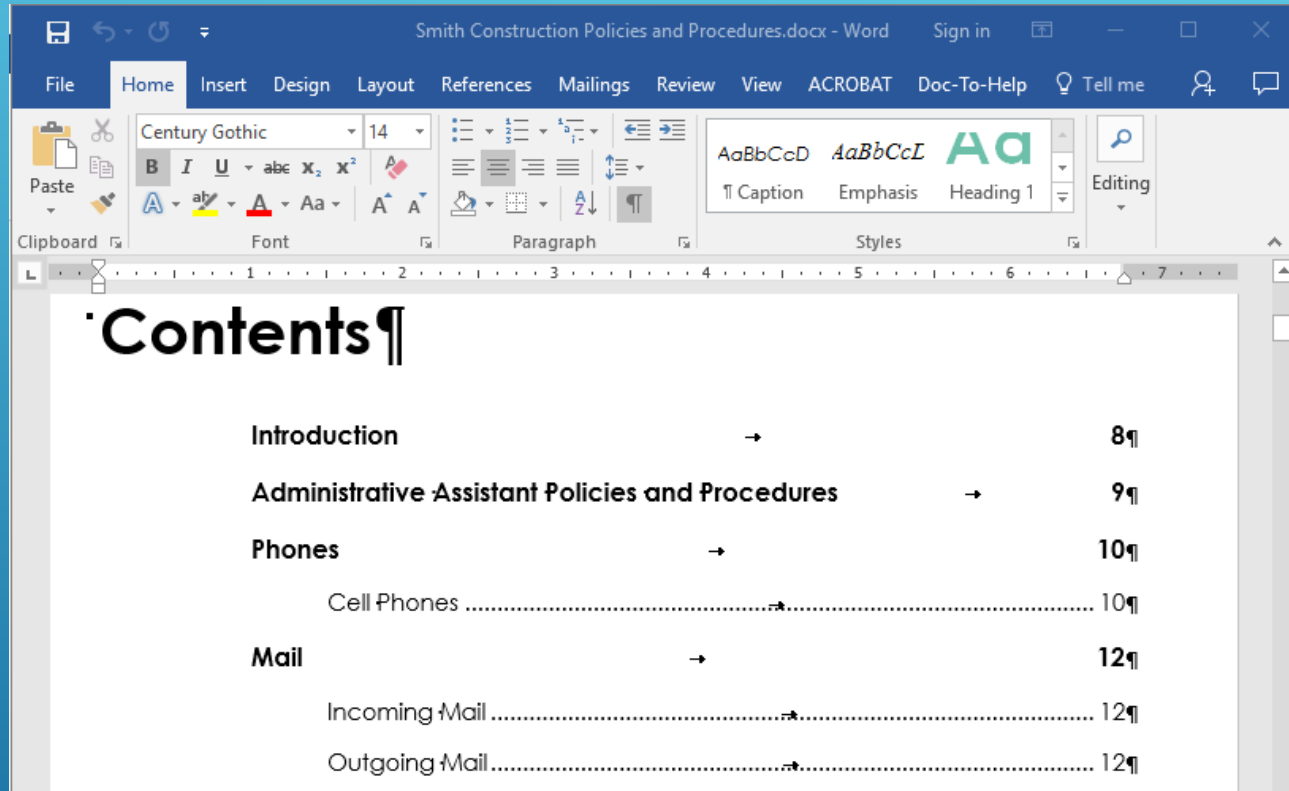


The screenshot shows the Doc-To-Help software interface. On the left is a 'Documents' pane with a tree view containing 'Smith Construction Policies'. The main area displays a table of contents with columns for Document, Title, Style, and Type. The table lists various documents and their corresponding titles, styles, and types.

Document	Title	Style	Type
Documents\Smith Con...	Introduction	Heading 1	Contents
Documents\Smith Con...	Administrative Assistant Policies a...	Heading 1	Contents
Documents\Smith Con...	Phones	Heading 1	Contents
Documents\Smith Con...	Cell Phones	Heading 2	Conceptual
Documents\Smith Con...	Mail	Heading 1	Contents
Documents\Smith Con...	Incoming Mail	Heading 2	Conceptual
Documents\Smith Con...	Outgoing Mail	Heading 2	Conceptual
Documents\Smith Con...	Correspondence and Forms	Heading 1	Contents
Documents\Smith Con...	New Jobsite Setup	Heading 1	Contents
Documents\Smith Con...	Jobsite Address/P.O. Box	Heading 2	Conceptual
Documents\Smith Con...	Trailers	Heading 2	Conceptual
Documents\Smith Con...	Utilities and Line Locations	Heading 2	Conceptual
Documents\Smith Con...	Phone, Fax, and Data Port Lines	Heading 2	Conceptual

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.



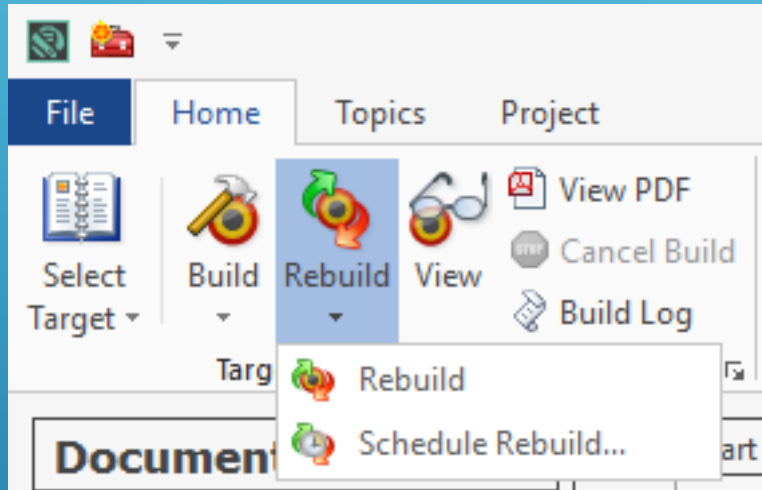


▶ Doc-To-Help Cool Feature 5

Rebuild outputs quickly and cleanly.

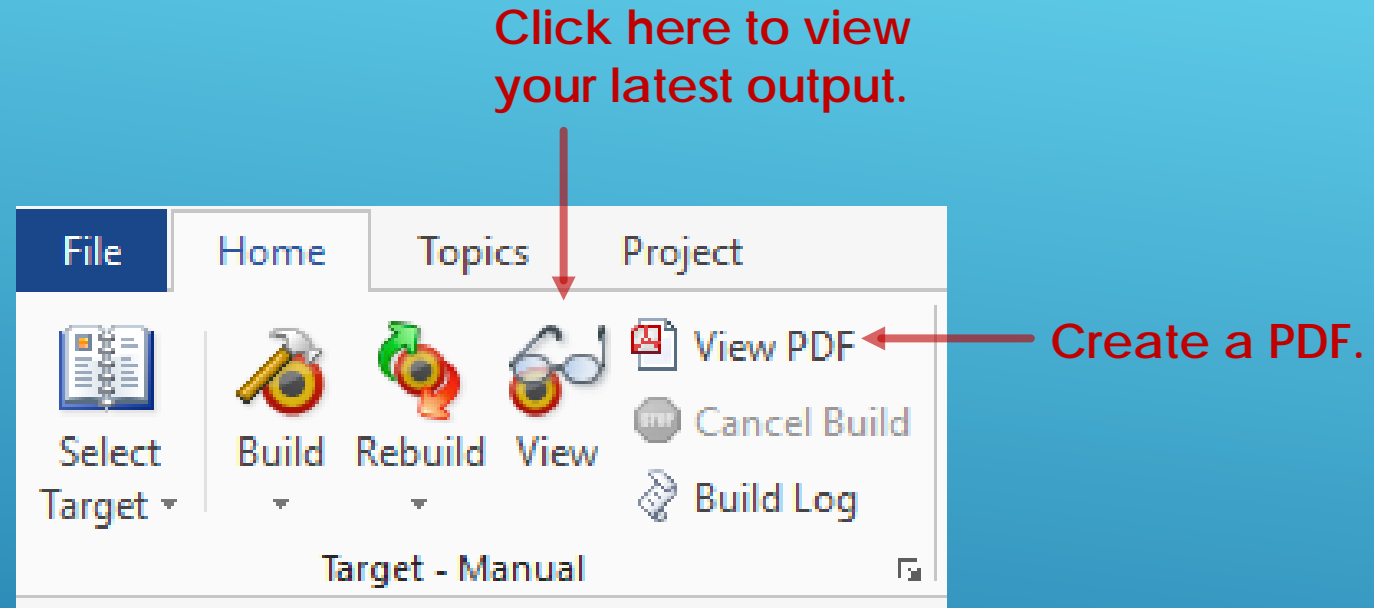
A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

Rebuild in two clicks!



Cool Feature 5:  
Rebuild outputs quickly and cleanly.

► Bonus Doc-To-Help Cool Features



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

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