Document Production Policy and Procedure

Policy Statement

My Department Stores is committed to producing clear, easy to understand information that is useful to staff and customers.

Structuring Documents

Documents should be structured logically to provide a clear flow of information. Formatting should be used to segment documents and highlight important information.

Identifying Document Inclusions

A range of inclusions may be used when structuring a document. The following are common examples which should be used in certain situations:

- **Cover page** is used on longer formal documents
- **Table of Contents** is used when there are several sections and headings in a document *(generally not suitable for short documents with less than three (3) pages)*
- **Body Text** is used in most documents when paragraphs or several sentences of text are used to convey a message
- **References** are used when citations are made in any document
- **Index** is used on longer formal documents to assist with navigation
- **Attachments** should be used only on emails when other documents need to be attached to the email
- **Active hyperlinks** are used whenever a website is included in text
- **Data entry fields** should be used on forms, templates and other documents where the user is asked to record information

Segmenting Documents

Factsheets, brochures, polices, and similar longer format documents should generally be broken up into sections to allow the reader to review and process small pieces of information at a time. Sections should be created to deal with each separate topic in a document (this policy can be reviewed as an example). Sections should be given headings to allow the reader to easily scan the document for information.

Forms and templates should be broken up into short sections with headings when possible, to group similar information into categories. Common examples of categories include:

- Customer Details or Staff Details (which would contain any general and contact information fields)
- Request Details, Complaint Details, Hazard Details, Enquiry Details, etc. (which would contain fields and longer/free text fields or questions about the details of the enquiry/request or event being described on the form)
- Approval, Manager Details, Outcome, etc. (which would contain any fields required to approve or close off the enquiry/request or event being described on the form)

© Learn For Work

Emails and memos and similar communications which are less than 500 words should be segmented using a different approach. The email should contain:

- Subject, which should clearly communicate the main point of the email
- Body, which should be formatted with lines between paragraphs or using other techniques to create 'white-space' in the email
- Sign off, which should include the senders name, role and the business name

Sequencing Documents

Documents should be sequenced in an easily understood order to make it easy for the reader to process the information in the document and navigate to find key information.

Most documents should include an introduction, body and conclusion (forms are often an exception to this rule).

Documents should be structured clearly and logically, with each topic flowing to the next.

Developing a Communication Method

A communication method should be developed/decided on for each document being created. The communication method is made up of a selected style and tone.

Style

Style refers to the level of formality that is used within the text of a document. The three (3) main styles which should be used are:

- Formal
- Standard (semi-formal)
- Informal

Tone

In the context of writing document, tone is expressed through the level of formality, syntax and opinion within the writing. When developing a tone for a document, a series of descriptors should be selected which reflect the purpose of the document, the needs of the audience and the style of the document.
The following examples can be used.

Tone Descriptors	Purpose best served	Audience needs which best met		Styles which best align		
		Customers	Staff	Formal	Standard	Informal
Respectful	*Solving problems, dealing with complaints*	*Complaints, information requests*	*Employment information, requests for staff assistance*	✓	✓	
Sincere	*Solving problems, dealing with complaints, giving advice*	*Complaints, information requests*	*Business changes, staff achievements, requests for staff assistance*	✓	✓	✓

Tone Descriptors	Purpose best served	Audience needs which best met		Styles which best align		
		Customers	Staff	Formal	Standard	Informal
Polite	*All*	*All*	*All*	✓	✓	✓
Appreciative	*Recognising input, loyalty and engagement*	*All*	*Staff achievements, requests for staff assistance*	✓	✓	✓
Humorous	*Developing rapport*	*Advertising, Product information*	*Informal emails and announcements*			✓
Positive	*Developing rapport*	*Product information, complain resolutions/ other solutions information requests*	*Business changes, staff achievements*		✓	✓
Upbeat	*Developing rapport, explaining products and changes*	*Product information, information requests*	*Business changes, staff achievements*		✓	✓
Humble	*Recognising input, loyalty and engagement, solving problems, dealing with complaints, giving advice*	*Complaints*	*Business approaches, changes, goals and achievements, requests for staff assistance*	✓	✓	✓
Honest	*Developing rapport, solving problems, dealing with complaints, giving advice*	*All*	*Informal emails and announcements, business approaches, changes, goals and achievements, requests for staff assistance*	✓	✓	✓
Insider	*Explaining products or processes, giving advice*	*Advertising, Product information*	*Technical and technology information, Business approaches*		✓	✓
Quirky	*Developing rapport*	*Advertising, Product information*	*Internal communication, staff achievements*			✓

Tone Descriptors	Purpose best served	Audience needs which best met		Styles which best align		
		Customers	Staff	Formal	Standard	Informal
Clever	*Explaining products, solving problems*	*Advertising, Product information*	*Technical and technology information*		✓	✓
Direct	*Solving problems, dealing with complaints, giving advice*		*Forms, instructions*	✓	✓	✓

Formatting Documents

All documents should be formatted based on the My Department Stores Style Guide.

Forms

Forms should include:

- A header and footer, using the format outlined in Headers and Footers in the My Department Stores Style Guide
- Use the table styles set out in Table Formats in the My Department Stores Style Guide
- Have a heading using Heading 1 format *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- Use Normal Bold text for field headings *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- Use Normal style text for field entry *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- Use Black font and Warm Grey fill for table heading rows/columns *(Refer to Colours in the My Department Stores Style Guide)*

Factsheets and similar materials

Factsheets should include:

- A header and footer, using the format outlined in Headers and Footers in the My Department Stores Style Guide
- Have a heading using Heading 1, Heading 2, (and when needed) Heading 3 and Heading 4 format *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- Use Normal style text for the body *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- When needed:
    - Use the table styles set out in Table Formats in the My Department Stores Style Guide
    - Use Emphasis, Intense Emphasis, Caption, Foot/End Note and Hyperlink style text *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
    - Use images which feature colours consistent with the My Department Stores Hero and Secondary Colours *(Refer to Colours in the My Department Stores Style Guide)*
    - Use background colours selected from the My Department Stores Hero and Secondary Colours *(Refer to Colours in the My Department Stores Style Guide)*

Email Communications (internal)

Internal emails should include:

- Use Normal style text for the body *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- When needed:
  - Use the table styles set out in Table Formats in the My Department Stores Style Guide
  - Use Emphasis, Intense Emphasis, Caption, Foot/End Note and Hyperlink style text *(Refer to Fonts and Headings in the My Department Stores Style Guide)*
- A signature using the format outlined in Email Signatures in the My Department Stores Style Guide

Reviewing Document Quality

Documents should be reviewed to ensure they meet their intended purpose, are clear and meet high writing standards.

Checking Spelling, Grammar and Punctuation

Spelling, grammar and punctuation should be checked regularly during the development of the draft and final version of the document. My Department Stores recommends using the built-in spell check functions of word processing, spreadsheet and other document production software.

Checking Spelling, Grammar and Punctuation Process

The following steps should be completed when checking document spelling, grammar and punctuation (based on MS software):

1. Navigate to the spell check function *(in Microsoft applications, click on the Review Ribbon)*
2. Click on the Spelling and Grammar button
3. Review each error found and select a correction
4. Save the document when complete

Proofreading

A complete check of document drafts should be completed by the person who developed the draft as a manual proofread. A supervisor/manager or colleague should also be engaged to proofread the document and provide feedback.

Manual Proofreading Process

The following steps should be completed when proofreading documents:

1. Begin at the beginning of the document
2. Review each line of text checking the spelling, grammar, punctuation and flow of the text
3. Check the document formatting is consistent (e.g. the same fonts and sizes of text being used)
4. Circle any errors identified and note the correction that should be made
5. Record your name and the date of the proofreading on the document

© Learn For Work



Reviewing Tone, Readability, Structure, Sequencing and Formatting

The tone, readability, structure, sequencing and formatting of draft documents should be reviewed by the person who developed the draft.

Reviews can be completed formally and documented (the following review checklist can be used to support this process) or informally as a thought exercise or conversation with a supervisor/manager.

Document Review Checklist

Document Review	
Document Name:	
Review Criteria	
Tone and Suitability	
The document text reflects the tone descriptors selected for the document	☐ Yes ☐ No *Descriptors:* _____
The document text clearly communicates and meets its purpose	☐ Yes ☐ No *Purpose:* _____
The document text is likely to appeal to the audience and meet their needs	☐ Yes ☐ No *Audience:* _____
Inclusive language is used	☐ Yes ☐ No
Non-discriminatory language is used	☐ Yes ☐ No
Language is appropriate for culturally and socially diverse audiences	☐ Yes ☐ No
Language/format is accessible by any person	☐ Yes ☐ No
Readability	
The document text is clear and easy to ready	☐ Yes ☐ No
The document text or form fields are broken up into sections with clear headings (not applicable to emails)	☐ Yes ☐ No ☐ N/A
The document text (within sections) is broken into paragraphs	☐ Yes ☐ No
The document has white-space (refer to https://www.computerhope.com/jargon/w/whitspac.htm)	☐ Yes ☐ No
Sequencing and Structure	
An introduction is included and makes it clear what the document is about (not applicable to emails)	☐ Yes ☐ No ☐ N/A
The document is clear and easy to follow	☐ Yes ☐ No
The topics discussed in the document flow logically	☐ Yes ☐ No
A summary/conclusion highlights the key points discussed in the document (not applicable to emails)	☐ Yes ☐ No ☐ N/A
Organisational Requirements	
The organisational logo use rules have been followed	☐ Yes ☐ No *Planned use:* _____

The organisational colour use rules have been followed	☐ Yes ☐ No *Planned use:* _____
The organisational font use rules have been followed	☐ Yes ☐ No *Planned use:* _____
The organisations chosen language (for spelling and grammar) use has been used	☐ Yes ☐ No *Planned use:* _____
The organisations file naming conventions have been used	☐ Yes ☐ No *Planned use:* _____

Document Approvals

Some documents require approval before they can be distributed to staff and/or customers:

- Staff communications about business changes and goals/project launches must be approved by the manager of the staff member preparing the document/communication
- Forms must be approved by the manager of the Department that will process/use the form (e.g. HR Manager, IT Manager, Customer Service Manager, etc.)
- Factsheets and staff training materials must be approved by the manager of the Department that is releasing the information, providing training or who would be responsible for answering staff questions and providing assistance (e.g. HR Manager, IT Manager, Customer Service Manager, etc.)

Saving and Storing Documents

Information may be stored on the My Department Stores server, or using an online file sharing platform. My Department Stores staff may use Box; www.box.com, Dropbox; www.dropbox.com, or Google Docs; https://docs.google.com/.

File Naming Conventions

All documents should be saved using the following file naming convention:

[File Name] ([Author Name]) [DDMMYYYY]

For example:

Customer Survey Results (John Smith) 04072018

Folders

Information should be organised into folders when it is stored on the My Department Stores server, or using an online file sharing platform. Folders should be named so that it is easy for staff to identify what information will be contained in each folder.

For example:

- **Policies and Procedures**
  - Customer Service Policy and Procedure (John Smith) 01032017
  - Information Management Policy and Procedure (John Smith) 28042017
- **Survey Results**
  - Customer Survey Q1 2018 (John Smith) 13042018
  - Customer Survey Q2 2018 (John Smith) 21072018
  - Staff Survey Q2 2018 (John Smith) 09042018
  - Staff Survey Q2 2018 (John Smith) 17072018

Storing Information Procedure

The following steps should be completed when storing information:

1. Set up an organised Folder structure to save files into
2. Set passwords for folders (when applicable)
3. Redact any private information from documents (when applicable)
4. Save files using My Department Stores File Naming Conventions
5. Move files into the most relevant folders

Producing Text Based Documents Procedure

The following four (4) processes should be completed when producing text based documents:

1. **Plan Document Production Procedure**
2. **Draft Document Production Procedure**
3. **Review and Proofread Draft Documents Procedure**
4. **Produce Final Documents Procedure**

1. Plan Document Production Process

The following steps should be completed when planning text based documents:

A. Identify the document purpose and audience
B. Plan the format, formatting requirements, structure and sequencing of the document
C. Develop a communication method for the document,
D. Select the technology/software to be used to develop the document
E. Identify the approval requirements for the document

2. Draft Document Production Process

The following steps should be completed when drafting text based documents:

A. Draft the document in the planned format
B. Use the planned technology/software
C. Use the planned structure
D. Include all of the planned key points
E. Use the planned formatting techniques and style and tone
F. Save the document draft using the File Naming Conventions followed by "V1"

3. Review and Proofread Draft Documents Process

The following steps should be completed when reviewing and proofreading document drafts:

A. Organise for a supervisor/manager or colleague to proofread the document
B. Complete a manual review of the documents spelling and grammar (refer to Manual Proofreading Process)
C. Review the tone, readability, structure, sequencing and formatting of the drafted document (refer to Reviewing Tone, Readability, Structure, Sequencing and Formatting)
D. Request feedback from the person who requested the development of the document about whether any new or changed information should be added
E. Plan changes to be made based on reviews and new information

4. Produce Final Documents Process

The following steps should be completed when producing final text based documents:

A. Make the planned changes to the document
B. Complete a manual review of the updated documents spelling and grammar (in particular reviewing any new/changed information)
C. Save the final document using the File Naming Conventions followed by "V2"
D. Store the final document on the My Department Stores server or an online file sharing platform (refer to Storing Information Procedure)
E. Distribute the final version of the document to the person who requested its development

© Learn For Work