

Manager's Report: We Do What We Can

By Dawnell Claessen, SIG Co-Manager



I'd like to continue on the topic of Volunteerism that Lois Marsh addressed in her report in

the last issue of Direction. We volunteer ourselves for what we value and care about. Volunteering for our communities is important, be they personal or professional.

I think volunteerism is part of fully participating in any profession. It can be something as simple as showing a new colleague where to find and how to use the department Style Guide or maybe just helping someone down the hall from you figure out how a procedure is actually used in their workflow. We show what we know and we do what we can.

For STC and the P&P SIG, volunteering can be something as easy as sharing a recent accomplishment or asking for input or

advice with a challenge or situation you are having, or even talking about a book or a website you have found useful or informative. You can do this by posting to our discussion list topic or even writing an article for the newsletter.

If you are new or haven't participated before, don't be shy! Just do what you can. There is no time like right now to jump right into the mix. If you have a question or are wondering about something, just post to the discussion list. For example, I have often wondered what reference sources my fellow P&P practitioners utilize most.

For me, even after 25 years in practice, I rarely get through a workday without some IEEE reference and www.oed.com. I sure am glad this dictionary is online now. Lois and I are very glad you are a member of our SIG and of our profession. We want you to get the most and best you possibly can from your

membership in STC and in our SIG.

We'd love to have you as a volunteer. We need someone to spruce up our SIG brochure and this wouldn't take more than a few hours.

We also really need someone to step up and take on the responsibility of membership coordinator. We have a good job description written and this position takes only about an hour or two per month.

I know I derive a great deal of personal and professional satisfaction from my volunteer efforts with the SIG and I think many of you would feel the same!

I am a big fan of Cheryl Crow and my favorite song of hers is called "We Do What We Can" and I think that is so true of so many things. Just show what you know and do what you can and somehow, it will all get done!

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2008 Conference Update

By Dawnell Claessen, SIG Co-Manager

I am pleased to announce that BOTH conference proposals submitted by or for the P&P SIG have been accepted and will be presented in Philadelphia June 1-4, 2008.

The exact dates, times and rooms for these presentations have not yet been scheduled. I'll keep everyone updated as the conference dates approach.

P&P SESSIONS

Assessing the Maturity Grade of Your Policies and Procedures, presented by Raymond Urgo

Topics of Special Interest. This will be a **joint Progression Session** presented by members of the STC Special Interest Groups for Policies and Procedures, Quality and Process Improvement and Envi-

ronmental, Safety and Health.

NETWORKING LUNCH AND BUSINESS MEETING

The P&P SIG will be hosting our **Networking Luncheon on Wednesday, June 4th**. You'll need to buy your ticket with your conference registration for the luncheon.

The SIG will also hold our **Annual SIG Business Meeting** during the conference. This will be a breakfast meeting held at the Philadelphia Marriott Downtown, date to be confirmed. All P&P SIG members are welcome to join us for this meeting—no reservations required!

I look forward to seeing many of you in Philadelphia June 1-4 2008.

Member Profile: Khaled Aly



Direction: Tell us a bit about your business background.

Khaled: Over twenty years of professional and academic background in the field of Information & Communications Technology: five years in network commissioning and site operations, ten years obtaining a Ph.D. in broadband switching and conducting applied research in network architecture and modeling

(published 21 research papers during that period), and most recently, six years with a global enterprise network services provider assuming several regional/global network and service management roles.

Direction: Tell us about your work – responsibilities, challenges.

Khaled: Before moving into technical writing, I managed the setup, operational processes and re-organization of several network/service management teams and activities. My latest responsibility was acting as liaison with different activity owners and performers to define and document processes and procedures. I worked on documenting SOX control standard procedures and got a fair exposure to the ITIL set of recommendations. I currently freelance in technical writing and documentation, working to establish an independent practice, while completing a professional diploma in Information Design with a focus on structured authoring. I am also working on some project proposals involving e-business process modeling.

Direction: Tell us about your audience.

Khaled: My audience ranged from operations staff to subject matter experts and technical/senior management. In my information design and development business concept, I would like to work for technical and business information "consumers."

Extracting and structuring relevant public knowledge for customized modular presentation as a "professional user" commod-

ity is both interesting and challenging.

Direction: What do you like most about your job?

Khaled: My favorite activities revolve around research, modeling, and documentation. I like doing process work for information and communications services. I decided to go independent to gain flexibility in defining my preferred pursuits.

Direction: What advice can you give to someone who wants to get into P&P documentation?

Khaled: In a fast-paced service provider environment:

- Be concise and strive to describe more with fewer words and effective illustrations that online operations staff can intuitively remember.
- Emphasize such information usability measures as: accessibility, visibility, structure, and cognition.
- Define a process with both "change" and "customer transparency" in mind.
- Derive modular procedures that minimize/eliminate the impact of process or policy change on daily operations.

Direction: What's the biggest P&P challenge that you face in your industry or specialty?

Khaled: Significant challenges, in my opinion, include:

- Working with constantly evolving technology, services, and business models.
- Taking advantage of current modeling and authoring technologies to support effective P&P specification and maintenance.

Direction: Tell us a bit of personal information about you – e.g., hobbies, where you live, your family, or other information to help us get to know you.

Khaled: I currently live in Cairo, Egypt; divorced; did much traveling in the past. I am interested in several sports (how many can one maintain!), modern jazz, geographical & theological history and technology progress news. I also find that extrapolating evolution and convergence of the way we would potentially conduct our lives is a motivating background mental activity!

Khaled Aly can be reached at ka.aly@luxsci.net

List Serv Manager's Report: Migration is Complete

By Eddy Frost, List Serv Manager and Chris Eideh, List Serv Volunteer

As an organization, STC is changing software vendors for their discussion lists (list servs) from Lyris to Mailman. We are happy to report that the migration is complete for the P&P SIG discussion list.

The new list will be easier to administer and easier for all of us to use. If you were a member of the old discussion list, you are now a member of the new discussion list.

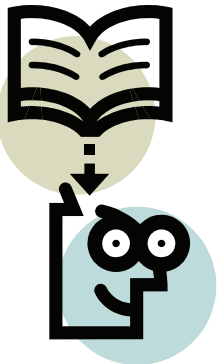
We hope that this migration has been as invisible to our discussion list members and users as we had planned. We still want users to be able to search and view the archives from the old

discussion lists, so we have migrated the archives to the new list too. We'll keep a watch for any stray posts to the old discussion list (in the form of replies to previous posts) and make sure all posts get out on the Mailman list.

To sign up, or view or change your discussion list preferences, visit: http://mailman.stc.org/mailman/listinfo/stc_ppsig. Then, to post to the discussion list, just send an email to stc_ppsig@mailman.stc.org. Our contact information for listserv related issues or questions is given at the bottom of the web page. See you on The Lists!

Book Review: Microsoft Word for Medical and Technical Writers

Authors: Peter G. Aitken, PhD and Maxine M. Okazaki, PhD



By Janet Seaborg

Dr. Peter Aitken and Dr. Maxine Okazaki are highly qualified professionals, with an impressive combined 50+ years of working and writing in the fields of science, medicine, and technology. I was delighted when granted the opportunity to read and review their new book, *Microsoft Word for Medical and Technical Writers*. I am happy to report that it was a valuable experience

for me. The authors have successfully documented how to manage the difficulties and not-so-obvious strengths of Microsoft Word 2003 (the book is also relevant to XP users). So well, in fact, that I feel the book is not just for medical and technical writers.

All versions of Microsoft Word have proved challenging throughout the years for anyone who has used it. We have all heard (or said) at one time or another, "Why did [insert name of feature] change? I liked it the way it was!" The truth is that MS Word is just another software product that is a constant work-in-progress. Also true, this book makes Word 2003 less of an enigma.

The things I love about the book, both in layout and content:

THE SPIRAL BIND – makes a neat, compact, open book and because of its dimensions (8.5 x 11), that is important to me.

THE LARGE FONT – a bonus; you can open the book to the topic in question, put it on a copy stand, and refer to your solution while working, without missing a stroke on the keyboard.

THE DEMYSTIFICATION OF STYLES AND FORMATTING – this topic has its own chapter—a veritable gold mine of information.

THE BOOK HAS AN INDEX! Not all help books are so accommodating.

After I skimmed the table of contents, read several chapters thoroughly, and flipped through the index to locate my pet annoyances, I decided that reading the Introduction would have been a smart first move. I was right and I suggest you start there.

After that, treat yourself to the last chapter (Chapter 9:

Techniques—The Good, The Bad, and The Ugly) for a snapshot of the authors' lessons learned. Then go right to the Index to browse for the topics that irritate you the most. Trust me, you'll find several that have plucked your last nerve—perhaps more than once.

I believe *Microsoft Word for Medical and Technical Writers* was not meant to be a textbook, but the authors have employed an instructional quality in their writing that is comfortable and friendly. They include especially helpful Recommendations for how to work around various Word features that they have found to be obstacles. The Recommendations are contained in the same style text box throughout the book for easy recognition.

Attention-grabbing Time Saver Tips are illustrated in another style of text box, so as not to confuse them with the Recommendations. Other important concepts appear in shaded text boxes and are identified by a bold heading that describes the type of help offered within. The authors also offer plenty of screen-shot examples, graphic illustrations of how things should work or look, and step-by-step numbered or bulleted lists to aid users in their quest to get the job done efficiently.

The authors also invite readers to visit their web site (www.tech-word.com) for updates to the book, corrections of errors found, to place an order for the book, or to order additional copies. Even after you buy the book, the good stuff still keeps coming! I highly recommend the book to anyone who has ever wrestled with understanding page breaks, document sections, and headers/footers; tried to use cross-references, templates, fields, or auto-numbering; worked with tables or tables of contents. I've learned a lot already and plan to keep the book handy as a daily reference.

Janet Pearson Seaborg is a Technical Writer with ViPS, Inc., a software developer for the healthcare industry. She writes and edits user documentation for claims-processing software for the mainframe and maintains web help sites for internal and external

Microsoft Word for Medical and Technical Writers , U\$39.95

Publisher: PMW-Piedmont Medical Writers, LLC, ISBN 978-1-60402-445-6

More Book Reviews Wanted — And We'll Pay for the Book!

Is there a book about technical communication you'd like to own? The P&P SIG will pay for your copy if you qualify for our book review program. How does it work? Up to four times a year, the editors of *Direction* will refund the cost of a qualified book on receipt of a book review and a purchase receipt.

Book selections must be approved by the SIG Co-Managers based on applicability for our readers and to some extent, price. The book must also be available for purchase by other members (i.e., still in print).

Email your proposal to lois.marsh@bmo.com including the title, author, price, and ISBN number.



Policies, Processes & Procedures, Part 2: Classification Schemes, Nomenclature & Numbering

By Cherie M. Fairburn

Part 1 of this series discussed the driving forces behind the burgeoning growth of policies and procedures and their imperative nature. Part 2 discusses an approach to developing a taxonomy for these variant drivers that is scalable to each business unit within the enterprise, regardless of source.

PolicyManager Information Architecture

The challenge for any enterprise to manage its growing portfolio of Policies and Procedures is to devise a classification scheme that links them with regulatory standards, where applicable, and also optimizes retrievability and usability. If the information architecture is not intuitive and user-friendly, users will avoid it, and the system will not be maintained over time. Foremost, the framework for storing these Policies and their associated Processes and Procedures must be rationally organized so that it is both conveniently accessible and easily usable with a minimal level of uncertainty.

In considering how to organize the data, the only meaningful classification structure is one that is standardized so as to extend application to the broadest reach possible. The information structure and presentation scheme must serve the needs of multiple users across the business areas, whatever their specific engagement.

A model information architecture classification scheme that meets these criteria might be structured as follows:

BCBSLA

Enterprise (corporate)

Business Units

- a
- b
- c

Operations

REGULATORY STANDARDS & BENCHMARKS

COBIT

- 1
- 2

HIPAA

- 1
- 2

ISO 9000

- 1
- 2

SOX (Sarbanes-Oxley)

- 1
- 2

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Other Compliance

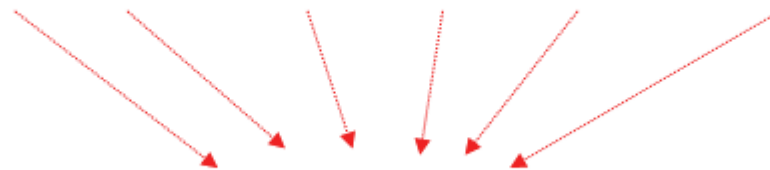
- Federal
- State
- Local

Where two or more categories apply, the regulatory standard should prime the more generic classification; however, documents can be associated with other categories for filtering/sorting/retrieval purposes.

Nomenclature and Numbering

Document suites are created in our web-based policy and procedure management tool, Policy and Procedure Manager®, a product developed by PolicyTech International. To the maximum extent possible, they are numbered and filed according to their controlling governing standards. The convention for document numbering established is as follows:

| Group ID | Standard | Domain/Section | Range | Alpha Designator | Doc Level



Example:

IT-COB-ME-4.2-F-2

In-

Interpreting this document number is a simple matter with the key provided:

- 1) **IT** Originator/Owner group;
- 2) **COB** the controlling regulation/compliance standard/recommended benchmark
- 3) **ME** the "Monitor/Evaluate" category of COBIT (Domain 4) IT governance standard
- 4) **4.2** the individual benchmark of the category
- 5) **F** the 6th document/document suite associated with the ME-4.2 benchmark
- 6) **2** a 2nd-level document (Process)

Policy, Process and Procedure Templates

BCBSLA templates for policies and procedures also integrate the processes out of which procedures flow so that users can consider the underlying relationships between these three document types and apprehend them as they should be understood—an interlocking system.

Policy states the objective to be accomplished and other relevant authorizations.

From a given policy, one or several processes may be operative. Process describes a workstream consisting of several activities. The Process template:

- identifies the roles and responsibilities of the participants in a given process,
- marks the entrance and exit criteria,
- distinguishes among possible variations (as provided for in the Tailoring Guidelines section),
- identifies the assets (artifacts, materials, tools to be used, e.g., a particular checklist, spreadsheet, or formula),
- and establishes the metrics by which achievement of objectives is to be measured.

A single process may control multiple procedures. Procedure provides the step-by-step directions associated with a given task.

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Illustrations of Policies, Processes, and Procedures templates are shown below

POLICIES			
Document No.	Department/Owner	Original Effective Date	
Title		Revision Number	Effective Date
Approved By	Title	Contact Person	
Revision History	Author	Brief Description of Changes	Effective Date
1.0			
1.1			
1.2			
1.3			
1.4			
1.5			

1.0 Policy Statement

1.1 Purpose

1.2 Superseding Policy

1.3 Scope

1.4 Application and/or Applicable Governing Standards

1.5 Policy

2.0 Definitions

3.0 References

4.0 Attachments

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PROCESSES			
Document No.	Department/Owner	Original Effective Date	
Title		Revision Number	Effective Date
Approved By	Title	Contact Person	
Revision History	Author	Brief Description of Changes	Effective Date
1.0			
1.1			
1.2			
1.3			
1.4			
1.5			

1.0 Objective

1.1 Purpose

1.2 Summary Description

2.0 BASIC

Process Steps ▼	Roles ▶					
	IT Project Manager	IT Management	IT P.O Director	Business Owner	Project Team Member	Stakeholders

R = Responsible (Designated person who takes the initiative and responsibility to make the work progress)
A = Approve (Must sign-off on the work before it is effective)
S = Support (Must be committed because they provide resources and/or play a role in implementation)
I = Inform (Must be notified of the results of the work, but need not be consulted)
C = Consult (Provide vital information and/or capability necessary to complete the work)

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3.0 Entry and Exit Criteria

Entry Criteria	Exit Criteria
.	.

4.0 Inputs and Outputs

Inputs	Outputs
.	.

5.0 Process Description

5.1 The (Title) Process, as depicted graphically in *Figure 1* (Title of hyperlinked Flowchart), (Provide brief summary). An activity by activity description of this Process includes the following (number) operations:

- 1.
- 2.
- 3.
- 4.

5.2

6.0 Tailoring Guidelines

6.1

6.2

7.0 Process Assets

7.1

7.2

8.0 Measure(s)

8.1

8.2

9.0 References

10.0 Attachments

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PROCEDURES			
Document No.	Department/Owner	Original Effective Date	
Title		Revision Number	Effective Date
Approved By	Title	Contact Person	
Revision History	Author	Brief Description of Changes	Effective Date
1.0			
1.1			
1.2			
1.3			
1.4			
1.5			
1.6			
1.7			
1.8			
1.9			

1.0 Application

1.1 Purpose

1.2 Scope

2.0 Definitions

3.0 Procedure

3.1 Overview

The Procedure consists of the following tasks:

- 1.
- 2.
- 3.
- 4.
- 5.

3.2 Support Resource

3.2.1 Task Preview

The Support Resource performs the following tasks in sequence:

- 1.
- 2.
- 3.

3.2.2 The Support Resource (describe Step 1)

3.2.3 The Support Resource (describe Step 2)

4.0 References

5.0 Attachments

Got questions about this article? You can contact the author at Cherie.Fairburn@bcbsla.com.

ANNOUNCEMENTS

Urgo & Associates Announces Seven Learning Opportunities



Check out these learning opportunities presented by Raymond Urgo on policies & procedures communication:
For more information about any class or event, please visit www.urgoconsulting.com/newsevents

URGO

Event	Date	Location
What Project Managers and Leaders Should Know about Policies & Procedures (guest speaker)	March 27, 2008	Cerritos, CA—Greater Los Angeles Project Management and Leadership Seminar
What Record Managers Should Know about Policies & Procedures (guest speaker)	March 27, 2008	Riverside, CA—American Records Management Association, Upland Inland Empire Chapter
What Project Managers Should Know About Policies & Procedures Communication (guest speaker)	March 27, 2008	Thousand Oaks, CA—Project Management Institute, Los Padres Chapter
Policies & Procedures Communication for Learning & Performance Improvement (guest speaker)	April 7, 2008	New York, NY—International Society for Performance Improvement - annual conference
Introduction to Policies & Procedures Communication (course instructor)	April 10 - June 5	Available online internationally; UCLA Extension course # x439.19
Assessing the Maturity Grade of Policies & Procedures Programs (guest speaker)	June 2, 2008	Philadelphia, PA—Society for Technical Communication - annual conference
Assessing Your Career in Policies & Procedures Communication (guest speaker)	June 2, 2008	Philadelphia, PA—Society for Technical Communication - annual conference

20th Annual Symposium—Utility Procedures Development Association Clearwater, Florida—June 16-19, 2008



Thanks to P&P SIG member Mike Brewer for bringing this event to our attention. UPDA is an organization of procedures professionals who practice in the nuclear industry.

The Procedure Professionals Association (PPA), along with SCIENTECH, will host the 20th Annual Procedure Symposium in Clearwater Beach, Florida, June 16 through 19, 2008. In this format, we continue to provide a forum for professionals working in the areas of procedure administration, control, and production.

The technical program consists of formal presentations as well as facilitated breakout sessions. As is customary, we will have a strong focus on providing greater and more diverse networking and benchmarking opportunities.

All levels of management, procedure writers, procedure administrators, training specialists, and procedure users will benefit by attending the specialized breakout sessions that deal with the issues related to their specific areas. Also, for the first time ever, a Procedure Writer Training Workshop will be held on Monday before the regular symposium schedule begins.

The symposium will be held at the Sheraton Sand Key Resort (<http://www.sheratonsandkey.com>). Rooms are available at a reduced rate.

For more information and the registration package, please visit the PPA website at www.ppaweb.org.

Volunteer News

Newest Additions to the Team

Chris Eideh—List Serv Administrator



Welcome to Chris Eideh who has taken on administration of our list serv discussion tool. Chris lives in New England in the U.S.A. with his wife and three kids. He went to college at the University of Massachusetts where he received a bachelor's degree in psychology and criminal justice. Chris has worked with Maxima Solutions, a document management software and solutions provider, for 7+ years, mostly focusing on Sales and Marketing.

Chris jumped in with both feet this winter, helping Eddy Frost with the migration of our list serv to a new service provider, Mailman. If you have questions about the list serv, or would just like to get to know him better, you can reach Chris at: ceideh@maximainc.com.



Khaled Aly—Topic Researcher, Newsletter Team

Welcome also to Khaled Aly who recently volunteered to join the newsletter team in a research capacity.

Khaled will work with the newsletter editors to identify and research current topics of interest to SIG members. The newsletter team is looking forward to working with him on our next issue.

You can learn more about Khaled in his member profile on page 2. If you would like to suggest a topic for a future issue of Direction, you can reach Khaled at ka.aly@luxsci.net.

Volunteer Opportunities

Want to get more involved in our SIG? There are always opportunities for new volunteers. Here are some current openings:

- **Short Term:** Revitalize our SIG brochure in time for the spring conference. Only requires a few hours.
- **Membership Coordinator:** This job is now considerably easier since STC implemented a database with standard reports that we can download ourselves. The main responsibility is to send a welcome email to new members. A report listing only new members is available as a quick download in Excel. We have a good job description written and this position takes only about an hour or so per month.

To volunteer or to learn more about these opportunities, contact Lois at lois.marsh@bmo.com.