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GUIDELINES FOR WRITING STANDARDS

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Department of Accounting and General Services
Information and Communication Services Division

Information Technology Standards

TABLE OF CONTENTS

1 INTRODUCTION

This document contains the State of Hawaii Executive Branch of Government's instructions for writing Information Technology (IT) Standards. IT Standards contain the Executive Branch IT policies, standards, procedures, conventions, and guidelines for the development of technical data processing reference information for the State's IT Standards Reference Set that is to be utilized by departments, agencies, and individual users of the Executive Branch centrally controlled information processing and communications hardware, software, facilities, or resources. The Standard Reference Set may be copied and modified as appropriate to departmental missions, goals, or objectives. However, doing so does not abrogate the responsibility of complying with the IT Standards as set out in the reference set when dealing with the centrally controlled IT resources.

1.1 Purpose

The purpose of this document is to present a standardized approach to writing reference material. A standard approach promotes consistency in the style, organization, format, and presentation of reference materials for standards chapters. Consistent usage of the common format and style of policies, procedures, conventions, and guidelines results in increased productivity for the individual who reads or uses the manual. By following a standardized approach, the documents developed will be quicker to write and easier to read. This document also contains practical advice and useful ideas for presenting the material.

1.2 Overview

This document contains the basic steps for organizing and developing a manual document.

It contains the recommended method of presentation, format, and layout for writing standards policies, procedures, conventions, and guidelines.

It explains the preferred style of writing and components that should be incorporated into the Standards Reference Set.

This document also points out things to watch for when reviewing drafts, and things to do when finalizing a standards manual document for publication.

The appendices contain a list of potentially confusing words that should be replaced by simpler words, and a list of action verbs that should be used when writing procedures.

1.3 Scope

The format, organizational structure, and style presented in this document will be followed by anyone who is responsible for compiling and developing technical data processing standards, policies, procedures, conventions, or guidelines for users of State Executive Branch's centrally controlled or departmental information processing hardware, software, facilities, or resources.

1.4 Comments and Suggestions

Comments, recommendations, proposals, or suggestions regarding the contents of this document may be sent either via email to icsd.admin.ppmo@hawaii.gov or in writing to:

Information and Communication Services Division
Project Planning and Management Office
1151 Punchbowl Street, B10
Honolulu, Hawaii 96813-3024

2 STEPS IN WRITING STANDARDS CHAPTERS

A step-by-step approach is a practical way for document organizers, technical specialists, and developers to get started. This reduces the time needed to complete a draft of the manual.

The following steps outline the processes to plan, research, write, edit, review, and prepare a manual for publication and distribution.

1. Size the project and obtain necessary permission to develop standards manual.
2. Set up the project team and meet with major stakeholders.
3. Draft a table of contents.
4. Prioritize sections for completion.
5. Organize and structure the standards manual.
6. Assign writing tasks.
7. Collect and review available information.
8. Write the standards for the manual.
9. Proofread and edit the standards manual.
10. Verify standards manual content with stakeholders.
11. Prepare standards manual for release.

The next nine chapters in this document expand upon topics in the above steps.

The last chapter of this document contains the format for structuring standards policies, procedures, conventions, or guidelines for computer programming languages.

If the organizer and developer of the technical reference material does not have the technical resources available to complete the design, development, and writing of the draft text for the IT standards reference manual, and they have completed steps 1 –7, collecting and reviewing the available information; they may ask the Planning and Project Management Office (PPMO) for assistance with the remaining steps 8 through 11 to develop the initial draft of the document.

3 STEP 3 - DRAFT A TABLE OF CONTENTS

Developing a preliminary table of contents helps to organize and formalize relevant ideas on a subject matter, organize the relationships of topics, and structure the scope and depth of coverage.

Any shortcoming, inconsistency, gap, or incompleteness in structure, organization, and information should become apparent by reading the subject matter flow in the preliminary table of contents.

The project manager responsible for the development of the standards manual should read the following sections to help them organize and structure the material.

3.1 Topic Or Subject Matter

Based on past experiences with the technical subject matter, list the main topics, issues, concerns, or points that should be discussed in the manual.

Include sections on the "who/what/when/where/how/why" of the subject matter, and where applicable, include samples, examples, or replication of physical items such as video screen displays.

3.2 Main Categories Or Chapters

Review the identified topics, issues, concerns, and points and organize them into separate topics or subject matter by related groups or categories to identify and shape the chapters of information for the standards.

These main topics or subject matters are numbered sequentially with integer numbers.

Develop a brief action statement that ties the related topics to the grouping. This statement should form the basis for the paragraph that introduces the chapter or summarizes the main category subject matter at the integer designation level.

Rearrange the main topic titles, if needed, so that there is a logical flow of information.

The chapter descriptive titles are in uppercase letters.

Each chapter title will be left justified on line 12 and should start on a new page to present materials related to the chapter topic.

3.3 Sub-Categories Or Sections

Subdivide the main categories into smaller related groups to define the sections related to a chapter or main topic.

The sub-divided group is numbered with one decimal position, for example: "2.1", "2.2", "2.3", "2.4", and "2.5".

If the descriptive title for the section or sub-category lends itself to include a conjunction word, consider splitting that group into another section.

The sub-categories or sections for a chapter are to contain descriptive titles. They should not start on a new page. Words in the title are to be in upper case letters for the first letter of each word. e.g. **3.3 Sub-Categories Or Sections.**

3.4 Logical Sequence Or Groups

When material within a section contains key, important, or critical information that may be referenced by users of this manual, breakdown titles into more specific areas, and logically order that information for presentation of the discussions of items that reference the section or sub-category.

Group the ideas in some relational order for emphasis and label them, for example: "2.1.1", "2.1.2", "2.1.3", and "2.1.4".

Each grouping must have a title that is descriptive of the information presented in the group.

A conjunction word in the descriptive title for a group means that the group should be broken down further, or the title needs to be reworded. A conjunction is not allowed in the group description.

The title for material in a group should have brief descriptive words that are in upper/lower case letters.

If a group contains statements that should be followed by users, could be represented as a list of items, or may be referenced by users, additional breakdown within the group is labeled with lower case alphabetic letters, for example: "a.", "b.", "c.", "d.", and "e.".

If further breakdown for greater emphasis is desired, bullets may be used.

3.5 Initial Table Of Contents

Assemble the main topic chapter title, section titles, and group names in ascending sequence to form the proposed table of contents.

Submit the proposed table of contents for review by a small select group of specialists or managers who would most likely be the principle users of the manual.

Present any returned comments, suggestions, recommendations, or proposals to the project team for possible inclusion into the manual. Finalize the table of contents.

4 STEP 4 - PRIORITIZE CHAPTERS FOR COMPLETION

Review and rank the chapters and their sections. Based on resource availability, prioritize the development of each chapter.

The ranking is based on the relative importance of the subject matter, or the availability of existing materials to develop each chapter.

Weighing and comparing a chapter's subject matter against other chapters within the document may also determine the ranking of chapters.

5 STEP 5 – ORGANIZE AND STRUCTURE THE STANDARDS MANUAL

The type of chapter to be developed is determined by the principle audience for the document.

5.1 Define Focus Of The Manual

A clear understanding of the difference between the terms: policy, procedure, standard, convention, and guideline are important. This is critical when planning, developing, and writing the manual.

5.1.1 Policies

Policies are statements that present the administration's direction and guidance for activities. Policies are the **WHAT** document to define management's decisions.

5.1.2 Procedures

Procedures are precise step-by-step actions that must be done to complete a function, activity, or task. Procedures are the rules of action. They define who does what task and when. A procedure is the **HOW** document to support management's directives.

5.1.3 Standards

Standards are rules, measures of performance, techniques, or restrictions. They define the State's official or approved methods of operation. Standards specify the functions or tasks to be done by people, products, and machines.

Written standards must be followed, and are not subject to arbitrary or discretionary action by anyone.

5.1.4 Conventions

Conventions are standards that have been developed as the normally followed standards for use within the Executive Branch.

5.1.5 Guidelines

Guidelines are strongly recommended suggestions that should be followed as written, but may be modified to meet the requirements of the situation or the user's needs.

5.2 Standardized Presentation

Standards manuals, references, procedures, and technical documents will be easier and quicker to read if every similar situation has a similar presentation.

Standardized methods of presenting technical materials provide consistency that will help plan, organize, and write the statewide IT Standards Reference Set.

The developer needs to determine which convention is appropriate for a particular manual, reference, or document.

5.3 Format And Layout

A uniform format and layout makes a manual easier to read. The management of information presented on the pages is very important.

5.3.1 Format

The format determines the appearance of information on every page. Each page has a heading, a title, some text, and footer.

a. The heading at the top of each page begins on line 3 at the upper right hand corner of the page, it contains:

- A document control reference number to identify the subject matter. This document control number and the corresponding title of the manual appears on the overall Master Table of Contents of the Statewide IT Standards Reference Set.
- The effective date of the material.

b. The footer has the chapter title left justified and the word "Page" followed by page number (right justified).

The footer page numbers for the table of contents, acknowledgements, or preface are in lower case Roman numerals.

5.3.2 Layout

"Layout" addresses the arrangement of the information.

a. The body of the manual (which includes the table of contents, text of policy, procedure, standard, convention, or guideline) falls between the title on line 12 and the footer text that begins on line 60. This is at most forty-eight line of material.

b. When an update to the manual causes text to overflow a page, the page references will change. Because of this, table of contents references and, when applicable, the index references must also be revised.

c. "Levels," are generally indented progressively but may be left justified for space. There may be up to five levels as follows:

1. Chapter
    1.1. Section
        1.1.1. Group
            a. Details
                • Bullets

For every "chapter," "section," or "group" level description name, there must be some text to explain or expand upon the meaning or intent of the names.

d. "Numbering," use numerals for chapter, section, and group descriptions; and use lower case letters for details.

e. "Page/Headings," start a new page whenever the chapter description changes.

f. "Entries," enter information for at least two entries for any chapter, section, or group identifier level.

g. "Indentation," indent consistently for each level.

h. "Emphasis," capitalize chapter and section description words. Use upper/lower-case letters for other title descriptions. Highlight text with bolding or italic font. Avoid the use of the underline.

5.4 Playscript For Procedures

The recommended method for presenting procedures is the "Playscript" style. This method identifies the "actors" and their appropriate actions, and organizes the roles in a sequential top-down manner.

Since the "actor" is clearly identified, the users need to read only the instructions that apply to them. A sample of this style is shown in Appendix A.

The purpose of a procedure is to convey detailed instructions clearly and quickly. The playscript style of "actor" and "action" defines the person who does a function, duty, task, or activity on the left side of a page, and has the description of the function, duty, task, or activity on the right side of the page. This style is extremely effective and is recommended for development of procedures.

The procedure's focus must be on the objectives, users, and processes of the procedures. Irrelevant, historical, background, or justification material must not appear in procedures.

5.4.1 Objectives of Procedure

A procedure tells people **HOW** to do a task or activity. The main objective of a procedure is to communicate work information; and to organize, coordinate, and systematize the work of people in a system process cycle.

5.4.2 Viewpoint of User

Procedures must be developed from the viewpoint of the people who must implement and use them, not from the viewpoint of the team, committee, or author.

5.4.3 Extraneous Matter

Statements that do not relate directly to the effective and efficient completion or resolution of a work process detract from the subject matter at hand and hinder understanding of what is expected of the person who must follow the procedures.

The following statements must **NOT** appear in a procedure:

a. Policies or practices
b. Purpose or mission
c. Why the procedure was designed
d. Plans leading up to the procedure development
e. Scope or limitations
f. Goals or objectives
g. Opinions or philosophy
h. How to complete a form

5.4.4 Policies Affecting Procedures

Procedural needs are usually identified and specified during the Systems External Specifications phase of the SSDM application system development life cycle.

If there is any executive or administrative policy that affects the procedure, this fact must be noted on form SDM-1100, "General Documentation Form". The form is available online by going to: http://www.hawaii.gov/forms/ then clicking on Statewide ICSD Forms.

5.4.5 Procedure Conventions

a. A third-person present tense action verb is the first word of a procedural statement.

b. Before an "actor" changes, the current "actor" passes or makes available something for the next actor.

c. When a step is based on an action to satisfy a condition, the conditional clause is stated at the integer level, and each possible conditional action is indented and given a designation of the condition's integer number with an alphabetic letter.

d. When a step is based on a group of related actions, the central controlling action is stated at the integer level, and each related action is indented and given a designation of the controlling integer number with an alphabetic letter.

6 STEP 6 - ASSIGN WRITING TASKS

An implementation action plan is developed which identifies the writing duties, tasks, and activities, and when they should be assigned to selected members of the project team.

Each member of the project team must have a thorough understanding of the style, language, and format for writing a policy, procedure, standard, convention, or guideline that will become a manual of the IT Standards Reference Set.

7 STEP 7 - COLLECT AND REVIEW INFORMATION

Some planning is necessary to ensure that information gathering is done in a systematic and organized manner. Preliminary investigations and fact finding is necessary to uncover or discover any past problems, requirements, documents, or observations about or related to the subject matter.

7.1 Previously Written Material

Look for copies of related materials of any previously written material about the subject. Contact sources from:

a. ICSD administration reading files (ICSD developed standards).
b. ICSD branch reading files. (ICSD developed standards).
c. ICSD acquired subscription reference materials. (ICSD developed standards).
d. State of Hawaii departmental agency reading files.
e. Other state government offices.
f. The federal government.

g. The Public Libraries.
h. Contractors, consultants, or vendors.
i. Trade journals, newspapers, magazines, periodicals, or reference materials.

7.2 Interview

Identify the people who should be interviewed. This includes people who requested the processes, who need the processes, and who must implement the processes.

Review any available documentation on the current processes to prepare for the interviews. Make a checklist of information to support the work environment. List the "who," "what," "when," "where," and "how" questions to be asked of each person.

7.3 Notes

Take notes of responses to interview questions.

Ask interviewees if they have working notes, memoranda, or correspondence that they use to streamline the processes.

Identify the person interviewed by name and contact phone number. Should any questions arise during the development of the document, that person could then be contacted for more information.

7.4 Organization

Do not worry about structure, language, shape, or organization. The material can be regrouped and put into logical categories after the information-gathering phase is completed.

8 STEP 8 - WRITE THE MANUAL

Use simple words and simple sentences to get ideas on paper. Each paragraph should discuss only one idea.

The document should include an introduction stating the purpose, background, scope, applicability, and expected use of the manual.

It should have a section on any applicable policies and related procedures.

Where appropriate, it should provide hints, tips, tricks, samples, examples, a glossary, an index, and supporting references.

8.1 Style Used

The recommended style is the use of simple commonly used words, brief sentences, active voice, present tense verbs, and consistency in language structure and syntax.

8.1.1 Simple, Clear Language

Use simple language, short words, fewest words possible, brief sentences, and "white space."

This helps the user read faster. The user wants to read fast to find out what action is needed.

A list of "big" words to be avoided with simpler and clearer replacement words is found in Appendix B.

8.1.2 Conversational Style

a. Contractions

Contractions are grammatically correct words. They sometimes make the sentences flow better. The only time contractions are not used is when a point needs to be emphasized.

b. Talk to the Readers

Use a personal conversational style. Call the user "you." "You" is unisex. The sexist personal pronoun controversy of "he" or "she" will be avoided.

When the people involved keep changing, refer to a position description to direct the subject matter to the proper person.

c. Short Sentences

Each sentence must have only one idea. Keep sentences short. Short sentences are easier to read and write.

d. Jargon

Do not use technical jargon or coded terms. Do not assume the reader knows what the jargon or coded term means. Always define or spell out the words of the coded term once the first time it is referenced. Place the coded term within parentheses immediately after it is spelled out.

e. Clichés and Idioms

Do not totally avoid often-used phrases and clichés. Sometimes they can get the idea across more clearly.

f. Slang

Avoid slang. It does not belong in any reference manual.

g. Positive Statements

Use positive statements to express an idea rather than the negative form.

When an exception is made, as when a negative statement is more straight-forward, do not use a double-negative. This confuses the reader.

h. Complete Sentences

Avoid a style of writing that omits connective words such as "the," "a," "an," and "is." They take up little space but add to the flow and clarity of the writing.

i. Lists and Numbered Paragraphs

Use checklists and indexed items to help the reader understand and visualize the topic more readily, or to look it up more quickly.

A compound or complex sentence that has more than one idea or clause should be broken up into a list.

j. Standards and Guidelines

Distinguish between "standards" and "guidelines." Use the term when presenting the material.

Standards are absolute. They include the word "must" or "will" in the paragraph, while guidelines typically have the phrase "recommended" or "should."

k. Excessive Words and Information

Eliminate redundant, extraneous, and unnecessary words or information that does not add or contribute to the intended message.

8.1.3 Consistent Language

a. Use consistent terminology. For example, do not refer to the word "command" one time, "function" another time, and "instruction" a third time to mean the same thing. The reader may think you're talking about three different things.

b. Use consistent grammatical structure. Paragraphs that use parallel structures are easier to read, and will add emphasis to the tone you want to set in the document.

8.1.4 Correct, Consistent Capitalization

Use consistent capitalization. For example, if a system's name is "Financial

Management System," do not refer to it as "Financial management system" or "financial management system."

If the name of commands are all capitalized, they should always appear that way. Do not use "EDIT command" and later use "edit command”.

8.1.5 Abbreviations or Acronyms

Be careful when using abbreviations or acronyms. Never assume the reader knows your meaning for the abbreviation or acronym. (Acronyms are words formed by taking the first letter, or the first few letters of words.)

Always explain and spell out the abbreviation or acronym the first time it is referenced.

Acronyms, abbreviations, and technical terms used in the document may all be defined in one place, either in the "Introduction," or in a glossary at the end of the document.

8.1.6 Active Voice Verbs for Procedures

Active voice means the subject of the sentence does the activity. The order for the statement is: **WHO DOES WHAT?** The sentence structure is "subject," "present tense action verb," "direct object." For example, "Accounts Payable Clerk checks the incoming invoice."

Appendix C has a list of commonly used present tense verbs that should be used in Playscript procedures.

Appendix D has a list of suggested active voice verbs.

8.2 Introduction Of The Manual

The introduction of the manual should have a brief explanation on the purpose, overview, applicability, and scope of the manual. It should also encourage suggestions and comments, and provide an address where these proposals and recommendations may be sent.

8.2.1 Purpose

Briefly, explain why the manual was designed, developed, and written.

8.2.2 Overview

Background information related to the subject matter, or surrounding the manual's evolution could be included to set the perspective for the reader.

A summary view of the materials to be covered in the document would help users visualize the entire manual. This could include a brief explanation on how the manual is organized.

8.2.3 Audience

This could include a brief explanation of who should use the material, and identify the prospective users. Provide a brief background, knowledge, or skill that readers should have.

8.2.4 Scope

Limit the manual to cover specific areas of information on the system or use of the system, and discuss how or when the document should be used, and under what condition or situation.

8.2.5 Suggestions and Comments

Identify who should be contacted, and where the reader should send suggestions and comments regarding the presentation or contents of the manual.

8.3 APPENDICES

Appendices contain material that should be included, but should not be written in the body of the manual. Appendices can be material that changes sooner than the rest of the information. Usually appendices contain tables, examples, reference materials, worksheet, or illustrations.

8.3.1 Examples

Examples should be numbered sequentially with the section and chapter that make reference to them. Use the chapter and section numbers as prefixes and number each example starting with "1." Thus, the first example referred to in CHAPTER 2, Section 1, will be numbered "Example 2.1.1;" the second, "Example 2.1.2;" etc.

Any extracted "real-life" report, illustrations, figures, graphs, charts, models, prototypes, or error message explanations should be placed in the appendices.

Short examples, formulas, and calculations that add to the clarity of a topic should be included in the text body when the subject matter is discussed.

8.3.2 Glossary

For standards manuals that make numerous references to specialized or technical subject matter, develop a glossary to explain or define the terms and abbreviations used in the manual. The user may wish to refer to terms that were used and explained in the text. Alphabetize the terms and abbreviations in the glossary.

8.3.3 Index

The Index is an optional component of IT standards reference manuals.

To design an Index, think of possible or probable questions that users may ask about the content of the document. If there are key words or phrases associated with those questions, an index should be compiled. List the pages where the key words or phrases occur.

8.3.4 References

For technical or controversial subjects, a bibliography or list of reference materials should be provided for the reader.

8.4 Review Draft of Standards Manual

There are two main steps in the review of the document:

8.4.1 Check Presentation

The developer should review it for:

a. Consistency of structure, style, and format.
b. Correctness of spelling, punctuation, and grammar.
c. Logical and complete discussion.

8.4.2 Check Content

The draft should be circulated to a team of technical specialists or to members of the project team that provided input during the development of the document for their review and comments. These reviewers should be looking for:

a. Depth of coverage of topics and details.
b. Topic omissions.
c. Conformance with stated goals and objectives.

8.5 Finalize Table Of Contents

After all the recommended revisions are considered, the modifications and corrections are made, and the page references are re-numbered, finalize the table of contents to reflect the contents of the final draft.

8.5.1 Title Descriptions

Chapter, section, and group descriptions should be in the table of contents. These must be spelled the same as they appear in the text. The wording and capitalization in the table of contents should be identical to those in the manual.

8.5.2 Indentation

Indent sections and groups under chapters. Start the first level (chapter) at the left margin. Indent consistently for the sections and groups under each chapter. For example, indent five spaces for the second level (section), and indent an additional seven spaces for the third level (group).

If the title description is too long for its line, it should be continued on the next line with an indentation to the beginning of the title

Indentation should be consistent. If space is a problem left justify as needed without indentation.

8.5.3 List Examples and Figures

If the body of a document has examples and figures with titles, they should be indexed and referenced in a list of examples and figures placed after the table of contents.

9 STEP 9 - PROOFREAD AND EDIT STANDARDS MANUAL

A technically good draft may still contain typographical errors, incorrect spelling, word omissions, unknown references, unclear items, etc. Proofreading and editing it should verify the manual.

9.1 Proofreading

Proofreading is a process by which a person other than the developer reviews a document for grammar and spelling. The proofreader checks for typographical errors, incorrect spelling and omissions, illogical breaks in thoughts, incomplete sentences, etc. The following items define the procedures that the proofreader should follow:

a. Read document through once for fluid and consistent sentence structure, punctuation, grammar, and spelling.
b. Read document a second time to look for consistency of terms, references, capitalization, indentation, format, style etc.
c. Read title descriptions separately from the discussion to determine that the discussion relates to the title.
d. Use ink or red marker to correct apparent errors. Place a visible check mark in either the left or right margin near the correction. Place a paper clip on only one side of the page on which anomalies are found.

9.2 Editing

Editing is a process whereby a person reviewing a document focuses on consistency of layout, style, and presentation. The document is read with a critical eye for answers to the following questions:

a. Is the document complete in relation to the scope?
b. Is it logically structured and organized?
c. Is it grammatically correct?
d. Is the tone and structure of the sentences in the active tense?
e. Can long compound sentences be re-phrased into two or more simpler, shorter, and more direct ones?
f. Does something raise unanswered questions or concerns so that it should be explained in greater detail?
g. Does it use consistent language, sentence structure, and capitalization?
h. Are words and terms used consistently throughout the manual?
i. Are words and phrases clear and simple?
j. Are pronoun referrals clear?
k. Are computer and technical terms explained either in the body or in a glossary?
l. Are abbreviations explained?
m. Does the table of contents match the title descriptions in the text?

10 STEP 10 – VERIFY THE MANUAL'S CONTENTS

The initial reviewers are to verify the content of the document and are technical specialists assigned to the project team who developed the manual, reference materials, or other document contents.

In subsequent review cycles, a copy of the draft is sent to ICSD branch chiefs and the DP Coordinators, or to respective departmental authorities, for review and comments.

The final drafts of Statewide IT Standards manuals are to be sent to the PPMO. The IT Standards are then reviewed by all DP Coordinators, corrected as needed by the PPMO and finalized. The finalized documents are sent for approval to the Comptroller after which they are released for publication by the PPMO. Each standards document is then sent to the originator of the standards chapter.

10.1 Review Draft

A cover letter (or email to reviewers) must accompany the draft to be reviewed. This should contain:

a. A brief statement describing what is expected of the reviewer.

b. The date that the reviewer's comments should be returned.
c. To whom the comments should be directed.

10.1.1 Draft Identifiers

A draft should be numbered sequentially or identifiable from other drafts. The date of the transmittal covering the draft could appear on the draft to provide a historical reference identifier. The drafts could be numbered as follows:

DRAFT #1 MM/DD/YY, DRAFT #2 MM/DD/YY, DRAFT #3 MM/DD/YY, etc.

10.1.2 Review and Comments

The reviewers should be directed to use ink or red markers to write corrections or comments directly on the pages of the draft or may be provided electronic copies in Microsoft Word documents, which are to be noted (redlined) electronically for corrections and comments.

10.1.3 Draft Reviewers

The reviewers should identify their name, and they should place a date completed in a transmittal to the document developer or the PPMO to designate return and review completion.

10.1.4 Designated Reviewers

When the designated reviewer assigns the document to other people for review and comments, these people's names and review completion date should also appear on the draft document or transmittal.

10.2 Incorporating Changes

The document developer or PPMO should review and consider all comments, corrections, and suggestions submitted by the reviewers.

a. When the drafts are returned, the document developer or PPMO should note the name of the reviewer. The paper clips or electronic redlining on the documents will direct the developer or the PPMO to the pages where changes or comments were made.
b. All suggested changes and comments submitted would be reviewed and evaluated.
c. Appropriate revisions should be incorporated into the document.
d. Only major revisions or substantive additions to a draft will cause the

draft to be circulated again for review and comments. The project team and the PPMO must apply judgment.

10.3 Review Draft Changes

The document developer or the PPMO should resubmit the revised draft to the team members for their review and concurrence.

a. If the team member assigns the document to other people for review and comments, these people's names should appear on the draft document. A date of when they reviewed the document should also be noted.
b. The comments and corrections to the revisions should be returned to the document developer by the date specified on the associated transmittal memo.
c. Repeat sections 10.1, 10.2, and 10.3 until all team members are satisfied that the document has achieved the project's objective.

11 STEP 11 - PREPARE STANDARDS MANUAL FOR RELEASE

The PPMO program support's clerical staff is responsible for spell checking and finalizing and reproducing the document to be placed on the Internet and/or the State Intranet for publication.

12 PROGRAMMING LANGUAGE FORMAT

The document conventions discussed in this section are applicable to any manual developed for information processing programming languages.

12.1 Program Language Verbs

12.1.1 Separate Verbs

The headers for each verb must have the verb right justified on the upper right hand corner of standards or guidelines.

Explain the standards or guidelines applicable to the verb. Show the required parameters or syntax and the optional parameters and options.

12.1.2 Objective

State the objective in terms of advantages or benefits to be realized by following the standards or guidelines.

Explain when the verb should be used, and under what conditions.

Explain why the verb is to be used in that fashion at the State's data processing facilities.

12.1.3 Examples

Give at least one example to aid in understanding and applying complex concepts. The use of the phrase "self-explanatory" does not help all readers to understand the use of the verb.

12.1.4 Opinions

When the use of a verb is labeled as a guideline, present a number of options and situations. Provide sufficient details so that an appropriate selection can be made.

12.1.5 Tips and Hints

Give helpful hints, tips, short cuts, or words of caution made.

12.2 Features

Provide a section on unique features or abilities of the program language software product, and how and when to use these features.

APPENDIX A

SAMPLE PLAYSCRIPT PROCEDURES

FORMS PROCUREMENT PROCEDURES

Responsibility		Action
Forms Clerk	1.	Checks inventory stock of forms on-hand.
	2.	Prepares Form 643, Supplies Requisition, when stock reaches minimum reorder point.
	3.	Sends Form 643 to Production Control.
Production Control	4.	Reviews requisition for obsolete items.
		4a. If item is current, initials in "Current" column and sends to Purchasing Clerk.
		4b. If item is obsolete, initials in "Obsolete" column and returns to Forms Clerk.
Purchasing Clerk	5.	Selects appropriate Vendor.
	6.	Checks vendor catalog for purchase order specifications.
	7.	Types Form 644, Purchase Order (P.O.), and gives to Buyer for authorization.
Buyer	8.	Reviews purchase request.
	9.	Checks for availability of funds.
		9a. If funds available, initials approval, returns request to Purchasing Clerk.
		9b. If funds not available, initials disapproval, returns request to Forms Clerk.

Purchasing Clerk	10.	Notes order date, vendor number, P.O. number, and quantity ordered on Supplies Requisition.
	11.	Distributes P.O. as follows: 11.1. Original - Vendor 11.2. Part 2 - Receiving 11.3. Part 3 - Accounts Payable 11.4. Part 4 - Forms Clerk, due date 11.5. Part 5 - Purchasing Clerk, vendor file
Forms Clerk	12.	Files Supplies Requisition with flag indicating pending P.O.
Receiving Clerk	13.	Files copy of P.O. in alpha order, and awaits the arrival of material.
Vendor	14.	Packs selected products.
	15.	Ships material.
Receiving Clerk	16.	Receives material.
	17.	Pulls P.O. copy. Checks material against packing list and P.O. copy. Notes partial shipments, damaged shipments, etc.
	18.	Sends material and packing list to Forms Clerk.
	19.	Routes receiving copy of P.O. through Purchasing Clerk to Accounts Payable.
Forms Clerk	20.	Unpacks, inventories, and stores material.
	21.	Posts incoming material to Supplies Requisition and remove pending order flag.
	22.	Files Supplies Requisition in Completed folder.
Purchasing Clerk	23.	Uses Receiving copy of P.O. to confirm purge due date file.

	24.	Sends Receiving copy of P.O. to Accounts Payable.
Accounts Payable	25.	Holds P.O. copy in suspense file in number sequence.
	26.	Matches Receiving copy of P.O. with Accounts Payable copy.
Vendor	27.	Sends invoice to Accounts Payable.
Accounts Payable	28.	Compares invoice with P.O. copy in Step 24.
	29.	Verifies invoice.
		29a. If invoice is correct, computes any discounts and extends net due.
		29b. If invoice is incorrect, follows Procedure XXX.
	30.	Prepares voucher check.
	31.	Sends check to Department Manager for authorization signature.
	32.	Mails check to vendor.
	33.	Posts payment in appropriate journals.
	34.	Files Accounts Payable and Receiving copies of P.O., invoice, and voucher check copy in vendor file.
Vendor	35.	Receives payment check.

APPENDIX B

AMBIGUOUS WORDS VERSUS SIMPLE WORDS

Ambiguous Words	**Simple Words**
Ascertains	Finds out
Administers	Runs
Appreciable	Some
Appropriates	Takes
Accumulates	Stores
Custody	Has it
Compilation	Collection
Discrepancies	Differences
Distributed	Sent out
Documents	Papers
Remunerate	Pay
Initiate	Begin
Origination	Starting point
Performs	Works / Does
Pursues	Follows
Resolution	Answer
Transmittal	Sent
Termination	Ended

APPENDIX C

COMMONLY USED WORDS IN PLAYSCRIPT PROCEDURES

Asks	Places
Checks	Prepares
Confirms	Provides
Decides	Receives
Files	Records
Forwards	Requests
Gets	Sends
Issues	Shows
Logs	Uses
Makes	Verifies

APPENDIX D

ACTIVE VOICE VERBS FOR PROCEDURES

ASKS OTHERS

Asks, Claims, Changes, Charges, Checks, Conserves, Controls, Corrects, Counts, Edits, Enforces, Follows up, Inspects, Insures, Logs, Measures, Proves, Rejects, Reports, Requests, Restricts, Reviews, Terminates, Verifies

CREATES

Builds, Designs, Devises, Develops, Formulates, Initiates, Installs, Originates, Plans, Schedules

EXECUTIVE ACTION

Approves, Authorizes, Directs, Establishes, Executes, Orders, Rejects, Requires, Signs, Supervises

EXPLAINS

Describes, Explains, Indicates, Shows, States

GETS

Accepts, Accumulates, Buys, Compiles, Gathers, Gets, Keeps, Obtains, Picks up, Procedures, Pulls, Purchases

HELPS

Aids, Assists, Participates, Protects, Serves

PUSHES ALONG

Encourages, Develops, Furthers, Maintains, Pushes

RENDERS DECISIONS

Decides, Determines, Reviews, Weighs

STOPS / HALTS

Checks, Deletes, Ends, Prevents, Returns

STUDIES / APPRAISES

Analyzes, Checks, Compares, Evaluates, Forecasts, identifies, Inspects, Interviews, Investigates, Measures, Plans, Reads, Surveys, Weighs

TELLS OTHERS

Advises, Assigns, Notifies, Orders, Prescribes, Recommends, Submits

TIES TOGETHER

Confers, Contracts, Coordinates, Links, Reconciles, Represents

WORKS

Attaches, Changes, Conducts, Destroys, Enters, Files, Handles, Hires, Inserts, Lists, Locates, Makes, Marks, Moves, Operates, Performs, Places, Prepares, Prints, Processes, Produces, Records, Retains, Reworks, Runs, Separates, Sorts, Stamps, Tabulates, Totals, Transcribes, Uses, Works, Writes