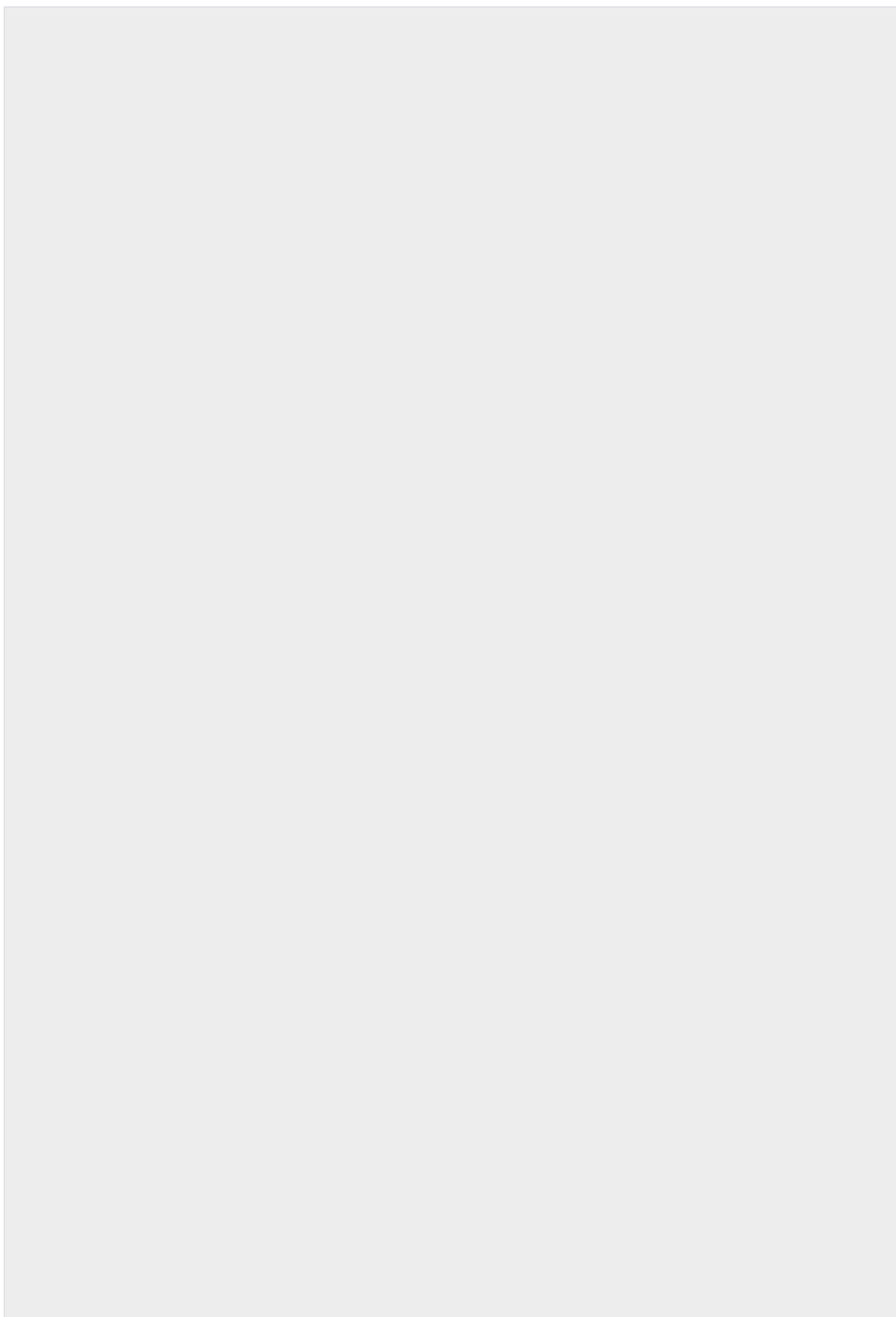


## Rules to create and maintain documents



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**Follow these rules and guidelines when creating and maintaining documents in PSL space.**



## Creating a page

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1. Choose a template
2. Create a draft and fill it with content
3. Create an appropriate title
4. Label your page
5. Place the page under the appropriate [category](#)
6. Publish the page by using the [approval workflow](#)



## Content and Templates

### General rules

- Beautiful is better than ugly.
- Explicit is better than implicit.
- Simple is better than complex.
- Complex is better than complicated.
- Sparse is better than dense.
- Readability is important.
- Special cases aren't special enough to break the rules. Although practicality beats purity.
- Title is the beacon of your page, make it count.
- Have one and only one page per process.
- Your document is a web page, treat it like one.
- Definitions belong in the glossary.

### Templates

All templates described below are mandatory and should not be modified. They are meant to ensure a consistent look for similar content in the space; some are made to be compliant with the [document quality requirements](#).

| Template name              | Use case                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Process</b>             | For pages describing a process or policy.                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Operating procedure</b> | For pages describing an operating procedure.                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>SAP Transaction</b>     | <p>For pages describing the use of SAP transactions.</p> <p>Title formula: SAP transaction code + description. Prefer to use description from SAP; you may use own description when the one in SAP is unclear or outdated.</p> <p>The description for t-code ZWFA05V in SAP is "Report posted invoice annulation", whereas a description like "Reject posted cockpit" might be more clear as to what the transaction is meant for.</p> |
| <b>Landing page</b>        | For pages that are used for grouping pages of the same subject and are not meant to have any content aside from a general description or a list of pages; like a title page.                                                                                                                                                                                                                                                           |



## Categories

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Each new page must be placed under one of the space [categories](#) and be appropriately labeled. If the page does not fit in any of the categories it must be placed in the [Other documents](#) section.



## General rules

- Always label your pages
- Separate words within labels with an underscore
- Do not combine system or product names within a single label
- Prefer to use existing labels, than creating new ones that are similar
- Specify the language of the page with a label if the language is not English



Use labels wisely to guide people and help find relevant information faster.

Remember that a page can be of multiple types at the same time and relate to several topics; make sure to include all the labels.

## Page type labels

| Type                               | Use-case                                                                                                                                                                  | Labels to use                                     |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| Organizational procedure or policy | A description of how an activity is carried out, its goals, scope and expected results. Process maps.                                                                     | <a href="#">process</a><br><a href="#">policy</a> |
| Standard operating procedure       | A set of step-by-step instructions compiled to help workers carry out routine operations.                                                                                 | <a href="#">operating_procedure</a>               |
| Specific                           | Specific instructions for a region, country or site that deviate from the standard process.                                                                               | <a href="#">specifics</a>                         |
| Control                            | A description of controls performed to ensure operational effectiveness and efficiency, reliable financial reporting, and compliance with laws, regulations and policies. | <a href="#">internal_controls</a>                 |
| Landing page                       | A title page for grouping pages with similar content                                                                                                                      | <a href="#">landing_page</a>                      |
| Other                              | All other page types that do not fall under one of the above mentioned categories.                                                                                        | <i>no label</i>                                   |

## Content labels

| Topic               | Use-case                                                                                                                                                | Labels to use                    |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Accounts Payable    | Pages or content related to accounts payable                                                                                                            | <a href="#">accounts_payable</a> |
| Provisioning        | Pages or content related to provisioning                                                                                                                | <a href="#">provisioning</a>     |
| Travel and Expenses | Pages or content related to travel and expenses                                                                                                         | <a href="#">travel_expenses</a>  |
| Payments            | Pages or content related to payments                                                                                                                    | <a href="#">payments</a>         |
| Support             | Pages or content related to supporting or transversal functions                                                                                         | <a href="#">support</a>          |
| Master data         | Pages or content related to master data                                                                                                                 | <a href="#">master_data</a>      |
| SAP transactions    | Pages or content containing description and use of SAP transactions                                                                                     | <a href="#">sap_transaction</a>  |
| Report              | Pages or content related to creating or maintaining reports                                                                                             | <a href="#">report</a>           |
| Application         | Pages or content related to an application or a program used by purchasing; like AoDocs or Convergence. Describes the functions and use of the program. | <a href="#">application</a>      |

## Location labels

| Location      | Labels to use       |
|---------------|---------------------|
| North America | <a href="#">nam</a> |
| Latin America | <a href="#">lam</a> |

|                                    |                      |
|------------------------------------|----------------------|
| Asia Pasific                       | <a href="#">apac</a> |
| Europe, the Middle East and Africa | <a href="#">emea</a> |
| World-wide                         | <a href="#">ww</a>   |

## Specific labels

| Type     | Description                                                                                                                             | Label example |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------|---------------|
| Language | Use when labeling non-English documents / pages. Use word language followed by an underscore and a 2 letter country code (ISO Alpha-2). | language_pt   |



## Document maintenance

| Document type                                                               | Maintenance and updates                                                               |
|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Process descriptions, Standard operating procedures, Controls and Specifics | Documents must be reviewed at least once a year. Outdated documents will be archived. |
| Other                                                                       | On demand                                                                             |

| Document status | Maintenance                                                                                                                                                                                                                                                                                                                             |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Drafts          | Documents with this status with no published version will be deleted if they remain in this status for longer than a month. Documents with an existing published version will be archived. If the document is being worked on the expiration date will be extended.<br><br>The reference date is the date when status was last changed. |
| For Review      | Documents with this status will be reverted to the previous state if they remain in this status for longer than a week.<br><br>The reference date is the date when status was last changed.                                                                                                                                             |
| To be approved  | Documents with this status will be reverted to the previous state if they remain in this status for longer than a week.<br><br>The reference date is the date when status was last changed.                                                                                                                                             |





## Retention policy

| Document type                                                                                              | Retention                                                               |
|------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Process descriptions, standard operating procedures, controls, specifics, project pages and best practices | Obsolete documents must be kept in archive for 2 years before deletion. |
| Other                                                                                                      | If no longer in use, the page may be deleted.                           |

Having trouble? [Get training](#).