

Rules to create and maintain documents

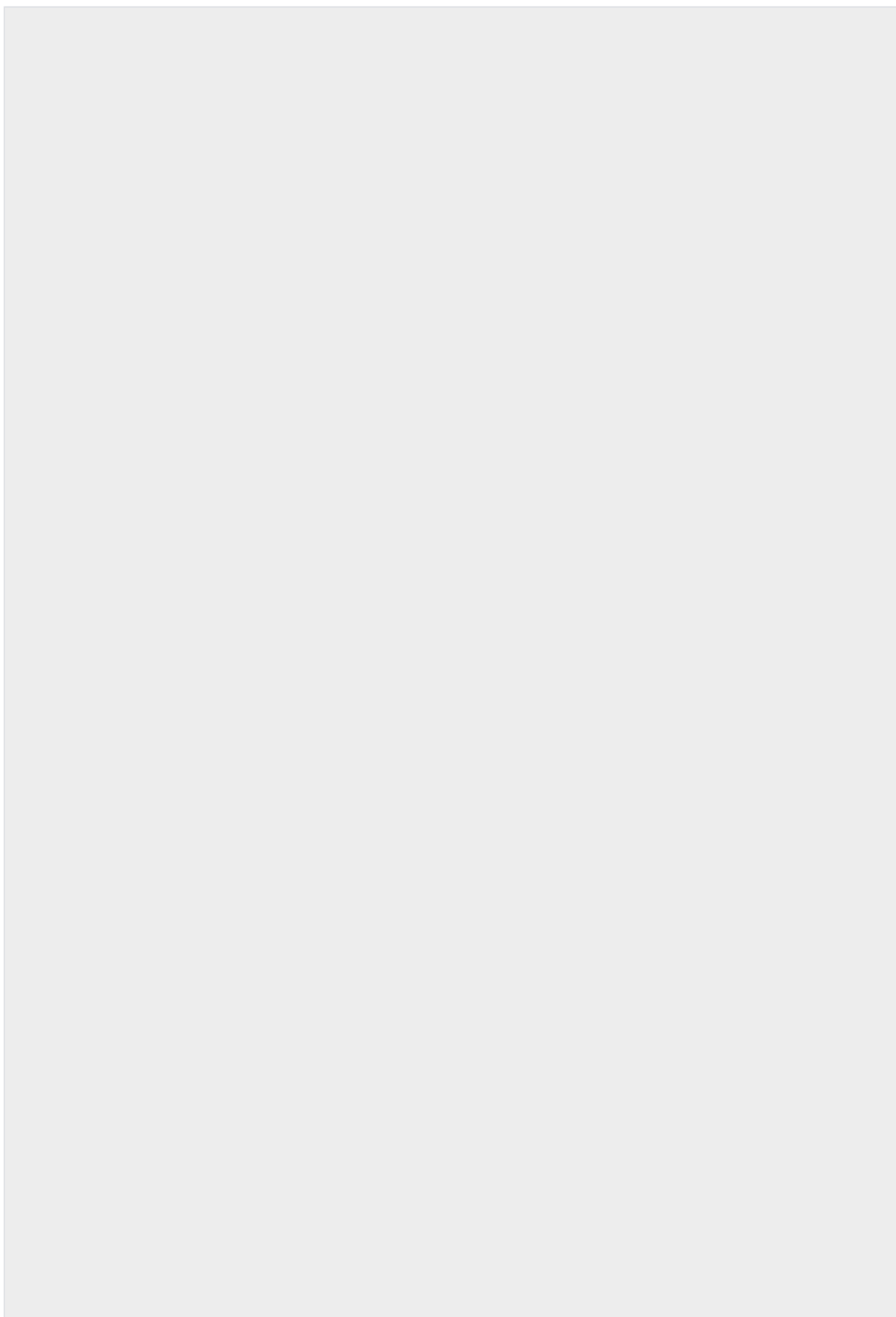


Table of contents

| | |
|-------------------------------|---|
| 1 Creating a page | 3 |
| 2 Content and Templates | 4 |
| 3 Categories | 5 |
| 4 Labels | 6 |
| 5 Document maintenance | 8 |
| 6 Retention policy | 9 |

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



Creating a page

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 |
|----------------------------|--|
| Process | For pages describing a process or policy. |
| Operating procedure | For pages describing an operating procedure. |
| SAP Transaction | <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 Prefer to use description from SAP; you may use own description when the one in SAP is unclear or outdated.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> |
| Landing page | 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

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 of how an activity is carried out, it's goals, scope and expected results. Process maps. | process policy |
| Standard operating procedure | A set of step-by-step instructions compiled to help workers carry out routine operations. | operating_procedure |
| Specific | Specific instructions for a region, country or site that deviate from the standard process. | specifics |
| Control | A description of controls performed to ensure operational effectiveness and efficiency, reliable financial reporting, and compliance with laws, regulations and policies. | internal_controls |
| Landing page | A title page for grouping pages with similar content | landing_page |
| 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 | accounts_payable |
| Provisioning | Pages or content related to provisioning | provisioning |
| Travel and Expenses | Pages or content related to travel and expenses | travel_expenses |
| Payments | Pages or content related to payments | payments |
| Support | Pages or content related to supporting or transversal functions | support |
| Master data | Pages or content related to master data | master_data |
| SAP transactions | Pages or content containing description and use of SAP transactions | sap_transaction |
| Report | Pages or content related to creating or maintaining reports | report |
| 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. | application |

Location labels

| Location | Labels to use |
|---------------|---------------------|
| North America | nam |
| Latin America | lam |

| | |
|------------------------------------|----------------------|
| Asia Pasific | apac |
| Europe, the Middle East and Africa | emea |
| World-wide | ww |

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. 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. 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. 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.](#)