

Technical Writing Policies & Procedures

Asset Management Operations

Version 1.1
July 18, 2022

Version History

Technical Writing P&P			
Department:	Asset Management Operations	Version:	1.1
Manager:	Andrew Olivero	Approval:	7/18/22
SME:	Angela di Gualco	Approval:	
Effective Date:	July 18, 2022		
Prepared By:	Angela di Gualco		
Page	Date/Initials	Change History	Reference
	7/5/22 ad	Initial creation	
	7/11/22 ad	(v 1.1) Addition of document control standards and audit	

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Technical Writing

The Technical Writer (TW) for Asset Management Operations (AM) is responsible for writing, cataloging, updating, and archiving accurate, timely, usable, and useful documentation that meets staff needs and business goals. Content may be produced in different mediums such as text, images, charts, and consumed in a variety of formats including policies and procedures, presentations, reports, manuals, briefs, proposals, etc. Documentation will conform to **homegenius** brand guidelines and **Radia** Record Management policies.

The TW gathers information from Subject Matter Experts (SMEs) through business process workshops and from written information in order to translate it into user-friendly documentation for a particular group in a standard format. Changes will be documented in the Version History, located at the beginning of each document. When documents are no longer required, they are moved into the appropriate Archive folders until deleted per document retention policy.

The TW maintains all AM knowledge assets on secure **Radia** servers that are protected and backed up by **Radia** IT staff. The most up to date and approved P&Ps and audit documentation are published in PDF format on the network **O:\GRC_profiles\RREM Policies and Procedures**, enabling staff to access policies and procedures necessary in the fulfillment of their responsibilities. Originals of AM documentation are secured in a different folder on the network **O:\GRC_profiles\Vendor Management\Technical Writing** that only the TW and their manager have access to.

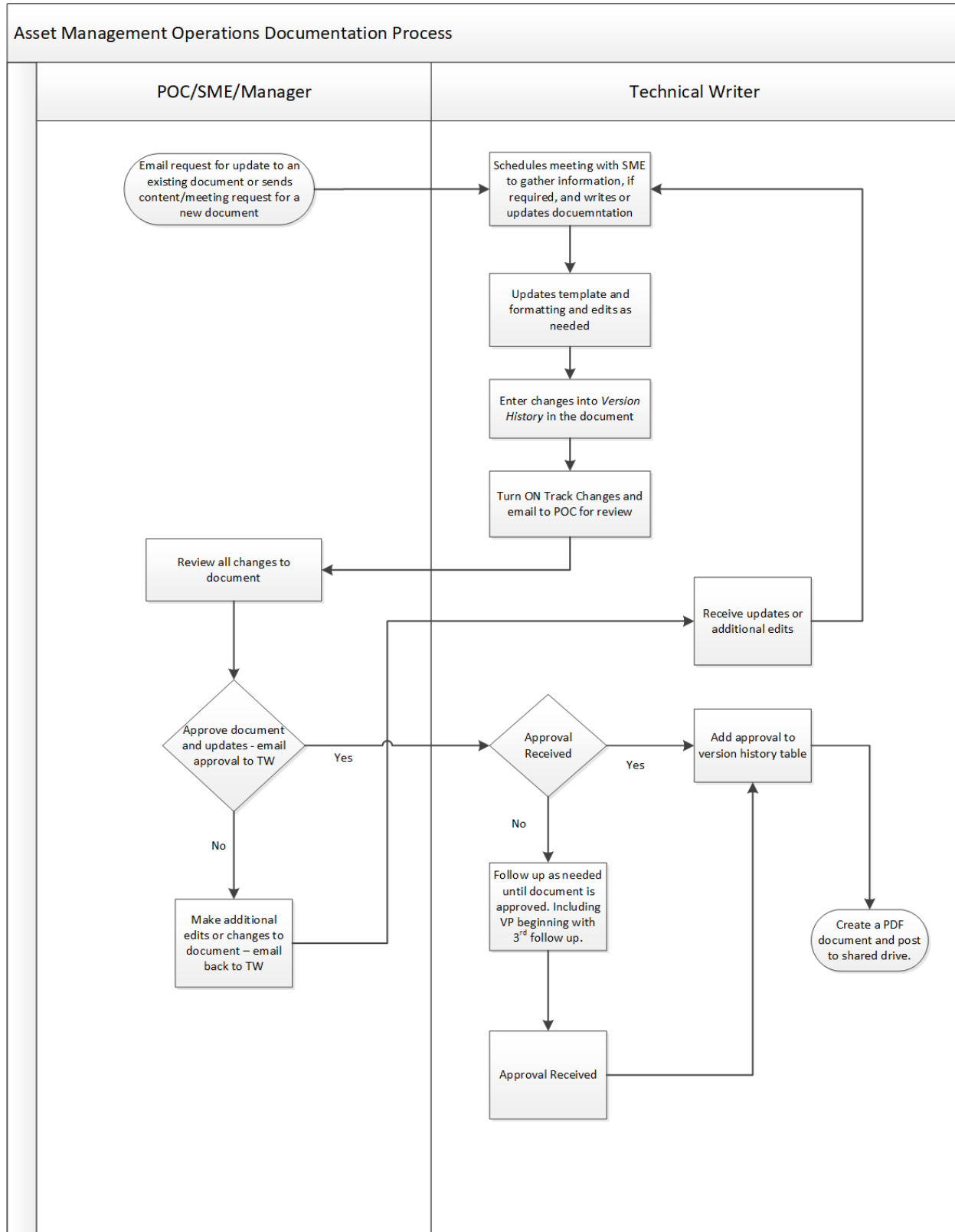
The TW will stay up to date on best practices in information gathering, technical writing, information design, document management, and knowledge management in order to make recommendations for standardizing and streamlining document production, maintenance, cataloging, retention, and consumption to ensure that AM knowledge is available, accurate, and usable by staff.

TW Contacts

Manager: **Andrew Oliverson**

Technical Writer: Angela di Gualco

Document Creation/Revision Workflow



Document Creation & Revision Processes

Document Creation

New documents such as P&Ps, audit documentation, presentations, reports, and proposals may be requested at any time.

- Requestor (Point of Contact - POC) will send content, client documentation, or information about the document and the SME that the TW should meet with to gather information.
 - If the latter, TW will schedule meetings with POC or SME in order to create requested documentation.
- TW will write and edit documentation in the appropriate template, including any applicable screenshots, tables, images, charts, etc., initiate version control and history, and save in a networked folder. (See Brand Resource Center)
 - For original P&Ps and audit documentation: D:\GRC_grcfiles\Vendor Management\Technical Writing
 - Approved and published P&Ps and audit documents: D:\GRC_grcfiles\RREM Policies and Procedures
 - Originals of other types of documentation: network folder provided by requestor or D:\GRC_grcfiles\Vendor Management\Technical Writing
- TW turn on Track Changes and send to the POC for review.
 - For large files, upload to Box and send the link to the POC.
 - TW will follow up weekly (or according to timeline provided by POC) until the document is approved, copying the VP beginning with the third follow up if no response from POC.
- After approval is received, the TW will update the approval date in version history and post a PDF copy to D:\GRC_grcfiles\RREM Policies and Procedures for P&P or audit documentation.
 - Copies of emailed approval will be saved in the appropriate Approvals folder on the network.
- The TW will alert the appropriate manager when published and they will inform their staff about the updated documentation.

Document Revision

Updates to existing documentation may be requested at any time and should be requested by managers whenever new client information is made available or when new policies or procedures are decided upon.

- Requested updates should be emailed to the TW.
- TW will make the requested changes and will also
 - ensure that the document is in the most recent Homegenius branded template
 - update the document's version history and update version number (if appropriate based on the type of updates)
- The TW will turn on Track Changes and send the document to the POC for review and approval.

Document Control Standards

- For large files, upload to Box and send the link to the POC.
- TW will follow up weekly (or according to timeline provided by POC) until the document is approved, copying the VP beginning with the third follow up if no response.
- Once approved, the TW will update the approval date in the version history (if appropriate based on the document type) and publish a PDF copy to **D:\GRC_profiles\RREM Policies and Procedures** for general reference and consumption.
 - Copies of emailed approval will be saved in the appropriate Approvals folder on the network.
- The TW will alert the appropriate manager when published and they will inform their staff about the updated documentation.

Document Control Standards

The following practices have been established to ensure conformity, compliance, and adherence to best practices in document management.

Version History

Version history tracks the revision history of a document. It is useful and important to understand why and when a document has changed, who modified it, who approved it, and the date it was approved/published in case questions arise.

- The TW will maintain version history in P&Ps and audit documentation for the lifecycle of the document, from initial creation until the document is made obsolete.
- Document version history will include the following information and will be placed on the second page, immediately after the cover page:

Document Name			
Department:		Version:	
Manager:		Approval:	
SME:		Approval:	
Technical Writer:			
Effective Date:			
Page	Date/Initials	Change History	Reference

Version Control

Version control tracks and manages changes made to P&P, audit documentation and other job aides. This is critical when multiple people are responsible for updates to documents. Version control identifies the latest version of a document.

Document Control Standards

Before making updates, the TW will save a new version with today's date in the filename in the TW folder on the network and move the previous versions into the ARCHIVE folder. Previous versions remain available to the TW and TW Manager for situations where policies or procedures revert back to a former state or there is some discrepancy that requires comparison to a previous version.

- The TW will set the version number for new documents at 1.0.
- When updates are made, the TW will increase the version number if changes require owner approval.
- Minor and Major revisions are incremented differently. Version numbers for minor revisions are made to the decimal number. For major revisions, the whole number is incremented.
 - Minor revisions: procedural updates due to software changes or client policies such as elimination or addition of tasks.
 - Major revisions: new procedures due to business process or software changes. EXCEPTION: if this is a new document that is being developed in phases and is not published, increment the decimal number. Immediately prior to publishing the first final/approved document, increment to the next whole number.
- Non-content changes such as formatting, rebranding/branding updates, correcting broken links, and typo correction do not require approval, so the version number does not change.

Version Increments	Change Examples
1.0	Initial Creation
1.1	Updates to Eviction Attorney Document Upload and Eviction Attorney Workflow per training PPTs (minor revisions)
2.0	Added auction procedures (major revisions)
2.0	Rebranded to homegenius and corrected typos (no increment to version)

- Version increases are noted in multiple points in a P&P or audit document.
 - On the cover page

Version 1.6
June 15, 2022

- In Version History

Eviction Management P&P			
Department:	Eviction	Version:	1.6

- In change history

Templates

Page	Date/Initials	Change History	Reference
53	3/31/20 [REDACTED]	(v4.8) Updates for North Carolina Redemption.	FW NC SC process 3 31 20_DW

Retention & Deletion

All previous versions of P&Ps and audit documentation, including those made obsolete, are preserved in the ARCHIVED folder until they are scheduled for deletion according to [Radia](#) Records Management policies. A document is made obsolete when the procedure or audit it was created for is no longer performed.

Templates

Most of the time, the [homegenius](#) template will be used to brand P&Ps and audit documentation. The [homegenius](#) and [Radia](#) templates may be found on the shared drive: [O:\GRC_grfiles\Vendor Management\Technical Writing\TW Tools\Templates](#) and in the Brand Resource Center. Logos, letterhead, and PowerPoint presentations are available in the Brand Resource Center as well.