



Enterprise Cloud Infrastructure Services (ECIS)

Documentation Standard Operating Procedure

Version 1.0

May 2018



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1 Document ID

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2 Document History

Revision Number	Revision Date	Summary of Changes	Author	Approval Name	Approval Date

3 Introduction

ECIS employs technical and other types of writing to document operational, technical, and administrative functions (for a more in-depth look at the types of documents ECIS writes, see the [Types of ECIS Documentation](#) section). This Standard Operating Procedure (SOP) defines ECIS's documentation process.

All ECIS documentation should adhere to this SOP, unless a special requirement arises, such as writing a document for a different group that doesn't follow the ECIS Style Guide.

3.1 Purpose

The purpose of this document is to describe procedures involved with writing documentation for ECIS functional teams, such as Engineering, Database, Linux, Active Directory, Project Management, etc. All ECIS documentation should be written using ECIS templates to ensure all documents coming from ECIS are professional and cohesive.

3.2 Types of ECIS Documentation

There are many types of documents that are used in the ECIS environment. The following list illustrates these documents by type:

- **Policies:** documents that outline the rules and regulations for the ECIS group.
- **Processes:** processes are high-level descriptions of ECIS functions and tasks.
- **Standard Operating Procedures:** specific step-by-step definitions of tasks performed by ECIS, such as how to set up a VM.
- **Training Materials:** step-by-step instructions for end users on specific products.
- **APIs:** APIs are a future project for ECIS documentation.
- **Project Management Documents:** includes statements of work, project plans, roadmaps, requirements, solution documents, communication plans, PowerPoint presentations, and SLAs, to name a few. We have a suite of templates for all project documents.
- **Diagrams:** Diagrams map out technical architecture, processes, and other visual representations. Visio or PowerPoint is used when creating diagrams.
- **Templates:** ECIS has templates for every type of document we produce. Our templates adhere to our style guidelines and should always be used when creating documents. Some of our templates include:
 - Standard Operating Procedure
 - Formal (more than ten pages)
 - Informal (less than ten pages)
 - PowerPoint
 - Technical Proposal

- Requirements
- SLA
- Runbook
- Policy Template
- Project Management Plan
- Quad Chart

3.3 ECIS Style Guide

The ECIS Style Guide, which can be found in the ECIS Document Library on SharePoint, is a guide describing the appearance, layout, and grammar guidelines for all ECIS documents. The Style Guide includes guidance on:

- Design elements
- Grammar, mechanics, and formatting
- Voice and tone
- Accessibility (Section 508 rules)
- Technical publications

The ECIS Style Guide should be consulted prior to producing any documentation that does not have a template.

4 General Guidelines for ECIS Documentation

This section details general guidelines for all ECIS documentation.

4.1 Document Naming Convention

All documents should have a consistent naming convention to be easily located in the document library. Document names should clearly describe the content and/or purpose of the document. For example, an SOP on how to install a Windows operating system should be titled “The Windows OS Installation Guide.” Try to be concise but descriptive when naming documents.

The ECIS documentation naming convention is as follows:

The document name followed by the version and date of the last update as follows:

DocumentName_v1.0_4.1.2018.docx

If this same document is updated to version 1.1 on May 1, 2018, then the new name is:

DocumentName_v.1.1_5.1.2018.docx

4.2 Versioning

Versioning is very important to keep a history of changes for documents as well as ensuring you have the latest version with the latest changes. This section outlines how ECIS using versioning to track documents.

4.2.1 Draft

When a document is first written it is given the version of Draft until the document is approved by the ECIS Director and published.

4.2.2 1.0

Once a document is approved and authorized for publication, the version is 1.0, indicating the first issue of the document.

4.2.3 1.x

Minor updates, such as changing a part of a section, adding graphics, adding a step to a process, etc., merits a change in the document version. While the major version number remains the same, the minor number would change (refer to Figure 1 for an example of major and minor version numbers). For example, for a minor change to a document with version 1.0, the version would change to 1.1.

4.2.4 x.0

Major updates merit a change to the major version number. For example, if an entire section is removed from or added to a document, the version would go from 1.0 to 2.0.



Figure 1 Version Numbering

SharePoint will be used in the future to track versioning for all ECIS documentation.

Most ECIS documents have a Document History table in the first few pages that you complete to keep track of versioning for each document as illustrated in Table 1.

Revision Number	Revision Date	Summary of Changes	Author	Approval Name	Approval Date
1.1	5.28.2018	Added a graph.	Tech Writer	Director	5.29.2018

Table 1 Document History Table

4.3 Using Figures and Tables

4.3.1 Figures

Graphics are an essential part of ECIS documentation and are used to support data and processes.

Figures should be treated as follows in all ECIS documentation:

- Figures should be introduced in the paragraph before the illustration; for example, “Figure 2 illustrates a picture of colorful birds.”
- All figures should be numbered and have a caption at the bottom of the graphic using Word’s caption feature as illustrated in Figure 2.
- Never use pictures from public sources without appropriate permission and credit. If possible, use Creative Commons Zero (CC0) graphics which are copywrite- and credit-free.
- The Table of Figures should appear after the Table of Contents in all documents with more than five (5) graphics.



Figure 2 This is a Picture of Birds

4.3.2 Tables

Tables are used to organize data to make it easier to understand. Guidelines for tables are similar to those for illustrations.

- Tables should be introduced in the paragraph prior to the table; for example, “Table 1 illustrates marketing data from last year.”
- All tables should be numbered and have a caption at the bottom of the table using Word’s caption feature as illustrated in Table 2.
- ECIS tables should be formatted using the custom table template. To use this template:
 - Click the **Insert** tab on the Word ribbon bar.
 - In the **Tables** section, click the down arrow under **Table** and click **Insert Table** as illustrated in Figure 3.
 - Select the **number of columns and rows** you want and click **OK**.
 - Alternatively, when you click the table icon, you can highlight the number of rows and columns you want on the grid and the table will be automatically created.

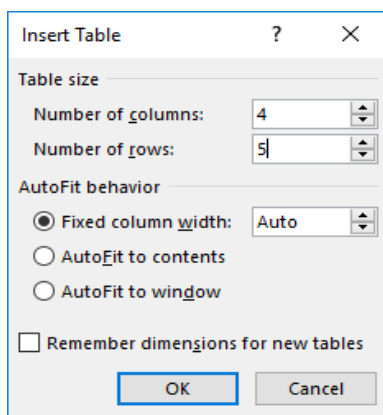


Figure 3 Insert Table Screen

- To format the table in ECIS’ color format, follow these steps:
 - Select the entire table in the upper-right hand corner
 - Click the Design tab
 - Click the down arrow under Table Styles to view all table styles
 - Under the Custom section, click the blue and white table style

Table 2 below illustrates the ECIS table style.

Heading	Heading	Heading
Contents		

Table 2 ECIS Table Style

4.4 Logos

All ECIS documentation should have the OCTO logo on the cover page (refer to this document's cover page) and in the header. The OCTO logo used in most ECIS documentation is illustrated below in Figure 3.



Figure 4 OCTO Logo

For guidelines on how and when to use the OCTO logo, refer to the ECIS Style Guide.

5 Documentation Approval Process

All ECIS documents must be reviewed by the Technical Writer and approved by the Technical Writer or Director before being formally published and uploaded to the ECIS Documentation Library.

Any ECIS document that has a version of DRAFT is still unapproved and should not be distributed for public consumption.

The ECIS documentation approval process is as follows:

1. Once a document is written, it is placed in the Documents for Approval folder on SharePoint.
2. The Director of ECIS or the Technical Writer reviews the document and either approves it or sends it back the originator for edits. Once the edits are complete, the document goes back to the Documents for Approval folder on SharePoint.
3. The Technical Writer reviews the updated document and informs the originator the document is approved for publishing.

4. The originator of the document changes the version to 1.0 and enters the date published in the Document ID table.
5. The document is disseminated to the appropriate parties.

Figure 5 illustrates the Document Approval Process.

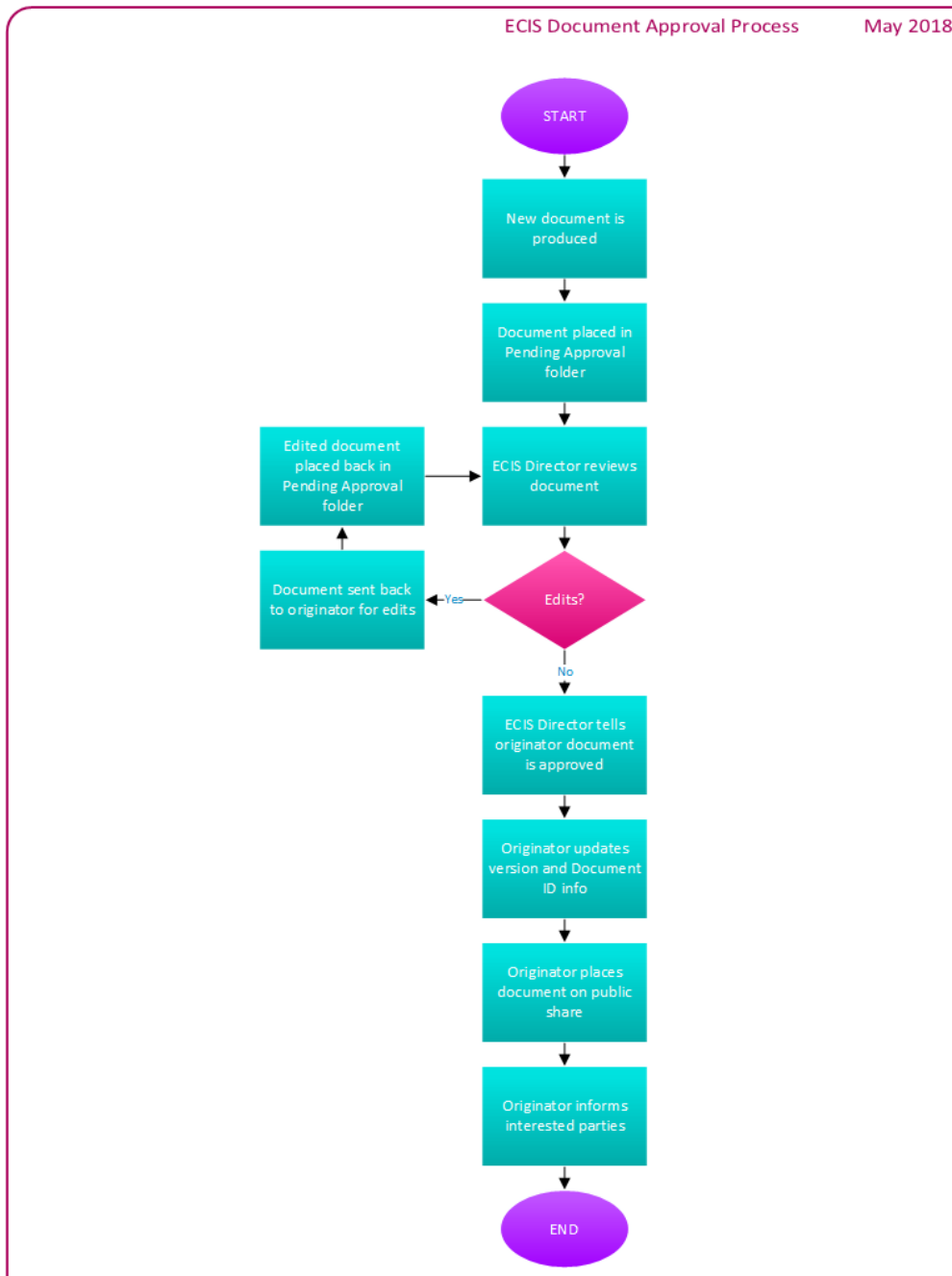


Figure 5 Document Approval Process

6 Document Control

In order to keep documentation updated and easy to locate, document control is a very important step in producing and publishing information. Document control allows us to:

- Know what documents we have and do not have
- Locate documents easily
- Update documents in a timely manner
- Keep a history of documentation

6.1 Document Location

Documents are currently housed in the [ECIS SharePoint Library](#) where everyone in ECIS can access our documents.

7 Documentation Audits

In order to keep all ECIS documentation current, semi-annual audits will be conducted.

Once a document is six months old, the technical writer will review the document with the appropriate group in ECIS to verify the information in the document is current.

Once updates have been made, the document will be routed to the Director of ECIS for review and approval following the approval process in [Section 5](#).

End of documentation process.