Manual/Handbook/Document Best Editing Practices

Please don't delete anything!

Editing existing language:
Strikethrough and turn red the words or phrases you would like to see changed/edited and add the new words or phrases in red text, next add a comment to the change you made with an explanation.

Deleting existing language:
Strikethrough and turn red the words or phrases you wish to have deleted and add a comment with an explanation.

Adding new language:
Type the words or phrases you would like to add, in correct place, in red and add a comment with an explanation.

Chiming in on someone else's comment:
Don't change the original edit, respond to their comment: answer the question at hand, make your own suggestion, give clarity if needed, etc...

Facilitator's Job (persona leading the project):
Review all comments and changes: accept them, deny them or revise the change as needed, and respond to comments when needed.

> **Accept**: change the red text to green text (including the strikethrough words)
> **Deny:** change to red text back to black text and respond to the comment with “Denied” and an explanation, if needed
> **Edit change request:** if you agree to make the change, but feel it needs to be reworded. Change the red text to green text and edit it to be the correct language. Make a comment to clarify the change.

Following up: if you need to follow up on a change request and don’t have an answer before the proofing round is complete, leave the change request as is and respond the comment and “following up and will have answer soon.”

Creative Director’s Job:
Download the current proof file, review the changes and make all the edits, upload the next proof and email group to notify it's ready for a new proofing round.

- I will delete all changes and comments and turn all text to black for next proofing round.
- I will leave any unanswered requests or follow up comments for the next proofing round.
- Final approvals will be via the Word doc.
- I will send a PDF for final review of visual features including line breaks and other formatting.

Leadership Meeting Notes on Editing Practices

Manual/Handbook/Document Editing Best Practices

- Purpose of files:
  - Centralized Reference
    - Procedures (How-To's)
    - Talking Points
    - Agendas/Meeting Minutes
    - General Reference - Internal
    - Others?
  - Collaborative Spreadsheets/Documents
    - Proofing/revising documents
    - Tracking (Ex: 3rd party waiver sheet)
    - Idea brainstorming
    - Others?

Editing Process Best Practices

- Team agrees that a new document is needed or that an existing document needs to be updated.
- Team agrees on who is the "Project Facilitator" - the team member who will be in charge of creating the draft, uploading it and keeping the team on task to edit the document
- Team agrees on who should be included to edit the document and who is responsible for which part of the document to edit
- Team agrees to a timeline to finish the proofing process.
- Project Facilitator (or designee) creates and saves draft on Office 365 in the appropriate group (if not already on it).
- If the document already exists, team member first saves a draft to an archive folder.
- Project Facilitator emails team to let them know where draft is and that it is ready for review, and includes tasks, timeline and this agreement in email.
- Project Facilitator has the responsibility and authority to remind the team regarding the open nature of the project/file until the project is complete (email or by using the group calendar to set up regularly scheduled reminders on people's calendars)

- **Team uses these document editing best practices to update the document:**
  - **Never delete anything**
  - Only use "Edit in Word Online" - do not download a copy or open using Word on your PC
  - More complex formatting to be done later in the process (such as images & PDFs), at which point the document can be shared in its new format for review, but it cannot be edited by all

- Any changes, even text additions, mark in red and include reason for each change in the comment section so we have a clear reference as to who made the change and why (To access the Comments area: when editing a document, click on "Review" in the ribbon up top, then "Show Comments") - be sure to select/highlight the statement/area you are referring to before creating a new comment
- Do not delete anything, only ~~striketrew~~ strikethrough and mark red, no matter how big or small
- Items that should **not** be changed (due to licensing regulation, etc) should be colored purple
- Facilitator needs to reply to the comment to say change accepted (ex: approve, I approve)
- Facilitator has authority to delegate tasks, but they must still follow-up with delegates
- Facilitator changes approved text to green. Red text denotes pending changes and green denotes approved
- All green changes will be changed to black by Julie as part of the new proof and comment will be deleted. Julie will upload revised proof.

- Team members notify team on significant updates using email or group discussion area
- Project Facilitator can make final change approvals OR For large projects, project the document on the wall during meeting and step through changes to agree to content - if in different regions, follow along on computer screens over conference call
- Changes are made to draft after agreement has been reached on each suggested change to content.
- Project Facilitator or designee reviews document for a final edit of grammar, spelling, typos, and word usage.
- Document presented to the team for final review