

# Publishing a Document to the Portal Library

## Overview

This guide provides instructions for creating user facing Data and Analytics Platform (DAAP) documents. It also covers the process for publishing both **new documents** and **edits to current** documents to the Data and Analytics [Portal Library](#). Below you will find two different templates to choose from and the purpose for each.

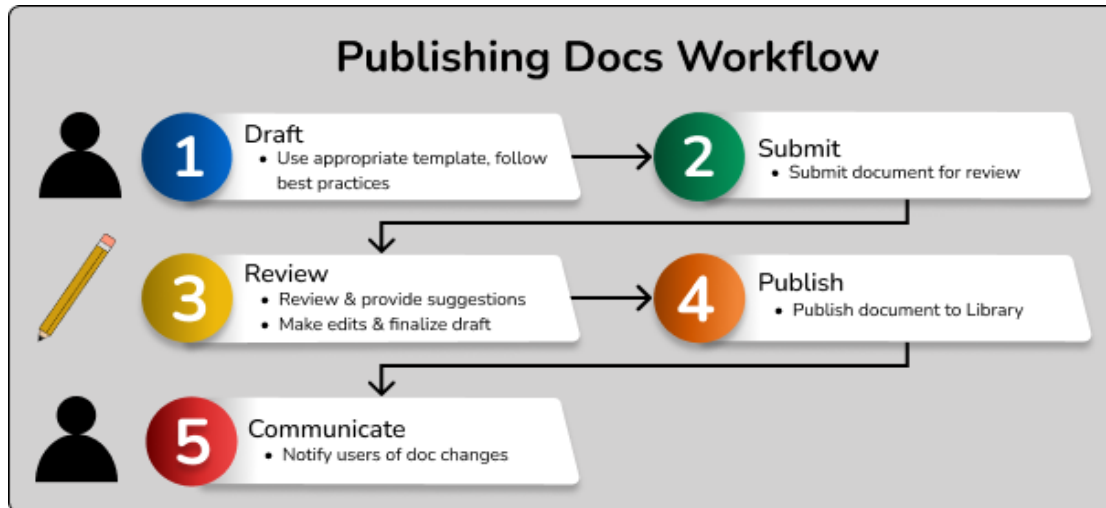


Figure 1 – Publishing workflow

## Instructions – New Document

### Step 1 – Select Template

- Sign into the [Data & Analytics Portal Library](#)
  - Only the user that submits the draft can edit the draft
  - If additional users require edit access, reach out to the AE team via [Teams](#) or [email](#)
- Navigate to the *My Documents* button and click on the *Create* document link

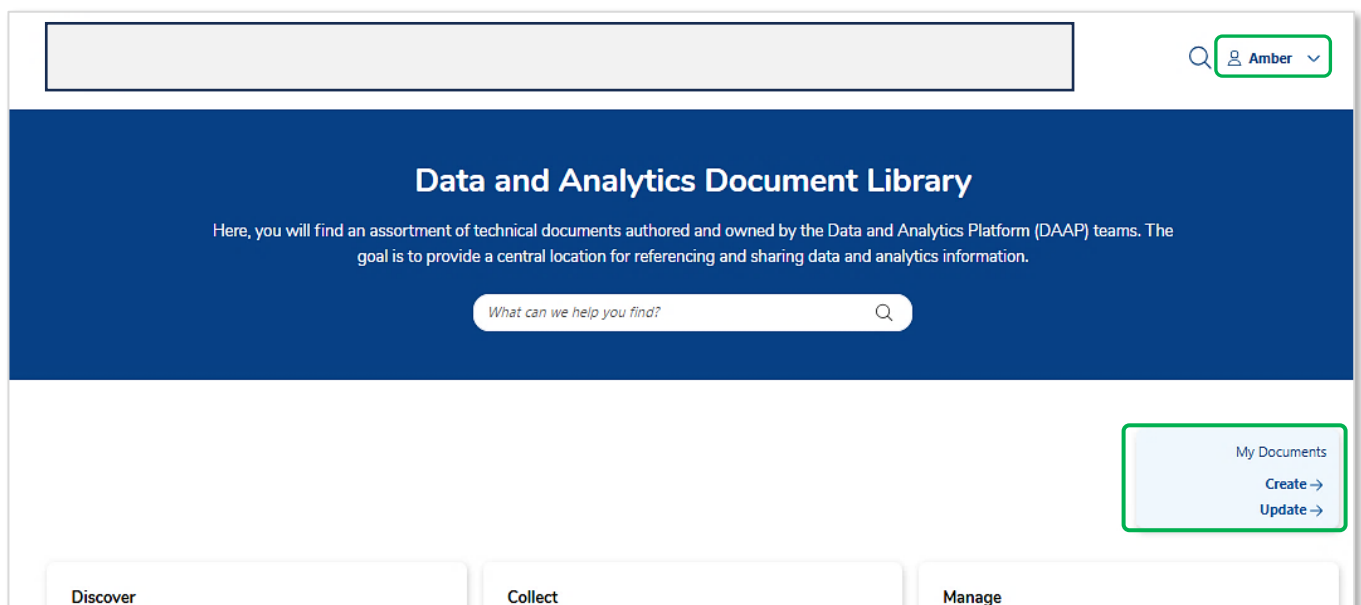


Figure 2 – Library landing page

c. Select the template based on the purpose of your document

If the purpose of the document is to	Then
Explain <b>How</b> to complete a process, do a task, or describe how something works. E.g., user guides, job aids, SDK docs	Use the <b>Instructional</b> template
Describe <b>What</b> a product, tool, or service is or what it does - it's functionalities, benefits, and uses. E.g., product overviews, company policies	Use the <b>Informational</b> template

- All documents have the following five parts:
  - **Title** – A brief, insightful name for the document (try starting with an -ing verb)
  - **Overview** – Introduces topic, identifies audience, sets expectations, names requirements
  - **Instructions/ Information** – Body of the document that informs (the what) or instructs (the how)
  - **Resources** – Links to important documents, tools, and sites. Provides options for support and feedback
    - **Summary** – A shortened version of the overview. **108 character max**. This serves as the doc preview in the Portal Library.
  - **Version History** – Includes version number, date, description of changes, and author

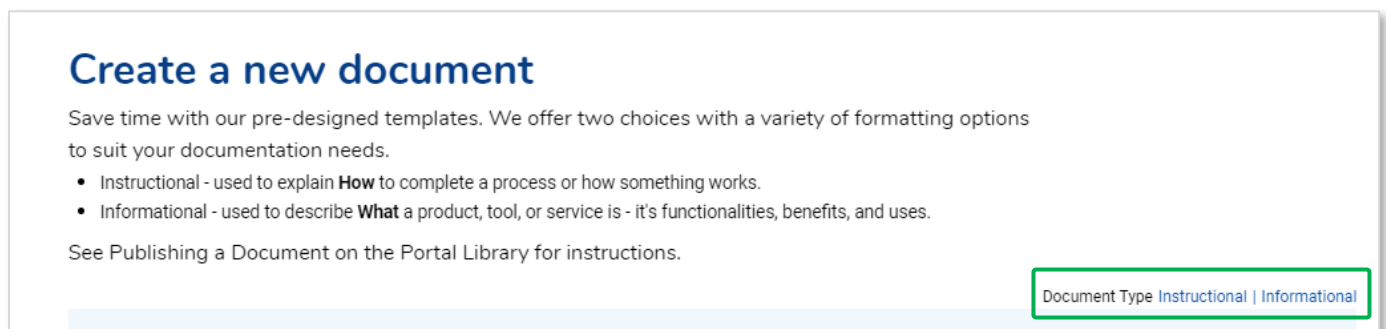


Figure 3 – Create a new document page

## Step 2 – Create Draft

a. Draft document following writing best practices:

- Write a **clear** document that readers can understand
  - Use proper grammar
  - Define unfamiliar terms, and avoid excessive acronyms, abbreviations, and jargon
- Ensure document is **concise**
  - Keep words and sentences short, and eliminate pleasantries
  - Write in active voice and use present tense (start with a verb)
- Confirm document is **comprehensive**
  - Think in terms of “Trigger to Target” – What Triggers the **Action**? What is the targeted **Outcome**?
  - Avoid assumptions with reader knowledge and understanding for a complete doc
- Aim for **consistency**
  - Use consistent headers, fonts, bulleting, and tone
  - Use industry-familiar terms and avoid over-interchanging terminology
- Verify document and the information contained within is **compliant**

- Adhere to technical writing best practices, templates, and established standard operating procedures
  - Consider company, local, state, & federal regulations related to data and analytics
- b.** Add in code blocks, images, links, and infographics to the document to provide clarity to the reader
- c.** Click *Save* to finish draft later, or move to Step 3
- **You must click the *Save* button to save the document. Autosave is not enabled**

### Step 3 – Submit Draft

Click on the *Review* button to submit the document for technical writer review

If tech writer	Then
<b>Does not</b> have any suggestions for improvement	Tech writer clicks the <i>Publish</i> button to move the document to the Portal Library in the agreed upon category <ul style="list-style-type: none"> <li>• The document will be live in the library within [ ].</li> </ul>
Has suggestions for improvements and clarity	Tech writer clicks the <i>Review</i> button to send the document, with added suggestions or questions, back to the owner for resolution

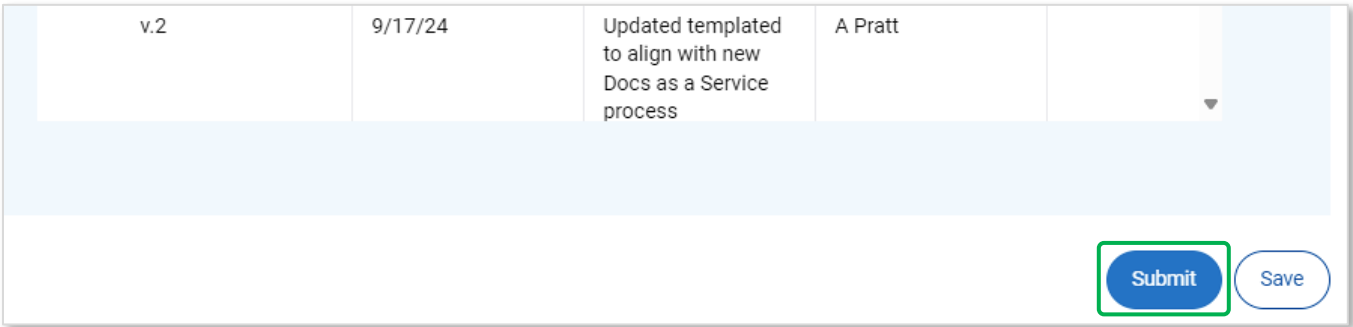


Figure 4 – Submit or save document

### Step 4 – Approve document

Review the highlighted changes or added questions made to the document

If you	Then
Agree with the document suggestions	<ol style="list-style-type: none"> <li>1. Click the <i>Review</i> button to send the document back for publication</li> <li>2. Technical writer publishes the document to the Portal Library in the agreed upon category <ul style="list-style-type: none"> <li>• The document will be live in the library within [ ].</li> </ul> </li> </ol>
Need to make more edits to the document	<ol style="list-style-type: none"> <li>1. Make the needed revisions in the document</li> <li>2. Click on the <i>Review</i> button to submit the document for technical writer review</li> <li>3. Repeat the process with the tech writer to finalize the draft for publication</li> <li>4. Technical writer publishes the document to the Document Library in the agreed upon category</li> </ol>

### Instructions – Edit Existing Document

Step 1 – Locate document

- a. Sign into the [Data & Analytics Portal Library](#)
- b. Navigate to the *My Documents* button and click on the *Update* link
- c. Click on the document from your list that requires the edits

My Documents				
Title	Submit Date	Modified Date	Modified By	Status
<a href="#">Publishing a Document to the Portal Library</a>	12/16/2024	12/16/2024	Pratt, Amber (NonEmp)	Draft

Figure 5 – My Documents

Step 2 – Prepare edits

- a. Complete the revisions following the best practices noted in Step 2 of the *New Document* section
- b. Click *Save* to finish draft later, or move to Step 3
  - **You must click the *Save* button to save the document. Autosave is not enabled**

Step 3 – Submit edited doc

Click on the *Review* button to submit the document for technical writer review

If tech writer	Then
<b>Does not</b> have any suggestions for improvement	Tech writer clicks the <i>Publish</i> button to move the document to the Portal Library in the agreed upon category <ul style="list-style-type: none"><li>• The document will be live in the library within 1 hour.</li></ul>
Has suggestions for improvements and clarity	Tech writer clicks the <i>Review</i> button to send the document, with added suggestions or questions, back to the owner for resolution

v.2	9/17/24	Updated templated to align with new Docs as a Service process	A Pratt	
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Submit

Save

Step 3 – Approve edits

Review the highlighted changes made to the document

If you	Then
Agree with the document suggestions	<ol style="list-style-type: none"><li>1. Click the <i>Review</i> button to send the document back for publication</li><li>2. Technical writer publishes the document to the Portal Library in the agreed upon category<ul style="list-style-type: none"><li>• The document will be live in the library within 1 hour.</li></ul></li></ol>
Need to make more edits to the document	<ol style="list-style-type: none"><li>1. Make the needed revisions in the document</li><li>2. Click on the <i>Review</i> button to submit the document for technical writer review</li><li>3. Repeat the process with the tech writer to finalize the draft for publication</li><li>4. Technical writer publishes the document to the Document Library in the agreed upon category</li></ol>

## Resources

### Summary

Guidelines for writing, editing, and publishing a Data and Analytics Platform doc to the Portal Library

### Documents

- Informational template
- Instructional template

### Support

Teams – Analytics Enablement Writing Support

Email – @kroger.com

- Subject line - *Writing Support*

## Version History

Version	Date	Description	Author
v1.0	6/8/23	Initial Version	A Pratt
v1.1	8/22/23	Step 2.c & d - Added "information" to make these instructions apply to both technical instructions and information documents.	A Pratt
v1.2	12/21/23	<ul style="list-style-type: none"><li>• Replaced references to the CMS with Document library.</li><li>• Step 2 - Added step e.</li><li>• Step 4 - Updating with instructions for editing document</li></ul>	A Pratt
v.2	1/29/24	Added Step 5 instructions for archiving / deleting a doc	A Pratt
v2.1	9/27/24	Updated instructions to align with the new Docs as a Service process and doc library	A Pratt