

VERSION 3.0

# THE EMPLOYEE HANDBOOK

PHANOUS RESEARCH AND INNOVATION CENTRE



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*Prepared with the deepest love for our  
country, Iran*



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# 1

## *About the Employee Handbook*

THIS is the Phanous Research and Innovation Centre employee handbook. The handbook will eventually do many wonderful things, but for now we stick with the basics: what roles we have and what is each one about.

This document is based on the design of Edward Tufte's books<sup>1</sup> and the use of the tufte-book and tufte-handout document classes.

<sup>1</sup> Edward R. Tufte. *The Visual Display of Quantitative Information*. Graphics Press, Cheshire, Connecticut, 2001. ISBN 0-9613921-4-2; Edward R. Tufte. *Envisioning Information*. Graphics Press, Cheshire, Connecticut, 1990. ISBN 0-9613921-1-8; Edward R. Tufte. *Visual Explanations*. Graphics Press, Cheshire, Connecticut, 1997. ISBN 0-9613921-2-6; and Edward R. Tufte. *Beautiful Evidence*. Graphics Press, LLC, first edition, May 2006. ISBN 0-9613921-7-7

## 1.1 *Why should you work for us?*

PHANOUS RESEARCH AND INNOVATION CENTRE is a new kind of research centre. We are innovative about the way we want to innovate. If there an idea, concept or challenge that we love and think we can make an impact about it, we build a labs for it with the best talent we can get hold off. Our labs then literally evolve with the research until it is matured into a state that has value and impact. We then break-off and move onto the next challenge.

AT PHANOUS we strive to do ethical research with integrity. We are pioneering and passionate in our contributions and principally innovative in our processes and deliverables.

WE GIVE YOU the opportunity, support and resources to become part of a truly unique team of passionate, innovative, and distinguished individuals to work on breakthrough research, development of disruptive technologies, and creation of novel processes. We want to create a once in a life-time opportunity to unleash your passion, creativity and dedication on making yourself, and Phanous a part of the global drive to solve future life challenges.



## 2

# Phanous Organizational Chart

THE ORGANIZATIONAL units of Phanous are shown in Figure 2.1.

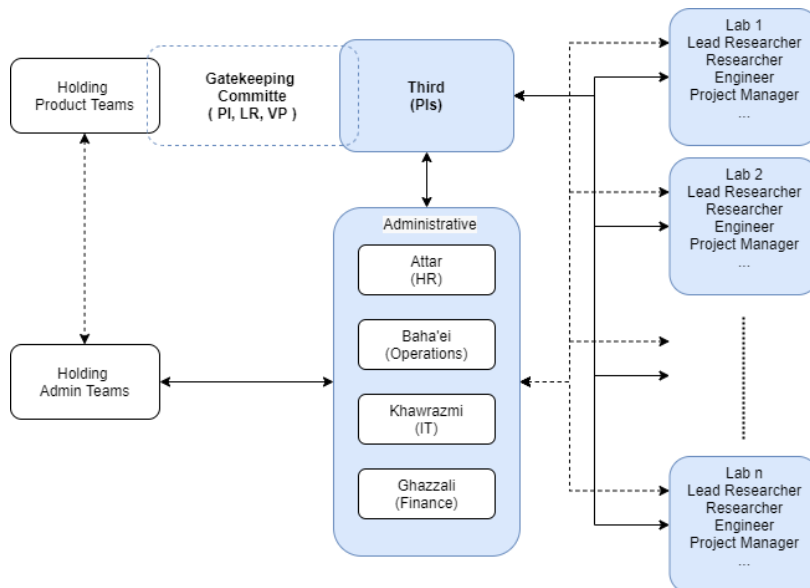


Figure 2.1: Organizational Chart of Phanous. Holding refers to the Hezardastan parent company

Each unit is briefly described in the subsequent sections.

2.1 *Innovation Labs*

<b>Unit name</b>	Innovation Lab
<b>Core Function</b>	To create value from research
<b>Is unit single phase</b>	No
<b>Initialization</b>	An innovative idea or concept requiring research with a potential to create value for the company, and approved by the Third committee
<b>Termination</b>	<ol style="list-style-type: none"> <li>1. Digestion</li> <li>2. Gate Failure</li> </ol>
<b>Unit size</b>	<ol style="list-style-type: none"> <li>1. Innovation Labs are multi-phase units and will grow or shrink in size with respect to their development stage</li> <li>2. At least 4 lab members</li> </ol>
<b>Responsibilities</b>	<ol style="list-style-type: none"> <li>1. Basic Research</li> <li>2. Applied Research</li> <li>3. Development</li> <li>4. Scientific publication</li> <li>5. Talent development</li> </ol>
<b>Additional Notes</b>	Gate progression is event driven and not time driven. However, gate transition is time bounded

Table 2.1: Unit description of Innovation Labs

2.2 *Third*

<b>Unit name</b>	Third
<b>Core Function</b>	Manage the R and D Processes
<b>Is unit single phase</b>	No
<b>Unit size</b>	Start with 2 PIs, grow as required
<b>Responsibilities</b>	<ol style="list-style-type: none"> <li>1. The Gatekeeping process</li> <li>2. R and D strategy and development</li> <li>3. Phanous funding</li> <li>4. Intellectual property</li> <li>5. Exogenous collaborations</li> </ol>
<b>Additional Notes</b>	Initially PIs will also serve as effective TLs

Table 2.2: Unit description of Third

2.3 *Attar*

<b>Unit name</b>	Attar
<b>Core Function</b>	Human resources management and development
<b>Is unit single phase</b>	Yes
<b>Unit size</b>	Resident HR Manager + Holding support manpower
<b>Responsibilities</b>	<ol style="list-style-type: none"> <li>1. Recruitment</li> <li>2. Learning and development</li> <li>3. Performance Evaluation</li> <li>4. Perks and Promotions</li> <li>5. Career path management</li> </ol>
<b>Additional Notes</b>	For the time being most of the admin work is done through the holding support staff

Table 2.3: Unit description of Attar

2.4 *Baha'ei*

<b>Unit name</b>	Baha'ei
<b>Core Function</b>	Operations and Maintenance
<b>Is unit single phase</b>	Yes
<b>Unit size</b>	Resident O and M Manager + Holding support manpower
<b>Responsibilities</b>	<ol style="list-style-type: none"> <li>1. Building</li> <li>2. Facilities</li> <li>3. Procurement</li> <li>4. Payments</li> <li>5. Digital identity and branding</li> </ol>
<b>Additional Notes</b>	For the time being most of the admin work is done through the holding support staff

Table 2.4: Unit description of Baha'ei



3

*You @ Phanous*

### 3.1 *Lead Researcher*

#### *Description*

THE LEAD RESEARCHER plays a central role in Phanous Research and Innovation Centre . Leads will shape the research and development plans for each scope of work and will be the key figure in talent selection, acquisition and retention. They will oversee the evolution of the research lab from the early stages of the formation all the way through business impact.

AS A LEAD researcher, you are technically highly accomplished, have an internationally renowned research track record, have a demonstrated ability to plan and manage visionary research projects, and enjoy a well developed network of academia and industry collaborators.

WE EXPECT our lead researchers to be a supportive mentor and motivating coach for their lab members. You will therefore understand the fundamental elements of effective team leadership skills, such as communicating effectively and listening well, resolving conflict, being organized, holding informative meetings, and have used these elements previously in your research management career.

PHANOUS lead researchers are expected to work closely and cooperate effectively with the Principal Investigators in their effort to implement the Phanous Research and Innovation Centre R&D strategy plan and maintain the Phanous Research and Innovation Centre on the value creation direction by ensuring gatekeeping occurs as intended. Industry experience is not required but preferred.



*Who to report to?*

The lead researchers report to the PIs.

*Responsibilities*

- Provide scientific leadership and vision
- Deliver effective value creation strategies
- Identify future value creation opportunities
- Knowledge transfer and documentation management
- Effective collaboration with the PIs
- Gatekeeping

*Qualifications*

- Doctorate in a related field
- Post-doc – Preferred
- Faculty – Preferred
- Corporate R&D – Preferred
- International caliber research

*Application pack requirements*

- Resume
- Covering letter
- Innovation Lab Research Proposal

### 3.2 *Senior Researcher*

#### *Description*

SENIOR RESEARCHERS are extremely valuable sources of knowledge and experience at Phanous. As a Senior researcher, you are technically highly accomplished and have an internationally renowned research track record with a selection of high-impact work. You have extremely well developed expertise in your field of research, a demonstrated ability to manage teams of scientists, and enjoy a well developed network of academia and industry collaborators.

SENIOR researchers will work closely with the Lead to make significant technical advances in the research and development plans for each scope of work, and are expected to be proactive in resolving major scientific hurdles encountered in the progression of their lab. Senior researchers will work closely with the lab Lead Researcher to facilitate lab gate progression.

WE EXPECT our senior researchers to play an active role in the overall development of the lab members, in areas such as (but not limited to) learning and development, professional mentoring and career path development. At Phanous you will be part of a diverse innovation lab which collaborates and interacts closely with academia and industry. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment.

*Who to report to?*

Senior researchers report to the lab lead researcher.

*Responsibilities*

- Basic/applied Research
- Documentation / dissemination of research results
- Team work

*Qualifications*

- PhD in a related field
- Demonstrated research skills (publications etc..)

*Application pack requirements*

- Resume
- Covering letter
- Statement of Research
- Academic references might be required

### 3.3 *Researcher*

#### *Description*

PHANOUS researchers are the backbone of our innovation labs. You drive our research and development machine through the gateways of innovation. You have a passion for discovery, creativity, and curiosity. You appreciate the ways in which we do research differently and love to get onboard.

AS A RESEARCHER, you will have the opportunity to get involved with various elements of fundamental, applied and developmental research. You will have strong analytical skills, demonstrated ability to take research projects to a conclusion, and can generate original and out of box ideas. Phanous researchers are intrinsically motivated by making an impact, solving real life challenges, and by being part of a multidisciplinary research team.

WE EXPECT our researchers to have a growth mindset, be proactive about their own -as well as their team members- learning and development, and be effective team-players. As a self-driven researcher, you will have the chance to develop your management, mentoring, and supervision skills, and to participate in the leadership effort of your labs by supporting your lead researcher.

AT PHANOUS you will be part of a diverse innovation lab which collaborates and interacts closely with academia and industry. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment.

*Who to report to?*

Researchers report to the lab lead researcher.

*Responsibilities*

- Basic/applied Research
- Documentation / dissemination of research results
- Team work

*Qualifications*

- Masters in a related field – preferred
- Demonstrated research skills (publications etc..)

*Application pack requirements*

- Resume
- Covering letter
- Statement of Research
- Academic references

### 3.4 *Research Assistant*

#### *Description*

PHANOUS RESEARCH ASSISTANTSHIPS are perfect for those who are planning a future research career (at industry or academia), but don't yet have substantial prior experience. RAs will join existing research projects and work closely with a lab researcher or the lead researcher directly. To qualify for this role, you need to clearly demonstrate your potential as a future effective researcher.

AS A RESEARCH ASSISTANT you are passionate about science and technology, and possess a broad set of existing technical skills. You love solving real life challenges and being part of a multidisciplinary research team. We expect our research assistants to have a growth mindset, and be effective team-players who also have the ability to work independently.

YOUR PRIMARY FOCUS is technical work, for which we give you the necessary training and development to become a competent researcher and make fundamental contributions to your project. However, you will also have opportunity to expand your management skills set and to create strong professional networks with the leading academic and technical talent

AT PHANOUS you will be part of a diverse innovation lab which collaborates and interacts closely with academia and industry. In addition to your Lead Researcher with whom you will work closely, you might also collaborate with other researchers and Senior researchers. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment.

*Who to report to?*

Research Assistants report to the lab lead researcher.

*Responsibilities*

- Participate in cutting edge research to develop solutions for real-world, large-scale problems.
- Document your work

*Qualifications*

- Bachelor's degree in a related field
- Ability to design and execute a research agenda

*Application pack requirements*

- Resume
- Covering letter
- Statement of purpose

### 3.5 *Research Intern*

#### *Description*

PHANOUS is all about collaboration, interaction, exchange and teamwork. We actively seek to maximize our research effectiveness by expanding our network of collaborators and partners in both academia and the industry. Interns are an essential instrument of such collaborative knowledge sharing.

PHANOUS research interns are passionate, self-motivated and love to discover new things. As a research Intern you are willing to put in the extra effort required to taking research ideas to a conclusion. You possess a broad set of technical skills and ready to take on some of technology's greatest challenges affecting the lives of millions.

WE GIVE you the opportunity to learn new knowledge and novel methodologies, and the chance to create strong professional networks with the leading academic and technical talent in the industry. You might also stay connected to your research roots as a contributor to the wider research community by publishing papers. If you have your own research ideas, at Phanous we give you the tools and support to develop them and make a real world impact.

AT PHANOUS you will be part of a diverse innovation lab which collaborates and interacts closely with academia and industry. In addition to your Lead Researcher with whom you will work closely, you might also collaborate with other researchers and Senior researchers. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment.



### *Who to report to?*

Interns report to the lab lead researcher.

### *Responsibilities*

- Participate in cutting edge research to develop solutions for real-world, large-scale problems.
- Document your work

### *Qualifications*

- Currently enrolled in a Bachelor's, Master's or PhD degree in a related field
- Returning to a degree program after completion of the internship
- Ability to design and execute a research agenda

### *Application pack requirements*

- Resume
- Covering letter
- Personal Statement

### *Notes and Restrictions*

Internships are limited to one opportunity per person and the duration of each instance is time bounded to 6 months.

### 3.6 *Visiting researcher*

#### *Description*

PHANOUS is all about collaboration, interaction, exchange and teamwork. We minimize research risks and maximize research effectiveness by expanding our network of collaborators and partners in both academia and the industry. Visiting researchers are an effective instrument of such collaborative knowledge sharing.

VISITING RESEARCHERS are considered as enabling tools towards realization of our mission and vision at Phanous. Visiting scholars increase dynamic diversity, cross-pollination of new research ideas and spark creativity in existing research projects. Visiting researchers are expected to hold permanent positions elsewhere. Their presence will therefore serve to promote and disseminate the research work that has been carried out at Phanous.

VISITING RESEARCHERS are encouraged to get in touch with the lab lead and to develop a concise, but comprehensive research visiting plan. In the plan, you will demonstrate your past research credentials, the specific proposals for your research activities whilst at Phanous, and explicitly refer to the outcomes and objectives you envision achieving.

AT PHANOUS you will have the opportunity to be part of a diverse research and innovation centre which collaborates and interacts closely with academia and industry. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment. You are a competent negotiator with effective communications skills.

*Who to report to?*

Visiting researcher report to the lab lead researcher.

*Responsibilities*

- Effective collaboration in the research effort
- Contribute to the value creation objective
- Organize Knowledge transfer events

*Qualifications*

- Masters in a related field
- Doctorate in a related field - preferred
- Promising research career and track record
- Permanent Position elsewhere

*Application pack requirements*

- Resume
- Covering letter
- Research Visit Proposal

### 3.7 *Engineer*

#### *Description*

INNOVATION LABS at Phanous operate on a gatekeeping cycle typically begins by a product challenge and ends by making a business impact. The function of the cycle is to make sure that only research which creates value is created. When promising basic research is ready to get into application state, engineers will join the team effort to facilitate the transition into development, and eventual integration of solutions in the product lines. They will help in testing, verification and quality assurance aspects of development.

PHANOUS ENGINEERS have a strong industrial background with experience in all related product development stages. They have a good understanding of the technical stack of tools required for design and prototyping and will also have an understanding of research methodologies and paradigms. Engineers are expected to help the researcher scientists to develop their ideas in a systematic and consistent fashion and to draw up strategies to minimize later risks of commercialization.

AT PHANOUS you will have the opportunity to be part of a diverse research and innovation centre which collaborates and interacts closely with academia and industry. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment. You are a competent negotiator with effective communications skills.

### *Who to report to?*

Engineers report to the lab lead researcher.

### *Responsibilities*

- Technology realization / prototyping
- Team work
- Driving and developing system design and architecture
- Early stage project technical direction
- Identify and implement risk mitigation strategies/methods.
- Collaborate across engineering, operations, product and other teams.
- Knowledge transfer and documentation
- Technical quality assurance

### *Qualifications*

- Bachelors in a related field – Preferred
- 2 yrs+ experience of product development
- Applied research implementation in product development
- Integrated System Design

### *Application pack requirements*

- Resume
- Covering letter
- Statement of Purpose

### 3.8 *Project Manager*

#### *Description*

INNOVATION LABS at Phanous operate on a gatekeeping cycle typically begins by a product challenge and ends by making a business impact. The function of the cycle is to make sure that only research which creates value is created. When promising basic research is ready to get into application state, project managers will join the team effort to manage the transition into development, and eventual integration of solutions in the product lines.

PHANOUS PROJECT MANAGERS will have prior project management experience, preferably in the field of product and prototype development. They have a basic understanding of the technical stack of tools required for design and prototyping and of research methodologies and paradigms. Project managers are required to be proficient in the use of related project management tools and are expected to create the necessary management systems required for seamless gate transfer towards the later stages. Project managers are required to provide effective communication and knowledge transfer between key stake holders -such as the product engineers, lead researchers, PIs- so that product prototype develop progresses in a systematic and consistent fashion and to draw up strategies to minimize later risks of commercialization.

PHANOUS project managers are expected to work closely and cooperate effectively with the Lead researcher and the Principal Investigator in their effort to implement the Phanous Research and Innovation Centre R&D strategy plan and ensure that the lab will deliver the business impact objectives as set out in the lab proposal. They will also serve as effective communication links between the related research and product teams. At Phanous you will be part of a diverse research and innovation centre which collaborates and interacts closely with academia and industry. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment. You are a competent negotiator with effective decision making and planning skills.

*Who to report to?*

Project Managers report to the lab lead researcher and the principal investigator

*Responsibilities*

- Prototype project management
- Contribute in designing prototypes
- Knowledge transfer and documentation management
- Effective collaboration with researchers

*Qualifications*

- Master – preferred
- 2 yrs+ plus experience in project management
- Familiar with knowledge management

*Application pack requirements*

- Resume
- Covering letter

### 3.9 *Principal Investigator*

#### *Description*

THE PRINCIPAL INVESTIGATOR (PI) is charged to conduct objective research that generates independent, high quality, and reproducible results. The Principal Investigator is responsible for the management and integrity of the design, conduct, and reporting of the research project and for managing, monitoring, and ensuring the integrity of any collaborative relationships. Additionally, the Principal Investigator is responsible for the direction and oversight of compliance, financial, personnel, and other related aspects of the research projects and for coordination with the core business side to assure research is conducted in accordance with the Phanous policies and procedures.

PHANOUS is managed, developed and operated according to the Phanous Research and Innovation Centre R&D strategy plan. The PI is chiefly concerned with implementation, development and expansion of the R&D strategy plan inline with the overall holding business strategy. Our PIs will not be directly involved in doing research, but to be effective in performing their duties, they will have a science and research background and be familiar with the research methodologies and paradigm.

WE UNDERSTAND that for many of our researchers, the experience of working at a corporate research and development centre such as Phanous will be new. The PIs are therefore expected to effectively coach the lead researchers towards successful execution of the Lab research proposal and value creation. PIs will have strong leadership skills, understands the basic principles of managing research scientists and projects, and must be excellent problem solvers. As a PI you will have strongly developed soft-skills such as communicating effectively and active listening, effectively resolving conflict, good negotiating skills and a proven track record of good decision making.



### *Who to report to?*

The PIs comprise the RD<sup>2</sup> committee which reports to the Third committee.

### *Responsibilities*

- R & D strategy and development
- Management of gatekeeping
- Evaluate Innovation Lab creation requests
- Innovation Labs performance assessment
- Learning and Development
- Collaborations
- Risk Management
- Establish effective links with core business
- Secure funding for Innovation Labs

### *Qualifications*

- 5 yrs+ tech industry experience
- 2 yrs+ Leadership / Management experience
- Experience of R&D processes such as DoD, RFPs, RFIs
- Familiar with KPIs, OKRs and ROIs

### *Application pack requirements*

- Resume
- Covering letter
- Statement of Purpose

### 3.10 *HR Manager*

#### *Description*

PEOPLE are the most valuable thing we have and you'll be the one to ensure we have a happy and productive research center where everyone is engaged, motivated, and contributes to the effort to realize our mission and objectives. Promoting corporate values and shaping a positive and creative culture is a vital aspect of a complete HR manager duties and responsibilities.

*Who to report to?*

The HR Manager reports to the Principal Investigators.

*Responsibilities*

- Nurture a positive, fun and innovative research environment. Listen to and resolve employee grievances. Resolving conflicts through positive and professional mediation.
- Upkeep and promotion of Phanous culture and values, and planning and implementing changes as required
- Oversee and manage a performance management system that delivers high performance, improves employee engagement and boost motivation.
- Assess training needs and execute training programs as required. Provide leadership training on soft skills and coach people's self development process.
- Continually evaluate compensation and benefits packages to keep them attractive and competitive with the objective of increasing retention.
- Manage the onboarding process, ensuring the process is up to date, effective, and with professional standard.
- Oversee necessary administrative duties and coordinate HR or related issues with the Holding.
- Counseling and helping people to develop their career path.
- Assist the PIs in effective implementation of the Phanous research development strategy plan (Katibeh)
- Maintain management guidelines by preparing, updating, and recommending human resource policies and procedures
- To provide a safe and secure work environment in which best practices and responsible research and innovation (RRI) principles are instilled and enforced via continuous improvement processes.

*Qualifications*

- 3+ years' experience in as a senior human resources officer.
- Excellent active listening, People oriented and results driven skills.
- Competence to build and effectively manage interpersona relationships at all levels of the company, strong interpersonal and communication skills and be able to build relationships at all levels of the organization.

- Have a top-down insight in sourcing and evaluation of candidates and the ability to analyse and adjust the process where needed.
- Passionate to create and develop distinguished culture and unify it among teams and people
- High level of integrity, discretion and proven experience successfully managing confidential information, exceptional ethical mindset.
- Great communication skills and understand how to communicate large complex change
- Great at influencing through strong relationships, ability to manage a complex set of stakeholders

*Application pack requirements*

- Resume
- Covering letter
- Statement of Purpose

### 3.11 *Operations and Maintenance Manager*

#### *Description*

PHANOUS is a young and growing research centre. As the OM manager you will face a range of operational and maintenance challenges which will require you to be highly resourceful, innovative, focused and persistent. You are an expert multi-tasker, pay attention to the details, and are well adept at documenting processes and events.

YOUR role at Phanous is chiefly as an enabler who ensures that our O&M processes are moving forward as intended. You will do basic analysis of data from our operations and where necessary propose more efficient ways and processes to operate. You are a highly-driven individual who derives immense motivation by being part of creating something from the grounds up.

AT PHANOUS you will be part of a diverse research and innovation centre which collaborates and interacts closely with academia and industry. You therefore have the necessary soft and interpersonal skills required to work productively in such a dynamic environment. You are a competent negotiator with effective communications skills.

*Who to report to?*

The OMM will report to the PIs

*Responsibilities*

- Tracking and coordinating contracts and other administrative documents and letters
- Managing financial invoices
- Supporting management tasks as an effective process coordinator
- Administrating the Phanous digital identity
- Solve simple IT problems and contact the IT department when necessary.
- Maintain electronic filing system, ensuring processes and software are up to date and working in order
- Building Management

*Qualifications*

- Strong soft-skills competency
- 2 yrs+ related experience

*Application pack requirements*

- Resume
- Covering letter
- Personal Statement

# 4

## *The Hiring Process*

AT PHANOUS, recruitment is processed through a process which is common at the base level and will be customized at the subsequent layers. Figure 4.1 illustrated the overview of the process.

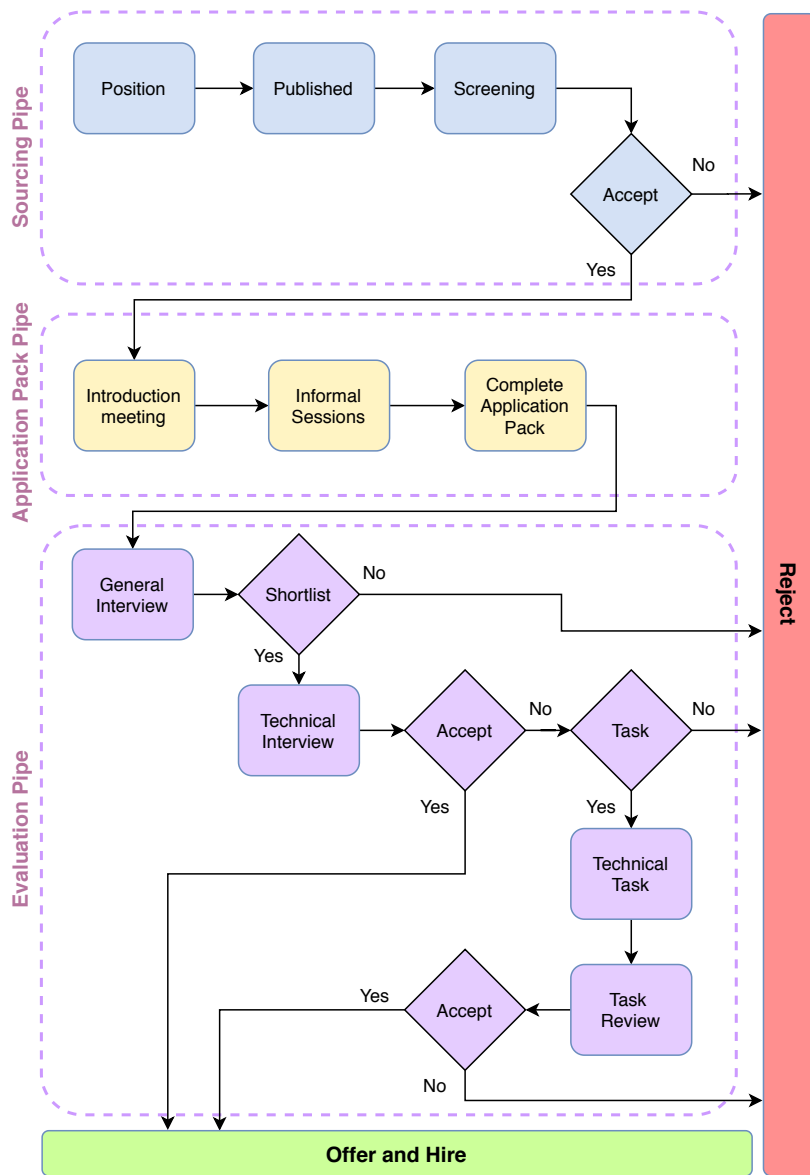
KEY DECISIONS such as those related to acceptance/rejection are taken by the hiring committee which consist of the PIs, the HR Manager and the Lead Researcher Associated with the lab.

FOR SOME POSITIONS, the recruitment process may not expand the entire length of the pipe and might reach a conclusion at an earlier point in the process.

THE PROCESS comprises of three stages and several steps. Each position has its own hiring committee and might utilize different metrics.

A BASIC DESCRIPTION of the stages and steps in the process is subsequently described in this chapter.

Figure 4.1: The principal hiring process





## 4.1 Stage 1: Sourcing Pipe

THE PURPOSE of the sourcing stage is to prepare a suitable pool of basically qualified candidates for later stages in the pipe. In case of a new position, this stage begins by composing a job description package, and end by a screening of interested candidates.

### *Job Description Package*

NEW JOB offerings are opened by creation of a new job description package by the hiring committee. This will contain:

- Job Title
- Job Description
- Qualifications
- Responsibilities
- Application form content (which typically contains):
  - Complete name and titles
  - Full contact details
  - How was the applicant informed about the vacancy
  - Expected duration of employment
  - Resume
  - Cover letter
- Items in the Supplementary Application pack

### *Publish*

EXISTING, or newly created job description packages will be published upon a request for the respective position. Request for recruits need approval of the respective hiring committee which might differ depending on the nature of the job and the role itself.

Upon approval of the request, details of the vacancy will be published in Workable and across the Phanous digital content platforms, including Social Media platforms.

To be considered for screenings, candidates must complete the application form in the allocated deadline (if there is a closing date). Referral applicants will also be required to complete this step.

### *Screening*

THE PURPOSE of screening is to direct only qualified candidates into the APP. Selection at this stage is only on the basis of meeting the necessary qualifications and there will be no comparative assessment. Rejection at this stage may also be automated based on simple conditions.

### *Checklist for Stage 1*

This is a quick checklist of stage 1.

- Stage 1 is screened (i.e. less people exit the stage than enter it)
- Screening in stage 1 is qualification based only (no skill assessment)
- Screening in stage 1 is default-pass. Candidates will fail the screening if it is shown that they don't meet one or more of the requirements.
- Mandatory documents for stage 1 are Application Form, Covering letter and full resume.
- A candidate cannot be considered for stage 1 with incomplete documentation.
- It is aimed that stage 1 is completed within one week of submission.

## 4.2 Stage 2: Application Pack Pipe (APP)

The Application Pack Pipe (APP) refers to an innovative segment of the overall recruitment pipe which has been engineered to increase the efficiency of the pipe by considering the following:

- Phanous is new in many ways. As an entity in the national and international ecosystem it is new. It is also new in the sense that it is one of the first, if not the first, truly private and industry sponsored research centers with an intention for fundamental research. Finally, the model with which we intend to develop our research profile is a principally different when compared to typical research centers. When people apply to be part of Phanous, we feel it is important that they are made aware of these stark contrasts so that they can make the right decision.
- For most of our positions, the supplementary application pack material is not routine content to ask for job applications in Iran. Things such as the SOP or the SOR are norms for applications abroad for most students, but researchers might have trouble filling these for a new research center of which they know little. At the same time it is important for us that distinguished talent successfully reaches the end of the pipe. For this we feel that - at least during the early stages of the development of Phanous - qualified candidates will need assistance in completing the supplementary application pack material. This assistance will be offered in the APP.

The APP stage consists of the following steps.

### *Introduction Meeting*

THE INTRODUCTION meeting is a non-interview session with the candidate. It is held by one of the PIs, and/or the lead researcher. The meeting is interactive and both sides may ask questions.

THE INTRODUCTION meeting serves the following purposes:

- Give the candidate a complete overview of Phanous, its background and main operating principals.
- Clarify the entire recruitment process
- Describe the operation of the respective research lab
- Specify the content of the application pack to the candidate
- Provide the candidate with contact details of persons relevant to the application.

*Informal Sessions*

ONCE the candidate has had the introduction meeting, the process will enter a preparation period in which the candidate will seek to complete his or her application as per the requirements. The duration of the period is dynamic and is dependent on how quickly the candidate will get the material in order.

DURING this period, the candidate may - on their own accord and initiative - arrange any number of meetings with any member of Phanous, in particular the PIs or the lead researcher. The purpose of such meetings is for the candidate to source the information required to complete the application pack material.

SPECIFICALLY, most candidates are required to hand in some sort of a statement as part of their application pack. A good statement needs to be written in reference to specific lab research work; since the candidate needs to justify their contribution to the lab. Therefore candidates are encouraged to consult with lead researchers to find out about all aspects of research work. Phanous HR provides guidelines to the candidates on how should these statements be written, and are not supposed to direct such enquiries to the lead researchers. The lead researchers are also discouraged from discussing the statement itself with the candidate (i.e. how to write one, what should be included in it ...)

*Complete Application Package*

THE APPLICATION PACK PIPE is finished upon the candidate submitting the completed documents. The protocol proceeding the submission of the documents is as follows:

- The PI and the associated lead researcher will review the documents.
- There will be no assessment at this stage, however the documents are used to highlight areas of interest for follow up in the subsequent interviews, technical and non-technical. The follow up may be in the form of interview questions or tasks.
- The candidate will be scheduled for the first (non-technical) interview.

*Checklist for Stage 2*

This is a quick checklist of stage 2.

- Stage 2 is not screened. All candidates entering the stage will proceed to stage 3, unless they withdraw themselves.

- Any meeting or session during this stage is informal and organized by the candidate themselves. Phanous will not solicit any meetings.
- Candidates are not supposed to seek help with writing their statements. They are only supposed to use the opportunity of the meetings to find out more about the work that is - or is planned to- happen at the labs. They may also use the chance to find out more about Phanous.
- It is aimed that stage 2 is completed within three weeks.

### 4.3 Stage 3: Evaluation Pipe

APPLICANTS who submit their completed packs will enter the Evaluation pipe. This consists of two main interviews; a nontechnical general interview, and a technical (professional) interviews with the additional possibility of a task.

#### *General Interview*

THE PURPOSE of the general interview is to focus on the applicants soft skills. Here are the key points related to the general interview:

- The interview is attended by the HR Manager and one of the PIs (preferably) not the same one as in the introduction meeting.
- The focus is on the soft skills, culture fitness, and other human related issues. However, technical questions may be asked if felt necessary.
- There will be no tasks for this interview. The reject/accept decision is made solely on the basis of submitted documents and the interview.
- Applicant are entitled to feedback if they ask for it.
- If the applicant is successful, they move onto the technical interview. If not they will receive the rejection letter
- We should aim to complete the process by two weeks.

#### *Technical Interview*

APPLICANTS who pass the general interview are shortlisted for the second interview which is technical by nature. The purpose of the technical interview is to focus on the candidate hard skills and readiness for the job from a technical point of view. Here are the key points related to the second interview:

- The interview is attended by the lead researcher, and one other person who may be a PI, or another member of the research team.
- The focus is on the hard skills, readiness to perform, and technical suitability for the job.
- Based on the outcome of the professional interview, the committee may decide to accept the applicant directly, reject the candidate, or to define a task.
- If applicants are rejected either before a task or after one, they are entitled to feedback if they ask for it.

- If the applicant is successful, they move onto the technical interview. If not they will receive the rejection letter
- From general interview shortlist, to the decision on the outcome of the technical interview, should take two weeks or less.

### *Technical Task*

THE COMMITTEE may decide to set the applicant a task to complete. Tasks are varied in nature and scope.

ONCE the applicant has submitted the task, there will have to be organized a task review session in which the deliverables are examined in the presence of the candidate.

HERE are the key points related to the tasks:

- Tasks should be designed to require at most 20 hours of work.
- Tasks are defined by the person to whom the applicant will be directly reporting to, should they get employed.
- Tasks should be designed to eliminate specific areas of concern or to shed light on any grey areas. Tasks should not be given to delay decisions or when a decision is not clear.
- The final decision (accept/reject) should be communicated to the candidate in the task review session. This means the task report should be studied in advance and the session is only reserved to clear up any ambiguities.

### *Checklist for Stage 3*

This is a quick checklist of stage 3.

- Stage 3 without task should be completed in about four weeks, and with task in about 6 weeks.
- The hiring committee will determine if a task is required, but the task is specified by the person directly reportable to in the respective position.
- Tasks should be required less than 20 hours of work and be specific in what aspect of assessment they help.
- It is aimed that stage 2 is completed within three weeks.





## 5

### *The Application pack components*

YOUR APPLICATION PACK will comprise of several documents, some of which may be new to you. During your interview process, we will work with you to get your pack in order. In the meantime you may refer to the brief guides below about what each component of your application pack comprises of what to include in it.

WHEN you are preparing your application pack, use each specific document to only describe its related content. For example, do not use your research statement to highlight your personal strengths.

INDIVIDUAL DOCUMENTS in your application pack (e.g., personal statement, research statement, resume, cover letter, etc.) will collectively form an impression of your academic career. It is therefore important that you use each document for its intended purpose and be discriminating and strategic about the information you include in each one.

## 5.1 *Personal Statement*

### *What is a Personal Statement*

A **PERSONAL STATEMENT** is an essay you write about yourself. It's your opportunity to state why you'd like to do your internship at Phanous Research and Innovation Centre, and what skills and experiences you have that demonstrates your passion for the work you will be doing at our research lab.

**THE PERSONAL STATEMENT** is considered as a support document. This means it is not supposed to replace or duplicate other documents in your application pack, such as your resume. Your personal statement, is unique to you, so is no standard template for it.

A **GOOD PERSONAL STATEMENT** does not cover your childhood, or your distant future plans in great details. Instead, it focuses on now; What are your passions? Why is this opportunity appealing to you? What do you hope to achieve at the end of your internship? and What evidence do you have to back up your statements?

### *Why is the Personal Statement important?*

**THE PERSONAL STATEMENT** is important because we only have a limited number of internships on offer, and most applicants are highly academically accomplished. You increase your chances for an internship if you can use your personal statement to effectively show,

- What makes you the perfect match for our program?
- What do you hope to learn/achieve from your internship?
- How will your internship benefit your university?

### *Formatting tips for your personal statement*

**PLEASE** pay attention to the following when preparing your Personal Statement.

- Keep it to 1 page
- Be to the point, write specific and natural.
- The statement of purpose is not a literary produce, so don't use untowardly vocabulary or grammar. keep it straight and simple.
- You may describe any personal circumstances that have affected your academic performance.
- Don't forget to talk about what makes you enthusiastic and motivated for this subject.

## 5.2 SOP: Statement of purpose

### *What is a Statement of Purpose (SOP)*

A STATEMENT OF PURPOSE is an essay, describing the the purpose behind your application. It illustrates your professional journey from the past, to the present and also the future. The SOP is a summary of your academic background, current accomplishments, and future academic intentions.

THE SOP is designed to complement other documents in your application pack, such as the CV. It is not a chronicle of your achievements, and is not supposed to duplicate or replace your resume. It is also not an autobiography.

A GOOD SOP describes how and why you became interested in your indented field of studies (the past), what have done to increase your competencies in this field (the present), and what are your plans for the future, what do you hope to achieve (in the future).

### *Why is the SOP important?*

THE STATEMENT OF PURPOSE is important because it,

- Allows you to directly communicate key features of your application that you consider are important.
- Shows how the research lab will benefit by having you? The SOP is your opportunity to describe how you will be useful to the research lab and what are the unique features you being with yourself.
- Shows how you will benefit by being a member of the research lab? The SOP is your opportunity to describe how being in the lab will serve your professional learning and development along your chosen career path? What will you gain here that is not available elsewhere?

### *Formatting and Organization of your SOP*

PLEASE pay attention to the following when preparing your statement of purpose.

- Be selective about what you include.
- Your SOP should be unique to you and reflect your individuality.
- The document should be between 1 to 2 pages long.
- You may write your statement in Persian or English.
- Refrain from using sectioning and itemizing.

### 5.3 SOR: *Statement of research*

#### *What is a Statement of Research*

A RESEARCH STATEMENT is a document with the purpose of describing the trajectory of your research to the hiring committee. It is a summary of your research accomplishments, current work, and future direction and potential of your work.

THE RESEARCH STATEMENT should contain technical details, but at the same time be understandable by experts outside your sub-discipline. Therefore your statement of research should also present a holistic picture of your work.

A GOOD research statements is a compelling and realistic agenda, which gives a sense of direction about your research work and illustrates the specific value you will add to Phanous and your innovation lab.

#### *Why is the SOR important?*

THE RESEARCH STATEMENT allows you to,

- Show that you can take on independent research.
- Demonstrate your writing ability, independence as a researcher, and ability to earn.
- State your short-term and long-term research goals.
- Show how your research background and expertise will fit with the needs, facilities, and goals of your innovation lab.

#### *Formatting and Organization of your SOR*

PLEASE pay attention to the following when preparing your statement of research.

- The document should be between 1 to 3 pages long.
- You may write your statement in Persian or English.
- You may use sectioning and itemizing.
- If you refer to any published work, include full citation details.

6

*Email Templates*

### 6.1 *Template to invite person for the introduction meeting*

Dear [CANDIDATE NAME]

SALAAM and we hope this email finds you well.

THANK YOU for your interest in working at Phanous research and innovation centre, and for submitting your resume for the [ROLE TITLE] position.

EMPLOYMENT decisions depend on fulfillment of additional requirements on which you will be informed in the course of the hiring process. The estimated time to completion of the process is around two months, but this may be shorter or longer depending on how quickly we receive material and are able to set meetings.

MORE DETAILS about the hiring process shall be divulged to you in an introduction meeting. The meeting is also an opportunity for you to ask questions or raise any concerns you might have. Proposed details of your introduction meeting are as follows:

- Date: [.....]
- Time: [.....]
- Location (Virtual/Physical): [.....]

IF this is not suitable please feel free to let us know. We look forward to meeting you.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)

## 6.2 *Template to ask someone to send in their application pack*

Dear [CANDIDATE NAME]

SALAAM and we hope this email finds you well.

THIS IS further to your application for the [ROLE TITLE] position.

WE ARE PLEASED to let you know that your application has passed the initial screening. This means you are considered eligible for employment, but does not indicate that a decision has been made. Such a decision will be made after fulfillment of other requirements on which you will be informed in the course of the hiring process.

AS PART of the hiring process we would now like to ask that you prepare and submit your application pack. We normally allocate up to [DAYS] for candidates to prepare their packs, but encourage you to submit it sooner if you can.

WE HAVE attached a short guide for you to prepare your pack. Here (link to roles in Gerd) you can also find out the required components for the application pack related to [JOB TITLE] position.

IF YOU need further assistance preparing your pack, please feel free to contact the following people:

- If you want to discuss technical aspects of your proposed research you may contact the lead researcher of your future innovation lab, Dr [LEAD RESEARCHER NAME]
- If you want to discuss any administrative aspect of your application please contact the Phanous HR Admin, [HR ADMIN NAME].
- For all other enquiries, you may contact any one of the Phanous Principal investigators.

WE LOOK forward to receiving your pack and meeting you again.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)

### 6.3 *Template to invite for an interview after application pack*

Dear [CANDIDATE NAME]

SALAAM and we hope this email finds you well.

THIS is further to your application for the [ROLE TITLE] position. We would like to acknowledge the receipt of your application pack, and to arrange for your first interview.

KINDLY note that this interview is the first of two possible interviews. While you should come prepared for any technical discussions that might take place, the principal purpose of the first interview is to assess your soft skills. For this reason the lead researcher of your proposed lab may not be present in the interview. The second interview -attended by the lead researcher of your proposed lab- is reserved for observation and assessment of your technical merits. You do not need to submit any further documents at this stage, but during the second interview stage might be asked to produce technical samples of your work.

If you have any questions about any of the above details please feel free to contact our HR Admin, [HR ADMIN NAME]. The proposed details of your interview are as follows:

- Date: [.....]
- Time: [.....]
- Location (Virtual/Physical): [.....]

If this is not suitable please feel free to let us know.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)



#### 6.4 *Template to invite for technical interview after HR interview*

Dear [CANDIDATE NAME]

SALAAM and we hope this email finds you well.

THIS IS further to your application for the [ROLE TITLE] position.

WE ARE delighted to share the good news with you that you have successfully passed your first stage interview. Congratulations on reaching the penultimate stage! This achievement is a reflection of the high standards of your overall competencies, and indicates a great potential to add value to Phanous.

AS WE COMMUNICATED in an earlier correspondence, the final stage of the hiring process is a technical evaluation stage which is primarily carried out by the lead researcher of your lab. Details of what this stage involves may vary, but in all instances, there will be at least one initial technical interview.

IN ANTICIPATION for this interview, please be prepared for in-depth technical discussions on matters related -but not confined- to the areas highlighted in your Statement of Research, your prior technical work experience, and the proposed work you shall be doing at Phanous.

THE PROPOSED details of your technical interview are as follows:

- Date: [.....]
- Time: [.....]
- Location (Virtual/Physical): [.....]

IF this is not suitable please feel free to let us know. Once again, exceedingly well done on getting to this stage, and we look forward to meeting you again.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)

### 6.5 *Template to inform admission to Phanous and offer meeting*

Dear [CANDIDATE NAME]

SALAAM and we hope this email finds you well.

IT IS WITH GREAT PLEASURE to inform you that your application for admission to Phanous Research and Innovation Centre has been successful and you are now considered as fully eligible! Thank you for your patience and perseverance during the selection process, which has been designed to ensure that only the most qualified and competent candidates are offered admission.

WE will shortly arrange a meeting in which details of the compensation and perks package offered to you are presented. Confirmation of acceptance of our offer, marks the terminal point of this process and will activate the legal proceedings of getting your employment contract drawn up and signed. We allocate up to two weeks for this process, but seek to complete it sooner if possible. You can expedite the matter by having your identification, education, and legal documents ready at hand.

YOU ARE RESPECTFULLY invited to attend you offer meeting as follows:

- Date: [.....]
- Time: [.....]
- Location (Virtual/Physical): [.....]

IF this is not suitable please feel free to let us know. We are excited to have you at Phanous and look forward to working with you.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)

## 6.6 *Template for offer letter*

Dear [CANDIDATE NAME],

SALAAM and we hope this email finds you well.

FURTHER to our recent notification of admission, we would like to thank you for your positive engagement during the hiring process and are extremely delighted to welcome you into our community with the following offer,

- Type of employment: [FULL-TIME, PART-TIME, etc.]
- Title of position: [.....]
- Reporting person: [NAME OF DIRECT MANAGER]
- Lab/Team name: [.....]
- Location: [.....]
- Gross monthly Salary: [.....]
- Net monthly Salary (only applicable to F/T employees): [.....]
- Gross monthly remuneration: [.....]
- Stock Options: [.....]
- Start date: [.....]

IN THIS ROLE, you will be required to [BRIEFLY MENTION RELEVANT JOB DUTIES AND RESPONSIBILITIES ].

YOUR EMPLOYMENT with Phanous will be on an at-will basis, which means you and the company are free to terminate the employment relationship at any time for any reason upon one month notice. This letter is not a contract or guarantee of employment for a definite amount of time.

AS AN EMPLOYEE of Phanous, you are also eligible for our benefits program, which are described in more details below.

**THE GROSS MONTHLY REMUNERATION** is dependent on the company revenues at the end of each quarter. The definite figure is determined by the board of directors at each quarter and paid accordingly. This figure is tax deductible.

**SOCIAL SECURITY INSURANCE COVER** shall be instigated for you from your first day of employment and the employee share of the premiums shall be directly deducted from your gross salary.

**SUPPLEMENTARY HEALTH INSURANCE** is available to our full time employees when the initial three-month probation contract has been consummated. Our health compensation scheme is extremely generous. However, payments are up to the figure approved by the board of directors, and may vary during the course of your employment.

**PERSONAL LOANS** are offered to all employees and you are eligible to apply after six months of continuous employment. Loan figures are dependent on your salary, and employment duration at the time of request.

**ADVANCE PAYMENT ASSISTANCE** is available to you for up to two times per year in which you can request up to four-fifth of your salary to be paid upfront.

**EMPLOYEE STOCK OPTIONS** are offered to all employees and stock promises are fulfilled over the duration of four years. Release of stocks commences with half of the promise upon two years of continuous employment, with the remaining half linearly released over the proceeding two years. Stock option promises are subject to final approvals by the respective committee.

**LEARNING AND DEVELOPMENT CREDITS** are allocated to all employees up to half your gross monthly salary figure per year. We value staff learning and development and actively encourage employees to self-learn during their employment.

**TEAM-BUILDING** budgets are allocated for all employees from day one of employment on a monthly basis. The budget expenditure is controlled by your team leader.

**FLEXIBLE WORKING ARRANGEMENTS** are available to all staff. Phanous is built on mutual trust and we do not record attendance times. You are trusted to monitor your own times to ensure that you fulfill the terms of your contract. Full-time employees are required to work 44 hours per week and part-time employees are expected to work at least 16 or 12 days per month, for 4-days and 3-days part-time contracts respectively. A day is defined as 6 hours of strictly-useful work, or 8 hours of being at work.

PLEASE CONFIRM YOUR ACCEPTANCE of this offer by signing and returning this letter by [OFFER EXPIRATION DATE]. We are excited to have you join our team! If you have any questions, please feel free to reach out at any time.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)

Wiki: [Gerd](#)

Signature:

Printed Name:

Date:

## 6.7 *Template for Onboarding email*

Dear [CANDIDATE NAME],

SALAAM and we hope this email finds you well.

IT IS OUR PLEASURE to have you with us at Phanous. Our colleagues are looking forward to helping you find your way into our company and learn more about what we do here.

PLEASE take a moment to carefully review the attached document which includes details about your compensation, benefits, and company and employee policies.

TO PROCEED with your contract and get authorized access to employee services, it is necessary that you complete THIS FORM at your earliest convenience. In addition, kindly send the scanned documents listed in the attached file [ESSENTIAL DOCUMENTS] to our HR Admin (Minareh Alexander) immediately upon activation of your Slack/Zoho account. Welcome aboard!

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)

## 6.8 Template for Company accounts email

Dear [CANDIDATE NAME],

SALAAM and we hope this email finds you well.

YOUR COMPANY ACCOUNTS (Phanous Email, Peygir, Slack, Zoho, and Keycloak) have been activated. The details are as follows;

- **Company Email:**

Mail:

Password:

mail server address: <https://mail.phanous.ir>

The attached file provides you with information on how to send emails using your Phanous email. Note that all employee service platform accounts are created with your Phanous email as the user account name. For your convenience, Phanous emails are also forwarded to your Gmail.

- **Slack:**

To activate Slack on first use, it is necessary to use a VPN. It is imperative that you completely set up your profile, including your contact information.

- **Zoho:**

Please complete your Zoho profile info as soon as possible. It is imperative that you completely set up your profile, including your contact information.

- **Keycloak:**

Username:

Password:

Keycloak server address: <https://keycloak.hezardastan.net>,

<https://hezardastan.yarooms.com/>

- **Peygir:**

Username:

Password: (has been sent to your company email)

PLEASE take a minute to read these Phanous Guidelines .

Cordially,

Phanous Research and Innovation Centre

Website: [Phanous.ir](https://Phanous.ir)

Wiki: [Gerd](#)

### 6.9 *Template for general rejection letter*

Dear [CANDIDATE NAME],

SALAAM and we hope this email finds you well.

THANK YOU for taking the time to meet with our team about the [ROLE TITLE] role at Phanous Research and Innovation Centre. It was a pleasure to learn more about your skills and accomplishments.

UNFORTUNATELY, we regret to inform you that it was decided not to proceed further with your application. Your resume will remain on file for future openings that better fit your profile.

WE ARE HAPPY to answer your questions if you would like any specific feedback about your application or interviews.

THANKS AGAIN for your interest in Phanous and best of luck with your job search.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)



### 6.10 Documents confirmation letter

Dear [CANDIDATE NAME],

SALAAM and we hope this email finds you well.

THIS EMAIL is to confirm that we have received your documents in relation to [JOB TITLE] position.

Cordially,  
Phanous Research and Innovation Centre  
Website: [Phanous.ir](http://Phanous.ir)  
Wiki: [Gerd](#)



# 7

## *Information Management*

AT PHANOUS we create a large amount of digital information. This information is used for the day-to-day work of the organization, as well as providing a record of decisions and actions needed for accountability and legal compliance. The task and responsibility to create, manage and store this information is collaboratively shared by all Phanous members.

THE PURPOSE of this document is to,

- Provide some simple guidelines for managing digital information.
- Help you to make decisions about how to manage and store particular types of digital information.
- Create unified standards of documentation across Phanous for effective decision making and knowledge sharing.

## 7.1 *Documentation Philosophy*

DOCUMENTATION is a fundamental part of our working culture at Phanous. We document for effective knowledge sharing and to ensure that our decision making is agile, consistent and systematic.

THE PHANOUS documentation guidelines is based on a 3-tier system philosophy. The three tiers of guidelines are;

1. Principles
2. Structures
3. Templates

DOCUMENTATION PRINSIPLES refer to the general guidelines and issues we look to maintain across all our documentations. These will be independent of the context of the document. Any guidelines identified as a documentation principle means it applies to all documents produced at Phanous.

A DOCUMENT STRCUTURE refers to a framework for documents with similar content, for example reports, papers, meeting agendas etc. Structure guidelines apply to all document with content matched with the respective scope of the structure.

DOCUMENT TEMPLATES are prepared for specifc types of documents. This will be either in case of regular documents required to be generated repeatedly, or in case of documents which are essential to be prepared to the correct format.

THE 3-TIER system is illustrated in [Figure 7.1](#).

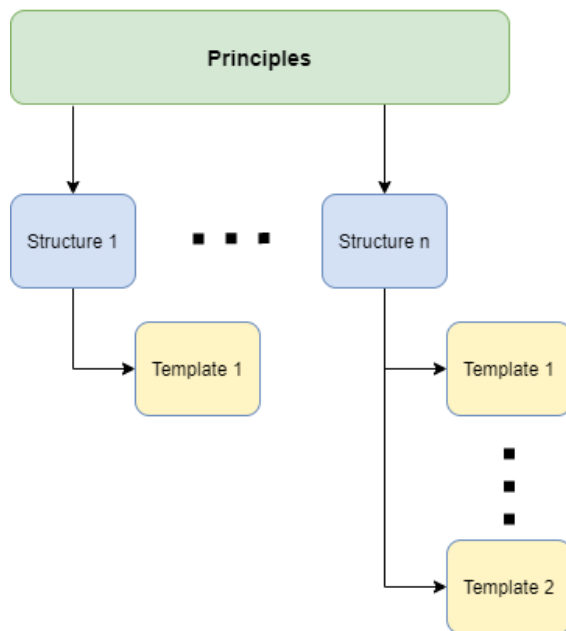


Figure 7.1: 3 Tier documentation guidelines at Phanous

## 7.2 *How to use the document guidelines*

THE SYSTEM is bottom-up. This means when you want to create a document, you should first check to see if there is an existing template for it. If not, you may consider creating one (we talk about this later) or refer to the next level up guidelines about how you should structure your document (according to the category of document). For example, all reports (with or without existing templates) must adhere to certain structural guidelines.

IF for the category of document you are looking to create there are no structural guidelines, then you may once again consider creating a set of structural guidelines, or else, refer to the overall principles of documentation to prepare your document.

IF you decide you want to create a template for your document, make sure of the following,

- Making a good template takes time and effort. Therefore templates are only recommended to be created for frequently generated document, or for documents which (may not be frequently generated) must have specific formats (e.g. financial docs).
- Consider all the future users who will be using your template. Is the template easy to use? clearly understandable? does it require special technical skills, or use of special codes?
- Do your research on whether there are pre-existing standards of documentation for the type of document you want to generate a template for. If so, please study and use them.
- Try to collaborate as much as possible with others when making a new template. The more people collaborate with you, the less chance you have missed something out.

IF YOU DECIDE to prepare structural guidelines for a new category of documents, please pay attention to the following,

- Keep it simple, to the point, and effective. Guidelines at the structural level should not be cumbersome or with too much detail.
- The structural guidelines you generate will be used in the future to generate document templates. Consider yourself as the next person who would be using the guidelines to generate a template. Are the guidelines sufficient and clear to generate a good template?
- Do your research on whether there are pre-existing standards of documentation for the category of document you want to generate guidelines for. If so, please study and use them.

- Try to collaborate as much as possible with others when making a new template. The more people collaborate with you, the less chance you have missed something out.

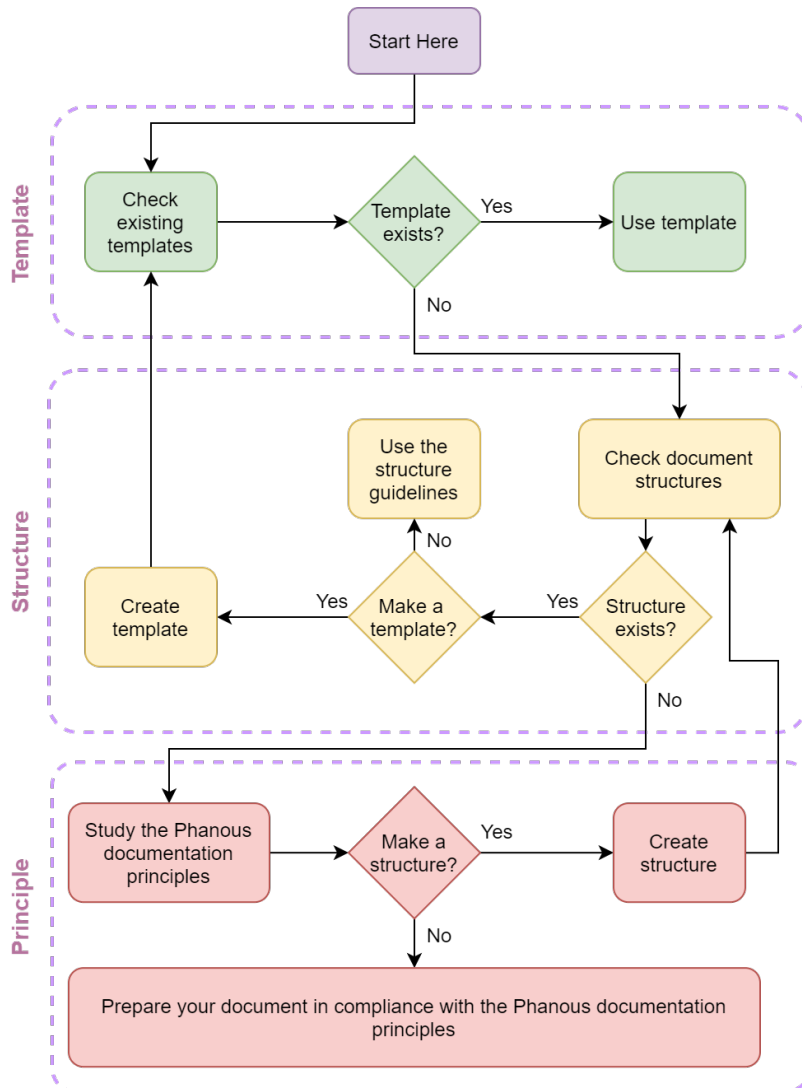


Figure 7.2: How to use the Phanous documentation guidelines

### 7.3 Scope of documentation guidelines

PHANOUS documentation guidelines covers major scopes related to the production and maintenance of Phanous documents. This is categorized into the following five scopes.

*Editing* is related to editorial processes.

*Formatting* refer to how a document is organized and its structure.

*Contents* is related to what should (and perhaps should not) be contained in the document.

*Referencing* outlines the proper use of other people work.

*Post-production* covers the processes that kick in once a document is created and how it should be maintained.

TABLE 7.1 illustrates the items related to each scope and whether they are tier 1 or tier 2 guidelines. Obviously in a template all items should be specified.

Scope	Items	Tier Relevancy
<b>Editing</b>	Version control	Principles
	Collaborative editing	Principles
<b>Formatting</b>	Fonts	Structure
	Identity	Principles
	Indexing	Structure
<b>Contents</b>	Goals	Structure
	Audience	Structure
	Clarity	Principles
<b>Referencing</b>	Giving reference	Structure
	Using other works	Structure
<b>Post-production</b>	Release	Structure
	Update	Structure
	Feedback	Structure
	Expiration	Structure

Table 7.1: Scope of the documentation guidelines



## 7.4 Documentation Principles

OUR PRINCIPLES of information management covers creation and management of documents. These guidelines are partly based on <sup>1</sup> and <sup>2</sup>. Recall these are context-free and apply to all documents generated.

### *Creating Documents*

#### **File names**

AGREE on a logical and consistent way of naming files within your lab/team. Naming files consistently also helps to prevent version control problems if you need to work on files with other people.

TO MAKE tracking and sharing easier across various operating systems and between people, use the following guidelines,

1. Use English to name your file. Do not use persian characters. Do not use Finglish.
2. Keep file names short but meaningful.
3. Use underscores to delimit words (snake\_case). Do not use spaces, CamelCase, kebab-case, etc.
4. When including numbers, use leading zero(s) so that files are listed in their natural sort order.
5. If using a date in the file name use the Hijri date in the international form i.e. YYYYMMDD.
6. Include the version in the filename.
7. Do not rely on folder names to give your filename context (think if they would still make sense if the file is moved elsewhere).

<sup>1</sup> The University of Bristol. Infosafe. <http://www.bristol.ac.uk/staffdevelopment/infosafe-tutorial/>, 2020. [Online; accessed 3-August-2020]

<sup>2</sup> The University of Essex. Uk data archive. <https://www.data-archive.ac.uk/>, 2020. [Online; accessed 3-August-2020]

## Saving files

CONSIDER the following points about saving files,

1. As a default, you should use a cloud service to store your files with the ability to share files, recover deleted files, and version control.
2. If you do have to store a local copy of your file, make sure you update it on the cloud storage as soon as possible.
3. If your local copy is in conflict with the cloud version, you must resolve the conflict as soon as possible. Do not keep a conflicted version of the file on the cloud storage.
4. You have the responsibility to ensure that the proper rights and accesses are granted for the file. Only people who need access to the information should have it (See the data protection and data classification guidelines).
5. Only use a file format which is accessible and easy to use for all people who are expected to collaborate and work with on the document. As a general rule, (where applicable) you should also store a PDF version of the final version of your document (for other people to view the content).
6. Choose a function-based approach to naming folders, give folders a meaningful name.
7. Keep folder names short to avoid very long file paths.
8. Try to achieve a balance between folders containing huge numbers of files, and folder structures many levels deep. A good rule of thumb is that most people should reach the information (file) they want in 5 or less clicks.

## Data Protection

As a PHANOUS researcher, or as a Phanous administrative staff, you might have access to restricted employee personal data or company data. It is very important that you take due care and precaution to protect this data.

THE FOLLOWING tips will help to keep confidential or sensitive data secure,

1. Do not communicate personal or restricted data via unencrypted email.
2. Do not take personal or restricted data home on physical storage devices such as USB sticks or the hard drive of your device. All such data must be stored on a cloud service that you can access outside Phanous if you need to work on it.
3. Take adequate measures to ensure that unwarranted access to your computer and data accounts is blocked.

## Data Classification

THE INFORMATION we hold at Phanous is organized under a classification system which facilitates proper control and protection of data. These are,

- Public
- Open
- Confidential
- Sensitive

EACH TYPES of data had a different risk factor attached to it and the impact on business is accordingly different. See the following tables for a more detailed description of the classifications.

Classification	Public
<b>Definition</b>	Available for public access
<b>Impact of leak</b>	Not applicable
<b>Examples</b>	<ul style="list-style-type: none"> <li>• Publications</li> <li>• Press Releases</li> <li>• Phanous contact details (public service)</li> <li>• Public events</li> <li>• Policies, Procedures and Guidelines (some may be Open)</li> </ul>

Table 7.2: Public data classification

Classification	Open
<b>Definition</b>	Available for all Phanous members
<b>Impact of leak</b>	Low branding or financial damage. Minor privacy breach for an individual
<b>Examples</b>	<ul style="list-style-type: none"> <li>• Member contact information (e.g. name, role, email address)</li> <li>• Phanous contact details (internal)</li> <li>• Policies, Procedures and Guidelines (some may be Public)</li> <li>• Internal events, seminars.</li> <li>• Public slack channel contents</li> <li>• Lab reports</li> </ul>

Table 7.3: Open data classification

Classification	Confidential
<b>Definition</b>	Restricted access for a controlled group of people
<b>Impact of leak</b>	Medium branding or financial damage. Intermediate privacy breach for an individual. May make it less likely that Phanous would be trusted with similar information in future.
<b>Examples</b>	<ul style="list-style-type: none"> <li>• Personal details and identifiable information (e.g. address, national ID, DOB)</li> <li>• Salaries</li> <li>• Non-Disclosure Agreements</li> <li>• Internal lab reports</li> <li>• Unpublished papers</li> <li>• Research data</li> <li>• Private slack channel contents</li> </ul>

Table 7.4: Confidential data classification

Classification	Sensitive
<b>Definition</b>	Restricted access for a controlled group of people
<b>Impact of leak</b>	High: Could substantially damage our reputation, have a substantial financial effect, or result in a serious privacy breach to one or more individuals.
<b>Examples</b>	<ul style="list-style-type: none"> <li>• Bank details</li> <li>• Financial data</li> <li>• Phanous members medical records</li> <li>• Passwords</li> <li>• Research papers intended to lead to patentable results (If research is ongoing and has not been published)</li> <li>• Investigations/disciplinary proceedings</li> <li>• Submitted patents/Intellectual Property Rights</li> <li>• All contracts</li> <li>• Gatekeeping documents</li> <li>• Employee performance review documents</li> </ul>

Table 7.5: Sensitive data classification

## *Managing Documents*

### **Version Control**

VERSION control is extremely important both for collaborative and non-collaborative documents. Version control,

- ensures people are working on the last edition of the document.
- allows for a history of changes to be gathered which facilitates recovery of information.
- makes labeling of documents easier and avoids lost time looking for the right information.

DOCUMENT version control uses incremental numbering or lettering of file names to show changes to a document or file. It allows you to keep track of revisions and removes confusion when different versions of the same information exist.

PHANOUS general guidelines for document version control are as follows,

1. Include the version in the filename and/or folder name.
2. Assign numbers after 'v' to successive versions e.g. `filename_vx.y.ext` (ext is the file extension).
3. Use x to denote major document changes and y to denote minor changes.
4. If you use a software which has automatic version control (i.e. previous versions of the file are available) you do not need to explicitly store previous file versions. Note that automatic version control is different to back up and recovery. Most cloud storage solutions (e.g. dropbox, onedrive) **do not** have version control.
5. For formal documents which may be subject to revisions over a long period of time (for example reports, handbooks etc.), it may be useful to include a document control sheet on the first page. The control sheet should record brief details of the revision process, including version number, who made the changes, when and why.



## Collaborative editing

COLLABORATION is part of our vision at Phanous, and we exercise it where possible. Our wiki, Gerd <sup>3</sup> is a great example of collaborative work created by Phanous members. Collaborative works should have an owner. The job of the owner is to manage the collaboration effort by,

1. selecting a suitable collaboration platform suited to the content.
2. ensuring proper rights and accesses are given to people who will be working together and none other.
3. resolving editorial conflicts.
4. preparing the final version of the document.
5. document version control.
6. ensure uniformity and consistency of content and formatting.

IN ORDER to have effective collaborations the following hints and tips are useful,

- As an owner;
  1. Make sure all potential collaborators can use the software platform you choose.
  2. If you want to dismiss a comment, let the person know why the comment is not applicable.
  3. Make sure people are clear what is the latest version of the file they should be working on.
  4. If you are not using a platform with file history, make sure you have proper arrangements for backup of the content. People always make mistakes.
  5. Control the file names and locations are correct and in accordance with the guidelines.
  6. When you close the work and create the final version, let people know about it and send them the final version.
- As a collaborator;
  1. Make sure you are working on the latest version of the file(s).
  2. It is good practice to let others know about the changes you have made (for example leaving comments etc).
  3. Co-ordinate any major changes with the owner.
  4. Keep your edits consistent with the style and format of the document.
  5. Avoid working offline. If you have to work offline, make sure you do not overwrite other peoples changes when uploading your content.

<sup>3</sup> Phanous Research and Innovation Centre. Gerd. <https://gerd.phanous.ir/en/home>, 2020. [Online; accessed 3-August-2020]

### Formatting; identity

INFORMATION created at Phanous should be objectively identifiable. The identification requirements vary depending on the document. A brief set of guidelines are as follows,

- Public documents released by Phanous (e.g. reports, presentations, etc) should,
  1. display the Phanous logo.
  2. have Phanous contact details.
  3. have release date, version and copyright disclaimer.
  4. refer to the organization as either 'Phanous research and development centre' or 'Phanous'. All other forms (e.g., Phanous research centre, Phanous centre,..) are **not acceptable**.
  5. unless there are specific reasons, not be editable.
- Phanous documents for general internal use (e.g, directives, handbooks, reports, etc) should,
  1. display the Phanous logo.
  2. identify who is the document owner to whom feedback and comments should be addressed.
  3. have release date and version.
- Single purpose task based documents (e.g. meeting agendas, draft papers, etc.) should,
  1. identify who is the document owner to whom feedback and comments should be addressed.
  2. have release date and version.

## Contents; Clarity

ENGLISH is the official language for documentation at Phanous. In the future, we aim to obtain the Crystal Mark and the Internet Crystal Mark accreditation from the Plain English Campaign <sup>4</sup>.

THE PLAIN ENGLISH Campaign has several editing, proofreading and writing guides and tools. An excellent short guide is the 'How to write in plain English' <sup>5</sup>. Here are some tips from the guide,

### 1. Keep your sentences short;

- Recommended average sentence length is about 15-20 words.
- Vary your writing by mixing very short sentences with longer ones.

### 2. Prefer active verbs;

- Consider the example: Peter (**subject**) watched (**verb**) the television (**object**). With a passive sentence, the object becomes the subject and the subject becomes the object. The television (**subject**) was watched (**verb**) by Peter (**object**). Or the example: 'The riot was stopped by the police' (passive) versus 'the police stopped the riot' (active). The passive form is longer because we have to add 'was' and 'by'.
- Active verbs give shorter, crisp and professional sentences.
- Passive verbs can be confusing, make sentences longer and make writing less lively.
- Passive verbs may be used to make something less hostile ('the bill has not been paid' is softer than 'you have not paid the bill'), to avoid taking blame ('a mistake was made' versus 'we made a mistake') or when it is not clear who the doer is.
- Aim to use 80-90 percent of the verbs in the active form.

### 3. Use 'you' and 'we';

- Try to call the reader 'you' (as opposed to 'the applicant', 'the supplier' etc..). For example: 'Applicant must send us' versus 'you must send us', 'advice is available from' versus 'you can get advice from'.
- Use 'we' Phanous, your team, lab etc.

### 4. Use words that are appropriate for the reader;

- Say exactly what you mean, using the simplest words that fit.
- Jargon is a type of language that is only understood by a particular group of people. Avoid jargon for general documents.
- In general, keep to everyday English whenever possible. And again, imagine talking to your reader across a table.

<sup>4</sup> Plain English Campaign. Plain english. <http://www.plainenglish.co.uk/>, 2020. [Online; accessed 5-August-2020]

<sup>5</sup> Plain English Campaign. How to write in plain english. <http://www.plainenglish.co.uk/files/howto.pdf>, 2020. [Online; accessed 5-August-2020]

**5. Don't be afraid to give instructions;**

- Imperatives (like 'Sit', 'Brush your teeth') are the fastest and most direct way of giving someone instructions. For example compare 'Writers should aim to be punchy' with 'Be punchy', or 'The packet should be removed from the box. The contents should then be placed in the oven' with 'Remove the packet from the box. Then place the contents in the oven'.
- You can use 'please' before commands to make them less harsh.

**6. Avoid nominalizations;**

- A nominalization is a type of abstract noun. For example: 'Complete' (**verb**) versus 'Completion' (**nominalization**), 'Provide' (**verb**) versus 'Provision' (**nominalization**).
- Nominalizations are often used instead of the verbs they come from. And because they are merely the names of things, they sound as if nothing is actually happening in the sentence. Like passive verbs, too many of them make writing very dull and heavy-going. For example: 'We had a discussion about the matter' versus 'we discussed the matter'.

**7. Use lists where appropriate;**

- Lists are excellent for splitting information up.
- There are two main types of list. A list that is a continuous sentence with several listed points picked out at the beginning, middle or end. And a list of separate points with an introductory statement.
- When each point is a complete sentence, then each one starts with a capital letter and ends with a full stop.
- With a list that is part of a continuous sentence, put semicolons (;) after each point and start each with a lower-case letter.
- Make sure each point follows logically and grammatically from the introduction sentence to the list.

**8. Myths (stuff you thought you cannot do but are perfectly ok);**

- You can start a sentence with and, but, because, or however.
- You can split infinitives. So you can say 'to boldly go'.
- You can end a sentence with a preposition.
- You can use the same **word** twice in a sentence if you can't find a better **word**.

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