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[To update the Table of Contents, position your cursor anywhere in the table, press F9, and then select "Update entire Table" from the pop-up menu.]

[Delete all blue instructional text from this template upon completion of your document.]

1.0 PURPOSE

"[Type the Purpose Statement here]"

[The Purpose statement should detail why the procedure was written, what it is intended to accomplish, for whom the procedure is written, for what specific process or product, etc. Special scoping considerations can be detailed here as well.]

"[Click Here and Type the Document Title]"

2.0 REFERENCES

2.1 **Applicable Documents**

Number	Title
"[Type Number or N/A]"	"[Type Title or N/A]"

2.2 **External References**

Number	Title
"[Type Number or N/A]"	"[Type Title or N/A]"

3.0 RESPONSIBILITIES

Function or Title	Responsibility
"[Type Function/Role Title]"	"[Type Role Responsibility or N/A]"

4.0 DEFINITIONS

Term	Definition
"[Type Term, Acronym, or N/A]"	"[Type Definition or N/A]"

5.0 FLOW CHART

"[Insert flowchart or type N/A]"

[Procedure Creation Instructions]

[When creating your procedure, there are two basic formatting styles available for you to apply: **Tabular** or **Outline**. Select the formatting style that is most appropriate for your procedure's content requirements. Section 6.0 provides Tabular formatting options and Section 7.0, the Outline option.

Use the following criteria to determine format type:

NOTE: Depending upon the requirements of the procedure, more than one procedure format **and/or table** type can be used **within your document**.

- For procedures that detail requirements (typically a SOP) select the **Outline** format (Section 7.0).

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- For procedures that detail step-by-step activities or a process, select the most suitable **Tabular** format option. The following five tabular options are provided:
 1. For single-role procedures with many pictures, use this table. This option provides separate columns for Actions and for Figures and aligns the illustrations beside the action.
 2. For procedures that require multiple roles and that have many pictures, use this table. This table provides an added column to identify the role performing a specific step.
 3. For single-role procedures containing no (or few) pictures, use this table.
 4. For procedures that require multiple roles, but have few or no pictures, use this table. This table provides an added column to identify the role performing a specific step.
 5. For single-role procedures that detail form completion activities, use this table. This table provides columns to identify both the Form Field and the associated form Completion Activity.

6.0 "[TYPE REQUIREMENTS, PROCEDURE, OR INSTRUCTIONS HERE [TABULAR]]"

[NOTE: When copying and pasting or deleting, retain the space ([Space]) following each table to ensure that you can add new tables and new heading sections as necessary.]

[For single-role Tabular Instructions containing many figures/illustrations, use this table:]

[NOTE: If no picture is associated with an individual step, you can merge the Action and Figure cells for that particular step.]

[NOTE: If the entire procedure is completed by a single role remove the "Role" row.]

6.1 "[Type the Sub-Section Title Here]"

Role:		
Step	Action	Figure (or Illustration)

[Space]

[For multi-role Tabular Instructions that contain many figures/illustrations, use this table:]

[NOTE: If no picture is associated with an individual step, you can merge the Action and Figure cells for that particular step.]

6.2 "[Type the Sub-Section Title Here]"

Step	Action	Figure (or Illustration)	Role

"[Click Here and Type the Document Title]"

[Space]

[For single-role Tabular Instructions having no (or limited) figures/illustrations, use this table:]

NOTE: If the entire procedure is completed by a single role remove the "Role" row.

6.3 "[Type the Sub-Section Title Here]"

Role:	
Step	Action

[Space]

[For multi-role Tabular Instructions that have no (or limited) figures/ illustrations, use this table:]

6.4 "[Type the Sub-Section Title Here]"

Step	Action	Role

[Space]

[For single-role Tabular instructions that detail form completion, use this table:]

NOTE: If the entire procedure is completed by a single role remove the "Role" row.

6.5 "[Type the Sub-Section Title Here]"

Role:		
Step	Form Field	Completion Activity

[Space]

7.0 "[TYPE REQUIREMENTS, PROCEDURE, OR INSTRUCTIONS HERE [OUTLINE]]"

[Use the available styles (headings, body text, numbering, bullets, and notes, etc.) created for this template (depicted in Section 8.0) to create an outline style procedure.]

8.0 STYLES AVAILABLE IN THIS TEMPLATE

[Delete all of Section 8 (available styles) in this template upon completion of your document.]

"[Click Here and Type the Document Title]"

[The styles shown in the following sub-sections are available for use in both tabular and outline style procedures as indicated. Not all possible formatting configurations have been provided, but each illustrated style option is available via the Styles Window menu.]

NOTE: No Styles have been created to add numbering or bullets within table cells. Either manually number each of your actions, or, use the auto numbering provided in the Word Ribbon. Add bullets the same way.

8.1 Heading Styles and Body Text Styles

[All headings are positioned Flush Left along the left page margin with a 0.50" tab stop except for Level 4 headings which have a 0.625" tab stop. Use the Heading Styles as indicated in both Outline and Tabular style documents. Following are the available Heading styles shown with the available body and table text designed to go with the headings:]

1.0 **HEADING 1** [Use in both Outline and Tabular Style Documents]

[Body Text]

1.1 **Heading 2** [Use in Outline Style Documents]

[Body Text]

1.1 **Heading 2 – Tabular Format** [Use in Tabular Style Documents]

[Table Text]

1.1.1 **Heading 3** [Use in Outline Style Documents – note smaller font size (11pts)]

[Body Text]

1.1.1 **Heading 3 – Tabular Format** [Use in Tabular Style Documents– note smaller font size (11pts)]

[Table Text]

1.1.1.1 **Heading 4** [Use in Outline Style Documents – not bolded]

[Body Text 4]

1.1.1.1 **Heading 4 – Tabular Format** [Use in Tabular Style Documents – not bolded]

[Table Text]

8.2 Number and Bullet Styles

[When using numbers and bullets, note that bullets are used for non-ordered list items and numbers and alpha characters are used for ordered lists or activities.]

8.2.1 Number and Alpha Character Styles

[Levels of numbers typically proceed in this order: Level 1= Roman Numeral, sub-step under Level 1 = small alpha character, sub-steps under alpha characters = small Roman numerals. Indented numbers and characters are provided to accommodate indented levels of body text.]

"[Click Here and Type the Document Title]"

1. List Number 1
 - a. List Letter 1
 - i. List Roman Numeral 1

1. List Number 2
 - a. List Letter 2
 - i. List Roman Numeral 2

1. List Number 3
 - a. List Roman Numeral 2
 - i. List Roman Numeral 3

8.2.2 Bullet Styles

[Levels of bullets typically proceed in this order: Level 1= solid bullet, sub-bullet under Level 1 = open bullet, Additional sub-bullets can be other shapes as appropriate. Dash bullets can be substituted for list or sub-bullets as desired.]

- List Bullet 1
 - List Bullet Open 1
 - List Dash 1

- List Bullet 2
 - List Bullet Open 2
 - List Dash 2

- List Bullet 3
 - List Open Bullet 3
 - List Dash 3

8.3 Styles for Notes, Cautions, and Warnings

NOTE: Bold text

[Notes provide supplemental or supporting information and can either follow or precede the content that they inform.]

CAUTION: Bold text

[Caution statements indicate that minor harm may be suffered by a person and/or piece of equipment if precautions are not taken. Caution statements **precede** the text they inform.]

"[Click Here and Type the Document Title]"

WARNING: Bold text

[Warning statements indicate that serious harm could be suffered by a person and/or a piece of equipment if precautions are not taken. Warning statements **precede** the text they inform.]

9.0 APPENDICES

[This section is optional. If your document contains appendices, consider adding this section and then list all of the appendices that will be contained in your document. If not used, the Appendices section can be either N/A'd or deleted.]

"[Click Here and Type the Document Title]"

APPENDIX A: "[TYPE NAME OF APPENDIX HERE]"

[Use the style "Appendix Heading" from the Styles Window to format your appendix headings and to ensure that they display in the Table of Contents.]