**Business Operational Procedures Template**

**GUIDELINES**

1. The Business Operational Procedures (BOP’s) will be written by Users, in a standard format. The following template has been designed to provide the Users with guidelines for writing the BOP’s.
2. Once compiled, the BOP’s will be classified by Subject Area and Procedure. Each BOP will contain a cover sheet indicating the approval of the procedure from the user department.
3. The procedural manuals may comprise one or more volumes, and each will contain:
4. Table of Contents
5. Business Operational Procedures
6. Glossary of Terms
7. The BOP’s will be created and filed in MS Word. The type of Font will be Arial. The font size for all information being typed is 10, unless otherwise specified. The creation of the BOP’s will all be subject to change as the Project continues to develop and integrate all systems. Each BOP will contain a creation date. Each time a BOP is updated, it should be reflected in the **REVISED DATE** area within the Footer.
8. Sample documents can be found on the “j” drive:
9. J:\STANDARD\BOP\Bopinstr.doc
10. J:\STANDARD\BOP\Sample1.doc (narrative and cover sheet)
11. J:\STANDARD\BOP\sample2.doc ( step-by-step procedure)
12. J:\STANDARD\BOP\tmplate1.doc
13. J:\STANDARD\BOP\tmplate2.doc

**Format**

The Business Operational Procedures shall be prepared using the following standard format:

**Narrative/Cover Sheet**

Each subject area will contain a narrative, with the following information:

**Purpose**

The purpose must describe the basic function of the sub-system. This area should describe **why** we would need to follow the BOP’s in this section.

**Scope**

The scope must describe **what** the procedure covers. This area should identify the purpose of the windows.

**Subject Area Components**

This area should list the basic components contained within this subject area. These components should represent all the windows within the subject area.

**Prerequisites**

This section identifies any documentation or windows that must be available or established prior to starting the procedure.

**Related Procedures**

The information contained in this area will identify procedures from within and other subject areas that are related. As the flowcharts are created, they will help identify the other subject areas and BOP’s that are related.

**Interacting Departments** (other users of the procedures)

List the names of the departments that will be using the procedures in this section.

**Job Classification Responsibility**

List roles or titles of those responsible for performing the procedures within this sub-system.

**Business Rules (SEPARATE PAGE)**

This section contains Business Rules associated with the procedure(s).

**Glossary (SEPARATE PAGE)**

The terminology associated with this subject area should be defined.

***Procedure***

This section will describe the step by step instructions that all affected organizations or personnel are to follow in order to carry out the procedure. Each procedure will contain the following information:

**Purpose:**

The purpose should describe the reason why we would need to perform the procedure. This area should describe the purpose of the window(s) and their use.

**Procedure:**

This is a step by step instructional area that walks the user through the procedure. The appropriate windows and their entry fields should be illustrated and described. The procedure should be concise and easy to follow. Each step in the procedure will be numbered with a period, (1.). All steps contained under a procedure number will be given a Capital letter (A)). If information must be listed under a lettered procedure step, it will be assigned a number followed by a right parenthesis (1)).

**Example:**

**1.**

**A)**

**1)**

**Flowchart**

Each procedure will contain a high level flowchart. The purpose of the flowchart will give the user an easy-to-understand process flow. It should be prepared using the symbols shown below.



Flowcharts are created in VISIO. The standard flowchart template will contain the symbols represented above. If, as a user preparing the BOP, you are unable to use VISIO, create a hand-drawn diagram and attach it to the BOP.

**Change Analysis**

Listed under the change analysis area will be any differences in the new way SYSTEM will perform a procedure in comparison to the old way. This area should highlight the major differences. For example, if something was once done manually on paper and it will be done on-line in SYSTEM.

***Possible Error Messages***

A numerical listing of all possible error messages that may appear while performing the procedure must be provided. A description of the message and how to escape the error message should be listed.

**Headers and Footers**

A header and footer will appear on each page of the sub-system (subject area) narrative/cover sheet and the Procedure sheet.

**Examples:**

This is the header that will appear on the subject area cover sheet.

**Business Operational Procedures** (Font size 8) (Font size 12) **SUBJECT AREA**

(Space)

This is the header that will appear for each BOP.

**Business Operational Procedures SUBJECT AREA**

**Procedure: (Font size 10) (Font size 10) Procedure name**

Footer for all Pages:

**Revised Date: 01-Jul-17 Creation Date: 4/17/97**

**BY: DEVELOPER** **DRAFT** **PAGE** 5

**How to Create a BOP**

1. Determine BOP Team (e.g., 1-Developer, 1-SME, 1-Transition Member).
2. Collect all windows. This includes primary windows, dialog boxes, and error message information.
3. Collect all Business Rules associated with the BOP from Development.
4. Complete the subject area Narrative/Cover sheet.
5. Recommended: Create a flowchart to identify each procedure based on screen flow.
6. Identify any prerequisites necessary to perform the procedure.
7. Identify the reason for the procedure (*Purpose*).
8. Identify the beginning, navigation Window(s), and conclusion of the procedure. (*Scope*).
9. Create step by step instructions.
10. Illustrate windows and all fields used in the procedure.
11. If information presented in a previous window has already been described, there is no need to re-describe that information on any subsequent windows that follow. You must describe the new fields (new information), however.
12. Identify related procedures.
13. Utilize the template/tools (software, standards, format) to formally write the BOP.
14. Provide a list of possible error messages and how to resolve them.