



**Your Company Name**

**Process Guide**

DATE

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## Revision History

Date	Version	Author	Change

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*Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select “Table Text” to restore the cells to the default value.*

## 1 INTRODUCTION

*This document is a process guide, which provides information about the <Name of System, Application, or Process>. Instructions, procedures, and process flows can be shown in visual graphics and also in a step-by-step text format to explain the action performed.*

*Process guides generally include the following information (e.g., who, what, when, where, why, how):*

- *Who is responsible for the activity or task?*
- *What activity or task is being performed and what procedures need to be followed to perform it?*
- *When does the activity or task start and end?*
- *Where is the activity or task performed?*
- *Why is the activity or task performed?*
- *How is the activity or task performed?*

### 1.1 Purpose and Scope

*Provide information about the purpose and scope of this process guide. Include background information that could indicate why it is needed or define the tangible parts of the process.*

### 1.2 Background

*Provide background information about the system, application, or process.*

### 1.3 Audience

*Provide information about who the intended audience for this document is.*



## 1.4 Referenced Documentation

*Provide information about all documentation referenced in this document, e.g., number, title, version, and date.*

Document Number	Version	Date	Document Name

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## 2 PROCESS INFORMATION

*For each process, provide the following information (e.g., who, what, where, when, why, how) to explain the action performed:*

- *Who is responsible for the activity or task, e.g., project approval and budget; who needs to sign off on a project; how many reviews are required and when?*
- *What procedures need to be followed to perform the task?*
- *Where is the activity or task performed?*
- *When does the phase, activity or task start and end?*
- *Why is the phase, activity or task performed?*
- *How is the activity or task performed?*

Notes:

- *Include graphics and process flows in this section or place them in the Appendix Section when more space is required.*
- *Copy and paste the tables in the Process Section for each process. Repeat it whenever necessary.*

Topic	Description
<i>Location</i>	<i>Business Unit, Department or Region to which the process applies.</i>
<i>Process Name:</i>	<i>Name / abbreviation for the process.</i>
<i>Parent Activity / Process</i>	<i>Parent business activity or process. If none, enter N/A.</i>
<i>Description</i>	<i>Describe the main purpose of the process.</i>
<i>Primary Product</i>	<i>Identify the primary product(s) with a brief explanation for each. Who will use each primary product?</i>
<i>Trigger</i>	<i>Identify the event(s) that trigger the process. Triggers include events such as dates, tasks, or external processes.</i>
<i>Sub-processes</i>	<i>When the main process is sub-divided, Indicate each sub-process with a brief description.</i>
<i>Standard Path Events / Activities</i>	<i>Identify the activities and events that occur for the main process.</i> <i>Identify an activity and event that occurs in a specific sub-process.</i> <i>Highlight where and how an alternative path breaks off from the main path.</i>



Topic	Description
<i>Alternative Path Events / Activities</i>	<i>Identify the activities and events that occur as part of the alternative path for this process.</i> <i>Start where the alternative path breaks off from the main path.</i> <i>End with where it rejoins the main path.</i> <i>Identify all sub-processes that include an activity / event.</i>

## 2.1 Major Procedures, Tasks, and Functions

*Provide the step action and procedural information about the respective procedure, task or function. Repeat section as needed.*

- Procedure, Task or Function Name. Indicate its name with a brief description. Include required sub-tasks if necessary.*
- Description. Provide a description for the action performed.*

Step #	Procedure, Task or Function	Description of Action Performed

*Note: Include graphics and process flows in this section or place them in the Appendix Section when more space is required.*



### 3 OTHER PROCESS INFORMATION

*Provide other miscellaneous process information. Delete the section or table information that is not required or necessary.*

Topic	Description
Security	<i>Provide an overview of the security available or required for the procedure, function or task.</i>
Hardware	<i>Provide hardware equipment information, e.g., what, when, where, why, how.</i>
Software	<i>Provide software information, e.g., what, when, where, why, how.</i>
Facilities	<i>Provide facilities information, e.g., what, when, where, why, how.</i>
Personnel	<i>Provide personnel requirements, skills, and training if necessary.</i>

### 4 GLOSSARY

The following table includes a glossary of all the terms and abbreviations used in the process guide.

Topic	Description





## **5 APPENDIX**

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*Include graphics and process flows in this section.*

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