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Revised By:	Fonda Logston	Review Cycle/Date:	Annually
Reviewed By:	Fonda Logston	Reviewing Unit:	ISD Standards Review Committee
Title:	Standard Format of Standards		
Description:	This document is the operating standard for documenting operating standards at OMES/ISD.		

Standard Format of Standards

1. General Statement of Purpose

- 1.1. This document contains the documentation standards for use at OMES/ISD. Its intended purpose is to provide a standard format for all internal standards documentation developed for the Office of Management and Enterprise Services (OMES) Information Services Division (ISD) in order to provide consistency and ease of use, as well as to expedite training.

2. Scope

- 2.1. This standard pertains to all standards documents developed by and for OMES/ISD, unless explicitly exempted in this document.

3. Terms and Definitions

- 3.1. Document – A written dissertation that is used to furnish decisive information. A written composition created with and about an application, which contains certain prescribed elements and information.
- 3.2. Procedure – A series of steps, operations, actions, changes, or functions performed in a specified manner with the objective of producing a particular result.
- 3.3. Process – A set of established methods for conducting the affairs of an organized body such as a business, organization, or government; a set or collection of procedures that achieve a specific task as a way of producing or affecting a desired outcome.
- 3.4. Standard
- 3.4.1. An acknowledged measure of comparison for quantitative or qualitative value; a criterion; an object that under specified conditions defines, represents, or records the magnitude of a unit.
- 3.4.2. An acceptable level of achievement though perhaps of less than top quality; a degree or level of requirement, excellence, or attainment.
- 3.5. Standard Operating Procedure (SOP) - A document, containing steps, operations or practices, that is widely recognized or employed, especially because of its excellence.

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4. Types of Documentation

4.1. The types of documentation developed by and for ISD are numerous and variable. This standard addresses the major types of documentation utilized, but may not be all-inclusive. The documentation format depicted in this standard is flexible enough to accommodate most document types, including those specified as well as those that are not specified. The following are the more common document types employed at ISD.

4.1.1. Procedures – (See “Standard Operating Procedures” below).

4.1.2. Processes – Processes, as defined in the Terms and Definitions, will generally consist of one or more procedures. Each procedure could be an established method for conducting the affairs of an organized body such as a business, organization, or government; a set or collection of procedures that achieve a specific task as a way of producing or affecting a desired outcome.

4.1.3. Standard Operating Procedures – The documentation of Standard Operating Procedures is vital to producing an organization where processes are uniformly executed and repeatable. The Standard Operating Procedures must be clearly and concisely written and not unnecessarily lengthy. They must provide specific information as to how to perform the subject operation, and may reference other standards by document number and title.

4.1.4. Standards – Documenting standards is necessary in order to maintain consistent and quantifiable measures for the quality or degree of completeness attained through the execution of the associated Standard Operating Procedures. A standard may be referenced by, but must not duplicate the content of a Standard Operating Procedure.

4.2. The following documentation types are exempt from this standard; however, the format described within may still be applied if practicable.

4.2.1. Applications Documentation – The documentation for an application program or system is generally developed during the development lifecycle and would likely be affected by the tools used to develop the system. It would always be advantageous to utilize the documentation generated by the development tools whenever possible. In the event that the development tools cannot produce appropriate documentation, the format described in this standard could be readily adapted to provide a template for the documentation of an application.

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4.2.2. Training Guides – Training guides often require a more creative and interactive format than the format described in this standard.

4.2.3. User Guides – User guides are generally used as reference material and provide “how to” instructions in the clearest and most basic terms possible. While the format described in this document is not required, it could be easily adapted to such use.

4.2.4. Project Management Documents – Documents related to projects controlled by PMO will use existing document templates developed specifically for that purpose.

5. Documentation Elements

5.1. Header

5.1.1. The header of the document appears in its entirety on the first page and in abbreviated form on all subsequent pages. The header in Microsoft Word is not a part of the document text, and therefore requires special attention when updating (see template document). Figure 5.1 below depicts an example of a header as described in this standard.

5.1.2. Editing the header – When editing the header to include information specific to your standard, special care must be taken to preserve the linking system that populates the abbreviated version on all other pages of the document. The following guidelines will assure easy and accurate editing.

5.1.2.1. Only make changes on the first page header. The other pages’ headers are tied to the first page header using the “REF” function.

5.1.2.2. Make your edits within the brackets. The items that are repeated in the abbreviated headers are enclosed in brackets. Any text outside these brackets will not be included on subsequent pages. The following list of entries is used to populate the abbreviated headers.

- Number
- Latest Version
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- Title
- Replaces

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5.1.3. Number

5.1.3.1. This is the number assigned to the operating standard by the PMO. Each operating standard will have its own unique number. Operating Standards are arranged in groups in numerical order on the Table of Contents.

5.1.3.2. The number is an alphanumeric reference number that uniquely identifies the subject document. Every document must contain a valid number. The procedure for obtaining the number for a standard is described in another document, as are the numbering/naming standards.

5.1.4. Title – Must accurately reflect the intended use of the document in as few words as possible.

5.1.5. Latest Version – The current version number of the operating standard or document.

5.1.6. Revision Date – The date of approval of the operating standard by the final reviewing authority.

5.1.7. Replaces – A reference must be placed in this cell if the subject operating standard or document replaces another standard or document. A “Replaces” reference is not required for a new version of an existing standard or document. This data is optional.

5.1.8. Effective Date – The original date that the standard was put into effect. It will not change unless the operating standard is replaced with a new operating standard. This date is required.

5.1.9. Revised By – This cell must contain the name of the individual who prepared and/or proposed the operating standard, or revised an existing standard.

5.1.10. Review Cycle/Date – Each standard is to be reviewed annually at a minimum, or more frequently if necessary. The review cycle date is the date of the last review. If the document has not been reviewed, the letters “N/A” for “Not Applicable” must be entered in place of the date. The valid review cycle intervals that can be used are:

- (A) Annually
- (B) Quarterly
- (C) Semi-Annually
- (D) Monthly
- (E) Bi-annually

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- 5.1.11. Reviewing Unit – The group accountable for the review. The director of the reviewing unit is responsible for sending out standards to be revised and to review corrections of standards and approve new and revised standards.
- 5.1.12. Reviewed By – Must contain the name of the director of the reviewing unit.
- 5.1.13. Description of Document – A short description of the document in one or two sentences.
- 5.1.14. Page – The Page and Number of Pages fields are automatic update fields in the Word document, and are required for each document and operating standard.

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Reviewed By:		Reviewing Unit:	ISD Standards Review Committee
Title:	ISD Documentation Standards		
Description of Document:	This document is a draft proposal for documentation standards for use at OMES/ISD.		

Figure 5.1 Header Example

5.2. The Body

- 5.2.1. General Statement of Purpose – This first section of the main body of the document is a general statement of what the document is or does. Every document must include a General Statement of Purpose. The statement may be followed by more detailed discussion in the “Instructions / Discussion” section of the document. The General Statement of Purpose may range from a few sentences to a few paragraphs. It should briefly explain the function or purpose of the document, mentioning explicitly any larger general concepts that may be needed to understand the document.

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- 5.2.2. Scope – A statement of the extent to which the document would apply. It should address the range of activities or subjects encompassed within the document, the intended audience, and the areas or sphere in which the subject activities must take place.
- 5.2.3. Terms and Definitions – Provides definitions of any terminology, words, or acronyms that are used within the document. Any terminology that would be considered obscure or could reasonably be misinterpreted or misunderstood should be defined in this section.
- 5.2.4. Discussion / Instructions – Contains the primary text of the policy, standard, process, or procedure. Because this part of the document will contain specific instructions or information, it must be detailed and thorough.
- 5.2.5. Roles and Responsibilities – Identifies the specific roles and responsibilities of those who are affected by the subject standard operating procedure. It should not name individuals, but rather should identify responsibilities by position, section, and/or unit. (i.e. Project Manager, Programmer, Data Modeler, etc.)
- 5.2.6. Summary – This section is optional and is primarily used in white papers and documentation of research activities.
- 5.2.7. Limitations or Implementation Notes – This section is optional and is used to provide information describing limitations that need to be communicated to the audience, or to describe information that would assist the reader in implementing the subject standard operating procedure.
- 5.2.8. Attachments – Attachments, such as diagrams, checklists, or other documents pertinent to the subject standard operating procedure must be listed in this section.
- 5.2.9. References
- 5.2.9.1. If the document is related to others, the relationship between the documents should be noted. This is the reason for dividing a larger document into several smaller documents. What do the documents related to this document have in common? Why are they related to this document instead of another? The organization of the document should also be described.

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5.2.9.2. If the document's functionality is detailed elsewhere, a stable link (URL) might be included. For example, a document that implements a standard might include a link to the document for the specification. A package that is documented in a user guide might include a link to that guide.

5.2.10. Copyright and Licensing Information (Optional) – This section is optional and would likely apply only to white papers or other documents that are protected under copyright law.

5.3. Guidelines for Writing a Document

5.3.1. As a general rule in professional writing, the overly familiar second-person form ("you...") should be avoided in favor of the third-person form ("it...").

5.3.2. This standard concerns the content of each type of document. The most important distinction to make in a document is between what the document does, and how it is implemented. The question "what?" is generally posed before the question "how?" so the explanation of what the document is, what it does, or what service it provides should always be included before the explanation of how it is implemented or why it has been implemented in a certain way.

5.4. Formatting Documents

5.4.1. The format of standard documents will be the same as this document: numbered outline, with the proper headings and footers.

5.4.2. The document may be in Microsoft Word or PDF Format.

5.4.3. Basic content will use an 11 point font, and major section titles will be 12 points.

5.4.4. Wrap lines automatically.

5.4.5. Italicize text for emphasis, or to make selective use of a special character style that highlights.

5.4.6. Graphics or pictures will be referred to and labeled as "Figures", and each figure should be numbered appropriate to the paragraph in which it is placed (i.e.: a figure first described in paragraph 4.3.2 will be labeled "Figure 4.3.2"). If there are two or more figures referenced in a single paragraph, each will be assigned and labeled with an additional suffix sequential letter. (i.e. 4.3.2A, 4.3.2B, 4.3.2C, etc.)

5.4.7. All dates referenced in the document will use the format MM/DD/YYYY.

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6. Summary

- 6.1. This document contains the documentation standards for use at OMES/ISD. Its intended purpose is to provide a standard format for all internal standards documentation developed for the Office of Management and Enterprise Services (OMES) Information Services Division (ISD) in order to provide consistency and ease of use, and to expedite training. It contains the format of the Standard and Operating Standards documents, and describes the requirements for each section of the document.

7. Attachments

- 7.1. 01.1.3a Standard Template

8. References

- 8.1. 01.1.1 Purpose And Scope of Operating Standards
- 8.2. 01.1.2 Adding Updating or Retiring an Operating Standard