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Revised By:	Joshua Graves	Review Cycle/Date:	Annually
Reviewed By:	Joshua Graves	Reviewing Unit:	Enterprise Programs
Title:	Operating Standard Review and Approval SOP		
Description:	This document is the standard operating procedure for reviewing and approving an Operating Standards.		

Operating Standard Review and Approval Standard Operating Procedure

1. General Statement of Purpose
 - 1.1. The purpose of this document is to outline the process of reviewing and approving a new operating standard, and reviewing existing operating standards.
2. Scope
 - 2.1. This standard applies to the handling of all OMES IS standards by the Technical Writer during the process of reviewing and approving operating standards.
3. Discipline
 - 3.1. General Standards
4. Terms and Definitions
 - 4.1. Operating Standards – Can include a standard or standard operating procedure that is used by OMES IS to perform a work function.
 - 4.2. The Wiki – An online forum used by the Technical Writer to post operating standards for a two-week period for OMES IS employees to review.
 - 4.3. Standards Review Committee Meeting – Regularly scheduled meeting held every other Monday to approve operating standards once they have completed their review period on the Wiki.
5. Instructions
 - The Technical Writer maintains the process of guiding operating standards through the processes of creation, review and approval. These operating standards are kept at the following location:
J: Drive < Function < ISD Operating Standards < Originals
 At this location, the operating standards are kept in the following folders, named for the approval step they are in:
 - 01-In Process
 - 02-Submitted
 - 03-Posted to Wiki
 - 04-Waiting for Approval
 - 05-Approved
 - 06-Approved & 508 Compliant

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5.1. In Process

- 5.1.1. Operating standards within the **01–In Process** folder are still being either created or edited by the Technical Writer.
- 5.1.2. When an operating standard from the 01-In Process folder is ready to be submitted to the Wiki, the Technical Writer will first create a request in the PPM Tool.
 - 5.1.2.1. This is done in the PPM Tool by going to **Create < Request < SoOK – IT Standards** to access the Create New SoOK – IT Standards page. The Technical Writer enters all the necessary information and attaches the standard.
 - 5.1.2.2. After the request is submitted, the Technical Writer selects the request # to open the request and then clicks the Ready for Review button. This will put the request into “In Review” status in the PPM Tool.
- 5.1.3. Operating standards can be submitted by any OMES IS employee, not just the Technical Writer or PMO staff members. As long as the employee has access to the PPM Tool, they can create a request the same way the Technical Writer does, as listed in the previous step.
- 5.1.4. The Technical Writer moves the operating standard from the 01-In Process folder to the 02-Submitted folder.
 - 5.1.4.1. For standards created by other OMES IS employees, the Technical Writer opens the Word document attached to the PPM Tool and saves it on the J: Drive, under the PMO folder structure. Then the Technical Writer reviews and edits it so the formatting and grammar matches the appropriate format for created standards.

5.2. Submitted

- 5.2.1. Determining which standards still need to be posted to the Wiki.
 - 5.2.1.1. The Technical Writer determines which standards need to be posted to the Wiki by going to the ISD Operating Standards dashboard in the PPM Tool.
 - 5.2.1.2. The ISD Operating Standards Dashboard is made up of two portlets, Standards in Process and Active Standards. In the Standards in Process portlet, the standards that still need to be posted to the Wiki will have a Request Status of “In Review” and will not have a “Most Recent Note”.
Note: The requests won’t have a “Most Recent Note” until the Technical Writer logs that they have been posted to the Wiki.
- 5.2.2. Once a standard has been placed in the **02-Submitted** folder, it needs to be posted to the Wiki for a two-week review period.
 - 5.2.2.1. The Technical Writer logs in to **Wiki.ok.gov** and selects “Chief Information Officer” on the left side of the Wiki Dashboard.

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- 5.2.2.2. He selects “ISD Operating Standards – For Comment” on the left side of the screen.
- 5.2.2.3. He selects “Add” and “Page” in the top right corner.
- 5.2.2.4. In the “New Page” text box at the top, the Technical Writer enters the name of the standard followed by “- Comments Close” and the date two weeks from the date of posting. For example, “Operating Procedure Review and Approval SOP – Comments Close 7-31-2014”, assuming the document was posted on 7/17/2014.
- 5.2.2.5. Then in the main textbox, he copies and pastes the purpose of the operating standard from standard itself. This gives a brief description to anyone who looks at the standard on the Wiki without having to open the document.
- 5.2.2.6. Below the purpose, the Technical Writer enters the words “Refer to attached documents for full standard”.
- 5.2.2.7. The Technical Writer attaches the operating standard by selecting “Insert” and “Attachment” from the toolbar of the main textbox.
- 5.2.3. After the operating standard has been posted to the Wiki, the Technical Writer updates the request in the PPM Tool, noting that the standard was posted to the Wiki and when the two-week period will end.
- 5.2.4. He then moves the standard from the 02-Submitted folder to the 03-Posted to Wiki folder.
- 5.2.5. On a weekly basis, the Technical Writer creates a Service Desk Case to send out a notification to all OMES IS employees listing which standards have been posted to the Wiki.
- 5.3. Posted to Wiki
 - 5.3.1. Once a standard has been placed in the **03-Posted to Wiki** folder, it remains there through the two-week review period.
 - 5.3.1.1. The Technical Writer forwards any response from the Wiki posting to the Reviewing Manager of the operating standard and prints out a copy to keep with the standard. The Reviewing Manager will review each Wiki response and make adjustments as they see fit.
 - 5.3.2. When the two-week review period ends, the Technical Writer goes to the Wiki and moves the standard to a new parent page.
 - 5.3.2.1. While on the page of the standard with the expired review period, the Technical Writer selects “Tools” and “Move” from the toolbar at the top right.
 - 5.3.2.2. He then selects the new parent page of “ISD Operating Standards – Comments Closed” and clicks “Move”.

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- 5.3.3. The Technical Writer moves the operating standard to the 04-Waiting for Approval folder.
- 5.4. Waiting for Approval
 - 5.4.1. Once the standard has been placed in the **04-Waiting for Approval** folder, the Technical Writer prepares it for the **Standards Review Committee Meeting**, held every other Monday.
 - 5.4.1.1. The Technical Writer is in charge of creating the agenda for this meeting and emailing the agenda and the operating standards scheduled for review to the committee members.
 - 5.4.1.2. Members of the Standards Review Committee should be given no less than one week to review operating standards for approval. Since the meetings are held on Mondays, the “waiting for approval” standards should be emailed out the previous Monday.
 - 5.4.2. The Technical Writer updates the request for the operating standard in the PPM Tool.
 - 5.4.2.1. The Technical Writer changes the status in the PPM Tool from “In Review” to “Waiting for Approval”.
 - 5.4.2.2. He adds a note that the operating standard has been added to the agenda for the Standards Review Committee Meeting and the date it will be discussed.
 - 5.4.2.3. The Technical Writer ensures all the text fields on the request page have been filled in, such as the Effective Date, Review/Cycle Date and Revision Date.
 - 5.4.2.4. At this time, the Technical Writer assigns a Standard Number. This standard number should be updated in the PPM Tool and on the operating standard itself.
 - 5.4.2.4.1. The Technical Writer determines the Standard Number by looking at the Operating Standards Table of Contents, located at: http://eclipse.omes.ok.gov/ISD/guidances/reusableassets/resources/Operating_Standards_Table_of_Contents.pdf
 - 5.4.2.4.2. He adds the operating standard to the table of contents at this time.
 - 5.4.3. The operating standards are reviewed at the Standards Review Committee Meeting. Once all the issues get worked out, the committee members determine that the standard has been approved.
 - 5.4.4. The Technical Writer makes any further changes the members determine are necessary for approval.
 - 5.4.5. When the operating standard has been approved, the Technical Writer moves the approved version of the operating standard to the 05-Approved folder.

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5.5. Approved

5.5.1. Once the standard has been moved to the **05-Approved** folder, the Technical Writer opens a Service Desk Case to have the operating standard sent to the Public Affairs team to make it 508 compliant.

5.5.1.1. The case will need to have the approved operating standard attached.

5.5.2. The Technical Writer goes to the PPM Tool and changes the status to “Approved” and notes the date of approval.

5.5.3. When Public Affairs has made the operating standard 508 compliant, the Technical Writer saves the new version in the 06-Approved & 508 Compliant folder.

5.6. Approved & 508 Compliant

5.6.1. Once the operating standard has been saved in the **06-Approved & 508 Compliant** folder, the Technical Writer posts it on the OMES Process Library website using Eclipse so it is accessible to OMES IS employees.

5.6.2. A PDF file of the standard will also be placed for employee access on the J: Drive at the following location: **J: Drive < Function < ISD Operating Standards**

5.6.3. The Technical Writer also creates a Knowledge Article in the CRM Tool for the approved operating standard and includes the URL for the operating standard in Eclipse.

5.7. Review

5.7.1. On the first of each month, the Technical Writer runs a search in the PPM Tool to generate a list of operating standards sorted by Review/Cycle Date. This Review/Cycle Date is always set at one year from either the approval date or the last review date.

5.7.2. The Technical Writer sends any operating standards that have reached their Review/Cycle Date to the Reviewing Manager for review.

5.7.3. The Reviewing Manager reviews the operating standard and sends any updates back to the Technical Writer.

5.7.3.1. The Technical Writer may approve minor changes.

5.7.3.2. If major changes are made, the Technical Writer will schedule the updated operating standard for the Standards Review Committee Meeting.

6. Roles and Responsibilities

6.1. Technical Writer

6.1.1. Moves the operating standards between approval folders located at:

J: Drive < Function < ISD Operating Standards < Originals

6.1.2. Creates requests for PMO-created operating standards in the PPM Tool.

6.1.3. Updates the PPM Tool requests for operating standards.

6.1.4. Edits the operating standards before they are submitted to be posted to the Wiki.

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- 6.1.5. Posts and updates operating standards on the Wiki.
- 6.1.6. Makes necessary edits to the operating standards before the Standards Review Committee Meeting.
- 6.1.7. Prepares the agenda and operating standards for the Standards Review Committee Meeting held every other Monday.
 - 6.1.7.1. The Technical Writer sends out the standards one week prior to the meeting.
- 6.1.8. Makes any necessary edits after the Standards Review Committee Meeting.
- 6.1.9. Creates a Service Desk Case to send approved operating standards to the Public Affairs team to be made 508 compliant.
- 6.1.10. Posts approved standards on the OMES Process Library using Eclipse, on the J: Drive and in the CRM Tool's Knowledge Base for employee access.
- 6.1.11. Generates a monthly list of operating standards that have passed their Review/Cycle Date and emails the operating standards to the Reviewing Managers.
- 6.2. Standards Review Committee Meeting members
 - 6.2.1. Review standards at Standards Review Committee Meeting every other Monday.
 - 6.2.2. Approve operating standards at the meeting, if possible.
- 6.3. Public Affairs team
 - 6.3.1. Makes the operating standards 508 compliant.
 - 6.3.2. Returns the standards to the Technical Writer.
- 6.4. Reviewing Manager
 - 6.4.1. Reviews operating standards on a yearly basis.
- 7. Limitation or Implementation Notes
 - 7.1. Access to the ISD Operating Standards folder on the J: Drive.
 - 7.2. Access to the PPM Tool.
 - 7.3. Access to **Wiki.ok.gov**.
 - 7.4. Access to the Eclipse process framework software.
- 8. References
 - 8.1. Operating Standards Table of Contents - http://eclipse.omes.ok.gov/ISD/guidances/reusableassets/resources/Operating_Standards_Table_of_Contents.pdf