Procedure Title

Audience

Summary

This is the "homepage" of the procedure.

Its opening sentence introduces the content — for example, "This procedure instructs the XYZ Team how to . . ."

- Use this section to present the purpose of the procedure, its audience, and necessary background information.
- You may provide an overview of the content, perhaps in a bulleted list, especially if there are multiple sections.
- You also may mention related procedures, particularly if the procedure is a key part of a larger process.
- Use the third person ("employees") in this section.

Guidelines or best practices

This is an optional section, to be retitled as appropriate.

- Use it to list guidelines, expectations, best practices, definitions, or other information that belongs outside the how-to steps.
- Use the second person ("you") in this section.

Instructions

This section lists the steps needed to complete the function described in the title of this procedure.

Use the second person imperative ("do this or that") in this section.

Follow these steps to complete the PDQ function:

Step 1   Do this.

Add cross-references as needed: For more information, refer to Procedure X.

Step 2   Do that.

Describe the result of this action in a subsequent sentence, if necessary: A new window opens.

Step 3   Perform a series of related actions:

   a.   Open this.
   b.   Select that.
   c.   Click **OK**.

Step 4   Verify this.

Step 5   Document your actions.

Note: Add supplementary information in this format. You also may add notes within steps.

Related items

List related procedures here.

Images

Paste screenshots here or within steps above. Create links to these images when you publish the procedure online.

Use this naming convention for image files: *BusinessPrefix_System_Screen.*