# FirstLight Federal Credit Union Procedure

# How to write and format a procedure

This Document can be used as a guide for creating a procedure for a manual process.

**Format of the Procedure**

**Title ( Remains Unchanged) = Times New Roman 16 point bold**

**Subtitle (Title of Procedure \*avoid using “How to”) = Times New Roman 14 point bold**

**Sections (will be Heading 2 style) = Times New Roman 12 point bold**

Regular = Times New Roman 12 point

**Fill in or remove any items inside brackets < >**

**The Procedure Document will be divided into the following Paragraphs:**

**Title**

**Subtitle**

**<If Procedure fails can it be run during business hours?>**

1. **Purpose (What is the purpose of this document)**

**Job Schedule**

If you have a job and it is not a SQL job, remove the “<SQL>”

|  |
| --- |
| **<SQL> Job name: <Job Name>** |
| **Periodicity: <Frequency>** |
| **Run Time:** **<Job run time>** |
| **Holiday Schedule: <Will this run on holidays? What if a holiday is a business day?>** |
| **<SQL> Server: <Server Name>** |
| **POC on failure: <Point of contact>** |
| **Department: <Department that owns procedure>** |
| **Author: <Author>** |

**Overview: (Provide an overview with a Job Schedule: Who, what, why, when? If a file is generated, where will it be placed?)**

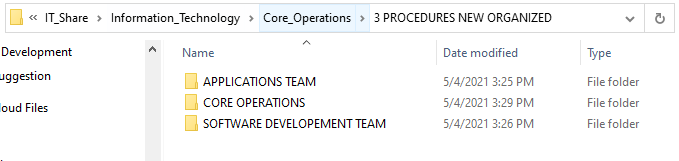
1. **Scope (This should be always the same as shown in this document)**
2. **Procedure (Attach screenshots/diagrams)**
   1. Step 1
   2. Step 2
   3. Step 3…

**IMPORTANT: provide a screen shot showing what the user will see on a successful job run.**

When the procedure has been finished it should be validated by a second staff member. The employee who wrote the procedure will send their supervisor the document for initial review. The supervisor will then send an email (preferably allowing 2-3 days for review if possible) for manual procedures approval.

The procedure should be saved in the following folder for future reference (each department using their designated folder):

\\v00483021\IT\_Share\Information\_Technology\Core\_Operations\3 PROCEDURES NEW ORGANIZED



1. Enforcement (This should be always the same as shown in this document)
2. Definitions (Special definitions that need to be explained)
3. Revision History = The revision history should show the

Approval Authority = Supervisor / Applications Director / VP of IT / CIO

Approved = Who approved the procedure with date

Revisions = Changes in the document with new approval

\*\*Template below should be used\*\*\*

FirstLight Federal Credit Union Procedure

<Procedure Name>

***<If automation fails, when should procedure be run: Ex: “Procedure can be run during business hours”>***

1. **Purpose**

<Purpose of the document>

Job Schedule:

|  |
| --- |
| **<SQL> Job name: <Job Name>** |
| **Periodicity: <Frequency>** |
| **Holiday Schedule: <Will this run on holidays? What if a holiday is a business day?>** |
| **Run Time:** **<Job run time>** |
| **<SQL> Server: <Server Name>** |
| **POC on failure: <Point of contact>** |
| **Department: <Department that owns procedure>** |
| **Document Author: <Document Author>** |

Overview:

<Why was this requested? Provide as much background as possible here.>

1. **Scope**

This procedure applies to all FirstLight Federal Credit Union employees, contractors, consultants, temporary staff, and other workers.

1. **Procedures (Attach screenshots/diagrams)**
   1. Step 1
   2. Step 2
   3. Step 3…

\*\*Attach screen shot of what a successful job looks like

1. **Enforcement**

Any FirstLight Federal Credit Union employee found to have violated these procedures will result in disciplinary action up to and including termination.

1. **Definitions**

|  |  |
| --- | --- |
| **Term** | **Definition** |
|  |  |
|  |  |

1. **Revision History**

|  |  |  |
| --- | --- | --- |
| **Approval Authority:** | | **(Supervisor / Application Director / VP of IT / CIO)** |
|  | **Date** | **Change Description** |
| Approved: |  |  |
| Revision: |  |  |