Title: Operating Procedures
Operating Procedure Number: BPM-C-1042

Revision History

Version No.	Revision Date	Effective Date	Revised By	Change Summary
1.0			Karen Davis	New operating procedure

Approvals

Name and Function	Signature	Date
Tom Kenney, Director Sales Operations		

Issues to be researched

Instructions: To suggest changes to the operating procedure, complete the Issues column and send a copy of the procedure to the Data Operations Mgr. via Lotus Notes.
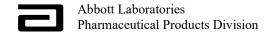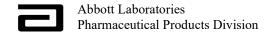
Issue	Owner	Resolution
1.		
2.		
3.		

Table of Contents

1   Overview

Written procedures – step-by-step instructions for performing work tasks – are a mainstay of work life and for good reasons.

1. **Procedures standardize the way work tasks are performed.** Procedures provide brief, clear, and consistent instructions for accomplishing important work tasks.

2. **Procedures supplement training.** The typical capacity of short-term memory is 7 plus or minus 4 bits of information. Couple this with the fact that a typical training class presents hundreds of pieces of information and you can begin to appreciate the value of written procedures that can be consulted long after the training class.

3. **Procedures allow for change and growth.** The people that make up a business are always changing. New employees are hired; others are promoted, taking with them "expert" knowledge. Over time, business requirements also change, meaning that procedures need to be revised, deleted, or added. A written set of procedures simplifies all of these tasks.

In reality, no employee or procedure exists in isolation. More typically, we all play a number of roles in a number of processes and each process can be involve several procedures. An operating procedure is a written document that contains the overview information, definitions, and procedures an employee needs to perform a specific role in a single process.

1.1 Purpose

To explain how to access operating procedures for the Galaxy system and how to use the operating procedure's structure to find key information.

1.2 Scope

Section 3 covers the following procedures:

3.1   Accessing an operating procedure

3.2   Understanding the structure of an operating procedure

1.3 Responsibility

Data Operations will update procedures and conduct annual training.

1.4 User Roles

Author(s)
- Responsible for creating or updating operating procedure.
- Gathers information regarding business requirements, process, and roles needed to draft operating procedure.

Drafts operating procedure.
- Coordinates approval of operating procedure.
- Coordinates distribution of operating procedure.

Approver
- Participates in information gathering.
- Reviews operating procedure for accuracy and consistency.
- Approves operating procedure.

User
- Attends training based on operating procedure.
- Consults operating procedure as needed in performance of work-related tasks.
- Notifies manager, author, or approver of errors or changed circumstances that indicate the operating procedure needs to be revised.

1.5 Reference Documentation
- None

1.6 Attachments
- None

2   Definitions

Business process mapping (BPM): A diagram of the interactions and decisions involved in performing a process.

Operating procedure: A written document that contains the overview information, definitions, and procedures an individual needs to perform a specific role in a single process.

Procedure: A sequence of tasks and decisions that an individual performs to accomplish a specific task. Usually recorded as a set of step-by-step instructions.

Process: A series of changes and events that occur over time and, in most cases, lead to an identifiable result. In business settings, usually

involves the interaction of more than one person and/or department. Can be described in words or with a business process mapping (BPM). Useful for understanding the relationship of functional areas and departments.
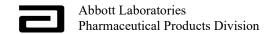
3 Procedures

3.1 Accessing an operating procedure

The following Data Management forms, documentation, and procedures are available electronically on the LAN:

LAN Directory structure

- Drive L:
- Path \Area\Data Operations
- Path continued \Folders
  - \Data Deliverables Documentation
  - \Data Orders
  - \Data Requirement Changes by Month
  - \Forms
  - \Operating Procedures
  - \Process Map Link
  - \System Feedback Reports
    - Deliverables
    - Market Definitions and Roll-Up Reports
    - Source-Level Report
    - Decile Calculation Report
    - Decile to Sales Force relationship
    - Master Call File criteria
  - \Training Manuals

3.2 Understanding the structure of an operating procedure

An operating procedure is divided into sections that are designed to help you quickly find and use certain types of information:

Revision History and Approvals

The revision history and approvals, shown on the first page, perform a number of important functions:

- Helps to confirm the effective date and summarizes changes made over time.
- Indicates the personnel who had responsibility for creating and approving the operating procedure.

1 The Overview

In addition to providing background information, the Overview provides the following:

- **1.1 Purpose.** The purpose statement typically includes two key pieces of information: (1) the audience for the operating procedure and (2) a general description of the procedures included in the operating procedure.
- **1.2 Scope.** The scope provides a more specific listing of the procedures included in Section 3.
- **1.3 Responsibility.** This section indicates the department that is responsible for creating, maintaining, and distributing the operating procedure.
- **1.4 User Roles.** This section lists the major responsibilities of each of the roles referred to in an operating procedure.
- **1.5 Reference Documentation.** Provides more detailed background information. Examples: The business process mapping (BPM) that underlies the operating procedure, a user manual for a system referred to in a procedure.
- **1.6 Attachments.** Attachments fall into two general classes: (1) Examples of forms or other documents that will be used in completing a procedure and (2) Schedules and other information that will be useful in following the procedure.

2 Definitions

This section groups the definitions of key terms that are used within the operating procedure.

3 Procedures

This section contains the procedures an employee in a certain role will perform in completing a work process.

4   Attachments

This section contains the attachments listed in Section 1.6 or indicates where the attachments can be found.

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4   Attachments

None

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