





Tips for Creating Work Instructions

Level 2

Reference Guide

			Company Name	
			Departmental Processes and Procedures	
			Doc. No. E-L2-0046	
REV	DATE	AUTHOR	LEVEL-1 DESCRIPTION	APPROVER
0	4 Feb 2015	Lisa Urbani	Department	First Last

	Tips for Creating Work Instructions			
	Doc. No.	E-L2-0046	Rev.	0

RECORD OF AMENDMENT			
REVISION	SECTION	SUB-SECTION	DESCRIPTION OF CHANGE
0	All	All	4 Feb 2015 – Initial draft

SAMPLE

TABLE OF CONTENTS

1. PURPOSE	4
2. SCOPE	4
3. BUSINESS PROCESS MAP	4
4. UNDERSTANDING THE WORK INSTRUCTIONS TEMPLATE	5
4.1. START WITH THE RIGHT TEMPLATE	5
5. WRITING THE WORK INSTRUCTIONS	5
5.1. UPDATE THE TITLE PAGE	5
5.2. WRITE THE PURPOSE STATEMENT	6
5.3. WRITE THE SCOPE STATEMENT	6
5.4. UPDATE RESPONSIBILITY AND AUTHORITY.....	7
5.5. ADD THE PROCESS MAP	7
5.6. DOCUMENT THE PROCEDURES FOR THE PROCESS.....	7
5.7. UPDATE REFERENCE DOCUMENTS	8
5.8. UPDATE THE ACRONYMS AND TERMINOLOGY TABLE	8
5.9. FINALIZE THE WORK INSTRUCTIONS	8
5.10. GET APPROVAL AND SUBMIT FOR PUBLISHING.....	8
6. REFERENCE DOCUMENTS	9
6.1. L3 OR L5 PROCESS MAP TEMPLATE.....	9
6.2. L4 OR L6 WORK INSTRUCTIONS TEMPLATE	9
6.3. SCM PROCESS DOCUMENTATION STYLE GUIDE	9
6.4. GLOBAL SCM PROCESS DOCUMENT CONTROL AND RETENTION PROCESS	9
7. ACRONYMS AND TERMINOLOGY	9

1. PURPOSE

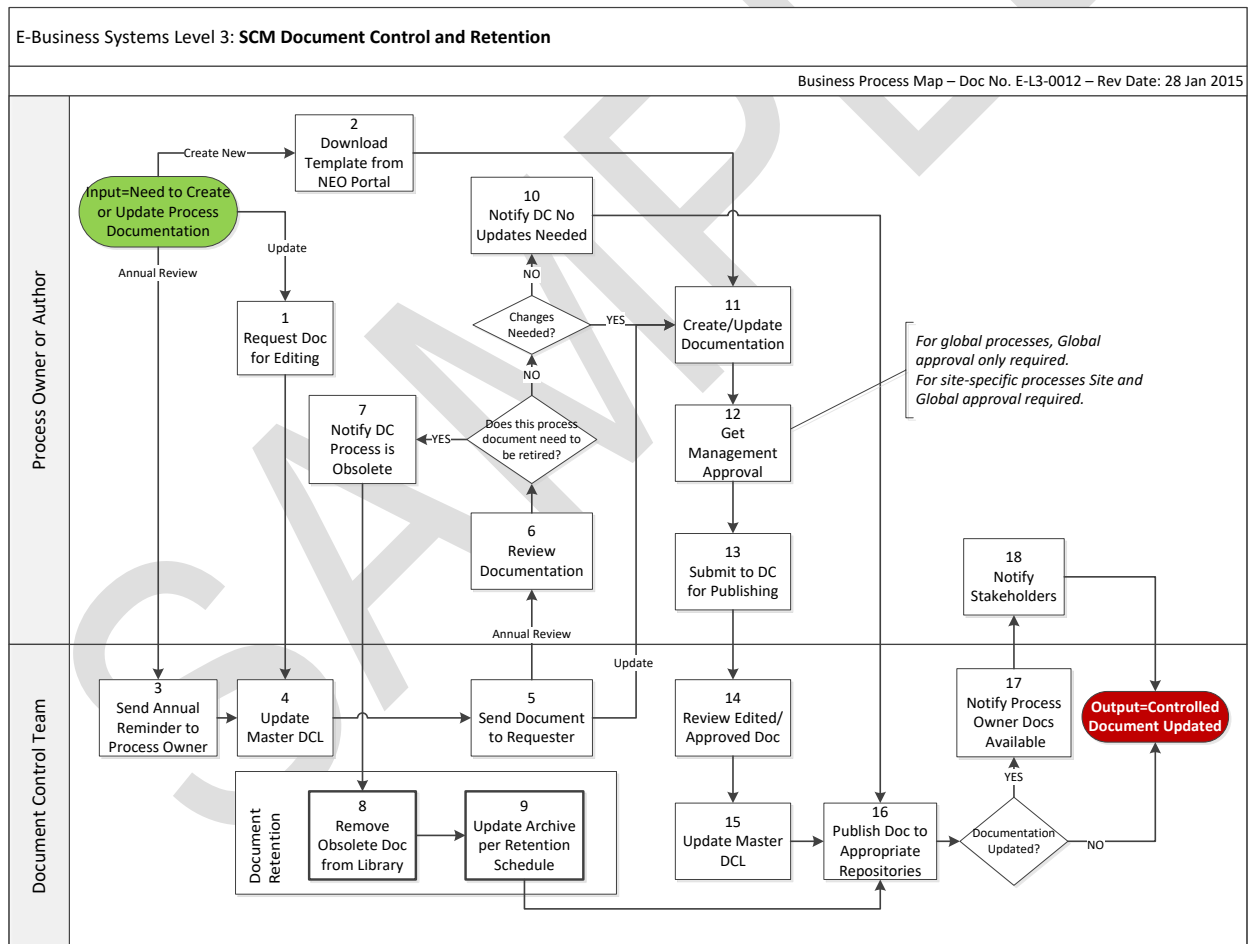
The purpose of this reference guide is to provide tips for creating clear process work instructions and using the work instructions template.


2. SCOPE

The scope of this reference guide is global and site-specific work instructions created for Supply Chain Management (SCM) processes.

Work instructions are used to document How the Who does What.

3. BUSINESS PROCESS MAP



	Tips for Creating Work Instructions			
	Doc. No.	E-L2-0046	Rev.	0

4. UNDERSTANDING THE WORK INSTRUCTIONS TEMPLATE


4.1. Start with the Right Template

- 4.1.1. Start with the L4 or L6 Work Instructions Template.
- 4.1.2. The template was created using Microsoft Styles.
- 4.1.3. Refer to the SCM Process Documentation Style Guide available on the SCM Process Document Control page for details about the template and other style issues.
- 4.1.4. All acronyms must be spelled out at least once at the first instance. All acronyms should also be added to the Acronyms and Terminology Table at the end of the document.

5. WRITING THE WORK INSTRUCTIONS


5.1. Update the Title Page

- 5.1.1. Determine if you are documenting a Global or Site Specific process.
 - 5.1.1.1. If you are documenting a Global process delete the comment on the word Global.
 - 5.1.1.2. If you are documenting a Site-Specific process, change Global to the appropriate site identifier: EG, FL, IL UK, US, etc. The comment should automatically be removed.
- 5.1.2. Remove the comment on Supply Change Management Processes and Procedures – do not change this text.
- 5.1.3. Leave the comment on Doc. No.; the SCM Doc Admin will update this when you submit for publishing.
- 5.1.4. Update the Revision Date in the format DD Mon YYYY.
- 5.1.5. Change the Author to your name.
- 5.1.6. Change the Level-1 Description to your SCM Group.
- 5.1.7. Change the Approver to the approver you're your group listed on the NEO Portal on the SCM Process Document Control page.
- 5.1.8. All comments should now be removed from the Title page except the one on Doc. No.



Global Process Documentation Work Instructions
Template

Level **4**

		Company Name		
		Supply Chain Management Processes and Procedures		
		Doc. No. ABB-CCCC		
REV	DATE	AUTHOR	LEVEL-1 DESCRIPTION	APPROVER
0	[6 Dec 2014]	[Lisa Urbani]	[E-Business Systems]	[Chris Blent]

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Comment [UX(1)]: Needs to be either Global or the Site identifier

Comment [UX(2)]: Level 4 – for Global Level 2 – for Site specific

Comment [UX(3)]: Do not change

Comment [UX(4)]: Doc Control Admin will assign number

Comment [UX(5)]: Enter date these work instructions approved

Comment [UX(6)]: Enter name of person responsible for writing / maintaining these work instructions

Comment [UX(7)]: Enter description of Level 1 Group


Comment [UX(8)]: Enter name of Process Owner approving these work instructions

5.2. Write the Purpose Statement

- 5.2.1. Write the purpose of the work instructions document.
- 5.2.2. The purpose statement must begin with the words “This procedure defines the process for”.
- 5.2.3. Remove the comments in section 1. Purpose.

5.3. Write the Scope Statement

- 5.3.1. Write the scope of the work instructions document.
- 5.3.2. The scope statement must begin with the words “This procedure applies to”.

	Tips for Creating Work Instructions			
	Doc. No.	E-L2-0046	Rev.	0

5.3.3. Remove the comments in section 2. Scope.

5.4. Update Responsibly and Authority

5.4.1. This is probably the most confusing part of the work instructions. Basically it is a list of the Whats by the Whos.

5.4.2. The headings are the Whos from the Process Map (PM).

5.4.3. The details below the headings are the exact words from the PM process boxes preceded by "Shall."

5.4.4. Create a heading for each swim lane on the PM.

5.4.5. Under the heading create a "Shall" statement for each process box in that swim lane.

5.4.6. Remove all comments in section 3. Responsibility and Authority.

5.5. Add the Process Map

5.5.1. Open the process map associated with the work instructions.

5.5.2. Click on the outer edged of the process map, the line should turn orange.

5.5.3. Right-click and select Copy.

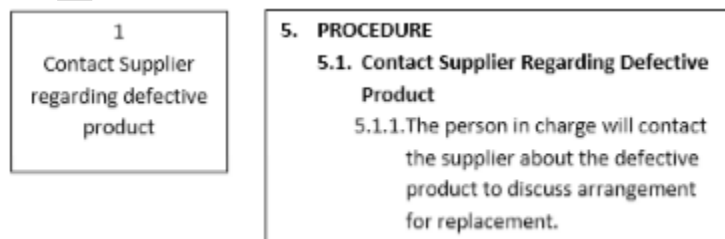
5.5.4. Return to the work instructions document and paste the process map under the Business Process Map heading.


5.5.5. Remove any comments, images or sample process maps from the template that do not pertain to the work instructions you are documenting.

5.6. Document the Procedures for the Process

5.6.1. Each heading in this section corresponds to a process box on the PM.

5.6.2. The words in the heading are the exact words in the process box on the PM.



	Tips for Creating Work Instructions			
	Doc. No.	E-L2-0046	Rev.	0

- 5.6.3. Add as many instructional (how to) steps under each heading as necessary to help the person performing the task understand what they need to do.
- 5.6.4. Precede at least the first how to instruction with the Who performing the task. See the example image under step 4.7.2. Replace the words “person in charge” with the Who from the swim lane heading.
- 5.6.5. Include screen shots as necessary.
- 5.6.6. Add if statements to represent the decision diamonds and show which step number to follow based on the alternate paths that may be taken.

5.7. Update Reference Documents

- 5.7.1. List any reference documents that will need to be consulted including sub processes mentioned in the PM as well as any other necessary documents.

5.8. Update the Acronyms and Terminology Table


- 5.8.1. Add all acronyms any new unfamiliar terminology used in the document to the Acronyms and Terminology table.
- 5.8.2. Spell out the acronym or add a brief definition for terminology.

5.9. Finalize the Work Instructions

- 5.9.1. Ensure at least one instructional step is included for each Procedure heading.
- 5.9.2. Ensure all acronyms are spelled at first instance and added to the table at the end of the document.
- 5.9.3. Ensure the current Process Map is included.
- 5.9.4. Ensure the Title page and the Record of Amendment table are updated.
- 5.9.5. Update the Table of Contents.
 - 5.9.5.1. If an image or screen shot appears in the table of contents, find that images, click to select it and then click the Purpose-Scope style. You can use the indent button to reposition the image.

5.10. Get Approval and Submit for Publishing

- 5.10.1. Forward the work instructions and process map to the approver.
- 5.10.2. Once management approval is received, forward to the SCM Doc Admin for review and publishing.

	Tips for Creating Work Instructions			
	Doc. No.	E-L2-0046	Rev.	0

6. REFERENCE DOCUMENTS

- 6.1. L3 or L5 Process Map Template
- 6.2. L4 or L6 Work Instructions Template
- 6.3. SCM Process Documentation Style Guide
- 6.4. Global SCM Process Document Control and Retention Process

7. ACRONYMS AND TERMINOLOGY

Acronym or Term	Definition
DD	Two digit day
Mon	Three letter abbreviation for the month created or updates
PM	Process Map
SCM	Supply Change Management
WI	Work Instructions
YYYY	Four digit year