

Document Types and Definitions

The purpose of this document is to show how technical documents relate to each other and define each document type. Figure 1, Documentation Hierarchy, illustrates the relationship of documents that govern and support.

Table 1, Document Type and Definition, provides the definition and example of each document type. Key words that indicate the document type are underlined.




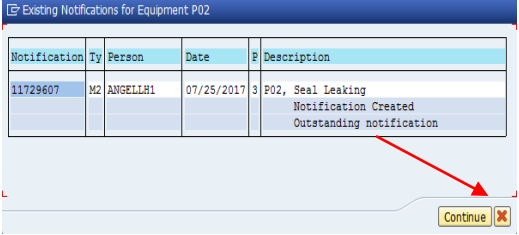
Figure 1: Documentation Hierarchy



Table 1: Document Type and Definition

Document Type	Definition	Example
<p>Policy</p>	<ul style="list-style-type: none"> Requires compliance (mandatory). Implemented by standards and guidelines. <p>Key words: ensure, required, prohibit, provide</p>	<p>It is the <u>policy</u> of the Company to <u>ensure</u> equal employment opportunity without discrimination or harassment based on race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty or status as a covered veteran. The Company <u>prohibits</u> any such discrimination or harassment.</p>
<p>Standard</p>	<ul style="list-style-type: none"> A mandatory action or rule. Supports and conforms to a policy. <p>Key words: required, rule, must, shall, prohibit, never, provide</p>	<p>Safety Rules:</p> <ul style="list-style-type: none"> <u>Never</u> operate equipment, machinery, valves, switches, or other controls in which you are not trained or authorized to use. Managers or designee are responsible for <u>providing</u> the needed training. <u>Never</u> ride or use a pallet jack as a “scooter”.
<p>Guideline</p>	<ul style="list-style-type: none"> Recommendations to help achieve a policy. Not mandatory, but a best practice. <p>Key words: should, may, can</p>	<p>Safety Guidelines:</p> <ul style="list-style-type: none"> Chisels, screwdrivers, and other similar pointed/sharp objects <u>should</u> not be carried in the pockets of clothing. Utility knives <u>should</u> be constructed so that when not in use the blade retracts into the handle or is shielded.
<p>Processes</p>	<ul style="list-style-type: none"> A series of events or phases that take place over time. Includes handovers from one group or actor to another. <p>Key words: action verbs, i.e. Make, Notify. In the example, <u>Process</u>, <u>Ship</u> and <u>Issue</u> are the action verbs.</p>	<pre> graph TD Customer[Customer] -- order information --> PO[Process Order] PO --> SG[Ship Good] SG --> IR[Issue Receipt] Inventory[Inventory] --- PO CustomerData[Customer] --- PO Transaction[Transaction] --- PO </pre>



Document Type	Definition	Example																				
Procedures	<ul style="list-style-type: none"> A repeatable activity in a process. Defines a series of steps on how to accomplish a task. May be performed by more than one person <p>Key words: action verbs often in caps and bold, implied you, i.e. GO, TURN</p>	<p>4.0 Develop Proposed Procedure Change</p> <p>Any employee can identify and submit a proposed procedure change and initiate the review process.</p> <table border="1" data-bbox="1094 370 2026 613"> <thead> <tr> <th>Step</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>DETERMINE if the change requires a new document or the revision of an existing document.</td> </tr> <tr> <td>2</td> <td>CONSULT with the Volume Owner for editorial changes.</td> </tr> <tr> <td>3</td> <td>DEVELOP a solution that implements the change. CREATE a new document or a redline mark-up of the existing document.</td> </tr> </tbody> </table>	Step	Action	1	DETERMINE if the change requires a new document or the revision of an existing document.	2	CONSULT with the Volume Owner for editorial changes.	3	DEVELOP a solution that implements the change. CREATE a new document or a redline mark-up of the existing document.												
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Work Instructions	<ul style="list-style-type: none"> Describe how to accomplish a specific job performed by one person. Typically, one to two pages in length. Can be used to create job aides. <p>Key words: action verbs and references to software features often in caps and bold, implied you, i.e. CLICK the green RUN button.</p>	<ol style="list-style-type: none"> OPEN the EXISTING NOTIFICATIONS for EQUIPMENT window, REVIEW the notification information to prevent duplication: <ol style="list-style-type: none"> If a notification has been created for the event, CLICK the red X  icon to cancel the process. If a notification does not exist for the event, click the CONTINUE button to proceed. 																				
Records	<ul style="list-style-type: none"> Checklists, surveys, or other forms that support an activity. Output of a procedure or work instruction. <p>Key words: Questions, instructions, self-explanatory.</p> <p>In the example, instructions are in red and in parentheses. The headings explain the information needed.</p>	<p style="text-align: center;">Sanitation Checklist</p> <p>DATE: <input type="text"/> AREA: <input type="text"/> <i>(First user please fill in the date)</i> SHIFT: <input type="text"/></p> <table border="1" data-bbox="911 1149 1944 1388"> <thead> <tr> <th>Area</th> <th>Cleaning Equipment Used</th> <th>Cleaning Chemicals Used (if applicable)</th> <th>Equipment Name (if applicable)</th> <th>Operator Initials</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="text"/></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="text"/></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Area	Cleaning Equipment Used	Cleaning Chemicals Used (if applicable)	Equipment Name (if applicable)	Operator Initials	<input type="text"/>					<input type="text"/>					<input type="text"/>				
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