

Documentation Standards for IT Program Procedure Template

Information	Procedures	
Introduction or Overview Definitions	Document Title Margins Table of Contents Main Headers Secondary Headers Tables	Body of Text Department Names/Colleague Roles as Headers Formatting an Image Bullets Version Control

Information

Introduction or Overview

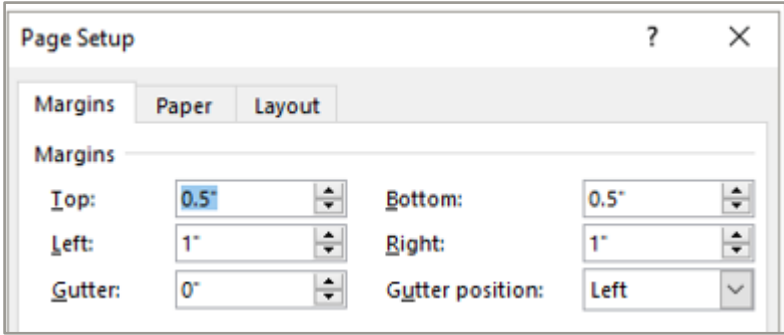
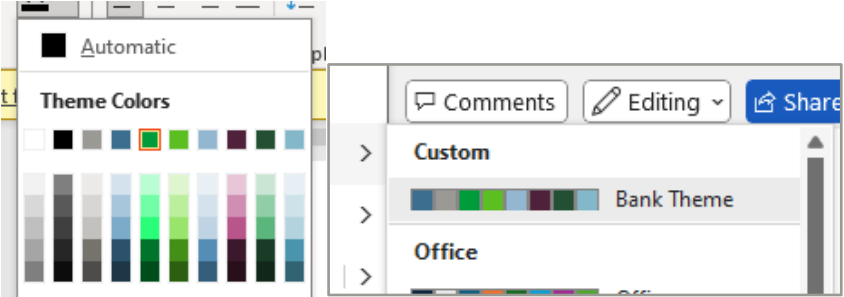
Use this stylesheet to create processes and procedures for use within information technology. A template aids in creating clear, concise and consistent documentation no matter who is authoring it.


Note: The main headings in this procedure are blue for visual clarity. This does not follow the normal dark green which is the established standard color for headings.

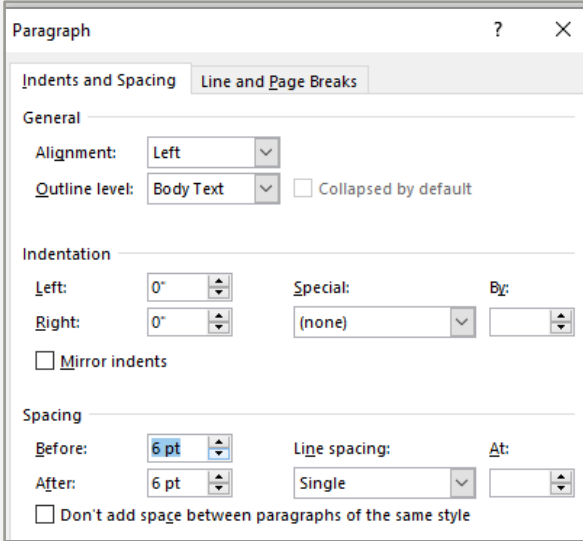
Definitions

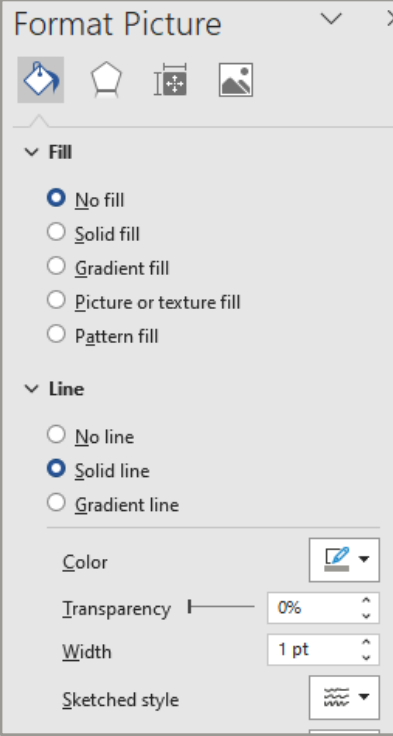


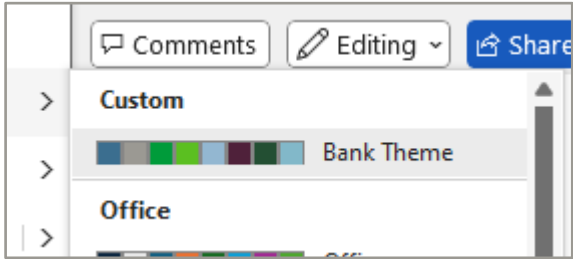
A process is a series of tasks and activities that produce an outcome.

A procedure is a set of instructions for completing a task or activity within a process.

Standard	Description						
<p>Policy/Sub-policy</p>	<ul style="list-style-type: none"> • Policies must be approved by the board; therefore, most of our documents will be sub-policies • Titling: <ul style="list-style-type: none"> ○ In a heading: Sub-Policy ○ In body of document and starting a sentence: Sub-policy ○ In body of document and middle of sentence: sub-policy 						
<p>Document Title</p>	<ul style="list-style-type: none"> • Enter as [Business Line – Title] • Align Left, Arial Bold, Font 22, Bold, Dark Green Accent 1, 18/18pt 						
<p>Margins</p>	<p>Set Margins as follows:</p> 						
<p>Table of Contents</p>	<ul style="list-style-type: none"> • Table of Contents is a two row/three column table • Headings are Information, Procedure/Procedures and Resources. Always list Version Control under Resources • Align Top Center • Header row: Dark Green Accent 1. lettering is White and bolded. Font is Arial 11. • Second row: White, Background 1, Darker 5%. Lettering is Black, not bolded, Arial 10, 6/6pt • Add 2 ¼ width black line between the header and first line • If the Table of Contents is not needed because the procedure is short, delete it <table border="1" data-bbox="558 1346 1398 1444"> <thead> <tr> <th>Information</th> <th>Procedure</th> <th>Resources</th> </tr> </thead> <tbody> <tr> <td>Introduction</td> <td>Normal or Standard Change</td> <td>Version Control</td> </tr> </tbody> </table>	Information	Procedure	Resources	Introduction	Normal or Standard Change	Version Control
Information	Procedure	Resources					
Introduction	Normal or Standard Change	Version Control					
<p>Theme Colors</p>							

Standard	Description
<p>Main Headers (i.e., Information and Procedure Names, Version Control)</p>	<ul style="list-style-type: none"> • Every document must have at least an Introduction and Version Control • Arial Bold, Font 18, Dark Green Accent 1, 18/12pt • Exception: Version Control heading is 18/6pt • If an introduction sentence is needed underneath a heading, review it • Maybe it can be added to the information section. If not, format like normal text. Arial, Font 10, Black, No Bold, 6/6pt
<p>More Than One Procedure in Document</p>	<ul style="list-style-type: none"> • If there is only one procedure in the document, no need to the add the procedure title as a header under <i>Procedure</i> heading because it is in the document's title. Leave the word <i>Procedure</i> as the section heading. • If there is more than one procedure in a document, list <i>Procedures</i>; then list the procedure titles using the same formatting as a Main Header. <p>Example:</p> <p style="text-align: center;">Procedures</p> <p style="text-align: center;">How to Open a Door</p> <p style="text-align: center;">Text.....</p> <p style="text-align: center;">How to Close a Door</p> <p style="text-align: center;">Text.....</p>
<p>Secondary Headers</p>	<ul style="list-style-type: none"> • Align Left, Arial 13, Black Bold, 12/6pt
<p>Third Header</p>	<ul style="list-style-type: none"> • Align Left, Arial 11, Black Bold, 12/6pt
<p>Tables</p>	<p>A table template has been created.</p> <ul style="list-style-type: none"> • Align Top Center • Even rows are white • Odd rows are White, Background 1 Darker 5% • Header row: Dark Green Accent 1 with white, Lettering is white and bold • Font 11 • Table is spaced at 4/4pt; this can be adjusted to fit a page <p>If a table continues to next page, add a “<i>(Table continues next page)</i>” notation in Arial Narrow 10 Italics, no bold. Split table so the green header line should also continue to the next page.</p> 

	<p>Add a 2 1/4 width black line between the header and first line</p> <table border="1" data-bbox="506 130 841 359"> <thead> <tr> <th>Date</th> <th>Version</th> </tr> </thead> <tbody> <tr> <td>11/6/23</td> <td>1.0</td> </tr> <tr> <td>06/04/24</td> <td>2.0</td> </tr> </tbody> </table>	Date	Version	11/6/23	1.0	06/04/24	2.0
Date	Version						
11/6/23	1.0						
06/04/24	2.0						
<p>Body of Text</p>	<ul style="list-style-type: none"> • Body of text is Arial 10, Left Justified, 6/6 pt • No indent for basic text. Use indenting when using bullets, charts, etc. • Line spacing which is under <i>Layout</i> is single spaced with <i>Don't add space between paragraphs of the same style</i> unchecked 						
<p>Department Names/Colleague Roles as Headers</p>	<p>When using department name or colleague role to show hand-offs during a procedure, format using Arial Bold, Font 10, Black, 12/6pt</p>						
<p>Formatting an Image</p> <p><i>(Table continues next page)</i></p>	<ul style="list-style-type: none"> • All images should have a defined border: <ul style="list-style-type: none"> ○ Right click image ○ Select <i>Format Picture</i> ○ Click <i>Paint can</i> ○ Fill: Check <i>No Fill</i> ○ Line: Select <i>Solid Line</i> ○ Color: Gray Background 2 ○ Width = 1pt • Unless there is an explicit need, do not use color within text unless it is previously defined as part of the stylesheet or specifically used in the application being used • Do not use the Highlighter feature to call out on an image. If a call out on an image is needed, use the Rectangle shape, with no fill, shape outline = Red with 2¼ width. • Only use an image if it adds to the procedure and/or helps to clarify the step 						

	
<p>Bullets</p>	<ul style="list-style-type: none"> • Bullets are formatted per the image below when in the body of a procedure • Do not punctuate a single-lined bullet, even if it is a full sentence. If the bullet becomes more than one sentence, add punctuation (generally a period). <p>Numbered step (Numbers have no left indentation.)</p>  <ul style="list-style-type: none"> • Level one bullets have left indent of 0.25" <ul style="list-style-type: none"> ○ Level two bullets have a left indent of 0.75" <ul style="list-style-type: none"> ▪ Level three bullets have a left indent of 1.25" - Avoid using more than 3 levels  <ul style="list-style-type: none"> • Bullets in a table start with no indentation (see Numbered step above), then follow the image above
<p>Version Control</p>	<ul style="list-style-type: none"> • Version Control heading is formatted 18/6pt not 18/12
<p>Theme</p>	<p>To use the correct colors scheme, use the custom Bank Theme</p> 

Version Control

Date	Version	Changed By	Department	Description of Changes
11/2/23	1.0	Cathleen Halsey	IT Program Management	New Document
01/27/25	2.0	Cathleen Halsey	IT Program Management	Removed Good Practice Section
04/21/25	3.0	Cathleen Halsey	IT Program Management	Updated table formatting
05/23/25	4.0	Cathleen Halsey	IT Program Management	Updated table formatting
07/22/25	5.0	Cathleen Halsey	IT Program Management	Updated Policy/Sub-Policy section with more detail