

XXX-PROC-YY: (Procedure Name) Month Year



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Document Identification Procedures

Background – The policy format has been developed to ensure consistency among all procedures created. The goal is to have consistent headings on all INCOSE procedures but be tailorable by the respective INCOSE Leadership responsible for the specific topic

Procedure Naming Convention – Per PMC-101 INCOSE Policy

- **XXX**: 3-Letter Functional Area Code (same code as for policies in PMC-101 Table 1)
- **PROC**: 4-Letter Document Type Code – PROC is for Procedures
- **YY**: 2-Digit Number Starting with 01

Document Headers – There are two different headers – one for page 1 and the other for the rest of the pages. Both are the same. Both will need to be updated.

- (1) Use the appropriate naming convention from PMC-101 for your organization.
- (2) Replace “(Procedure Name)” with your specific procedure name.
- (3) Enter your version number.
 - (a) Recommend starting with 0.1 with your first draft,
 - (b) Increase by 0.1 for every update, i.e., 0.2, 0.3, etc., and
 - (c) When it is accepted by all Procedure RACI “ACI” reviewers, make 1.0.
 - (d) When updates are necessary, with the most recent accepted version number (i.e., 1.0, 2.0, 3.0, etc.) and add a 0.1 for every review round.
 - (e) Then, your next accepted version is the next whole number (i.e., 2.0, 3.0, etc.)
- (4) Add your month (full name, no abbreviation) and 4-digit year.

Document Footers – Do not change.

Title Page –

- (1) As with the headers, use the appropriate naming convention from PMC-101 for your organization.
- (2) Replace “(Procedure Name)” with your specific procedure name.
- (3) Add your month (full name, no abbreviation) and 4-digit year.
- (4) DO NOT change/move the INCOSE Logo and the INCOSE contact information.

Text Standards –

- (1) Text type should be Times New Roman.
- (2) Text font size should be 12 for body text, 14 for sub-headers and 18 for section headers (matches header information described in red text in Section 1.0 on page 1).

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Foreword

Where INCOSE Policies are “must do” requirements needing INCOSE Board approval, INCOSE Procedure documents provide guidelines on the “how to” for INCOSE Processes and do not require INCOSE Board approval.

The Procedure RACI (Responsible Accountable Consulted Informed) Responsible “R” will

- Draft / update their procedure,
- Submit to their respective “ACI” INCOSE Leadership for review, and
- Appropriately incorporate all “ACI” review comments into the procedure.

Once all comments and recommendations have been resolved, the Procedure Responsible “R” will:

- Provide the INCOSE Chief of Staff updated information for the Procedure RACI (date of update, version number).
- Coordinate with the INCOSE Operations Manager for posting on the INCOSE website.
- Inform all their Procedure RACI “ACI” reviewers that the updated procedure is posted.

(This next paragraph is some background on this document. Please type over this red text.)
The procedures are described in this document.

Document Change History

The following table identifies each version or issue of this document and provides a description of the purpose or reason for the change. Performing a document comparison between any two versions of this document can identify detailed change differences.

Version	Date	Comment
Z.Z	DD/MMM/ YYYY	Describes the high-level changes in the version.

Table of Contents

(If you use the style provided (see description in Section 1), this will automatically be created for you. To ensure current, right click in the Table of Contents and select update field. Then select “Update page numbers only” or “Update entire table,” as appropriate. Delete this red text before sending out for reviews.)

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1.0 Scope

[Please delete the red text before sending out for reviews. For all sections:

- The Section Titles are bolded, numbered 1.0, 2.0, 3.0, etc., centered, and use “Heading 1” in the Styles section on the Word Home tab.
- The first level sub-section titles are numbered 1.1., 1.2, 1.3, etc. (first number is the associated section), left justified, and use “Heading 2” in the Styles section on the Word Home tab.
- The second level sub-section titles are numbered 1.1.1, 1.1.2, 1.1.3, etc. (where the first number is the associated section and the second number is the associated sub-section number), left justified, and use “Heading 3” in the Styles section on the Word Home tab.
- If there are third and fourth level sub-sections, they will follow the process listed above for the first and second sub-sections, but use “Heading 4” and “Heading 5,” respectively, in the Styles section on the Word Home tab.
- The actual content under the section and sub-section tiles will use “Normal” in the Styles section on the Word Home tab (second row).

If the styles are used, then the Table of Content will be created properly.]

(This section details the process purpose and describes the major objectives. Delete this red text before sending for review.)

1.1 Purpose

This procedure applies to (type over this red text with your specifics on the purpose of your procedure, i.e., the reason for doing the process.)

1.2 Objectives

(Type over this red text with the output or what you wan to accomplish by doing this procedure.)

2.0 Definitions

(Please delete the red text before sending for review. These definitions are related to / needed for the procedure. Each definition sub-section number is “Heading 2,” and after the sub-section number, is the definition name.)

2.1 Definition 1 Name

(Definition 1 description)

2.2 Definition 2 Name

(Definition 2 description)

.
.
.

2.n Definition n Name

(Definition n description)

3.0 Responsibilities

[Type over this red text with the responsibilities related to this document. You should include who is responsible (the Procedure RACI Responsible R), the INCOSE cross-disciplines responsible for supporting and following the procedures (at a minimum, the Procedure RACI Accountable A's, the Consulted C's, and the Informed I's), and any other responsibilities in your INCOSE organization (e.g., the Tech Ops organization has several Assistant Directors – which ones have responsibilities for the specific procedure). In addition to the responsible roles, include how they are responsible.

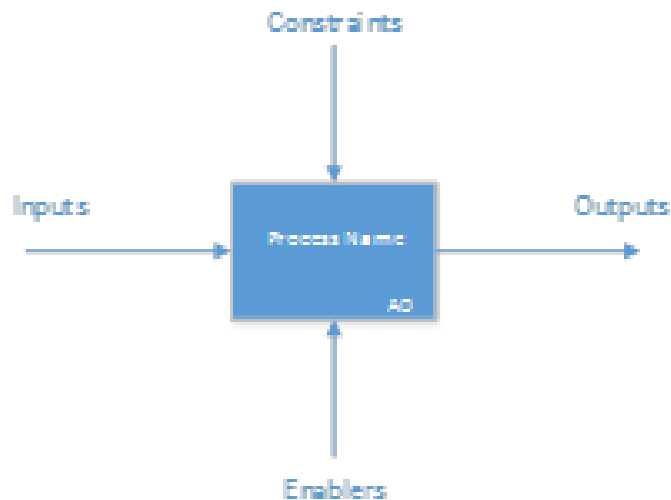
Also include the specific tasks or duties that individuals are expected to complete as a function of their role; a consideration is to identify the Roles and Responsibilities in a table indicating who is primary/responsible.]

4.0 Process Information

[NOTE: This will be included in the procedure template as information to support the content in sections 5 - N.]

[A formal process model or flow diagram, like IDEF0, is one option, but not required. A simple list of STEPS is another alternative. IDEF0 may not be applicable to many INCOSE procedures.]

Below is one of a few representations.



[The box can be a task, a process, an activity – something that transforms the inputs to the outputs. Constraints can be legislations, standards, contracts, company practices, rules, etc. Enablers can be other processes, tools, resources, etc.]

[Whether using an IDEF0 process, listing STEPS, or something else, as much as possible of the following information should be included.]

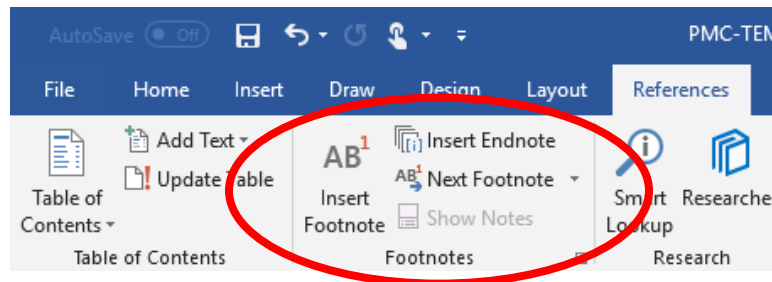
4.1 Inputs / Outputs

4.2 Constraints / Rules

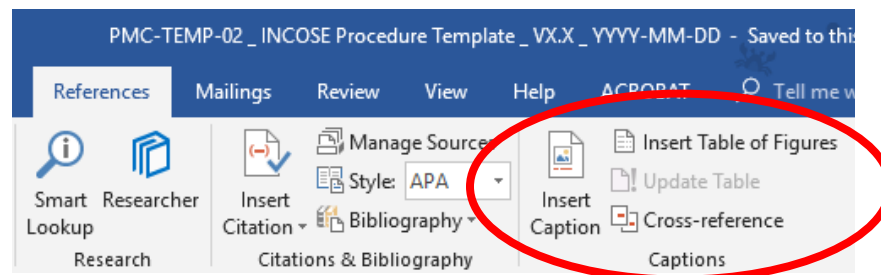
4.3 Enablers

5.0 Content Section # 1

(Type over “Content Section #1” with your first section title. Then add your content below using sub-sections and text, as appropriate for your procedure. NOTE: Avoid the word “shall” or similar words; INCOSE procedures are not directives, just guidelines for “how to” do something. Policies are directives. Delete this red text before submitting for review.)



(If you need to add footnotes or endnotes, as shown in the screenshot, there are icons to insert a footnote and insert an endnote. When the button is clicked, the next number is placed next to the text you want the footnote / endnote, and then Word takes you to the bottom of the page to insert your footnote or to the endnote page to type in your endnote. Word keeps track of your footnote / endnote, renumbering if you insert one in the middle of others. Delete this red text and screenshot before forwarding for reviews.)



(If you want to include figures and / or tables, in the row with the tab titles to the right of the Help tab, there is a magnifying glass picture with the words, “Tell me what you want to do.” Type “Insert a table of figures” and click enter. The help dialogue box will open on the right-side of the screen with information on inserting captions and a table of figures (see the screenshot. Delete this red text and 2nd screenshot before forwarding for reviews.)

6.0 Content Section # 2

(Type over “Content Section #2” with your second section title. Then add your content below using sub-sections and text, as appropriate for your procedure. Delete this red text before submitting for review.)

7.0 Content Section # 3

(Type over “Content Section #3” with your third section title. Then add your content below using sub-sections and text, as appropriate for your procedure. Delete this red text before submitting for review.)

n.0 Content Section # n

(Type over “Content Section #n” with your nth section title. Then add your content below using sub-sections and text, as appropriate for your procedure. Delete this red text before submitting for review.)

References

(Delete the red text before submitting for reviews. This section lists the respective references.)

REF-1 INCOSE Policies

(In this sub-section, list the related INCOSE Policies.)

REF-2 INCOSE Procedures, Templates, and Forms

(In this sub-section, list the related INCOSE Procedures, Templates, and Forms.)

REF-3 Other References

(In this sub-section, list the other related references.)

A – Appendix Title

(If you have appendices, continue as before. Type over Appendix Title with your appendix title. Then add your content below using sub-sections and text, as appropriate for your procedure. Delete this red text before submitting for review.)

B – Appendix Title

(If you have appendices, continue as before. Type over Appendix Title with your appendix title. Then add your content below using sub-sections and text, as appropriate for your procedure. Delete this red text before submitting for review.)