



STANDARD HEADING
(DO NOT MODIFY)

Administrative Standard Operation Procedure (SOP)

Enter SOP Title

1. Highlight over "Enter SOP Title" and enter your SOP Title.

3. Click on the text to see the drop-down calendar. Click on the effective date, it will then show in the field.

V-1 Effective Date: Click down arrow for calendar

2. Click here and enter the version number. If this is a new SOP, it is automatically Version 1. If you are updating an existing SOP, determine which version it is (how many times has it been updated in the past?) and enter the appropriate number.

- I. Purpose
- II. Definitions/Acronyms
- III. Criteria
- IV. Process or Procedure

MAIN SECTION HEADINGS
(DO NOT MODIFY)

SECTION HEADING
(DO NOT MODIFY)

I. Purpose

- A. Purpose #1
- B. Purpose #2

Adding text to SOP Sections (using the Purpose Section as the example) Text is added to all sections using these steps.

Return to beginning of [SOP Title](#)

4. To replace default text, highlight over "Purpose #1" and type in your Purpose statement. If you have more than one Purpose Statement, repeat this step with "Purpose #2."

5. To add additional Purpose Statements, place your cursor at the end of the last statement, click and press enter. Type your next statement.

6. To add subtext to a statement place your cursor after the statement, click, press enter then tab. Type your subtext.

7. To remove default text, if a second Purpose Statement is not needed, highlight "Purpose #2 and press delete.

These sections are all **pre-formatted multi-level list style** (DO NOT change the font, font size, style, etc.)

II. Definitions/Acronyms

- A. Definition/Acronyms
- B. Definition/Acronyms

Return to beginning of [SOP Title](#)

III. Criteria

- A. Criteria #1
- B. Criteria #2

Return to beginning of [SOP Title](#)

C. Process or Procedure

- D. Process or Procedure #1
- E. Process or Procedure #2

Return to beginning of [SOP Title](#)

Highlight the underlined text only and type the SOP Title. This is a pre-formatted hyperlink to the top of the page. Repeat this step after each section



Using the Standard Operations Procedure (SOP) Template Procedure 000 V.1 Effective 1/13/16

- I. **Opening and Saving the SOP Template**
- II. **Creating a New SOP**
- III. **SOP Template Diagram (Flow Chart)**

I. **Opening and Saving the SOP Template**

- A. Open GEARUP; select the SOP folder on the CSOA Procedures page.
(GEARUP>DCSS Collaboration>CSOA>CSOA Procedures>SOPs)
- B. Open the SOP Template
- C. Save a copy of the blank SOP Template on your computer.
- D. Open the saved SOP Template and perform a “Save As” on the document
 - 1. Save and re-name the document as a .docx file (do not save as a .dotx file) to the “My Documents” folder on the “C” or home drive.

NOTE: It is very important that the “save as” action is performed before doing anything else. Saving the document in this manner ensures the saved SOP Template is not compromised or corrupted. Saving the document on the “C” drive or the HOME drive ensures that a clean template is available every time a new SOP is created.

II. **Creating a New SOP**

- A. Header Section
 - 1. Document Heading - Do not modify “Administrative Standard Operation Procedure (SOP)” This is a standard heading that does not change.
 - 2. SOP Title - Highlight over “Enter SOP Title” and type the SOP Title
 - 3. Version Number
 - a. If creating a new SOP, no change is made. The default Version number is automatically set to 1.
 - b. If updating an existing SOP, highlight the “1” to the right of “V.” and type the appropriate version number in the highlight field.
 - 4. Effective Date – Click anywhere on “Click down arrow for calendar.” The down arrow appears to the right; click on the down arrow and select an effective date to populate the field.



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B. Main Section Headings

1. The Main Section Headings are pre-formatted and are not to be changed.

NOTE: If the SOP author desires and justifies adding additional sections to the SOP, add new section headings by placing the cursor after the heading the new heading is to follow and pressing enter. Type the new section heading title here.

C. Document Sections

1. Adding content to the SOP.

- a. Replacing pre-filled default content in a section.

- 1) Highlight over pre-filled text and type in new text. (Ex. Highlight over “Purpose #1” and type “The purpose of this SOP is to instruct staff...”)

- b. Adding additional content to a section.

- 1) Place the cursor at the end of the last statement in the section and press enter. Type new text.

- c. Adding subtext to existing content in a section.

- 1) Place the cursor at the end of the existing statement that the subtext follows and press enter and then tab. Type new text.

- d. Removing pre-filled default content from a section.

- 1) Highlight the content to be removed and press “Delete.”

2. Adding hyperlinks to the SOP.

- a. Pre-formatted hyperlinks

- 1) Text that reads “Return to the beginning of SOP Title” is included at the end of each section of the SOP Template. These are pre-formatted hyperlinks to the top of the document.

- a) Highlight over SOP Title and type in the actual title of the document after each document section.

- b. Optional hyperlinks

- 1) Hyperlinking to a website.

NOTE: When linking to a website, it is recommended that the displayed text for the hyperlink is a reference to the website and not the actual URL.

Example #1: the display text for a link to the PORT should be [The PORT](#) , rather than <http://dcssmadcaprod/>.

Example #2: the display text for a link to the DES Intranet HOME Page should be [DES Intranet HOME](#) instead of <http://intranet.azdes.gov/default.aspx>.

- a) Highlight over the name of the website in the text and right click.

- b) Select “Hyperlink” from the drop-down menu. The “Insert Hyperlink” dialog box opens.



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- c) Under “Link to” select “Existing File or Web Page.” The text that is highlighted will appear in the “Text to Display” field at the top.
 - d) Open a web browser and navigate to the website that is being hyperlinked. Select and copy the web address from the browser bar at the top of the page.
 - e) Paste the copied web address into the “Address field” at the bottom of the hyperlink dialog box and click “OK.”
- 2) Hyperlinking to another document.
- a) The procedure for hyperlinking from one document to another varies based on the location of the document being linked. Consult with Policy for direction on linking to documents.
- 3) Hyperlinking to a location within the same document.
- a) Creating a bookmark.
 - i. Single click just left of the beginning of content being bookmarked, this is the insertion point.
 - ii. From the “Insert” menu at top of the page, select “Bookmark” from the “Links” section. The Bookmark dialog box opens.
 - iii. In the “Bookmark” field at the top, type the word adjacent to the insertion point.
(Example: If bookmarking “b) Creating a Hyperlink to a Bookmark” click just left of the word Creating).
 - iv. Click “Add.” The bookmark is added to a set of bookmarks for this document.
 - b) Creating a hyperlink to a bookmark
 - i. Highlight over the text that will link to the bookmarked location in the document and right click.
 - ii. Select “Hyperlink” from the drop-down menu. The “Insert Hyperlink” dialog box opens.
 - iii. Under “Link to” select “Place in this Document.” The text that is highlighted appears in the “Text to Display” field at the top and any bookmarks that are created appear in the box.
 - iv. Click on the desired bookmark from the list and click “OK.” A hyperlink is created to that bookmark.
- 4) Hyperlinking to an email address.
- a) When an email address is entered as content in a document a hyperlink to a new email is automatically created.