



What to Use to Create a Manual:

- Microsoft Word or OneNote. Choose/update based on preferences and what can work best for your department.
 - Word: One large document which includes an index/table of contents.
 - OneNote: One notebook which has sections and subpages per topic.
 - Using either format could mean linking to other documents created such as process/workflows or internal job aids.
- Visio for process/workflows.
- Other tools/programs which the department prefers!

Contents of an Operations Manual:

- Overview of the department
 - The department's function, high level organization, and roles of the department.
 - May or may not include department's mission, values, etc.
 - May include names and contact information of those in the department – this information may be linked/included in.
- Department internal expectations:
 - Office hours, how to request off (email manager, a form, or just through HRS?), how to notify for unplanned absences (direct supervisor, one/primary department phone number, email/phone/text??), and more.
- Internal onboarding logistics
 - Internal shared networks/Teams/SharePoint locations and purpose.
 - How to obtain access to specific/unique programs/systems the department uses.
- Branding reference/linking to department branding information.
- Customer service expectations for the department.
 - In-person, on the phone (standard greeting for department?), and via email.
- Commonly asked situations/FAQs (if applicable).
- All department processes/workflows of how to complete work.
 - Processes/workflows may be made in Visio or using another process creator. Link to workflow locations or use screenshots for small processes.
 - Processes can also be bulleted or numbered lists.
 - Job aids – when processes are electronic and screen shots are helpful to complete a process, job aids are most effective.
- Checklists or forms created and used for internal processing within the department.
- Explanation of department forms used – purpose, how to update/or obtain updated forms, how to complete/review (may be a job aid), etc.