



# BUSINESS PROCESS DOCUMENTATION (BPD)

[INSERT PROJECT NAME]

## NOTES FOR THE AUTHOR

1. *This Business Process Documentation (BPD) Template can be used on projects that involve defining As-is and To-be business processes.*
2. *You may find it neater to create one document per process*
3. *Customize the document for your use by removing the sections and placeholder text that contain explanations; they have either been placed in square brackets - [] or highlighted in green; this template can be adapted to suit the style of your project and accommodate the level of detail you need.*
4. *Text contained within square brackets or highlighted in green (including this section) have been provided for the purpose of clarity and should be removed before submitting the document for review.*
5. *To update the Table of Contents, right-click and select “Update field” and choose the option, “Update entire table”.*
6. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the section headings are heading 1 and heading 2.*
7. *This template can be used in conjunction with the following templates which are available at this [link](#):*
  - a. *Business Process Analysis Questionnaire (BPAQ) – A compilation of 35 key questions for arriving at a comprehensive definition of As-is and To-be business processes.*
  - b. *Business Process Functional Specifications (BPFS) – Provides a starting point for business analysts looking to create standard and comprehensive requirements specification documents.*
  - c. *Business Rule Documentation & Questionnaire (BRDQ) – Provides a guideline for channeling discussions at elicitation events (workshops, focus groups, interviews, etc.) to focus on questions that trigger stakeholders to think about existing processes and the business rules that should be adhered to.*

## Business Process Documentation

**DOCUMENT TITLE:** *[This should show the name of the document and can be used for identifying it when stored in a repository.]*

**PROCESS NAME/TITLE:** *[This should show the process to be defined. Provide the full name of the process here and it should be in the form of "Verb + Object", e.g. Apply For Leave]*

**PROCESS VERSION NUMBER:** *[Insert version of process to be defined. Examples of version numbers are 1.0, 1.1, etc. You may increase the version number as the document is reviewed]*

**PROCESS ANALYST/AUTHOR:** *[Insert name of analyst/author. This is the name of the main analyst in charge of analyzing the process or preparing the document for review. If the document is for an external organization, you should include your company name & logo.]*

**ASSESSMENT DATE:** *[Insert date the process was assessed.]*

**STATUS:** *[The status of the document can be draft, pending review, final, released, etc. It helps anyone reviewing the document to know whether it has been approved or not.]*

**ISSUE DATE:** *[Insert date document is to be issued for review.]*

**VERSION NUMBER:** *[Insert version number of document. Examples of version numbers are 1.0, 1.1, etc. You may increase the version number as the document is reviewed and commented upon.]*

**DATE LAST UPDATED:** *[Insert date the document was last updated. This will help reviewers to know how recently the document was modified.]*

**LOCATION/FILE PATH:** *[Insert details of where the file is located. This is where stakeholders can go to confirm if they have the latest version of the document, it could be a cloud repository or a network drive that is accessed through user accounts and passwords.]*

**PREPARED FOR:** *[Insert name of client]*

*[Insert Client's Address, if this document is being prepared on behalf of client.]*

*[Insert Client Logo or Banner, if applicable. The client logo may also be placed in the footer or header section.]*

[Insert Process Name]

[Issue Date]

[Version No.]

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