


Templates download/IMS Documents

This well-designed template set is our solution for managing controlled documents with BlueSpice. It enables you to organize the documents for any process-oriented quality management approach with little effort.

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Process descriptions

New page

Page	Business unit	Process owner	Approval state	Valid until	Status
Contract process	Company, Project Management	Andrew Hayes	Approved	20. Juli 2021	
New customer management	Project Management, Sales	Margarie Castillo	Approved	13. April 2022	
Sales process	Company	Carlos Olson	Approved	8. Mai 2021	

New customer management

Last edited 15 minutes ago by [MLR](#)☆ Watch 🔒 This page is approved

Document type:

Process description

Document ID:

1312

Assigned standards:

ISO 9001:2015 - 8.1 Operational planning and control

Process owner:

[User.Mlink-rodrigue](#)

Roles affected:

[Office Manager](#)

Business unit:

Sales, Project Management

Approval state:

Approved (Version: 62)

Approval by:

[MLR](#)

Approval date:

16:30:34, 19 July 2021¹

Valid from:

February 1, 2021

Valid until:

April 13, 2022

Internal audit due:

May 27, 2021

edit

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Purpose / goals

Why is this process necessary? Provide a brief summary of the purpose of this process.

Predecessor

Process that precedes this process.

Recipient

Process that follows this process.

Process steps

R=Responsible party; P= Participants in the process

Input (resources)	Steps	Work instruction	Output (deliverables)	R	P
what is needed to start this step?	name or brief description of the process step	related instructions	result of this step	who?	who?

Included templates

This set contains the forms, templates, and overview pages for the following document types:

- Process description
- Work instruction
- Role definition
- Audit report

Supported norms

Out-of-box, the following standards are supported:

- ISO 9001:2015
- ISO 14001
- ISO/IEC 27001
- ITIL 3/4

These standards can easily be expanded or replaced by other standards.

Importing the template files

Detailed instructions for importing and using the template set are included in the archive file (.zip) as a PDF.

Screenshots

Role definitions

[New page](#)

Page	Role description	Role owner
Product manager	Planning, coordination and control of the products and services to be marketed and sold	Mary Short
Project manager	Operational planning and control of the project to achieve the project goals.	Alice Mikowski
Support level 1 associate	Processing of all new support inquiries and decision on the escalation route.	Mark Gabelberger, Anna Klein, Joseph Solinger

List of role definitions

Process descriptions

[New page](#)

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List of process descriptions

Work instructions

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Page	Business unit	Process owner	Approval state	Valid until	Status
Closing a customer account	Sales	Andrew Hayes	Approved	May 26, 2021	✖
Writing an offer	Sales	Margie Castillo	Approved	June 30, 2022	✔

List of work instructions

Audit reports

[New page](#)

Page	Audit status	Auditor	Audit execution date	Audit planned date	Status
Project management	open	Maria Oppermann		July 29, 2021	✔

List of audit reports

Product Manager

[New page](#)

Role owner: Mary Short

Role description: Planning, coordination and control of the products and services to be marketed and sold

Responsibilities

List of individual responsibilities that are assigned to this role within the organization.

Type	Responsibilities
Type 1	List of responsibilities in this area

Authorities

List of authorities that are specifically assigned to this role.

Related pages

- [Contract process](#)
- [New customer management](#)
- [Sales process](#)

Template for a role definition

Closing a customer account

[New page](#)

Assignment type: Work instruction

Assigned owner: Andrew Hayes

Approval state: Approved

Valid until: May 26, 2021

Assigned process: Closing a customer account

Purpose / Goals

Why does this process exist? What is the expected outcome?

Assigned process

Which current process produces the work instruction?

Work instruction

Responsibility	Step	Procedure	Related tasks
Who completes this step?	Step 100	Initiate and confirm during the step	person involved physical tools

Template for a work instruction

Template IMS Process description.png

Template for a process description

Example audit report

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Audit title: Example audit report

Audit status: open

Auditor: Maria Oppermann

Audit execution date: July 29, 2021

Audit planned date: July 29, 2021

Considered aspects of the organization:

- 1. General information
- 2. Scope of the audit
- 3. Objectives of the audit
- 4. Resources
- 5. Risks
- 6. Opportunities
- 7. Non-conformities
- 8. Corrective actions
- 9. Follow-up

Conclusions

Individual results:

Conclusions:

MR analysis:

Signatures:

Template for an audit report

Edit IMS Process: IMS:Contract process

Decompose type	No value is set automatically
Decompose to	<input type="text" value="001"/>
Version	No value is set automatically
Roles affected	<input type="text" value="x Office Manager"/> <input type="text" value="x CEO"/>
Business unit	<input type="text" value="x Company"/> <input type="text" value="x Project Management"/>
Assigned statistics	<input type="text" value="001 IMS:2015"/> <input type="text" value="x"/> <input type="text" value="1.2 Organisational roles, responsibilities and authorities"/> <input type="text" value="x"/>

Process parent	<input type="text" value="Financial mgmt"/>
Approval by	No value is set automatically
Approval date	No value is set automatically
Valid from	<input type="text" value="01/06/2015"/> <input type="text" value="30"/>
Valid until	<input type="text" value="30/05/2017"/> <input type="text" value="30"/>
Internal audit due	<input type="text" value="01/06/2015"/> <input type="text" value="30"/>

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Example of an edit form