Pathworks Procedure Authoring Standards

Author: Erik Cummings

Description:

Audience:

    This procedure outlines the Authoring Standards as defined by the Pathworks Implementation Working Group on 30 Jun 2006. These guidelines are intended to allow for the most flexible yet organized and consistent usage of Pathworks within the Stanford IT Services environment.

    This procedure can be referenced at any time, and it is intended that it be "required" for all new Pathworks users to complete prior to being authorized to create new procedure documents. When finished with this document, the user should be able to create new procedures and categories which fall in line with the structure defined for IT Services by the Pathworks Implementation Working Group.

Prerequisites:
    <NONE>

Procedure Steps:

1. **<u>Procedure/Category Naming:</u>**

    1.1. Use spaces and correct/appropriate capitalization in procedure names to make searching easier. Remember - procedure names are not file names!

        1.1.1. GOOD: "Locating Service Numbers in Pinnacle"

        1.1.2. BAD: "locating_service_numbers_in_pinnacle"

    1.2. Avoid words like "Procedure" "Process" and "Steps" in the name of the procedure.

        1.2.1. GOOD: "Restart SMTP Relay Service"

        1.2.2. BAD: "Restart SMTP Relay Service Procedure"

    1.3. Always include the name of the functional system in the procedure name even though it will appear in the category name. This will make searching for procedures easier.

1.3.1. GOOD: "Reboot AMCOM Servers"

1.3.2. BAD: "Reboot Servers"

1.4. Use group names and categories already established within Pathworks wherever possible.

- **Categories** refer to the directory structure under which your procedures will be saved and will be added by the Pathworks Administrator as needed.
- **Group Names** are used to assign authority and access and are managed by the application administrator. When asking for a new group to be created, please consider whether an existing one will work.

1.5. Names of procedures should indicate the goal or actions contained in the procedure (i.e. "Restart httpd on www.stanford.edu", "Reboot AMCOM servers").

Wherever possible, they should involve active-voice verbs (avoiding passive voice).

1.5.1. GOOD: "Generate Monthly PCG Report" (this is active voice)

1.5.2. BAD: "Monthly PCG Report is generated" (this is passive voice)

1.6. Don't use abbreviations in procedure names unless they are defined in the Procedure Vocabulary document.

2. **Category Structure ("Directories")**

There are 2 types of procedures in Pathworks--those related to services (whether internally or externally provided), and those related to the internal working and management of the groups themselves. The procedures in the latter category are categorized under "*group/orgname/groupname*" (reflecting the proper Organization Chart), while those in the former category are categorized under "*service/servicename*".

2.1. *service/AMCOM* contains all procedures related to the operation, maintenance, troubleshooting, and management of AMCOM. Some examples in this category are below:

- Reboot AMCOM Servers
- Maintain and Update AMCOM Oncall Schedules
- Shutdown AMCOM System
- Build an AMCOM Workstation

2.2. *service/ITS/SCS/OPS/PCG* contains procedures for the operation and management of the Production Control Group. Some examples in this category are below:

- PCG New Hire
- PCG Termination
- PCG Requesting Time Off
- Generate Monthly PCG Report

3. **Description** should list the functional groups which generally perform the procedure and the goal of the procedure.

3.1. The end state of the procedure should be spelled out in some detail.

3.2. If applicable all affected systems should be listed.

4. **Prerequisites**

These are optional, but sometimes helpful requirements which must be met prior to execution (or completion) of this procedure. For prerequisites, please consider whether you want the user to interact w/ this step every time they run the procedure. If it is obvious they need some software installed, or clear that they need Administrative access, then perhaps these items should not be listed in the prerequisites at all.

4.1. What software do you need to have installed and/or running?

4.2. What access privileges do you need on any system you will touch as part of this procedure?

4.3. What other procedures are prerequisites (either one-time or every-time) for this procedure?

4.4. What buildings or access-controlled doors do you need to finish this procedure?

5. **Steps**

Please use the Procedure Vocabulary document guidelines to describe elements in a procedure.

5.1. **Use of Images**

There are several methods to insert images within a procedure. This section recommends when to use each method. Please note, it is best to use images only when they are required to provide clarification of a step.

5.1.1. Do not do a screen capture for every step.

5.1.2. Always crop images to only display the necessary portion, and use appropriate text near the image.

5.1.2.1. GOOD: Click on the icon.

5.1.2.2. BAD: Select the "day view" icon.
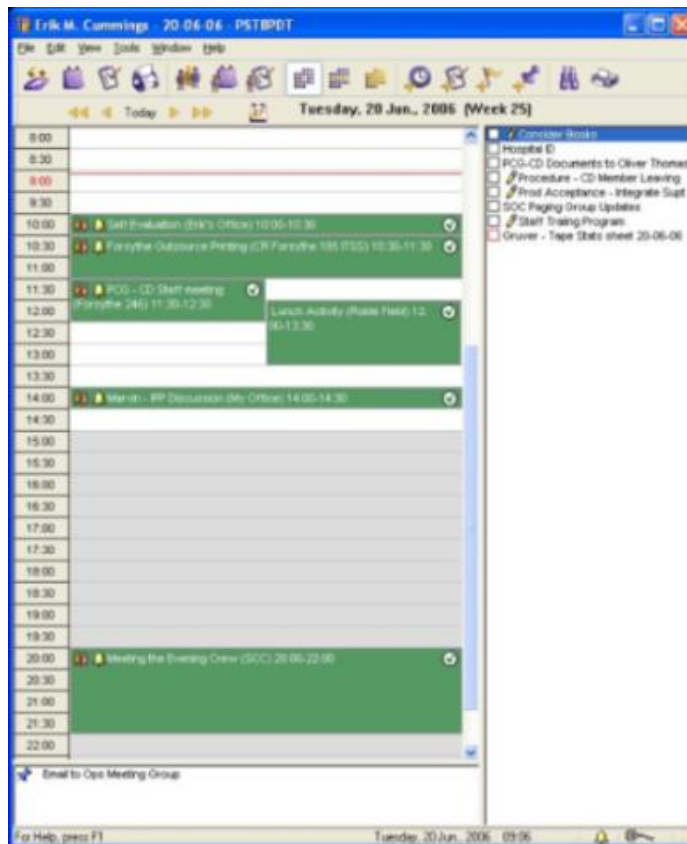
5.1.3. Make use of Circles/Arrows/Text on captured images to highlight specific areas of interest.

5.1.4. If you need to reference an image which will take more than a quarter of a page, and the image needs to be presented in its full size for clarity of the step, you can re-size the image (within the step) after inserting it. This results in the creation of an icon which can be expanded "for more detail." When using this method, add a note, "Click Image for more detail", or similar text, next to the image.

5.1.4.1. GOOD: (Continuing the examples from Step 5.1.2, if location of the icon were a concern, you could do this:)
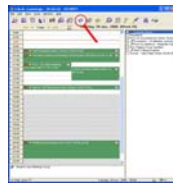
(Click on the image for more detail)

5.2. **External References**

There are three methods of external reference which are described below. Please carefully consider which is most appropriate in a given situation.

5.2.1. Procedure References in required steps should only be used when absolutely necessary (as an prerequisite procedure that must be performed exactly every time). This forces the user to interact with each step of the referenced procedure.

5.2.2. Optional Procedure References are preferred in most cases, especially for any sub-procedure (e.g. software install) that isn't strictly necessary each time the parent procedure is run. In this case the user would be allowed to "Skip" the optional step, or choose to execute it and follow/interact with each step.

5.2.3. URL's should not be used to call to another Pathworks procedure--use an Optional Procedure References instead. Embedded URL links should be used for any reference webpage outside of Pathworks.

NOTE: The best method for creating a URL is to type your link text, e.g. "Stanford Home Page", then highlight that text. Right click on the highlighted text and select insert > Hyperlink (URL). In the box provided, insert the actual URL/link text (http://www.stanford.edu). Your result will be:

Stanford Home Page

5.3. Be aware of the audience of the procedure (i.e. the functional group that will be performing the steps). Do not assume expertise and/or privileges that the staff may not have. Check with the manager of the relevant functional group if you are unsure.

5.4. Write steps as imperative, positive statements and use active voice (e.g. Do this, do that). Only use a negative statement when there is no clear positive statement that expresses the same action.

5.5. Follow standard English grammar and spelling.

5.6. Use arabic numerals (e.g. 1,2,3...), rather than spelled out numbers. Although this sometimes violates standard English grammar, it makes procedures more clear and easier to follow.

5.7. Be concise.

5.8. Use bold type, italics, and other emphasis markings sparingly.

5.9. **Substeps and Hierarchical Process Flow**

5.9.1. Each step or sub-step should represent a discrete action (command issued or action taken).

5.9.2. Each completed discrete action should result in a check-off.

5.9.3. Use of a hierarchical structure in steps is preferred. A step should signify a task, sub-steps should signify the actions needed to complete that task.

5.10. Conditional steps should use the following format: **IF WHEN {NOT} THEN IF NOT** . Multiple **IF**'s can be **AND**ed together. All conditional terms should be in bold type.

5.11. For physical location information, use building names (Forsythe Hall), floor (2nd floor), room number (Forsythe

246), and rack location if applicable. Do not use colloquial names (Abdi's Area, Phil's Cube).

6. **Vetting/Production Rollout of procedures**

6.1. All procedures to be put into production must be approved by both the relevent SME and the manager of the affected functional group. The manager of the functional group is responsible for ensuring that the information is accurate, and for performing the actual "push" to production.

6.2. The manager of the functional group, as well as the Pathworks Administrator, are responsible for enforcing these style guidelines.

6.3. The Pathworks Administrator is responsible for creating new categories for functional groups, topics, or services. Procedure authors are responsible for placing each new procedure in an appropriate category.

> NOTE: If an appropriate category does not exist, the author should advise the Pathworks Administrator (via HelpSU) and the manager of the affected functional group in order to discuss creating the new category.

7. **The Use of Comments**

7.1. If, while executing a procedure, an error is noted or there is other information which should be communicated with the procedure owners, enter a comment using the "Feedback to the Owner" function.

> NOTE: These comments may be seen by all owners of the procedure.

7.2. Reference the procedure name and step number in any correction comment.

7.3. Explain the effects of the mistake in the procedure in any correction comment.

7.4. "Public Comment" should be reserved for instances when serious repercussions could arise if the "new" information is not available immediately.

> NOTE: Public comments may be seen by anyone who views, executes, or manages that procedure.

8. **<u>Maintenance of Procedures</u>**

       8.1. Each procedure must be reviewed by the author or relevant SME every 3 months. The Pathworks Administrator is responsible for notifying authors and SMEs that their procedures are up for review.

       8.2. If a user finds a problem with a procedure, they should submit a comment to the author explaining the problem. The author is expected to evaluate the feedback and reply with its intended disposition to the person who submitted the comment.

Created on 7/12/2006 3:53:09 PM