| **File name** | Procedure for creating procedures |
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# Introduction

This document is a walkthrough for someone who is writing a new procedure. It describes basic steps which need to be taken before, during and after writing a new procedure.

# Goals

When making procedure keep in ming that the purpose of the procedure is that:

1. anyone can execute it without asking for help or additional explanation.
2. it can be executd quickly, easily, and efficiently by anyone.
3. procedure must be practical, well organized, easy to follow, short and concise, wihout content that is not relevant to execution of the procedure.

# Importance of Procedures

Procedures are not just an essential part of the business – they are the business.

Procedures are agreements and consents within a company about how things should be done in the most efficient and secure way. They are created based on experience, creativity, learning from mistakes and by **constant analysis and improvements**.

Constant improvements of the procedure are mandatory.

Deviation from the procedure is possible in **special cases,** however only after reasons and risks are assessed by the management and consent is reached within the team.

It is possible that sometimes it is not clear why procedures are the way they are. If in doubt – please ask and let's add that explanation in the procedure document. We will all benefit from fully understanding why things should be done a certain way.

We create and keep procedures only when we need them. If you identify a procedure that, in your opinion, is not needed, please send an email to the management with the explanation. We **want** to remove any excess overhead (unnecessary files).

***Well-defined procedures make a difference between a software company and a group of hackers*** (taken from IT magazine).

***A developer is a formally trained programmer who doesn’t just solve problems but does so in a structured and disciplined way that was probably learned formally.*** (taken from [link](https://danielmiessler.com/study/programmer_hacker_developer/))

# Need for a new procedure

**Procedures save time and save us from falling apart on large projects and large teams. They have to be created for every repetitive task.**

Before creating a new procedure take the following steps:

1. Consult with members of the team that your procedure is related to and in special cases Zoran to see if there is a need for some procedure or to see if similar procedure already exists.
2. If the procedure already exists, ask the related team’s members to give you the location of that procedure.
3. Read the procedure to see if that is what you are looking for. If it’s not clear to you or if that procedure didn’t help you at all, consult again with the related team’s members if there is a need to create a new procedure.
4. Create a new procedure in predefined Word template located at (youtestmedoc\trunk\Document Templates)

# Procedure construction

**Rule #1:**

Use standard document template in SVN:

\youtestmedoc\Document Templates\

Choose most appropriate template – if procedure is for client, then choose one with cover page.

**Rule #2:**

Do not change formatting in document (fonts, tables, headers, line spacing). If you do that you are defeating the purpose of template and creating a unnecessary work for somebody who would need to fix it.

**Rule #3:**

Use MS Word properly – do not use it as a typewriter.

Refer to MS Word best practices document:

\youtestmedoc\Procedures\Technical Procedures\YTM MS Word Best Practices.docx

**Rule #4:**

Document must be in English unless there is specific reason why it has to be in another language.

**Rule #5:**

Do not copy and paste information from other documents. If we do that we are creating one more place where we have to maintain up to date information. Instead put the link to the document and say something like “*you can find instructions in this document*”.

When you open the Word template for a procedure, pay attention to template header. In template header define the name of procedure. Make it clear and straight to the point. In author field enter your name, and in field Confidentiality identify if the procedure is for internal or public use.

The next section is the introduction to the procedure. In this part in a couple of sentences you need to describe what is the procedure about. Keep it clear as the title of procedure, so the reader can see right away if the procedure will be of help to them. It could save a lot of readers’ time.

After introduction proceed to the procedure itself. Also try to keep it as clear and simple as possible. If parts of procedure that you’re writing is related to some existing procedures, point the reader to those procedures.

Also, try to use visuals (images, tables, infographics, diagrams) to explain something. Words are useful, but picture is worth of thousands of words and reader will remember it rather than bare text.

Another important thing to mention is automation. Where possible, point the reader to an application/script/website which solves particular step of a procedure rather then writing the explanation of the process within the procedure.

# Procedure revision

After you finish the procedure, remember to save it with its new name at a proper location on SVN (in case you save it over the Word Template, close the document, make a copy of it at your local disk and rename it, delete the file from the SVN and then go right click on SVN trunk folder/SVN update to bring back the original Word template).

When you save the procedure at the proper location don’t forget to commit it to SVN (right click on folder containing your procedure/SVN Commit).

**Procedure needs to be tested** by persons (at least 3) with similar skill set to persons that are likely to use the procedure.

If procedure can be executed independently by at least 3 people just by following the document, then the test was successful and hence procedure document is useful.

“There are documented, tested procedures and there is storytelling. There is no use of storytelling in IT”. - *Zoran*

When you get the feedback and make changes (if necessary), and **only** if the procedure **is extremely important** send it to Zoran as well (for example if the procedure requires high-level input for development, clients, customer support, etc.).

## Example of the mandatory Procedure testing

This table has to be placed at the begging of the document just before table of context.

| **Test Date** | **Tested by** | **Comments from Testing** |
| --- | --- | --- |
| **23-Jan-2018** | Dragan Petrovic | Step #3 in procedure is not clear. More details are needed.  It is not clear what O/S user need to be used to perform task.  It is not clear is this procedure for Linux or Windows.  I could not complete procedure independently (without help or asking additional questions). |