Software Writing Sample - Procedural

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Background

The [Application] provides a cloud-based solution for managing capital projects, facilities, and assets of any size in every vertical market. It combines cost management and control, document management, schedule and resource management, fund management, and more.

Prior to the 22.10 upgrade of the [Application], users were not able to use the [Application] to analyze their construction-project performance. With the 22.10 release of the application, the users could analyze their project performance by way of using the newly embedded feature called: "Earned value management and earned value analysis."

Audience

Users responsible for calculating earned value and related measures (planned value, actual cost, variances, performance indexes, and at completion values) for their projects.

Administrators responsible for setting up and configuring the features and modules in the administration mode the [Application].

Designers responsible for creating and publishing shells, managers, workflows, and business processes.

Developers responsible for integrating [Application] with external systems using web services and operations.

Scope

My task was to update the user guide by:
- including information about the concept of earned value management and earned value analysis and
- writing the procedures for using the feature.

To gather the pertinent information, I used FRDs (Functional Requirement Documents), interviewed product management, curriculum, and development team members.

About software procedural writing sample

The following software procedural writing sample is an excerpt from the user guide that included the procedures for using the EV Analysis feature.

Note: To prevent proprietary issues, I have removed the original formatting and changed the company name, document name, product names, licenses, trademarks, components (including third-party components), applications, guides, codes, and sample codes where applicable.

Steps for setting up earned value analysis

Before you begin

The instructions and information presented in this section is based on an out-of-the-box setup of [Application] and before being customized by the system administrator. Contact your system administrator, if you require assistance with identifying any of the elements mentioned in this section.

To perform earned value analysis on your project, you need to ensure that you have the following project-performance permissions:

- New
- Edit
- View
- Delete

Security for developers - API security

With APIs, developers can use some of the data and functionality of [Application] outside of the limitations—and relative safety—of the [Application] environment. This opens many possibilities but as with any situation where data can move in potentially unpredictable ways, it presents risk. For more information on integration, refer to the [Application] Integration Interface Guide.

Note: Only the Cost-loaded and Resource-loaded projects are used for earned value analysis. Duration-based project cannot be used for earned value analysis, but it can be included in an activity sheet, a duration-based project cannot be used for earned value analysis.

The steps required for setting up earned value analysis are as follows. Once you complete a step, proceed to the next step, based on the following order:

A. Set up integration parameters
B. Import
C. Fetch
D. Link

The following topics describe each step in detail.

A. Set up integration parameters

This section explains how to set up integration parameters in [Application], Gateway, and [Application A].

To set up integration parameters in [Application], Gateway, and [Application A]:

1. Open [Application].
2. Go to your **Company** tab and switch to **Administration** mode.
3. From the left-hand navigation pane, click the **Integration** sub-module to open the **Integration** log window.
4. In the Integration log window, click **Select** to open the menu.
5. From the menu select [**Application A**] to open the [**Application A**] **Parameters** window.
6. In the [**Application A**] **Parameters** window click the following options:
    a. **Option A**
    b. **Option B**
    c. **Option C**
7. Click **Save** to close the [**Application A**] **Parameters** window and go back to the **Integration** log window.
8. Repeat steps **4** to **7** to set up the Gateway parameters.
9. In the **Integration** log window click **Save**, click **Commit**, and click **Close** to close the **Integration** log window and go to your **Company** tab.
   At this point you have set up the parameters in [Application A] and Gateway. To verify that your setup has been successful, in the **Company** tab click the **Integration Parameters** option to see [Application A] and Gateway listed. If they are not listed, log out [Application], log back in, and check. If they are still not listed, contact [Company] support at: companysupport@company.com.

B. Import

This section explains how to import [Application A] activities, assignment, and rates.

To import you must first synchronize the applications and then import the activities, assignments, and rates.

1. Open [Application].
2. Go to your **Company** tab and switch to **Administration** mode.
3. In the **Company** tab click the **Synchronization** option to open the **Synchronization** log window.
4. Click the **Source** drop-down menu and select [**Application A**].
5. Click **Synchronize** and wait until the "Synchronization successful" message appears.
   At this point the applications are synchronized. Close the message.
6. From the **Company** tab click **Import**.
7. Follow the prompts to import the activities, assignments, and rates from [Application A] into [Application].
8. *Continued…*

C. Fetch

This section explains how to fetch global roles and resources data from [Application A].

Note: You cannot map the same [Application A] project to multiple [Application] shells.

To fetch global roles:

1. Go to the shell and switch to **User** mode.
2. From the left-hand navigation pane, click the **Activity Manager** module to open the **Activity Manager** log window.
3. The **Activity Manager** log window lists the shell activity sheet and shell-level rate, WBS, and OBS sheets.
4. Double-click to select and open the activity sheet. The activity sheet window shows the activities and assignments data from the linked [Application A] projects.
5. From the activity sheet window click Fetch to fetch data required for roles and resources.
   Similarly the rate sheet enables you to select and fetch data to create rate sheets, if shell-specific rates are required. This creates a shell-level rate sheet with roles and resources that will be used in the shell.
6. *Continued…*

D. Link [Application A] projects to [Application] project

Note: The currency in [Application A] projects must match the currency in [Application] project.

To link projects:

1. Go to the project and switch to **User** mode.
2. *Continued…*