HOW TO USE PROMANADE BASIC

Contents

21 Edgehill Terrace ABERDEEN AB15 5HA UK
*Tel:+44 (*0)1224 325 230 Fax*:+44 (*0)870 094 1916 *Email:* info@mandos.co.uk *Web:* www.mandos.co.uk

UNDERSTAND THE BASIC PRINCIPLES

PROMANADE BASIC is the introductory version of the PROMANADE range of software products.

It enables you to define a complete set of process definitions using deployment flowcharts and the RACI (Responsible / Accountable (or Assists) / Consulted / Informed) methodology.

PROMANADE creates the flowcharts for you – you do not need to drag and drop, or handle pagination, or design your own format.

EDITIONS and FUNCTIONALITY

PROMANADE creates flowcharts for you – you do not need to drag and drop, manage pagination, or design your own format.

All data is held in a single dataset. The system uses a "Role Register" which you define yourself to provide a standard list of Job Titles. See the User Guide for more information.

[There are 3 editions of PROMANADE offering different levels of functionality (see separate sheet). All versions are upwards compatible. The top of the range version is PROMANADE ADVANCED. PROMANADE ADVANCED enables you to define and publish (as a set of HTML files) a complete management system based on process definitions using deployment flowcharts and the RACI (Responsible / Accountable (or Assists) / Consulted / Informed) methodology.]

WHERE YOUR DATA IS STORED

All data is held in a single dataset. The system is based on a number of "registers" or lists – in PROMANADE BASIC**,** Roles (ie Job Titles) - which you define yourself.

OTHER OPTIONS

These notes give an introduction to some of the main features of PROMANADE (see the User Guide for more detailed information).

The software has 3 "views" ("**Easy menu" / "Normal view" / "Extended functions**"). Only the **Easy menu** and **Normal views** are described in this document – see the User Guide for information about the **Extended functions**).

See **HOW TO… GET STARTED / EASY MENU** to start using the software. You can also see sample screenshots of the three "views" at http://www.promanade.co.uk/files/v4/v4_Screenshots.pps.

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GET STARTED / EASY MENU

Open PROMANADE from the icon on your desktop.

It will help to have an idea of how your final system will be structured before you start (although it is not difficult to change your mind at a later stage).

BASIC "REGISTERS"

In PROMANADE BASIC, you have the following "registers" (or lists) available for you to populate as required:

PROCESS GROUPS and PROCESSES

DEPARTMENTS and ROLES.

As a minimum, you will need to create at least 1 PROCESS GROUP before you can define your first PROCESS.

Define DEPARTMENTS (any logical grouping which will make it easy for you to find a Role) and ROLES to give you the Job Titles required for Role involvement in a process.

When you define a process, you select ROLES from the relevant drop-down lists.

EASY MENU / NORMAL VIEW / EXTENDED FUNCTIONS

The first time you open PROMANADE you will be in the **Easy menu**. At any time you can change to the **Normal view / Extended functions**. The three "views" are designed for:

- **Easy menu**: for the first time user, and for a user who hasn't used the software for some time and who wants to create a new process description
- **Normal view**: for routine functions and everyday use
- **Extended functions**: for less common requirements & for the more sophisticated user.

EASY MENU

The first time you run PROMANADE a new dataset called "**Quick Dataset.mdb**" will be created for you in the "**My Documents / Promanade Datasets**" folder, otherwise the last used dataset will be opened for you. (If the last used dataset has been moved or deleted, you will be returned to the "Normal view" to select a dataset or create a new one)

Enter an **Organisation Name** (this will be shown as a heading on your process descriptions / flowcharts).

All the subsequent screens show you the file path for the dataset in use. At any time if you want to select a different dataset, go to the **Easy menu** page and click the "**Change**" button for "**Data saved here**".

Each screen in the **Easy menu** section has its own guidance notes. Default values are shown where relevant, but you can overwrite them as required.

At any time in the Easy menu, you can select **Normal view** to view the dataset that you have updated and to use the full features of PROMANADE to (eg):

- change the order of tasks within a process
- change a task to be a HEADER task
- print a process using the Excel View (this gives a more professional output for presentations etc)
- add a new Process Group
- move a process to a different group
- move a Role to a different Department.

- DEFINE A PROCESS

Each process must have a unique Reference, and must belong to a Process Group (remember that these can be changed easily using the **Normal view** at a later stage).

You can move through the screens by selecting "**Continue**" or by clicking the required **Step** number.

Select "**Finish**" to: view the flowchart for a process you have defined; add another process; or return to the "**Easy Menu**".

- SHOW FLOWCHART

Select the "**Show flowchart**" button on the "**Easy Menu**" to see a list of the processes in the current dataset (and to select one to view). If you want to edit an existing process, select the **"Normal view"**.

- IMPORT A LIST OF ROLES

If you have a list of Roles (Job Titles) available electronically, you can: select the "**Import list of roles**" button, enter a Department name, paste your list of Role titles and "**Continue**". You can then delete any which you don't want to retain and "**Finish**".

Repeat the steps to add another Department. These Role titles will then be available for allocation when you define your processes (you will also be able to type in additional Roles as you define each process).

USE THE NORMAL VIEW

NORMAL VIEW

To create a new dataset, select the "**New dataset**" button in **System Manager**, select a folder and give the dataset a name (or if you have already defined a dataset, select "**Get dataset**" and browse to it).

For a new dataset:

Go to **List Manager** and highlight "**Process Groups**" in the list on the left.

ADDING A PROCESS

Click "**Add Process group**" and enter a process group name (every system must have at least one process group defined before you define any processes).

Go to the **Process Manager** tab and click the "**Yes**" button to add a process.

Enter a Process Reference, a Process Title and "**OK**". This adds the new process to the list of processes in the "**Select Process**" sub tab in the lower half of the screen.

ADDING TASKS

Go to the **Task Manager** tab. This shows you the first task (already created for you) in the new process. The Task Title and Description are both blank – to change them: either click the "**Change**" button or double click in either the task title or task description fields to open a new window. Enter the required text and "**OK**".

To add another task: click the "**Add**" button and continue.

If you want to re-sequence a task: highlight it in the list of tasks in the "**Task Sequence**" subtab and click the "**Move up**" button until it is the required position.

To "**Add**" a task, select the task you want to insert it after and click the "**Add**" button.

Header Tasks: if you want to define a header task at the start of the distinct stage in a process, enter the task in the normal way (NB. It can be useful to use upper case) and then tick the "**Header**" box in the top left of the window.

You have now listed a series of tasks within the process.

ADDING ROLES

To set up a corporate list of Roles (Job Titles) from which to select the roles involved in this process, see **HOW TO… MANAGE THE LIST OF ROLES.**

If you have set up the required Roles, go to **Process Manager** and select the "**Roles**" subtab. (You can always go back and add a Role later, then continue)

The right hand frame lists all the current entries in the Role Register. Select each role you want to select for the current process and "**Add**" them to the list on the left hand side.

Now go to **Task Manager** and select the first task in the list. Select the "**Roles**" subtab.

Select each role involved in the task from the list on the right and click “**Add**”. Click on the type of involvement in the new window. Do the same for each other role involved in the task.

[Note that you cannot allocate role involvements to header tasks]

To move on to the next task, either: click the **Next** / **Previous** buttons or the “**All Tasks**” subtab. Work your way through the other tasks and select the types of involvement as required.

VIEWING A PROCESS

To see what the process description looks like: go to **Process Manager** / “**Processes**” and highlight the process in the list. Click the “**View**” button to the right. This generates an HTML page which is displayed in your default web browser.

See also **HOW TO… PRINT PROCESS DETAILS**.

EXTENDED FEATURES

See the User Guide – Section 1 (in the **System Manager** tab / **Help** button) for the additional functionality available.

MANAGE THE LIST OF ROLES

Go to the **List Manager** tab and highlight the “**Roles**” entry in the left hand list.

ADDING DEPARTMENTS AND ROLES

You must define at least one Department before you can add any Roles.

Click “**Add Department**” and enter a Department name. [For smaller organisations, we find that a limited number of departments such as “Internal Staff”, “Senior Manager” and “External Bodies” is sufficient.]

To add another Department: highlight “**Roles**” in the left hand list again and click “**Add Department**”.

To add a Role to a Department: highlight the required Department and click the “**Add Role**” button.

To change an entry: click the “**Change**” button or double click over one of the fields to open a new window.

To move a Role to another Department: “drag and drop” it.

A change to a Role name is applied automatically to every affected process.

ADD MORE DETAILS TO A PROCESS HEADER

Go to the **Process Manager** tab. Select:

Process Comments: this can be used for (eg) "Scope and Objectives". To change the terminology: use the "Language" function in **System Manager** (see HOW TO… CUSTOMISE THE TERMINOLOGY**)**

Revision history: select the **Revision History** subtab and "**Add**". You can change or delete items in the history as required. If you publish the system electronically, the revision history is available in the HTML version of the flowchart. "Under Review": every new process is automatically flagged as **DRAFT**, and is shown as such when it is printed or published. Untick the "**Under Review**" flag to "authorise" it.

Process Owner/ Process Approver: this is also accessed throughout the revision history subtab. Click the "**Change**" button and select the required owner from the list. To cancel a selection: select "(none)".

ADD MORE DETAILS TO A TASK

The flow lines on a flowchart are drawn by PROMANADE to connect each "Responsible" role to the next.

To break this flow: tick the "**Do not link to next task**" box.

Branches: the "normal" flow in a process is as described above. If there are circumstances when you would follow a different route:

- select the "**Branch to**" subtab for the task which has the alternative route out

- select the destination task in the right hand list

- click the "To" button

- enter a reason ("xxx") for going this alternative route (this will be printed in the Task Description column of the flowchart in the form "**Go To 1.23 if xxx**").

Decision Gates: If you want to make a task stand out in a process flow, you can use the Decision Gate symbol (selected in the same way as for a branch). This does not create an alternative route but the "Responsible" symbol is replaced with a solid diamond. A comment can still be added.

PRINT PROCESS DETAILS

To see what the process description looks like:

Go to **Process Manager** / "**Select Process**" and highlight the process in the list.

Click the "**View**" button to the right. This generates an HTML page which is displayed in your default web browser.

Be aware that printing from a web browser is less than ideal, so if you want a properly formatted version:

Go to the **Print** tab and select the process from the list.

Click the "**Excel View**" button to get a formatted, paginated version which you can save as a .pdf file if you need to email the process description.

CUSTOMISE THE TERMINOLOGY

Go to the **System Manager** tab / **Extended Functions** and select the "**Edit" Language** button.

To define a language file, click the "**Add**" button. Give it a name to identify the language variation (this will appear in the sidemenu in the published system) and a file name.

To edit the default terminology: select the word or phrase to be edited (the system displays Help text to explain where it is used) and double click the entry (or click over the displayed field) to display a new window.

The list can also be sorted by clicking on the column headers.

You can "**Clear all**" (or "**Clear"** for a selected item) to revert to the default value(s) for all items visible while a filter (see below) is active.

To find all fields using a particular word or phrase, enter the relevant text and click the "**Filter**" button.

You can also "**Import**" a language file (for example, from another user).

If you have defined more than one language file, Click the **"Set" Language** button to select the one required for use.

The selected language is then used for all field names on screen.