

...USE THE “EASY MENU”

The “Easy menu” makes it even easier to define processes. The “Experienced user view” can then be used to review and refine your data – see below.

Open PROMANADE from the icon on your desktop. If this is the first time you have run PROMANADE, you should be in the Easy menu (if you are in the “Experienced user view”, click the “**Show easy menu**” button).

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.

WHERE YOUR DATA IS STORED

All the details you enter are held in a single file (a “dataset”). When you select “**Show easy menu**” you will be asked to name a new dataset (or to select an existing dataset).

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.

(Optional): 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).

DEFINING A PROCESS

Select the “**Define a process**” button. Each process must have a unique Reference, and must belong to a Process Group (remember that these can be changed easily using the “**Experienced user 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 a flowchart for the process you have just defined, add another process or return to the “**Easy Menu**”.

REVIEWING YOUR PROCESSES

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 “**Experienced user view**”.

USING THE EXPERIENCED USER VIEW

At any time in the Easy menu, you can select the “**Experienced user view**” to view the dataset that you have updated and to use the full features of PROMANADE. These are described in the “**HOW TO... USE PROMANADE**” guide. They include the ability to:

- 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

as well as to define file paths for document links, publishing your system electronically and a range of analyses and reports.