

## ENHANCEMENTS in v4.1

(some features are for the **ADVANCED** edition only)

### PROCESS MANAGER

Option added to allow **RTF Checklists** to be generated automatically and published (in HTML) for selected processes. For a selected process, toggle the option on/off as required using the Tick box (in Extended View). Toggling "On" will display the Checklist configuration screen where Tasks can be selected for inclusion, plus other options.

The selected options will be stored in the dataset. The Hyperlink and Responsible Role options will be applied to all Checklists in the dataset (or at least those generated at the same time). If the Checklist option is "on" for any process, the Checklist will be generated whenever the process is published (and regenerated at each subsequent HTML "Publish" to reflect any Role or Document name changes).

### TASK MANAGER

A **second** Task Description ("**Task Notes**") field has been added to enable extra text to be displayed (eg for "checks to be carried out") – see also PUBLISHED SYSTEM below.

You can now **re-sequence tasks** by dragging / dropping multiple tasks (they do not need to be consecutive tasks). The text "*To rearrange the task sequence, drag and drop the task row*" will appear beside the Task list each time PROMANADE is run, but will disappear for the remainder of the session once the feature has been used.

### LIST MANAGER

#### Roles:

Option added to the Change window to enable **documents to be associated with a Role** (eg for a high level Job Description).

Report now includes **generic roles**.

#### Documents:

New button added in the Change window to interface with **document management system(s)** (already done for Hummingbird DM)

For each List: option to create a **.CSV** output file. The button is available in the same situations as the "Print Report" button.

### PRINT MANAGER

#### Processes:

New option (extra button) to select "**Processes Under Review**" only.

**Flowchart / HTML & Excel views:** the new **Task Notes** field can be toggled on/off.

**Excel View:** when making a .pdf from the "Excel view", the **default file name** is now the relevant "process reference".pdf.

**Roles:** Resource and Custom reports are now **sortable** (click on the relevant column heading).

## **PUBLISHED SYSTEM**

### **SIDEMENU**

#### **Organisation Chart:**

The hyperlink (“i”) beside a Role title now shows the **Role Information page** (as in the “Roles” link in the Sidemenu) in a new window. Clicking on a Role title shows the next level on the chart.

This **Role Information page** now includes any associated document links.

#### **Search:**

A **more sophisticated** search now recognises words as well as the previous phrase pattern search. 1- or 2-letter words are omitted from searches unless they are part of a phrase (eg searching for “*pick a*” in “*pick a pocket or two*”, “*picket*” or “*swing a cat*” would get a hit on the first two strings but not the third).

Results are no longer shown in 10-item pages (this gives faster results).

Process Titles on the Process Search page show in a different colour for **processes under review** (per the Custom Colours selection).

#### **Sidemenu reports:**

Option added to make existing reports a single link (already available for Documents/Groups). Some cosmetic changes to improve the way links are shown.

### **PROCESSES**

#### **Flowchart:**

The display of the new **Task Notes** field can be toggled on/off below the Task Description (always shown with Task Description in the STANDARD edition).

A new “**Task Details**” view allows all details of a selected task to be viewed while details for all other tasks are hidden. Click the Task Title of the relevant task to show all Task Details (Task Title, Description, Notes, document links, alternative views, sub-process links, branch to/from links) for the selected task.

An additional “**Checklist**” hyperlink has been added for a published flowchart (for use as eg a “job sheet”). You should flag a process in **Process Manager** as “Requiring a Checklist” – see above. [The Checklist can still be printed in **Print / Processes**]

### **[SPECIFIC USER REQUIREMENT]**

[All flowchart headers in the published HTML will be blank except for roles, legends and column titles if the line **htmlheaderhide=enabled** is included in the **[style]** section of the PROMANADE “config.ini” file (“C:\Documents and Settings\All Users\Application Data\MandOS\Promanade\Config.ini”).

Flowcharts displayed using Process Manager / View, Print Manager / Flowchart / View, Print Manager / Flowchart / Excel View, or the Print link on the published (HTML) flowchart, will not be affected]

And finally...

#### **\*NEW\* SCREENSHOT VIDEOS**

See <http://www.promanade.co.uk/videos> for further guidance with commentary to explain many of the key features.

14<sup>th</sup> October 2010