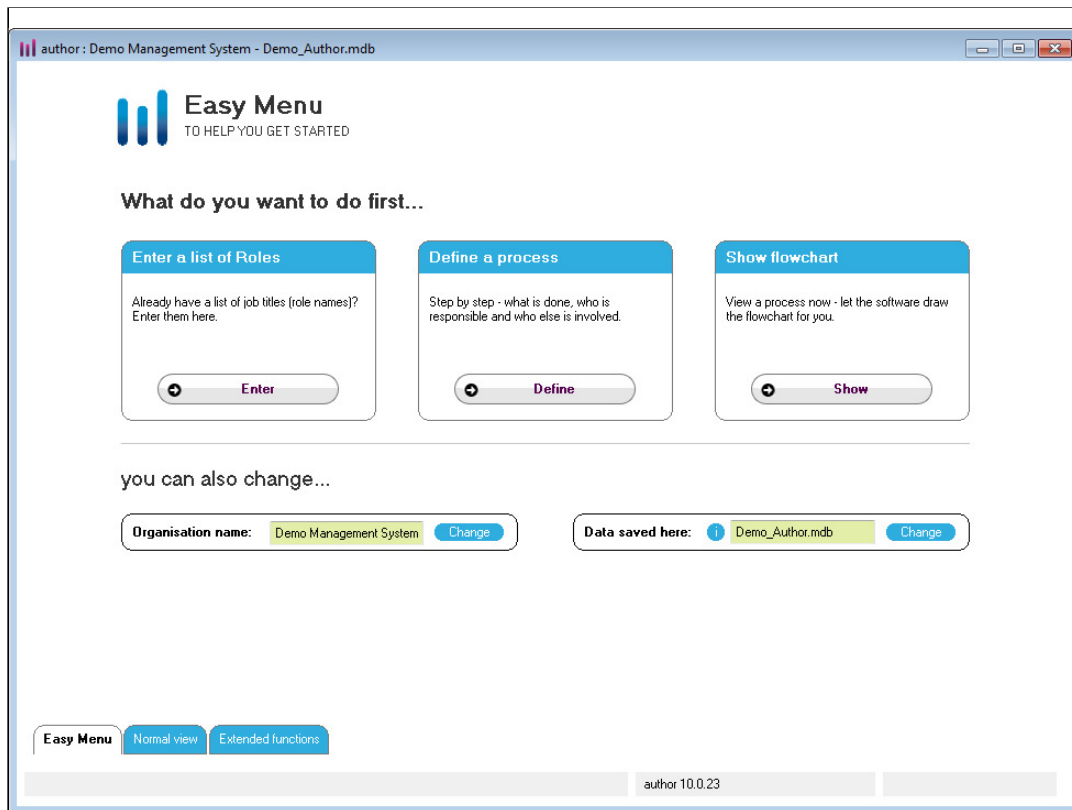




“Using the Easy Menu”



Select the Easy Menu tab at the foot of the screen.

If you have a list of Job Titles which you want to import electronically, you can use the “Enter a list of Roles” tab to save keying them in individually.

If you have opened an existing dataset, any Roles you add here are added to the dataset.

Click “Define” to start to define a new process.

1 Start defining your process here

2 List the tasks

3 List the roles

4 Who is responsible?

5 How are others involved?

Process Reference: QP0001

Process Title: Quick Process 1

Process Group: Quick Process Group

Existing Process Groups

- 1 Planning and Organising
- 2 Getting Work
- 3 Doing Work
- 4 Managing Resources
- 5 Managing People & Relationships
- 6 Reviewing and Improving

Accept the defaults or enter your own values as required.
 Select 'Continue' or click the required screen number above to move through the wizard until you selecte 'Finish'.
 Once the process is defined, you can continue to define more processes.
 The 'Normal view' on the Easy Menu gives you access to the main author functionality to refine your data further.

Continue →

✓ Finish

✗ Cancel

The system will allocate default values, but you can type over them.

If you have an existing dataset open, you can drag and drop data from the list on the right hand side of the screen.

Define a process

1 **Start defining your process here** 2 List the tasks 3 List the roles 4 Who is responsible? 5 How are others involved?

Process Reference: QP0001
Process Title: Quick Process 1
Process Group: 4 Managing Resources

Existing Process Groups:
1 Planning and Organising
2 Getting Work
3 Doing Work
4 Managing Resources
5 Managing People & Relationships
6 Reviewing and Improving

Accept the defaults or enter your own values as required.
Select 'Continue' or click the required screen number above to move through the wizard until you select 'Finish'.
Once the process is defined, you can continue to define more processes.
The 'Normal view' on the Easy Menu gives you access to the main author functionality to refine your data further.

Continue → ✓ Finish ✕ Cancel

Define a process - Quick Process 1

1 Start defining your process here

2 **List the tasks**

3 List the roles

4 Who is responsible?

5 How are others involved?

Seq	What is done?	How is it done?
1.1	Step 1	
1.2	Step 2	- and how you do it...
1.3	Step 3	

Define each task (we suggest 'verb-noun' format for What is done, eg Check the goods) then to add another task

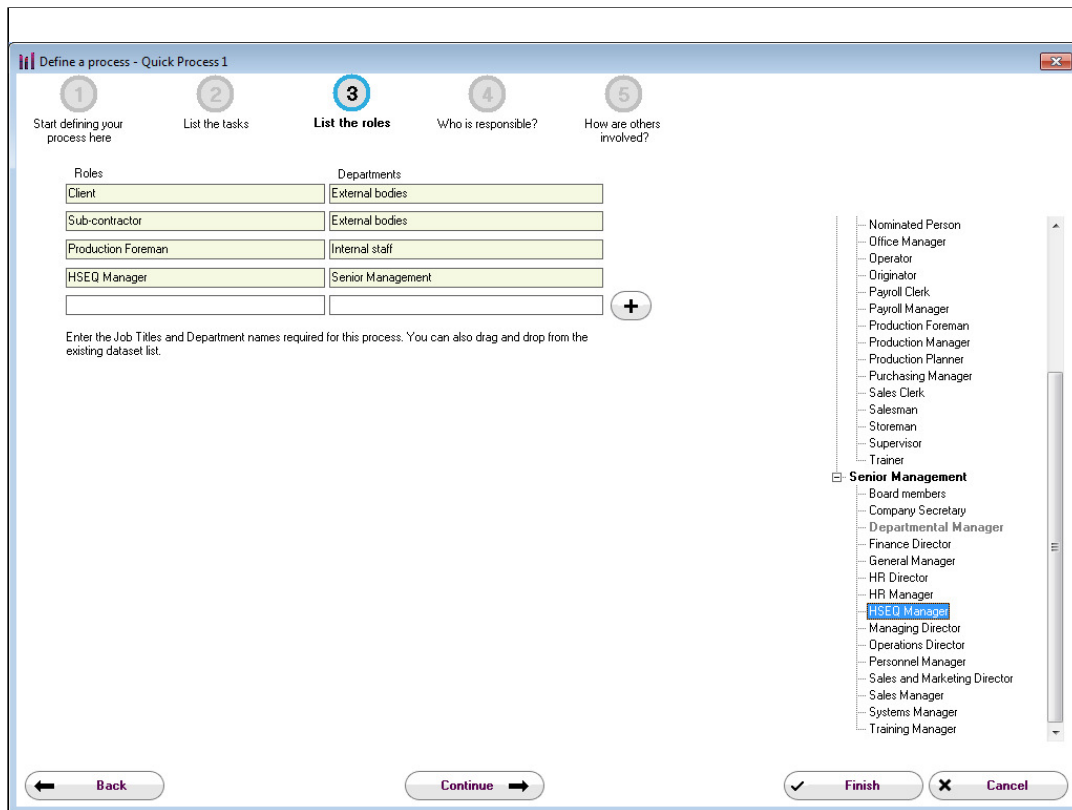
Back Continue Finish Cancel

To use the wizard, click “Continue” or the relevant numbered button at the top of the screen.

Define the tasks in sequence.

Once you have drafted the process, you can then use the “Normal view” functionality to:

- manage the sequence of tasks
- add new tasks
- add header tasks
- add links to supporting documents in the Document Register
- and to other processes.

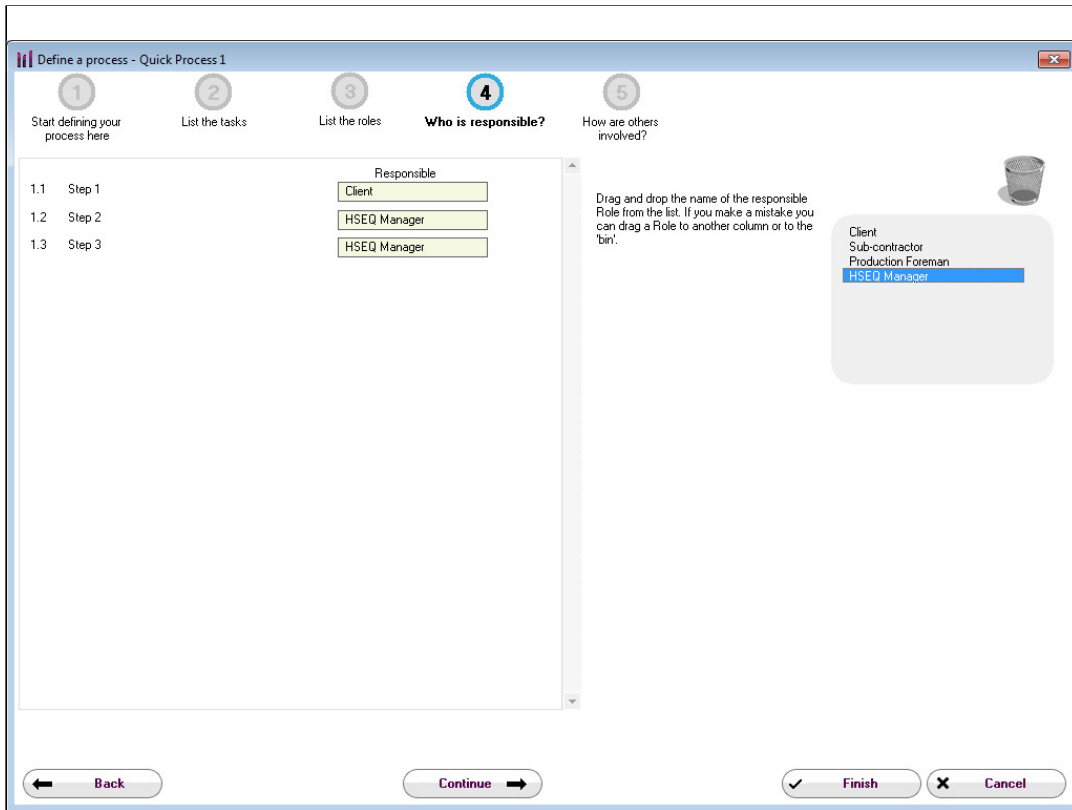


Select the roles involved in the process.

Again, if you have a dataset open, you can select a role by dragging it from the list on the right.

If you want to add a new role, just type it in and it will be added to the dataset.

NB if you are adding to an existing dataset, make sure that the department name is spelt exactly the same as the spelling in the dataset.



For each task, drag the “Responsible” role from the list.

Define a process - Quick Process 1

1 Start defining your process here 2 List the tasks 3 List the roles 4 Who is responsible? **5 How are others involved?**

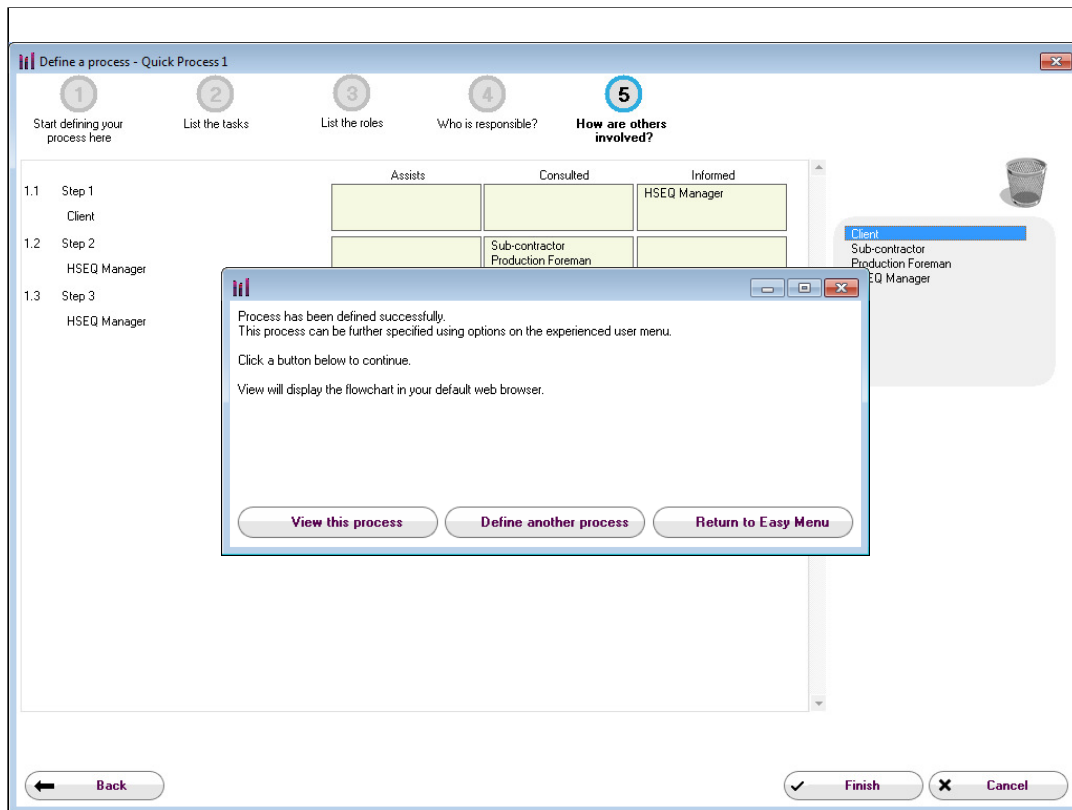
	Assists	Consulted	Informed
1.1 Step 1 Client			HSEQ Manager
1.2 Step 2 HSEQ Manager		Sub-contractor Production Foreman	
1.3 Step 3 HSEQ Manager	Sub-contractor	Client	

Client
Sub-contractor
Production Foreman
HSEQ Manager

Back Finish Cancel

And finally, allocate all the other role involvements.

If you make a mistake, you can drag the role to the “bin”.



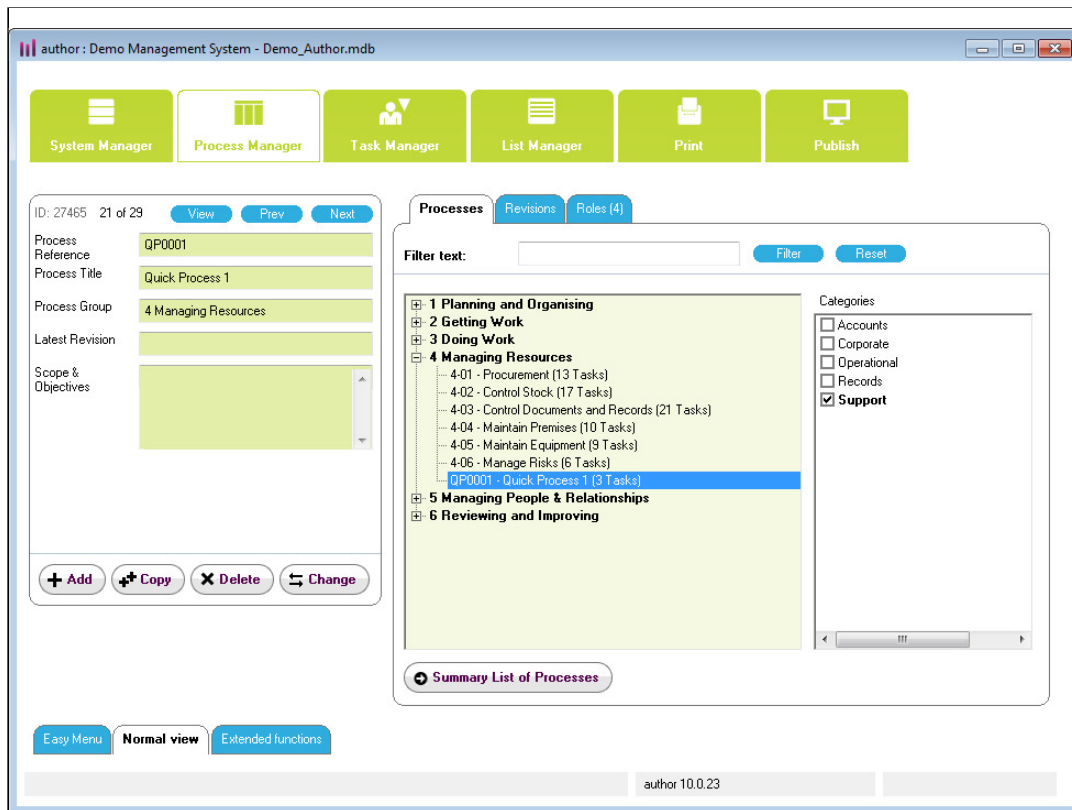
Remember that you can go back through the various screens to adjust details if necessary.

When you are finished, click the "Finish" button.

You can now define another process or click "View this process".

Demo Management System 4 Managing Resources Quick Process 1				Process Ref : QP0001 Revision : Revised : Owner : Approver :	DRAFT!	
Seq	Task Title	Client	HSEQ Manager	Production Foreman	Sub-contractor	Task Description
1.1	Step 1		i			
1.2	Step 2		C	C		- and how you do it...
1.3	Step 3	C			a	
▼ Responsible a Assists C Consulted i Informed ◆ Branch To 🏠 Milestone Printed by author v10.0.23 on 28/01/2014						

Author will draw the draft process for you in your web browser.



If you return to “Normal view”, you will see that the process has been added to the relevant Process Group.

You can now update it as normal.



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