author
STARTER

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HOW TO…

…UNDERSTAND THE KEY PRINCIPLES

AUTHOR STARTER is the introductory version of the AUTHOR 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.

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

All data is held in a single dataset. The system is based on a "register" or list of Roles (Job Titles) which you define yourself.

The following notes are intended to give you an introduction to the main features of AUTHOR STARTER (see the User Guide – Section 1 for more information)

Open STARTER from the icon on your desktop.

EASY MENU / NORMAL VIEW

When you open STARTER, the last dataset used (if any) will be opened for you (a sample dataset will be opened the first time). 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.

At any time you can select the **Easy menu** / **Normal view** from the tabs at the foot of the screen. The two "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.

When you are in **Normal view**, the tabs across the top of the screen show the main functions in STARTER.

…USE THE EASY MENU

EASY MENU

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.

After defining a process in the Easy menu, you can select **Normal view** to view the dataset that you have updated and to use the full features of STARTER 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).

If you have an existing dataset open, you can "drag" an existing value from the list on the right on relevant screens.

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 NORMAL VIEW

- DEFINE A PROCESS

To create a new dataset, go to the **System Manager** tab and select "**New Dataset**". Then go to the **List Manager** tab, select Process Groups and click "**Add Process Group**" to enter a process group name (every system must have at least one process group defined before you define any processes).

In **Process Manager,** click the "**Add**" button to add a process. Enter a Process Reference, a Process Title, select a Process Group and "**OK**". This adds the new process to the list of processes in the "**Processes**" subtab.

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 "**All Tasks**" subtab and click the "**Move up**" or **"Move Down"** 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: if you want to define a "header" at the start of a distinct stage in a process, enter a task in the normal way (NB it can be useful to use UPPER CASE) and then tick the "**Header**" box near the foot of the window.

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

To set up a corporate list of Roles 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 side of the screen lists all the current entries in the Role Register. Select each role you want to allocate to the current process and click the **Left Arrow** button to add 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 selected task from the list on the right, click the **Left Arrow** and select the type of involvement in the new window. Do the same for any other roles involved in the task.

To move on to the next task, you can use the **Prev**" / "**Next**" buttons or select the required task from the "**All Tasks**" subtab. Work your way through the other tasks and select the types of involvement as required.

[Note that you cannot allocate role involvements to headers]

- VIEW A PROCESS

To see what the process description looks like: go to **Process Manager** / select the process in the list / click the "**View**" button on the left of the screen. This generates an HTML page which is displayed in your default web browser.

You can do the same in **Task Manager** / select the process / click the "**View**" button. This displays the flowchart in your 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 print or email the process description.

...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 Management" 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.

...PRINT PROCESS FLOWCHARTS AND OTHER REPORTS

Go to the **Print** tab**.**

Remember that printing from your web browser is never totally reliable, especially when you are printing flowcharts. For this reason, we use Excel to produce a standardised, paginated process description with transfers well into .pdf format.

First, select the process you want to print. NB make sure that you select the required process when you request a report

Process Flowchart: Use the tick boxes to select which elements of the process details you want to show on the flowchart.

Click the "**View**" button to create an HTML version in your browser.

Click the "**Excel View**" button to create the fully formatted and paginated version. If you have .pdf creation software, you can "print" to that software to generate a .pdf which you can, for example, email to recipients.

Checklist: This report is often used as an audit checklist for a process. The first screen allows you to suppress selected tasks from the report.

The default is to list each responsible role at the top of the report (for example, if you want to use the Checklist as a control record for an "instance" of a process), although this can be suppressed by unticking the "**Responsible Roles**" box.

You are then asked to "**Save"** to define a location for the .rtf document which is created.

Process Responsible Role Report: for a selected process, this summarises all tasks for which each involved role is responsible. This allows you to create automatically that section of a "traditional" narrative procedure which attempts to summarise what happens within the process.

Note that STARTER builds up a list of all selected prints for each type for the current session. This is cleared when you close the program.

…CUSTOMISE THE TERMINOLOGY

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

To define a language file, click the "**Add**" button. Give it a name to identify the language variation and a file name (a text (.lng) file will be created).

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 the "**Change selected item**" button) to display a new window.

You can "**Clear**" a selected item to revert to its default value.

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

You can also "**Import**" or "**Export**" a language file (for example, from / to 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.