

SOME REMINDERS AND SUGGESTIONS FOR USING AUTHOR

(see also the “**How To...**” and **User Guide** for more detail)

DATASETS

Even if you are working on separate sets of processes within an organisation, we suggest that you try to use a single dataset if the processes are all part of the same system. This will allow you to build up a standard list of job titles etc, so that they are consistent in every process in the organisation. This will obviously be required when you convert existing “policies” and procedures into a single process-based system.

Multiple Software “Users”

Although individuals may be working on different processes, we would suggest that you use a “master” dataset. If there is a reason for users to work independently on separate datasets, they can each have their own dataset and then use the Export / Import facility to copy selected processes from the “subsidiary” datasets and import them into the master.

The owner of the master dataset will then need to ensure that the other users are kept up to date with the latest lists of Roles, Documents etc to avoid the risk of duplicates being created with slightly different names. [“Export” only the selected register (tick the relevant box on the right hand side of the Export window) and Import the resultant dataset into the destination dataset]

Language Files

If you have customised any field names etc in a .lng file, you will need to make sure that every user has his or her own copy of the file. Use the “Export” / “Import” buttons in **System Manager** (Extended functions) / Language / Edit.

Export / Import

This needs some thought and care. For example, if a Role name is slightly different between a source dataset and a destination dataset, “Import” enables you to match (and replace) one to the other. If you don’t, you will end up with both “Roles” in the destination dataset.

CREATING YOUR DATA

In addition to using the standard functionality, there are other options for adding data to your system. “Import from Excel” in **System Manager** enables you to import existing data such as lists of job titles (roles) or documents, or to use Excel to define the task details for a process. The “Easy menu” can be used to define the key elements of a process quickly.

Grouping Processes And Documents

In **List Manager**, you will need to define at least one Process Group and one Document Group. Again, the overall structure for the final system will need to be thought about at some stage, although it is easy to change groups later.

There is also a “Category” option which enables you to categorise groups at a higher level and to associate individual items processes and/or documents) to other categories. Groups and individual items can be allocated to more than one category. If you use a customised “front page” (alt.htm file) for your published (html) system, you can create a link to a selected category (as well as to a group or other item).

INDIVIDUAL PROCESSES

Converting Narrative Procedures

If an existing procedure document includes blank forms or templates and you intend to convert the narrative into a (flowcharted) process description, a separate document should be created for each form or template and these referred to within the process definition.

Process Manager: “Comments” Field

You can use the Language option in **System Manager** to change the wording to (eg) “Scope and Objectives” for the dataset. This is worth doing for good process management anyway, but it also means that you have somewhere to put any “standard” sections from a “traditional” narrative procedure.

If you want to avoid having a specific Guidance document as a separate file, it may be possible to start the process description with a “task” whose title is (eg) “Background information” and put the (summarised) text on the right hand side.

Roles

We would suggest that you go through an existing narrative procedure and highlight every role which seems to be “doing” something, and select them in **Process Manager** / Roles (after creating them in **List Manager** / Roles first if they don’t exist in the dataset). Find the start of the process, and work your way through the sequence of steps (bearing in mind that they may not be in a logical sequence in the procedure).

Tasks

Remember that you can use “Header tasks” (we use upper case for the Task Title) to show separate stages in a long process.

Defining the tasks first, and then going back and saying who does what in each one, is often the best sequence to follow.

Do not make a Task Title too long – splitting it across into the Task Description works well (eg “**Submit completed form**” ... “ - **within 7 days of receipt of outcome.**”)

In every case, try to make the Task Title “active verb - noun” format.

You can flag a task as a “Decision Gate” (it is shown as a solid diamond on the flowchart) and you can also show an alternative “Branch to” path for an alternative route.

When you publish the system in the **Publish** tab, the “Roles” link in the sidemenu identifies the role involvement in the tasks of “draft” processes as well.

Revisions and Versions

Once you have published an approved process definition, and you make further changes to the original, the published system and the process details in the dataset will be out of step unless you use the “Versions” option. This allows you to create and retain a copy of the existing (approved process) before you edit the original. If for any reason you need to reinstate the original version, you can “Activate” that version to replace the current copy. You will need to decide a policy for this, depending on whether you need to keep superseded versions of a process in your dataset.

Documents

When the system is to be published electronically, you will need to agree where any referenced documents will be held on the network, so that you can set up their file paths in their Document Register entries so that they can be accessed through hyperlinks in the published system.

Complex / Long Processes

You probably have two choices – either define a top-level outline of the process, and refer to sub processes for each main section, or go as far as you think is sensible and then start another process to continue the “flow”.

Managing Changes to a Process

Remember that a new process is automatically marked as “Under review” (see **Process Manager** / Revision History sub tab).

You should establish a “process” for controlling changes to a process. Typically you control access to the software (and thus to the dataset) by limiting the number of users who have the software. When an approved process is to be changed, you should:

- save a .pdf copy of the current (approved) process (if required)
- flag the process as “Under Review”
- make changes and issue for comment
- when approved: update the Revision History, update the “System Information” text (if you use it to show “Current Status and Recent Changes”), unset the “Under Review” flag and republish.

Some organisations require a signed copy of the new process map to be filed as proof of the changes and approval.

PRESENTATION OPTIONS

Customising A Dataset

You can change the “Company Name” and the logo, and customise the colours, in **System Manager**. Rather than just making the company name “ABC Organisation”, you could make it more specific for each dataset (eg. “ABC Organisation: HR Processes”).

Customised “Front Page” Graphic

Use (eg) PowerPoint to create a graphic and then save as a .png file. Use (eg) Microsoft Office Picture Manager to adjust the size of the graphic (Picture / Resize). 690x520 pixels is sufficient.

Then create an “alt.htm” file to specify the links required to specific groups etc in the published system.

Defining File Paths For Documents In The Published System

The file location can be entered manually, so “file://...” paths that are not currently available, “http://...” and other paths that are recognisable by the browser can be entered. There is more information about this on page 13 of the User Guide.

The Browse function is available to make it easier for a user when the file path can be accessed using the Windows file manager and to help eliminate transcription errors.