

# Instruction Guide



# Instructions for Use

## Starting the System for the first time

The first thing's first - have you read the 'Start-up' section? If not, read it now, and then continue from here.

With the system settings as recommended in the start-up section, and Excel macro security to low, place the CD into your computer.

Open Windows Explorer and open the file on the CD named:

### Process Developer 2.1.xls

The file will open and prompt you to enter the password key which can be found on a white sticker inside the CD casing. Enter this 12-digit password and click 'continue installation'.

You will now be asked where you would like the system folder to be placed on your hard-drive. The recommended location is C:\Program Files. (A folder created anywhere on the computer can be moved to another location with its contents remaining intact, including all links between saved *processes and procedures*.)

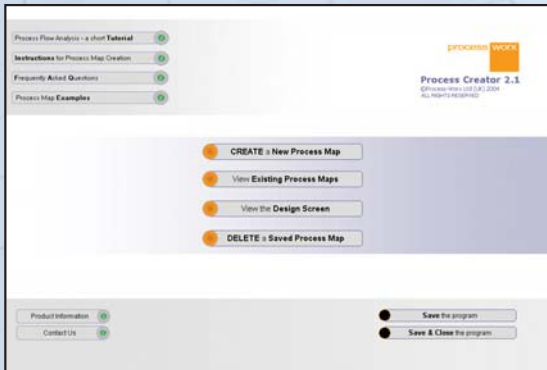
Click 'continue' when you have decided where the folder should be placed on your computer. The folder will now be created on your computer where you have specified. This will take a few seconds.

The software will be located in:

**C:/Program Files/Process-Worx/Process Developer** folder, and the software file will be the Microsoft Excel file called "**Process Developer 2.1.xls**"

Once installed you can remove the CD - keep it safe for use when installing updates, upgrades and for licensing information in the future.

# The Main Menu Screen



This is the Main Menu screen as you will see it. In this product the Excel toolbars are all removed except for the Drawing bar for reasons which will be explained later. This means that the only way to navigate the program is to **click on the buttons**. Most buttons have written on them their function, so to do what the button says, simply click on it!

The main menu is used mostly for the following functions:

- Viewing product usage information
- Viewing the design area
- Creating new maps
- Deleting existing maps
- Viewing maps
- Saving and closing the program

In the main menu screen you can view further instructions, see examples of process maps, see answers to FAQ's and even take a short tutorial into process mapping.

These are in the top-left of the screen, with symbols next to them.



Click on the button you want to follow.

## Creating a New Process Map

This is the way you can create a new process map from the start, name the map creator, name the map reference, title and the date. This information is then fed onto the map and you can then begin designing the map layout.

1. To begin with, click on the 'CREATE new Process Map' button in the main menu.
2. Fill in the form which will appear, including all details asked for.
3. Click on the 'Begin Mapping' button at the bottom of the form.



The screenshot shows a dialog box titled "New Process Map Details Form - complete all fields". It contains the following fields and values:

- Your Name: John Edwards
- Date: 9/1/2003
- New Process Map Title: Customer Services Process
- New Process Map Reference Number: A1.3

At the bottom right, there are two buttons: "Begin Mapping" and "Cancel".

Information is then placed onto the new process template in the Design Area. This is where you will be taken to, and the design area screen looks like this:



probable require the five-line wireframe. Click on the 'ADD' button below the appropriate wireframe for your new map and it will appear in the centre of the white design space.

You are then ready to add your various process symbols.

The alternative to using a wireframe is to create lines using the 'line' option on the design toolbar.



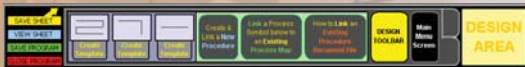
*The line buttons. Found on the Drawing Toolbar*

In order for the process map to start in the right way the line template should be set out first. This is because the symbol objects placed onto the map to give the map meaning are placed on layer by layer. If the lines are not placed on the map before these symbols then the lines will appear on top of the symbols. This can be rectified though. See the 'Drawing Toolbar' section for options for customising your process maps.

## Design Symbols and their Definitions.

These are the symbols used in map creation. A list of the symbols and all of their definitions is given in the program itself, and it can be referred to at any time. It is found on the design toolbar:

A view of the Design Toolbar and its symbols



Design symbols can be added to the map by clicking on the grey 'ADD' tabs which are attached to them. When one of these tabs is clicked upon, the associated symbol will appear in the pastel yellow 'DESIGN AREA' frame. It is from this area that the symbols are then dragged onto the map wireframe. Move the mouse cursor over the centre of the symbol to be

dragged from this frame. Left-click on the symbol and, holding down the left mouse button, drag the symbol where you want it to go on the map.

**Fine movements of process symbols** can be achieved in the following manner: once the symbol has been placed roughly where it should be on the map, fine adjustments to the placement on the map can be made by using the **arrow keys** on your keyboard.

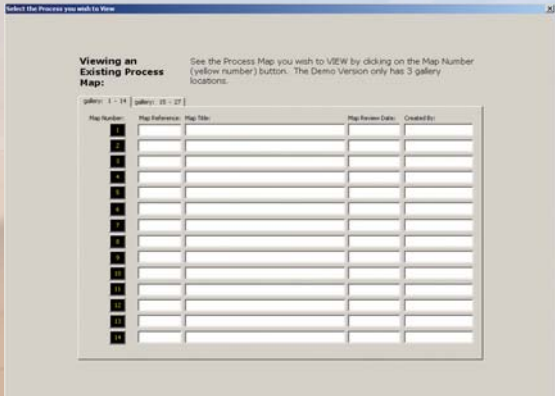
**Selecting Groups of object symbols.** This can be achieved by using the arrow key on the drawing toolbar which is at the bottom of the screen. The arrow (bottom left) can be used, once it is selected, to left-click, drag over an area, and release. Any symbols covered by the drag-area you drag the arrow over (it creates a dotted rectangle showing the area it is covering) will be selected. They can then be edited, moved, deleted, etc as required. *The arrow must be de-selected before any of the program buttons will work, so be sure to do this or no more navigation around the program will be possible until is de-selected.*

Another way of selecting multiple symbols is by clicking on the group of symbols you want to select, one by one, whilst simultaneously holding down the SHIFT key. Once symbols are selected they have four tiny white squares at each extreme of their span.

**Deleting symbols** is achieved by selecting the symbol to be deleted, (either using the arrow on the drawing toolbar, the left-click of the mouse, or the multi-select while holding down the shift key as explained previously), and hitting 'delete' on your keyboard.

## **Saving process maps**

Once you have created a process map in the Design Area you will want to save it. There are a total of 27 locations to which you can save your process maps, which means you can save up to 27 maps at any one time using this system. To save your map, click on the yellow 'SAVE SHEET' button at the top left of your screen.



the saving screen - with no maps saved to any of the 27 locations

You will then be taken to the 'Saving Screen' which is a green-bordered array of map details. If you have not saved any maps before, this will be empty except for the buttons on the left side numbered one to twenty seven. Each of these numbers corresponds to a storage location in the viewing gallery. If maps have already been saved in the system then the details of the map headings will be shown - giving you an accurate breakdown of what maps are where, when they were created, what they were called and by whom. In this way you can plan a logical way to lay the maps out.

When you have decided where the current map will be located in the viewing gallery, simply click on the number of the location you want to send the map to. The map will be copied to this location, then you will find

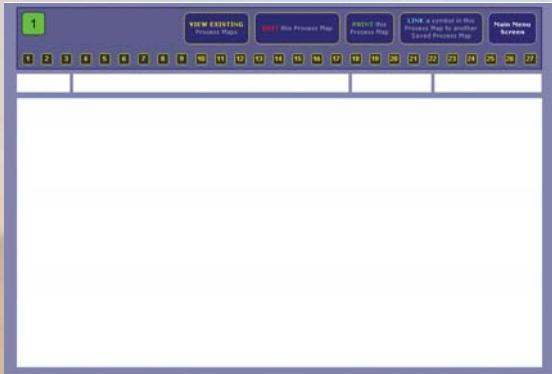


yourself in the 'Viewing Screen'. This is a blue-bordered screen which looks similar to the save screen. From here you can view all of the twenty seven locations in the viewing gallery simply by clicking on the corresponding buttons once again.

## Navigating your processes

Click on button number 7 now. You will find yourself in the viewing location for map 7, which is also blue-bordered. From any of the viewing locations you can see any of the other locations by using the numbered buttons at the top of the screen. You can see which location you are in by looking at the green box at the top left of the viewing toolbar. ***The buttons with yellow numbers and lettering generally either take you to the location numbered on the button, or perform the task stated on them.***





viewing location #7. This location is empty. All of the 27 locations are linked, and can be viewed either from the viewing screen (where the map details are also held), or from one of the locations as above. In a location, click on the yellow numbers to view other locations.

Saved maps can be viewed from the Main Menu, by clicking on the 'View **Existing Process Maps**' button. This takes you to the Viewing Area where the map details are held. From here, click on the location you wish to view to see the saved map in the viewing gallery. To see the other maps in the gallery you can repeat this process to find a specific map or browse the existing maps by clicking the numbered buttons in each area, as previously explained.

## Editing Saved Process Maps

If you want to edit a map, go to its location and click on the '**EDIT** this Process Map' button. It will then be taken to the Design Area for editing. Once you have finished editing the map, save it as outlined before.

Nb.

It is recommended that you save the map to its previous location after editing it. If you choose to move the map to another location, any saved map in that location will be erased to make way for the new map. The old location for the edited map should then be cleared by selecting the 'DELETE a Saved Process Map' button in the Main Menu screen, then selecting its previous location, to stop map duplication from occurring. Links to the old location will also have to be updated (if you have created any).

## Deleting Saved Process Maps

Saved process maps can be deleted using the 'DELETE a Saved Process Map' button in the Main Menu screen. Click in this button then select the number (1-27) of the map you wish to delete from the form which will appear. When you are ready to complete the deletion, press 'Delete'. This form is given to you over the Viewing Screen in order that you can see which locations contain what.



Select a Process Map to Link

Please select to which Process Map you would like to link the selected symbol (viewing areas 1 - 27), then click on 'Link' below. (The map number is the same as the number on the yellow tabs in both the Saving Area and the Linking Area.)

1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27

< Link -> Cancel Linking

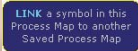
The delete form. It looks similar to the linking form, but is reached in a different manner. Select the location you wish to clear and press the 'DELETE' button to remove the process map stored there.

## Linking Process Maps together

This can be a very useful tool for linking process maps together directly. It can be done from both the Design Area and from each of the Locations in the Viewing Gallery.



The Design Area button



The Viewing Gallery button(s)

Click on the button as above (depending upon where you are), and follow the instructions to link a symbol on your map to another Viewing Gallery location.

1. Select the process symbol you wish to link to the relevant map. This is done by left-clicking on it once.
2. Click on the circular round 'Go!' button which will appear on top of the link button in the toolbar.
3. Choose which Viewing Gallery location you wish to link the symbol to from the form which will appear.

The selected symbol is now linked to the specified map.

This is very useful when you have maps situated on different levels, or tiers. The top level map may have a symbol on it which represents the movements of a department in the company, for example. Another saved map may be of the processes involved in that department. By using this facility the viewer can click directly on the symbol itself and they can be taken to the process map for that department. In this way very simple navigation of all processes can be achieved, with internal symbols providing the logical buttons to the process stages they represent.

## Linking Existing Procedures

This is a useful tool which allows the user to link any existing procedure files to process descriptions on a process map. It can only be done in the Design Area, and the button for it is next to that for the linking maps together button on the opposite sheet. It looks like this:



Click on it and it will explain the stages you must follow to create links to your existing procedure.

This is a very useful tool as it allows you to link your processes to your procedures, and allows them to be accessible through one file in a folder on your system, where all of your other procedures can be stored also. This kind of availability of information is key to analysing your processes and economising your system by means of 'click and go' technology. Descriptive text box linked to the procedure will turn pastel yellow in order for you to see which of the descriptive boxes act like buttons to open you Microsoft Word procedure documents.

## Saving the System

Saving the system can be done from two places - In the Design Area or in the Main Menu screen. In the Design Area press the green 'Save Program' button on the left of the toolbar. This will save the program as it is. From the Main Menu, click on the 'Save the Program' button at the bottom right of the screen.

## Shutting Down / Closing the system

This can be done by clicking on the button below the save buttons in the areas explained above. They are clearly marked 'Close Program' (red in

the Design Area), and 'Save & Close Program' (the bottom right button in the Main Menu).