



ProcessManager

User Guide

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ProcessManager ApS

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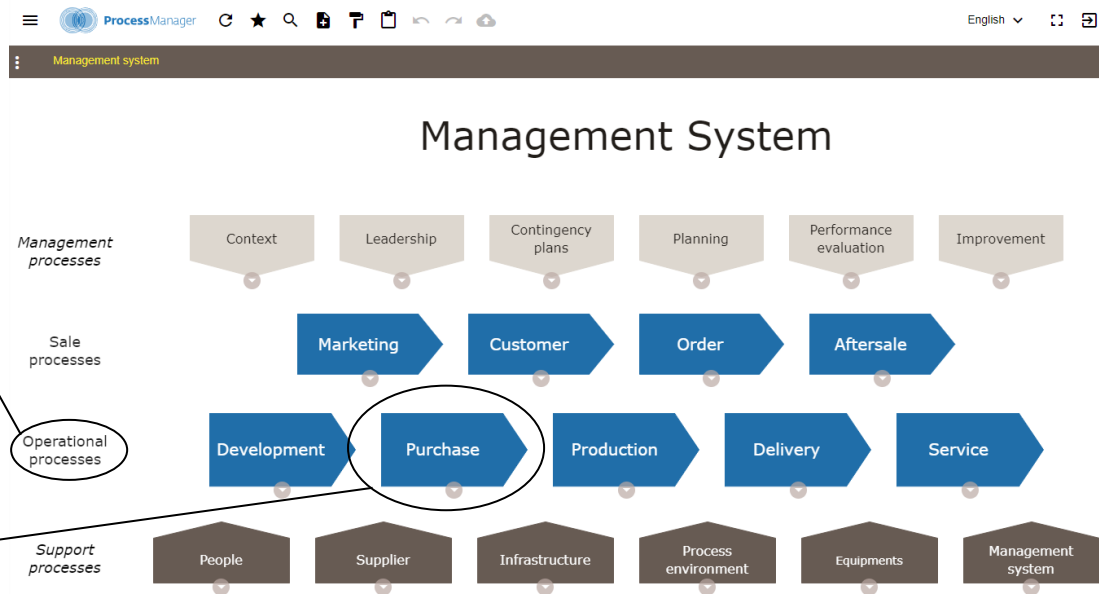
Web: www.process-manager.dk

CVR 28 69 77 67

Introduction – process overview

Process management is composed of six parts.

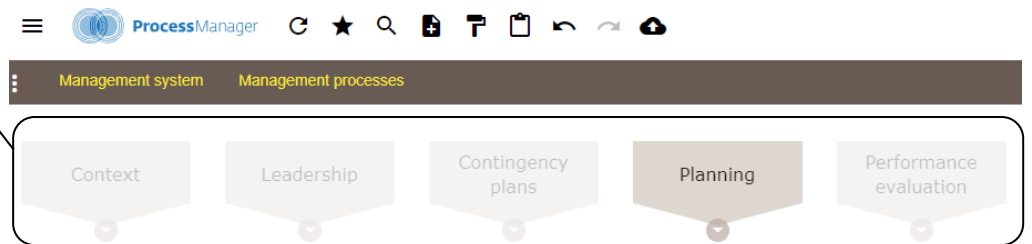
1. The main page is the main process view. It gives an easy overview of the company, departments and processes and is used to navigate to a specific area.



2. The main process is a top-level process. This could be Management, Sales, Operations and Support.

3. Processes are subdivisions of a main process.

4. Changing to the subpage allows for unfolding processes.



5. Process can be unfolded, showing its **Subprocesses**, which can also be unfolded into new sub processes.



6. Bullet points for the sub process.

Bullet points can be used to link to documents, internal documents, other cloud systems, Internet web pages etc.

- Risk management is applied on significant aspects marked with **bold** in Context
-
• Template, risk management quality

- Quality objectives are derived from Quality policy
- Quality objectives must be measurable

- Improvement plans to address quality objectives are established
- Plans must address:
 - what
 - resources
 - responsible
 - timeframe
 - evaluation
-
• Template, objectives and planning

This is the place to gather all operational information on how to do e.g. procedures, instructions, templates, etc.

Link

Bullet points/processes with a link are marked by an orange dot. Click the dot to open the link.

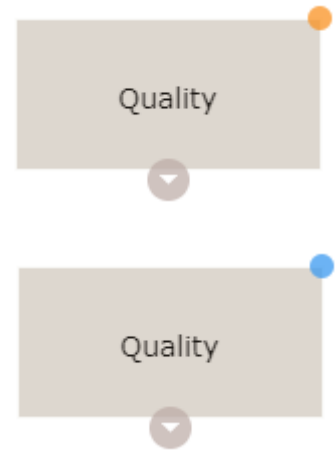
Uploaded document

If a document/file has been uploaded to a process or a bullet, an orange dot will be shown. Click the dot to open the document.

Internal document

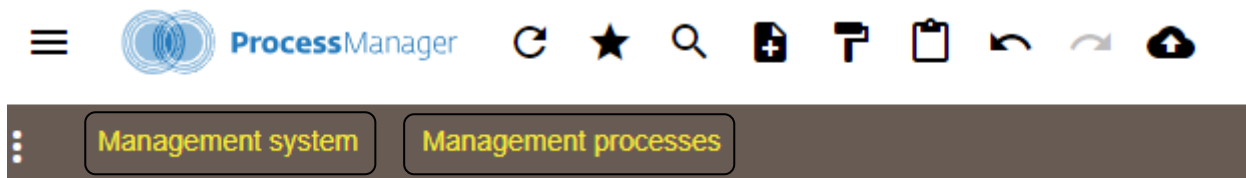
If an internal document is created related to a process or a bullet, a blue dot will be shown. Click the dot to open the document.

In all cases the link or document name will be displayed when hovering the mouse over the dot.



User functions

The path with yellow text in the brown bar is used to navigate between main and subpages.



Reload



This button is used for updating the system. This will reload/refresh all content from the server to the browser.

Favorites



This button is used to jump directly to your favorites. Clicking the button will show a list of favorites. Then click the favorite you are after.

Search



This button is used to search the system. Either words or phrases can be entered. The search is case-insensitive. Only words on 3 characters or longer will be used in the search.

Searching for words will find names/information that contains any of the entered words, or where the entered words are a part of the name/information.

Searching for phrases is done by surrounding the words with quotation marks, i.e. "This is my search phrase". Only names/information containing the whole phrase will be found. If quotation marks is not used any of the words will be used for the search.

1. Select what to search for.

2. Write the search term, at least 3 characters.

3. It will automatically begin to search

Search

Search in:

- Processes and bullets
- Document names and links
- Internal documents

Search

Only words longer than 3 characters will be used in the search

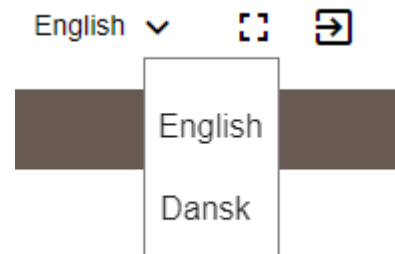
Label ↑	Path
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The list will show the results. Clicking a result will show and highlight the process/document.


Language

If more than one language has been created for the ProcessManager installation, it will be available as a drop-down list. It will be sorted alphabetically.


When a specific language is chosen, all processes and bullets will be shown in that language, if they have been translated. If not translated, they will be shown in the default language.




User guide

 This button will give you access to the user guide.

Full screen

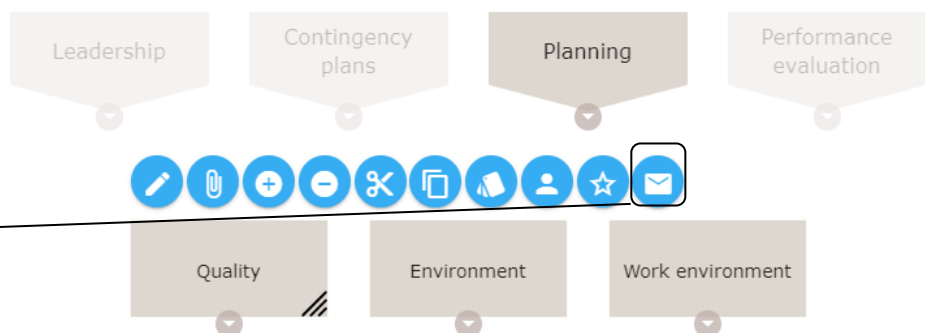
 This button will turn on full screen. Click again and it will go back to normal view.

 This button will close ProcessManager.

Contact process owner

It is possible to send an email to the process owner, e.g. with suggestions for improving the process.

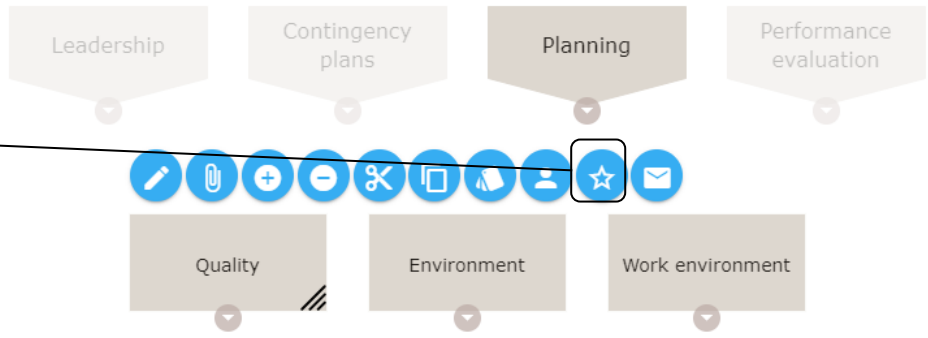
Right click the process in question, then click the "letter button". You can write and send a message from the system.



Favorites

Favorites can be used to gain quick access to a process or bullet.

To create or delete a favorite right click a process or bullet then click the "star button".



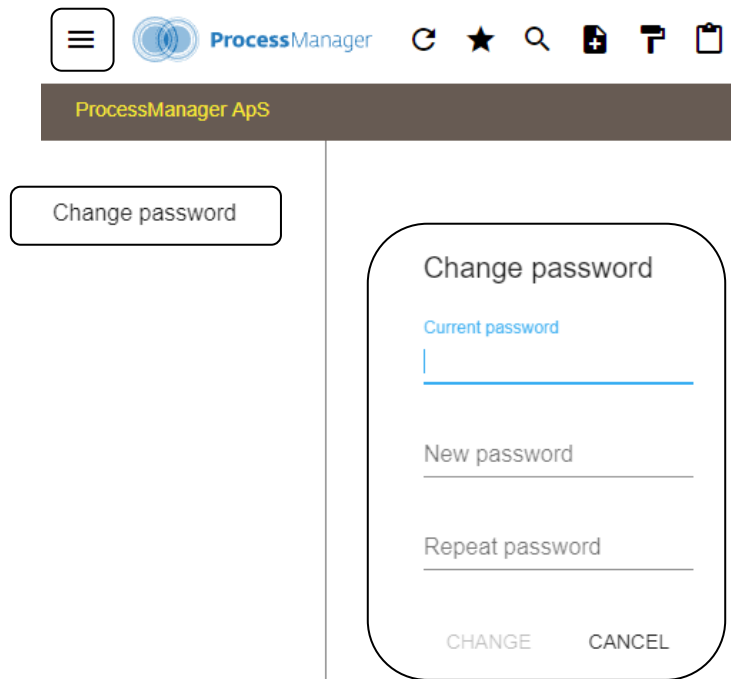
The favorite

function will alternate between activated or not – and the star symbol will change correspondingly by being empty or filled.

Change password

All users can change their own password by clicking on the three-line button next to the ProcessManager logo and then choose "Change password".

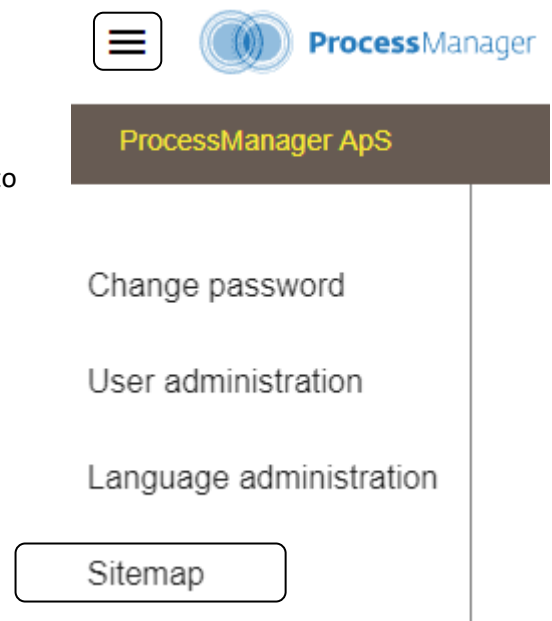
Fill in the fields and click "Change"



Sitemap

The sitemap button generates a list/file as a tree structure including all information entered into ProcessManager.

It is another way to have an overview - in this the way for you to get all your information out of the system e.g. for back-up purposes.



Author functions

Authors will have a number of tools available to manage and improve processes.

New Process



This will create a new process. This is mostly used for adding the first process on a new/empty main page. In an established system you just add a process to an existing process.

Format painter



This is used to copy formatting (font, colors, alignment and shape) from one process or bullet to another.

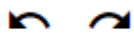
1. Click the button. It will be highlighted to show that it is active.
2. Click the process or bullet point that is the source of the format. It will be highlighted to show that it is the source.
3. Click the targets to “paint”.
4. Click the button again to deactivate the tool. Highlights will disappear.

Copy - Paste



This is used for inserting previously copied elements. An element is copied by right clicking it and clicking “Copy process/bullet”. After clicking the paste button and hold it down, the element can be dragged to its desired position.

Undo/Redo



These will undo and redo operations, much as in most other programs. Operations will only be undoable until they have been saved, though.

Save



This will transfer your changes to the server and save them. **Please note:** It is advised to save often in order not to lose your work due to e.g. PC or network problems or disruptions.

Main process creation

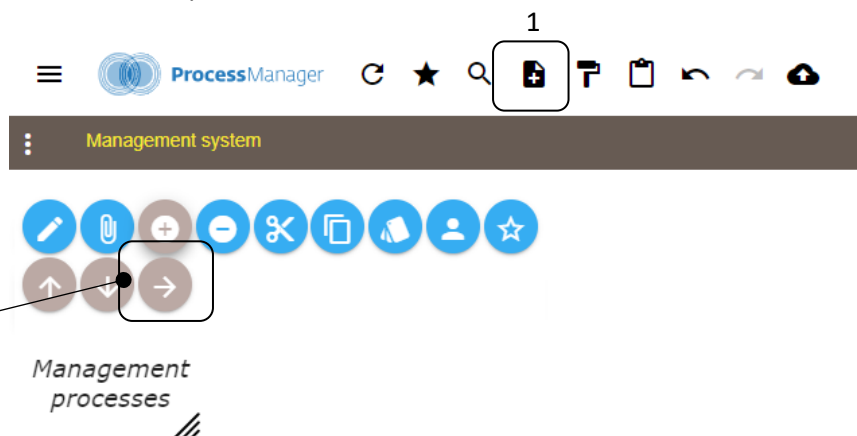
Click on the toolbar button “New process” (1). This will open an editing box, which will enable you to name and style the main process.

The main process serves as a headline for a row of processes.

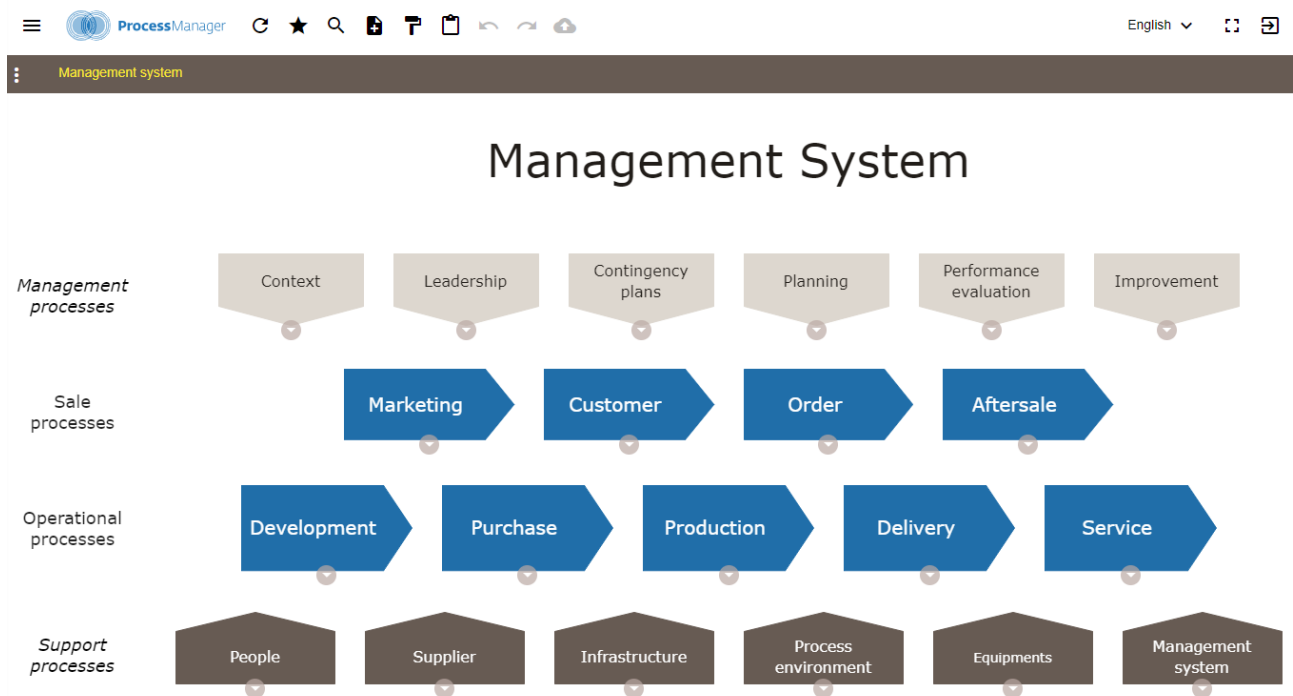
Process creation

To start adding processes right click the main process/ headline you just created and click on the “+” button.

Now three arrows will appear. Click the right arrow. Then the editing box will appear, enabling you to define the text and design of the process.



Continue doing this, until the main page is completed as shown below.



Creating a subpage

When a main page is completed, a subpage can be opened by clicking one of the processes in a main process. The list of processes will now be places on the top of the page. This is called the subpage view.

Here, sub processes can be added to a process. These are created the same way as the processes on the main page:

1. Right click a process.
2. Click “+” in the menu.
3. Click the downward arrow.
4. Enter the details of the sub process.
5. Click outside of the text box when you finish editing.



When a sub process has been created, more sub processes can be created, either at the same level, or as children to the new process, thereby describing the process in even more detail.

Creating bullet points

When it makes no sense to subdivide a process any more, a number of bullet points are created below the deepest sub processes.

1. Right-click a sub process.
2. Click on “+” button
3. Click the three-line button
4. Enter the details of the bullet point.
5. Click outside of the text box when you finish editing.



More bullet points are added by repeating this.

Inheritance

When a new process or bullet is created, it will inherit size, shape and font settings from the process its parent.

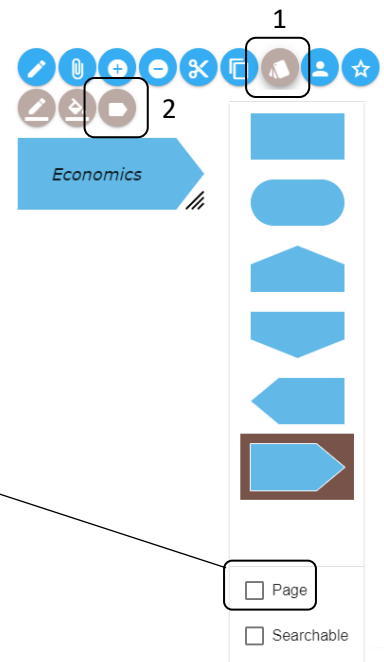
Process owner will always be inherited from the parent.

Main page

If you want a process to unfold onto a completely new main page, the checkbox "Page" inside the tab "Shape" should be checked.

Right click on the process

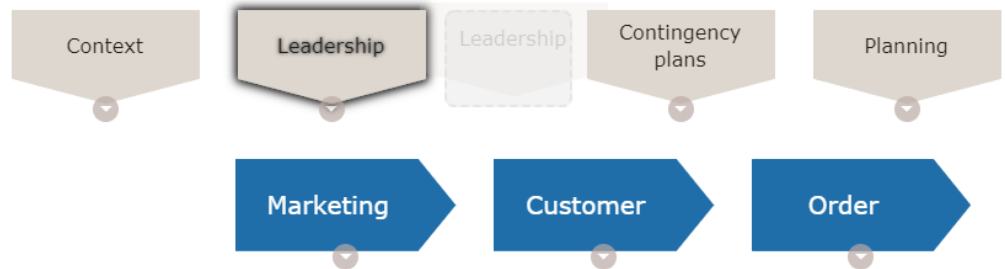
1. Click on "edit styling"
2. Click on "choose shape"
3. Check mark "page"



Drag & drop

It is possible to edit the position of documents, simply by dragging them to a new position.

1. Click and hold the left mouse button or bullet point that you want to move.
2. Drag the element to the wanted position. If the position is valid, a gray bar shows where the element ends up.
3. Let go of the left mouse button. The element will move.



If the position is off the screen (i.e. if the content is wider than the screen), dragging the element to the edge, will scroll the page

Creating Internal document

Right click on a **bullet** point or process, click on the “paperclip”, then choose **internal document from the** drop-down menu.

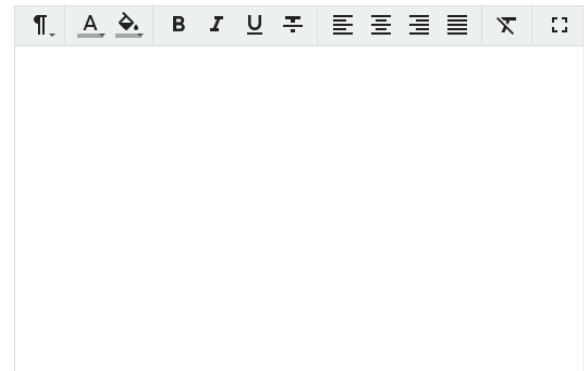
Type title and then write the document.

Click “OK”.

Add resource

Resource type
Internal document

Document title *



OK CANCEL

Creating links

Right click on a bullet point or process, click on the “paperclip”, then choose link from the drop-down menu.

To link to a home page or to a document in SharePoint or Dropbox, simply enter or copy the URL into the field.

Click “OK”.

To link to another bullet point or process, first copy the element (using the right click menu and clicking Copy process/Copy bullet), then paste it into the field.

Add resource

Resource type
Link

URL *

OK CANCEL

Uploading files

Right click on a bullet point or process, click on the “paperclip”, then choose upload from the drop-down menu.

You can now browse your PC or network and select the file to be uploaded.

Add resource

Resource type
Upload

Vælg fil Der er ikke valgt nogen fil

OK CANCEL

4. Skiv den ønskede tekst og brug design mulighederne som beskrevet nedenfor:

Ikonet "Vis punkt" giver mulighed for at fjerne eller tilføje den sorte prik til venstre fra det skrevet punkt.

Dette kan gøre hvis man

f.eks. ønsker at punktet skal være en overskrift.

Management evaluation

Performance

Show bullet

- Management review is conducted annually in Q2 - 6 months staggered from the external audit
- CEO owns meeting - the entire management group participate
- Result from management audit to be documented
- Konklusioner på hvert delpunkt inkl. nøgledata

- Template, ISO 9001

Ved at "venstreklikke" på "blyanten" kommer der en ny redigeringsmenu frem, denne giver mulighed for at style teksten på flere forskellige måder.

kommer der en ny redigeringsmenu frem, denne giver mulighed for at style teksten på flere forskellige måder.

Management evaluation

Performance review

Font

Font size

Text color

Background color

Bold

Italic

Underline

Strike

Unordered list

Ordered list

Horizontal rule

Remove format

Change font

Change font size

Change text color

Change background color

Change text to **bold**

Change text to *italic*

Change text to underline

Change text to ~~støke~~

Add unordered list

Add ordered list

Inter horizontal rule

Remove format

Flere punkter til den samme figur tilføjes under eksisterende punkter. Herved får det nye punkt automatisk samme grafiske design

Communicating with the process owner

It is possible to make communication between users and the process owner easier, by entering the process owner's email into the process.



This is done by right clicking on a process or bullet and then on the "letter" button.

Process ownership will be inherited unless a new email is entered.

Permissions

It is possible to set permissions on each single process and bullet! However, this is only recommended if really needed, as it will increase complexity.

You simply choose from the dropdown menus who shall be granted respectively read and edit access. This can be granted either to users or groups.

You can choose to inherit permission from parent or to define new.

Ownership and permissions

Process owner email

Inherit permissions

Read access

Nothing selected, everyone can view

Edit access

Nothing selected, all editors can edit

OK

CANCEL

Administrator functions

User administration

The screenshot shows the 'User administration' interface in ProcessManager ApS. It features a sidebar with navigation options: 'Change password', 'User administration' (highlighted), 'Language administration', and 'Sitemap'. The main content area is titled 'User administration' and has tabs for 'Users' and 'Groups'. It is divided into three panels:

- User profile:** Fields for 'User' (New user), 'Given name', 'Surname', 'Initials', 'E-mail', and 'Language'.
- Account and permissions:** Fields for 'Username *', 'Password *', and 'Repeat password *'. Checkboxes for 'Generate password' and 'Send email'. A 'Permissions' section with checkboxes for 'Administrator', 'Author', and 'Document viewing'.
- Process access and start process:** A table with columns for 'Process', 'Access', and 'Start'.

Process	Access	Start
ProcessManager ApS	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Unnamed	<input type="radio"/>	<input type="radio"/>
Ledelses- processer	<input type="radio"/>	<input type="radio"/>
Salgs- processer	<input type="radio"/>	<input type="radio"/>
Leverance-processer	<input type="radio"/>	<input type="radio"/>
Støtte- processer	<input type="radio"/>	<input type="radio"/>

At the bottom, there are buttons for 'OK', 'CANCEL', and 'DELETE'.

Click the three-line button next to the ProcessManager logo to gain access to the "User administration" module.

User profile

In this section you can add a new user or edit an existing one.

Account

The user name is assigned manually by the administrator.

The password can also be assigned manually, and the administrator must inform the user. However, it is most convenient to use auto-generation by check marking "Generate Password."

The auto-generated password can also be sent automatically to the user by check marking "Send Email". The user is then sent a temporary password and is asked to change password.

Permissions

A user can be assigned 4 levels of permission:

- The **administrator** has all rights.
- The **author** can do anything except manage users and create new languages
- **Document viewing**, the user can view all information in the system, but without editing anything.
- **No check marks**, the user can view the system, but not internal documents, links or uploaded files.

Process access and start process

In this section you can choose on which level the user has access, and you can also choose on which level the user will start when logging into the system. E.g. to a level frequently used.

Creation and editing groups

The "Groups" tab lets you create groups based on already created users.

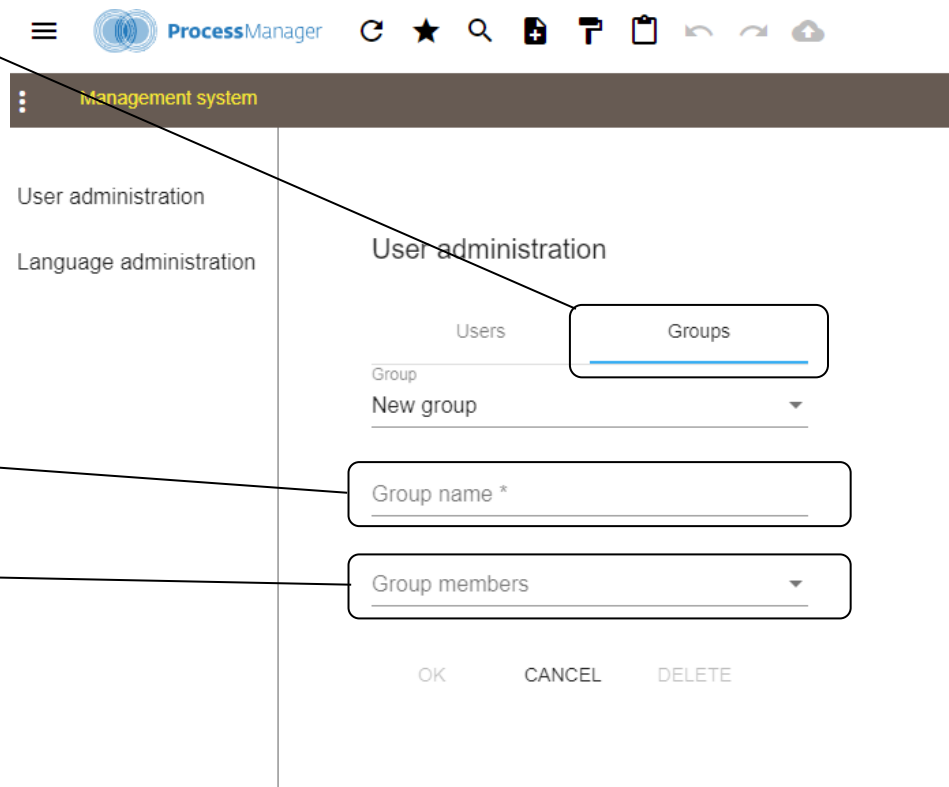
It is for example an advantage when allocating rights to a management team. Instead of assigning rights for each user, you can handle the entire group at one instance.

Create a new group by entering a group name.

Choose which users to join the group.

Then click OK.

To make changes to an existing group, select the group from the "Group" menu.



Please note that only authors can be given editing rights, and that administrators always have all rights.

Languages

It is possible to add new languages. This will enable authors to translate processes and bullet points into the created language. If a process or bullet point has not been translated, the default language will be used.

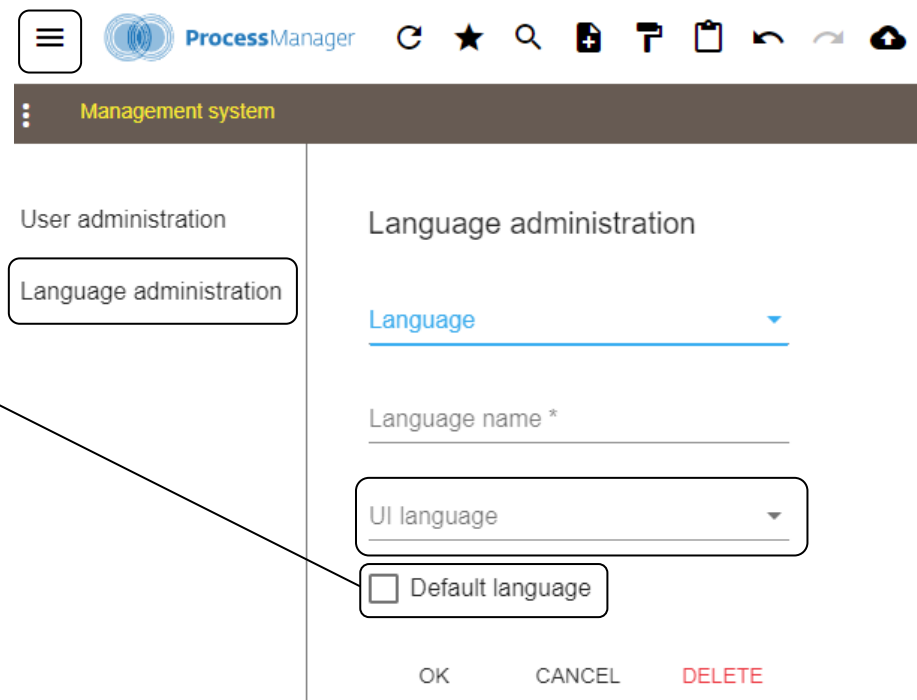
Authors can translate but only administrators are allowed to create and editing languages.

For each language, it is possible to choose the user interface language.

One of the languages shall be defined as the "default" language.

When authors change to a non-default language, most editing options will disappear.

In translate mode, texts, information and links can be edited, along with font and font colors.



Edit logo or watermark

You can enter and edit logo as well as watermark by clicking the three white bullets in the tool bars left corner.



Then click on “Edit logo or watermark” and you will see the menu.

In the menu logo/watermark can either be inherited from parent or a new one can be uploaded.



For the logo you can choose in what corner it should be positioned – and for the watermark you can choose opacity.

