

# Method Manager Checklist

## ***Preparation***

1. Install current version of Method Manager on local PC
2. Prepare set of diagrams for navigation use
3. Prepare set of files and links to be included in the method
4. Prepare file and link groupings into documents and spare placeholders
5. Prepare display structure for documents i.e. by process and library

## ***Create the New Method Template***

1. Use Menu – File - New to open Create New Template. Provide a name and check the path is acceptable then press OK. Note creation direct to the server is not recommended.
2. Use Menu – File – Template Properties and then set up key info for the method in General, Aliases and Colours tabs

## ***Define Overall Methodology Structure***

1. In the main template explorer use the Project Structure area to define processes and subprocesses, using right click:
  - a. Process – purely a grouping mechanism to make the method template easier to navigate
  - b. Sub-Process – a grouping which may be navigated to for display in the file explorer. Usually the destination for a menu or navigation diagram click
2. In each sub-process include the required documents, using right click:
  - a. Create new Documents, or:
  - b. Include documents you have already used in another sub-process
3. Define project and specialist documents with combinations of folders and documents

## ***Assign/Include files and content at project level***

1. Click on the required Document and using right click:
  - a. Create new file (internet or windows shortcut), or;
  - b. Browse to add existing file (either initially from the collection of files already assembled for this method or from existing files held elsewhere)

## ***Setting up stages***

1. To set up a method with a single stage template, use the Stage (default) template area in the Template Explorer main window. This area uses the methodology structure (processes and sub-processes) defined earlier if additional ones are required you will need to return to the Project Structure section to add these which will then be reflected in the Stage area.
2. In each stage sub-process include the required documents, using right click:
  - a. Create new Documents, or:

- b. Include documents you have already used in another sub-process (Note documents created in the project area will not be available in stages and visa versa)
3. To add a new additional stage, use the Main – File – Template Properties form, Stage type tab where you can add and rename stages. Then:
  - a. Select the new stage (this will initially have no processes showing against it)
  - b. Use Main – Explorer – Sync stages to project structure. This will include any process and sub-processes defined in the project structure.
4. To include a stage already set up on a different project:
  - a. firstly save your method then close method manager. Use file explorer to open your method up and that of the method you are copying the stage from.
  - b. Create a copy of the stage folder required and paste this into your new method template in the same location
  - c. Reopen Method Manager, select the new stage and use Main – Explorer – Sync stages to project structure. This will remove the process and sub process names defined with th stage from its old method and include any process and sub-processes defined in the project structure for the current method. The add existing doc item for this stage will still have the library of docs, files and links set up previously which can then be remapped to the new process structure.

### ***Setting up diagram navigation***

1. In the Template explorer form use the process images item. Right click to browse add a new file, or reorder (top item is the usual starting point).
2. For each process diagram use the controls on the form to set up links to other diagrams, the explorer with a defined sub-process in focus or to a saved link.
3. Any number of diagrams and combinations of link types can be used.

### ***Setting up the menu***

1. In the Template explorer form use the Menu Items item, right click to browse add, delete or reorder items. Note a nested menu can be created if required.
2. The form use to manage the menu link is the same as for the diagram navigation and often a similar structure is used but this isn't mandatory and the two can be very different if required.
3. Note when nesting menu items no link capability will be available from the parent item.

### ***Setting up The template library***

1. In the Template Explorer main form select Template Library and using right click:
  - a. Create new file (internet or windows shortcut), or;
  - b. Browse to add existing file (either initially from the collection of files already assembled for this method or from existing files held elsewhere). Note browsing files into here from a project or stage structure does not live link them and if files are changed in the originating location the Template library will need to be updated again.

## ***Setting up Reporting including extended properties***

1. In the Menu – File – Template Properties form use the Stage Status Flags to create the RAG questions for each stage (max six).
2. In the Menu – File – Template Properties form use the Spreadsheet Named Ranges tab to define the dataranges which will be standardised across projects using this method. These should refer to named ranges made available in spreadsheets provided in the method template content.
3. In the Menu – File – Project/stage/process Extended Properties form define and manage additional data storage points for projects of this Method. In practice mainly used for project and Stage level only.
4. If an existing set of dataranges or extended properties are defined in a different method template these can be moved directly in the XML with care.
5. The reports tab allows you to set the name of the document which will be used when finding report folders (particularly for translations)
6. The Logs, Spreadsheets and Plans tabs have been migrated from the main application's Project Summary Information form. They allow you to define starting set of materials to be used in reporting by referring to the content of the method template. When the project is created from the method template these contents will be migrated to the Project Summary Information form to enable immediate reporting on the project.

## ***Defining Methodology standards***

1. In the Menu – File – Client Options form, general tab. Define the file numbering and naming conventions to be applied to projects created from this method template as well as other policies/standards. Alternatively tick the ignore box to let the project be created with the default server set instead.
2. In the office export properties tab select the properties you wish to have auto updated into office template files. The list includes the standard default set plus any project extended properties defined earlier. Select an Item and then define an alias which will be the name given to the doc property created.
3. In the Menu – File – Lookup values form you define the terms to be used for Project and Portfolio Status, Project Roles and Document Flags for projects of this type. Note if you Change the Project and Portfolio Status from their default values then you will have to change the coloured icons used in the reporting to match this.

## ***Finishing Touches***

1. Each Document in each sub process (project and stage) can now have the following finishing touches added using right click:
  - a. Default document flags set
  - b. Default document tips (hover text) defined, this needs to be added in each location the document appears.
2. Each file (in main body of the method and in the template library) can now have the defined Office export properties added (right click). You may then want to reopen the file and display these as displayed content in the method. So that they will be auto updated by the system on first checkout of the file.
3. Review the description in Template Properties
4. Save the method template

## ***Testing and Publishing***

1. Method Manager has internal diagnostics which can be checked using menu – Explorer – Validate template/stage structure with any errors being displayed in the Errors tab at the bottom of the Template Explorer.
2. Upload the method template to a server (preferably a test server) and create a project from it to test it is as you expect. Once you are happy with any iterations create operational projects from it.