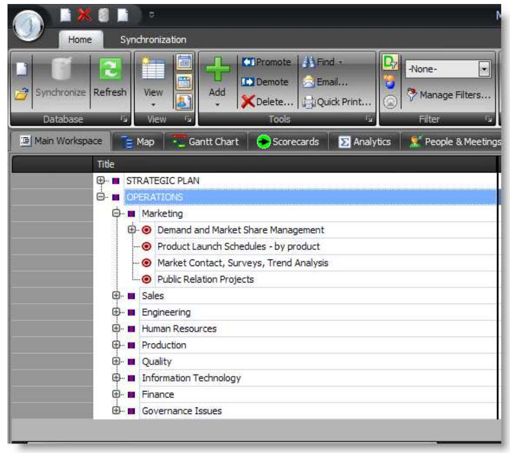
3 Steps to Configure ManagePro for Use in Your Business Environment

1. "Build the House"- Create a **new** database and use the Main Workspace view to layout a basic outline of your primary business goals, departments, projects and customers. Think of it as framing out a house, with one "room" (outline tree) for each area:



- Start with creating a heading for Strategic Plan, and a second heading for Operations or Departments. Under Operations, type in your primary business departments, each as a separate line item using the Add/Heading ribbon control sequence. Many businesses add additional Heading records for Customers, Products and/or Services, and Projects. Underneath each heading demote one level and add your top projects currently active under each department (projects can refer to products and customers as well). See the following link for instructions: http://www.managepro.com/mprodocs/Operations.pdf

- Lay out your strategic plan, starting with a Heading title of "Strategic Plan", then add your top growth initiatives or goals, demoted one indentation level directly below the Strategic Plan record. See the following link for specific instructions: http://www.managepro.com/mprodocs/Strategy.pdf

- When you finish you'll have an outline that will look something like the Enterprise template database outline. The icons in front of line items (Heading - box, Goal - target, Action Plan – arrow, Task – checkmark) are there to help prompt solid planning and easy visual organization. Regardless of the icon, the records all have the same functionality.

- Note: At this point you are just entering text into the title fields. In step one you can either continue to add text to the detail fields, accessed by double clicking on any record, or you can wait for the people assigned to each record (next step) to complete themselves. Additionally you may note that two of the indented goals have a different (moon over mountain) icon, that indicates they have been formally entered into the strategic plan, a right click advanced option.

- Note: A common question is when to use Tasks versus To-dos? Best practices are to use To-dos as electronic "Post-It" notes, as reminders; use Tasks when creating a checklist underneath an Action Plan step.

- If completing the detail fields yourself, we suggest you start by only completing the following fields in this step:
    1. Requirements (the overall details or scope of each record)
    2. Start and Due Dates for records that are appropriate
    3. Who's assigned as responsible for the outcome, designated as Lead, with an asterisk after their initials, and who's assigned who is generally assigned to work on the project or goal. Completing #4 requires that you complete step 2, so let's head there next.

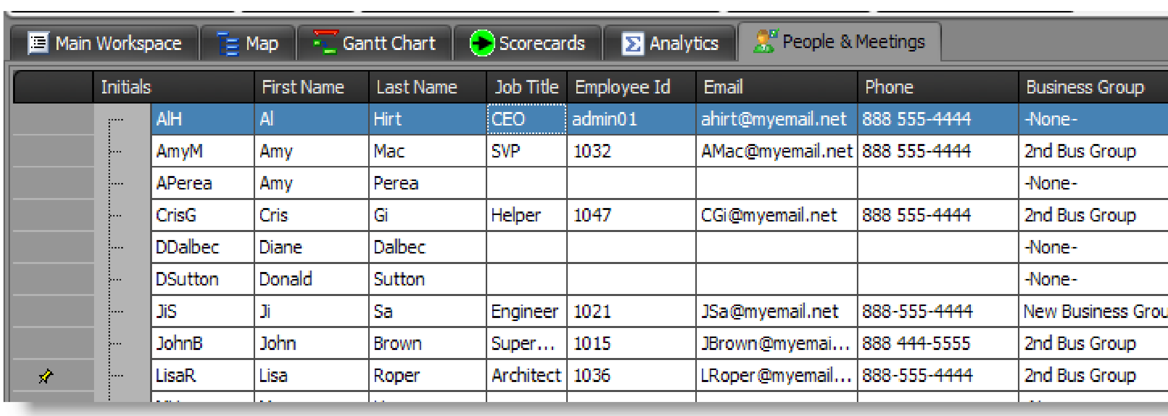
2. Add the People – Use the People/Meeting tab to add in the people in the organization who will be assigned to goals, projects and tasks.

- Type in your name over the top of the Admin record (do not delete it), then use the Add button in the ribbon control to create one new record for each person. For the "initials" field we suggest you only use the initials or the first name and last initial. Add all the people who will be assigned to records, whether they will be using ManagePro or not. For those who will be using the program, be sure to check the "Enable Login" button and given them a default password to initially log in. They can change their password at any time thereafter. Make sure you enter the email address for each person, the database uses this for emailing out notifications.

- If creating a database for a small organization it is not necessary to create business groups, but to review the tutorial on user access and business groups please go to http://www.managepro.com/mpro7/tutorials/useraccess/useraccesstutorial.html prior to creating and assigning users to business groups. Business groups can be added at anytime and can be used to easily create views or access to only certain parts of the database based upon membership in a business group. That's all advanced stuff.

- User access setup is a right click option which is covered in the tutorial and the help file. Bottom line, for each person logging into the database as a user, you'll need to check the "Enable Login" checkbox, give them a temporary password and assign them one of the 5 access levels.

- At this point your People/Meeting tab view should look something like this view:



Initials	First Name	Last Name	Job Title	Employee Id	Email	Phone	Business Group
AlH	Al	Hirt	CEO	admin01	ahirt@myemail.net	888 555-4444	-None-
AmyM	Amy	Mac	SVP	1032	AMac@myemail.net	888 555-4444	2nd Bus Group
APerea	Amy	Perea					-None-
CrisG	Cris	Gi	Helper	1047	CGi@myemail.net	888 555-4444	2nd Bus Group
DDalbec	Diane	Dalbec					-None-
DSutton	Donald	Sutton					-None-
JiS	Ji	Sa	Engineer	1021	JSa@myemail.net	888-555-4444	New Business Grou
JohnB	John	Brown	Super...	1015	JBrown@myemai...	888 444-5555	2nd Bus Group
LisaR	Lisa	Roper	Architect	1036	LRoper@myemail...	888-555-4444	2nd Bus Group

- Before moving on to the 3rd step, work your way back through the database and assign people to each record, by double clicking in the Who field for each record. To access all the people you have entered for assignment to records, first check their names in the Who/Enterprise tab, then they will appear and be available for assigning to records in the Who/Personal tab.

  Note: you can assign multiple records with a single step if you use the Right Click Multi-Edit/Who option. You can also use this option to set the Creator field, so that when people begin using the database they will be able to have full access to the records typically they are lead on. This makes it easier to change dates and or change the outline positioning of records.

3. Getting the House Operational – The final step in this over-view covers several issues and doesn't address many more, simply because they aren't critical to get you up and operational – which is the goal of this document. So let's get started with what you need to add to get operational at this point.

- First of all, instead of randomly clicking on different screens and links "to see what happens", we suggest that it is well worth taking a few minutes of your time to "know your way around the house", e.g. learn the basic functionality:
    - Review the basic tutorials found at (and book mark) http://www.managepro.com/m9portal.html it is your best resource for tutorials and training aids
    - Print out the two page overview of the program features – download at http://www.managepro.com/pdfs/Mpro9_Overview.pdf, and

- Add Custom Views: There are over 200 available fields in ManagePro, plus the capability to add additional calculated fields (using formulas just like in Excel). But knowing that most people only scan 4-6 columns at a time, you need to think about creating separate views that display the information directly addressing your 5-10 most common business questions. Presuming you are logged in as "admin" or have given yourself Administrator rights, you will be able to create and modify those Views using the right click option "View Configuration."

- Some custom views are added by default when you create a new database, ex. A display of all records marked with a priority of 1. You'll ultimately want to tailor views for specific solutions, such as:
    - Project management; timelines, critical dates, performance tracking, earned value
    - Portfolio management; identifying the criteria to track that will create the biggest impact for you and your customers and setting up dashboards to track and display your product line and output against those criteria

  Note: PST provides cost effective consulting to help you rapidly configure the Views and fields to wrap around your business process and dramatically shorten your learning curve in this area (see http://www.managepro.com/services.consulting.html)

- **Help others be successful in using the program.** Finally, the database isn't operational until people are using it. Getting a database operational typically means that you've done some work addressing the "Why?" (a business case for using a new tool) and "What's in it for me?" questions, training, business rules and follow-up dates and performance reviews. Check out a sample training Powerpoint we use that addresses each of these topics. http://www.managepro.com/mprodocs/ManageProBasicTrainingDeck.ppt And by all means check out our blog, especially the section on leading performance improvement for state of the art help on managing the software adoption process – http://www.managepro.com/blog

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