Framework Navigator User Guide

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Revision Date:	September 26, 2002
Print Date:	December 19, 2016, 5:53 PM

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About This Document

This is the first edition of this document. As such, it is not exhaustive. The content is limited to the functions, features, and procedures that method analysts and content developers need to master to enter, edit, and manipulate content in Framework Navigator.

About Framework Navigator

Framework Navigator is the firm's object-oriented application for developing and publishing methods. It is also the repository for all method components (tasks, roles, etc.) and methods. Framework Navigator provides these benefits:

- Establishes a single repository of content based on a common framework
- Enables reuse of information without duplication or loss of context
- Provides seamless integration between methods
- Streamlines the method authoring process by providing a structured environment
- Enables authoring through a web browser and publishes in standard HTML

The Framework Navigator application is based on alfabet, an object-oriented development platform that supports our information model. It also satisfies our need to create and maintain generic content that we can customize and rearrange to create individual methods. The application is composed of three main areas:

- **Method component library**—where generic, modular content is developed
- **Assembly area**—The "factory" where we arrange and customize the pieces to create individual methods
- **Published environment—**the published web site (in HTML) used by practitioners to view the method

Support

Functional Issues

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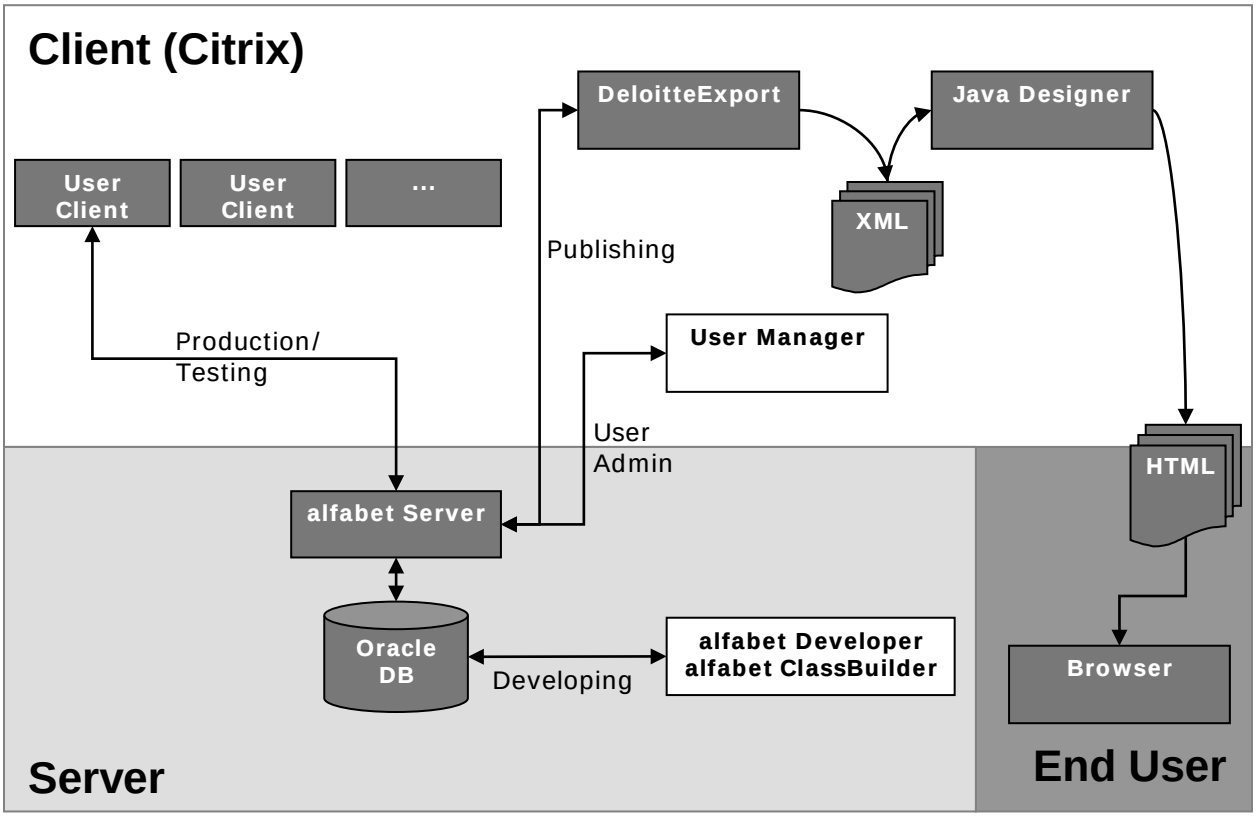
System Overview

Framework Navigator is built with alfabet, an object-oriented development platform by alfabet AG.

Technical Architecture

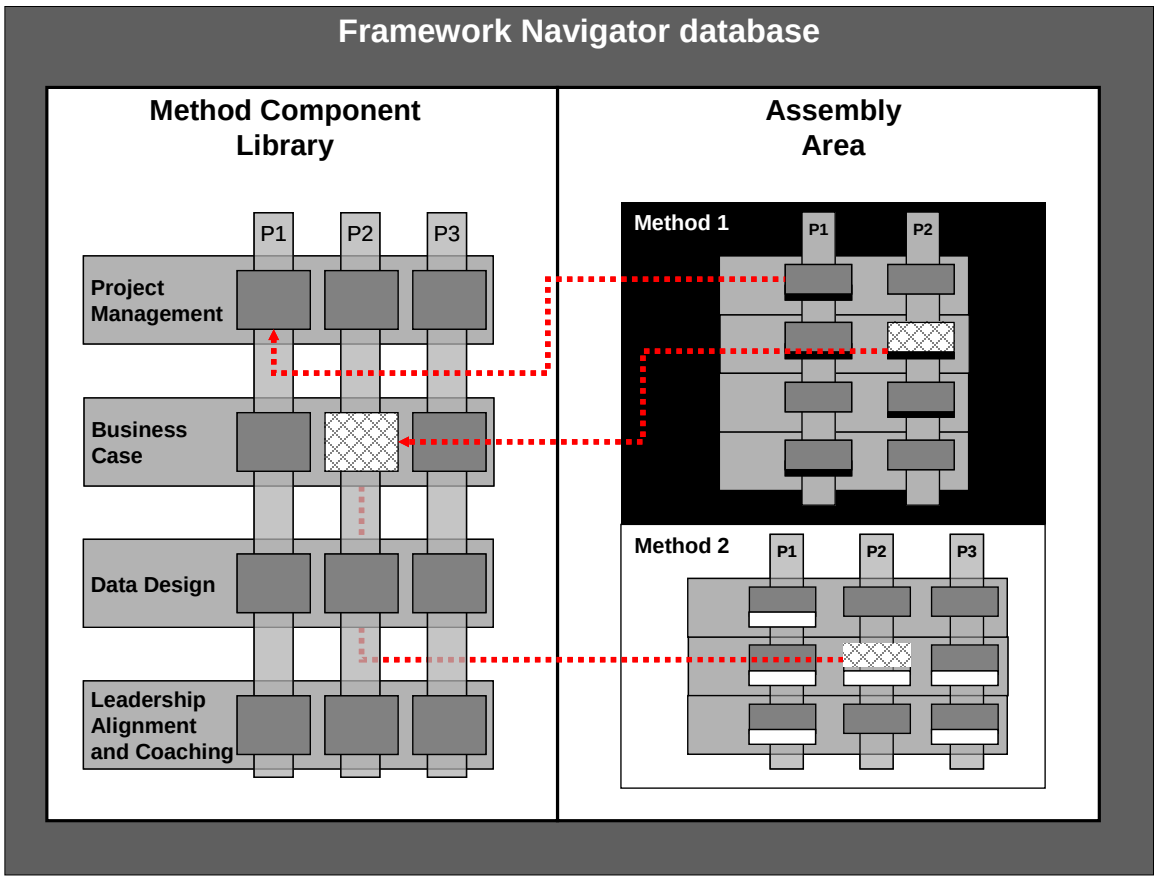
alfabet is a client/server system. It contains several applications, as shown below.



Application	Users	Purpose
User Client	Method analysts Method developers	1. Develop and manage method content 2. Assemble methods 3. Generate reports 4. Prepare methods for publishing
Deloitte Export	Method analysts	5. Export method content from the system as XML in preparation for publishing
Designer (Java)	Method analysts	6. Convert XML to HTML 7. Control the look and feel of the final web page
Browser	Everyone (inside the Deloitte firewall)	8. View published methods
Server	Administrator	9. Manage the alfabet system

Functional Architecture

Functionally, the Framework Navigator database is split into two logical areas: the method component library (MCL) and the assembly area (AA).



The **MCL** is where global content for methods is developed and managed. Global content consists of these method components:

- Phases
- Threads
- Content Categories
- Modules
- Tasks
- Deliverables
- Tools
- Roles
- Detailed Procedures
- Alias Roles
- Alias Deliverables
- External Inputs

In the **AA**, modules are reused (either from the MCL or from a method in the AA) to assemble new methods. In addition, the AA is where local content is added. Local content consists of the following:

- Phase – Name; Description
- Module – Name*; Key Considerations
- Task – Approach*; Key Considerations; references to Tools, Detailed Procedures, and Roles
- Deliverables – Template, Samples

*The local Module Name and Task Approach are used very seldom; it is only done with the express approval of the method manager.

Getting Started

Requesting Access

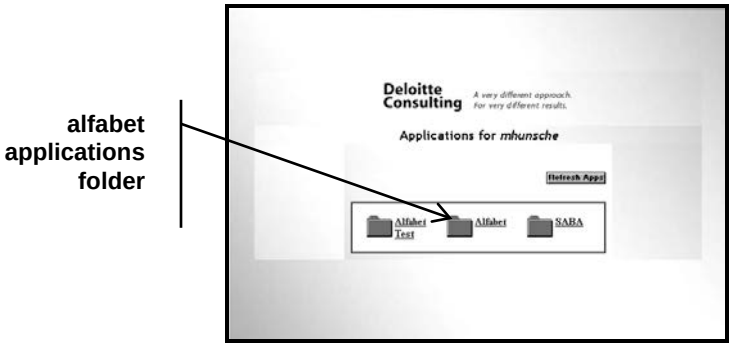
The method manager initiates the user setup process. She also informs you when the process is complete.

Logging in through AppWeb

Follow this procedure to log in to Framework Navigator through your browser.

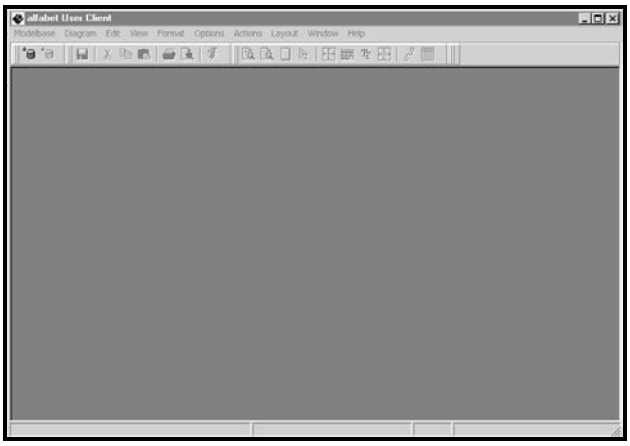
1. Use your browser to open **http://appweb**. The Welcome to AppWeb screen opens.

2. Enter your <**Outlook user ID**> and <**password**> and select your mail domain.
3. Click **Login**. The available applications appear.

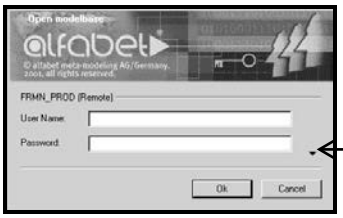


4. Click the **alfabet** folder. The alfabet applications appear. They are described in the System Overview chapter.

5. Click **alfabet User Client**. After a processing delay, the alfabet User Client window opens.



6. Select **Modelbase, Open**., or click . The Open modelbase logon dialog opens. The cursor is in the User Name field.



Show Further Options. Click here to reveal more database options.

7. Enter your <**Outlook user name**> and press **TAB**.
8. Enter your **<initial password**>, which is *password*.

   Note: You can click the triangle to show further options. Check the box for remote access and make sure the correct modelbase is selected.

9. Click **OK**. The Select Profile window opens.
10. Select your profile and click **OK**. The Framework Navigator Welcome page opens. The names of the open database and the registered user appear in the lower right corner of the screen.

    Note: If you are assigned various user profiles, select the one that is appropriate for the working session. These profiles are available:
    - IDOC Uploader
    - Method Owner_DC
    - Developer_All
    - Method Owner_All
    - Method Analyst_All
    - Method Analyst_DC
    - Developer_DC

Changing Your Password

Framework Navigator passwords expire every 90 days. Use this procedure to change your password at any time.

1. On the Modelbase menu, click **Change Password**.

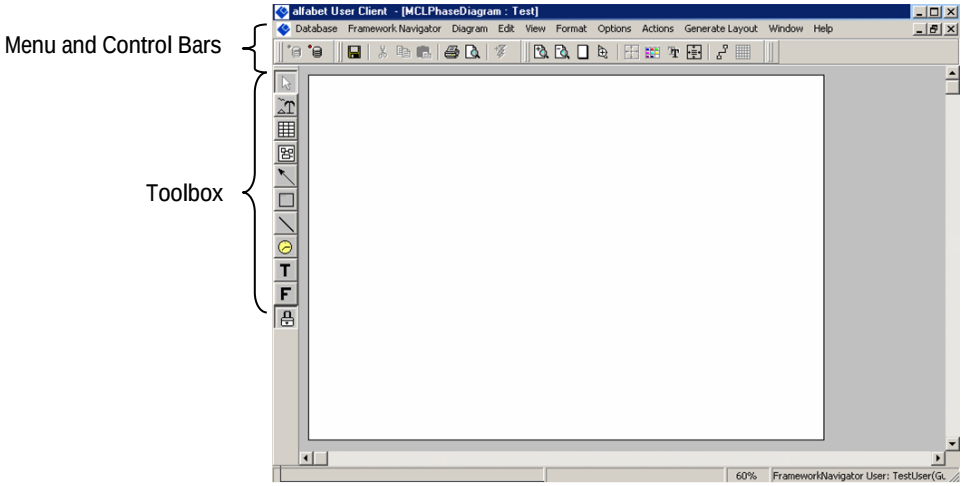
2. In the Old Password field, enter <**your current password**>.
3. In the New Password field, enter <**your new password**>.
4. In the Confirm Password field, enter <**your new password**> again.
5. Click **OK**.

Navigating in Framework Navigator

This section describes the graphical user interface (GUI), including:

- Windows (diagrams, dialogs, selects, text editor)
- Menus and controls
- Toolbox

Framework Navigator has the standard Windows look and feel. The Menu and Control bars appear at the top of the window. The toolbox appears on the left side of the window.



Working with Framework Navigator Windows

The Framework Navigator GUI makes use of four types of windows that are defined and illustrated in these sections:

- Diagrams
- Dialogs
- Select
- RTF Text Editor

Diagrams

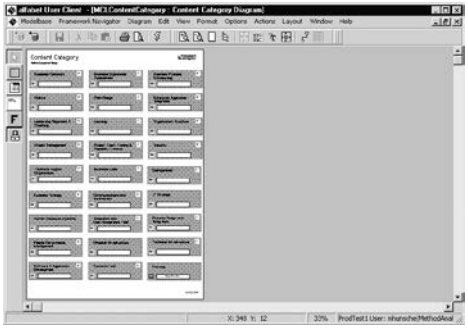
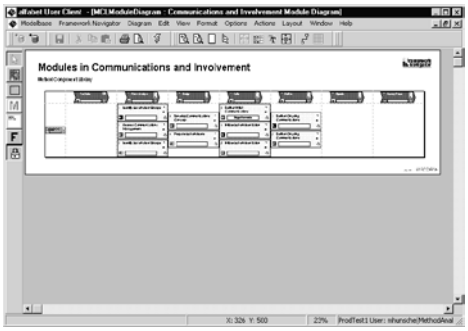
Method managers and analysts can use the diagrams to create modules and other objects in the MCL and AA. Method analysts and content developers can also use the diagrams to select and edit method components.

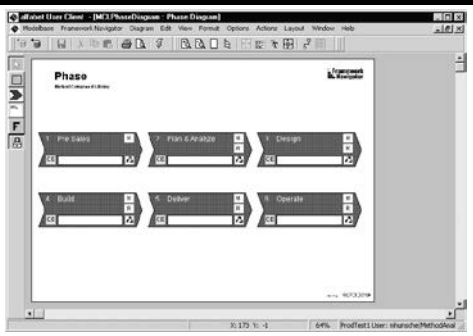
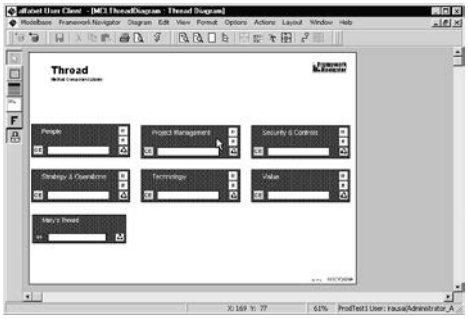
Follow this procedure to use Framework Navigator diagrams.

1. Display the FrameworkNavigator menu. It provides access to two diagram groups that are of interest to method analysts and content developers:
   - **MCL diagrams**—a visual depiction of the method component library
   - **AA diagrams**—a visual depiction of the assembly area
2. Follow these steps to view the various types of diagrams.

   MCL Diagrams:

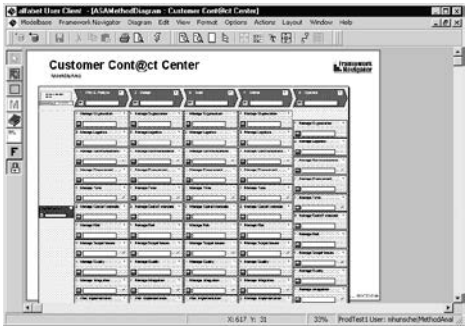
   - Click **MCL Diagrams**. The MCL Diagram explorer opens.
   - Click **Plus** (⊞) to expand the tree. MCL diagrams exist for content categories, modules, phases, and threads.
   - Double-click the diagram of interest to open it. The following table includes screen captures of the various diagrams and describes the purpose of each.

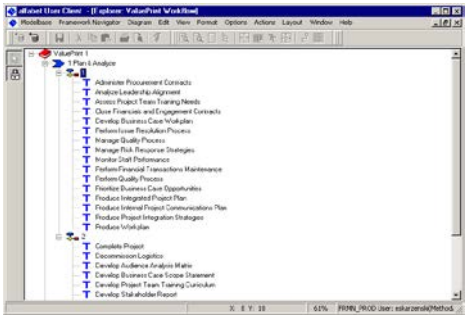
Type	Illustration	Purpose
Content Category		• Create content categories • Associate modules with content categories • Edit content categories (for example, add descriptions)
Module		• Create modules within content categories • Select and edit modules by content category (for example, a module in the Business Case content category) • Associate tasks with modules

Type	Illustration	Purpose
Phase		• Add phases • Edit phase descriptions
Thread		• Add threads • Add thread descriptions

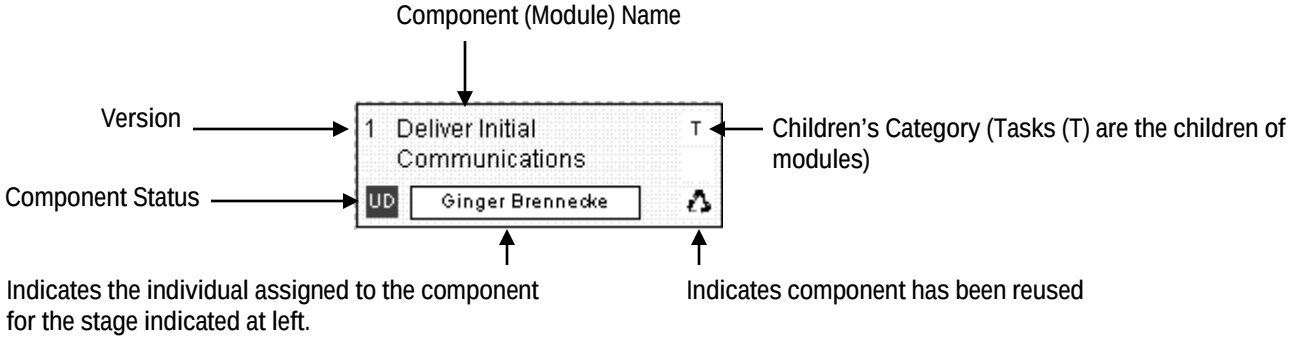
AA Diagrams:

- Click **Assembly Area**. The Assembly Area Diagrams explorer opens.
- Click the **Plus** button ⊞ to expand the tree. AA diagrams exist for Deloitte & Touche methods, Deloitte Consulting methods, Method Overviews, and Workflows.
- Click the **Plus** button ⊞ to expand the tree of interest.
- Double-click on the **diagram** of interest to open it. The following table includes screen captures of the various diagrams and describes the purpose of each.

Type	Illustration	Purpose
Deloitte Consulting Methods		• Assemble Deloitte Consulting methods • Edit components that require local information • Edit the method object (add home page information, framework attachments, etc.)

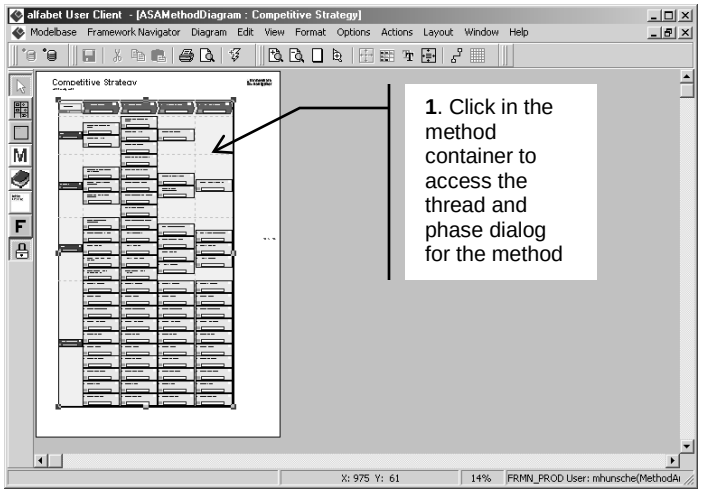
Type	Illustration	Purpose
Workflows		• Create the Workflow Groups and tree for assembled methods

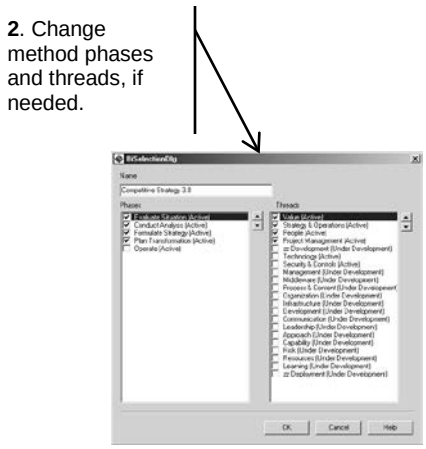
3. Diagrams display certain objects in the database visually. These visual representations include selected data points about each object, such as the name. The data displayed depends on the type of component. See the figure below for a description of the information displayed on Module objects.



4. Double-click an object to open its dialog. The next section describes how to navigate dialog windows.

   Note: If you access a project diagram in the AA, you can click on the object container to access the dialog that lets you change the method phases and threads.



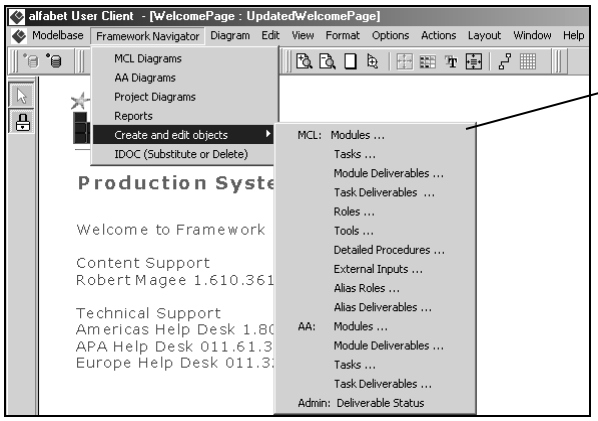


Dialogs

The majority of method content is developed and edited in dialog windows. Sections of the various method components are accessed through a set of tabs that are unique to the type of component. All components include the General, Comments, and Administration tabs.
Follow this procedure to view a dialog window.

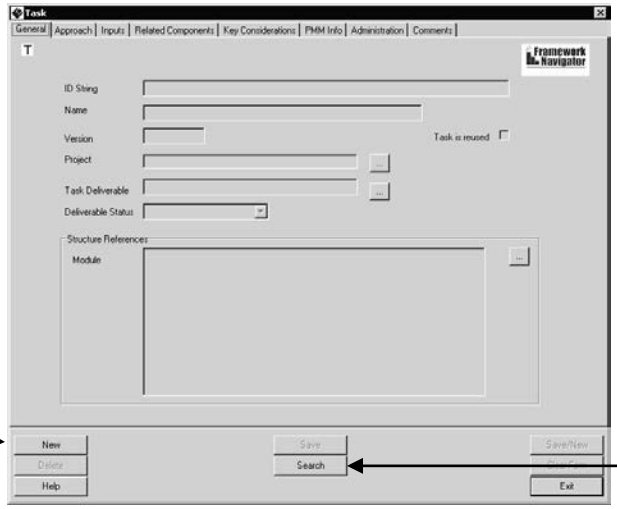
1. Open a dialog window in one of these two ways:

   – Double-click an object on a diagram. Its dialog opens to the General tab.
   or
   – Open the **Framework Navigator** menu, click **Create and Edit Objects**, and then select a component.



Create and Edit Objects drop-down menu

The dialog opens to the General tab of the selected component.



Click New to create a new component of the selected type

Click Search to edit an existing component of the selected type

2. Take the appropriate action:
   - To create a new document, click **New**. The Select Copy Scheme window opens.
   - Click **Create**, and then click **OK**. The document dialog opens to the General tab. Required fields are highlighted in yellow.

   or
   - To edit an existing document, click **Search**. The Select Instance window opens.
   - Locate the document as described in the following section. The document dialog opens to the General tab for that method component.
3. Click a tab to display it.
4. To enter data in a field, click on it. Or use the **Tab** and **Arrow** keys to move from field to field.

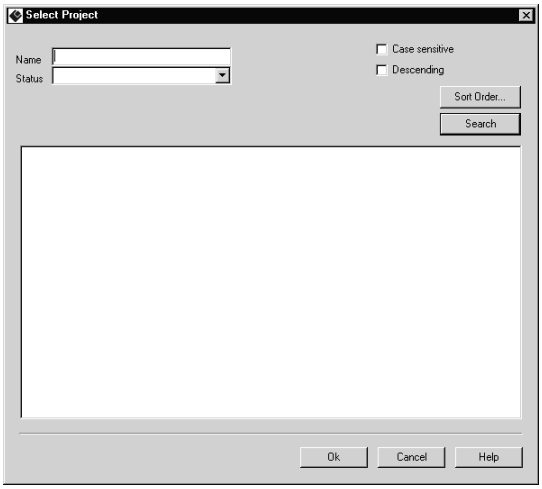
   Note: When the **Dot** button ( ) appears next to a field, click it to take further action (for example, to make a selection or to access the Text Editor window.

Select

The Select window is used to select objects stored in Framework Navigator (for example, tasks, deliverables, inputs, tools).

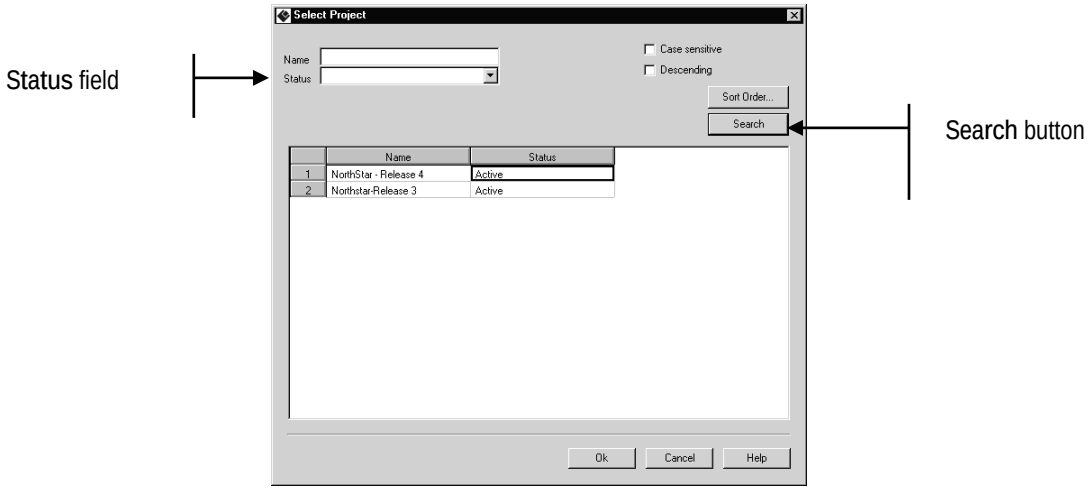
Follow this procedure to use a Select window.

1. Open a dialog as described in the previous section.
2. Click the **Dot** button ( ) that appears next to a field that enables you to select, view, add, edit, or dissociate a method component. A Select window opens, as illustrated.



3. Take one of the following steps:

   – To display all choices, click **Search**. All possible selections appear in the lower part of the window.

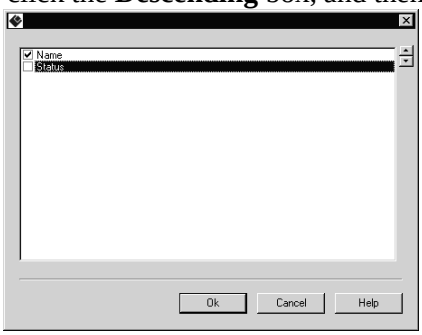


   – If you know the exact name of the component you want to select, enter it in the Name field. Then click **Search**, or press **Enter**.

     Note: The name you enter must be exact in terms of spelling, punctuation, and spacing. You can use **%** (percent) as a wildcard character.

   – The Select window for most components also contains one or more filters, which narrow the list by property value. To use a filter, select the property value you want from the drop-down menu, and then click **Search**.

   – To change the sort criteria for the list, click **Sort Order**. Framework Navigator displays the columns that appear in the Select window, as illustrated. Select the box next to the column you want to use as the sort criteria and click **OK**. To reverse the numerical or alphabetical sort order for the current sort criteria, click the **Descending** box, and then click **Search**.



4. When you have located the component you want to select, click to highlight it, and then click **OK**. To select more that one component, hold down the **CTRL** key.

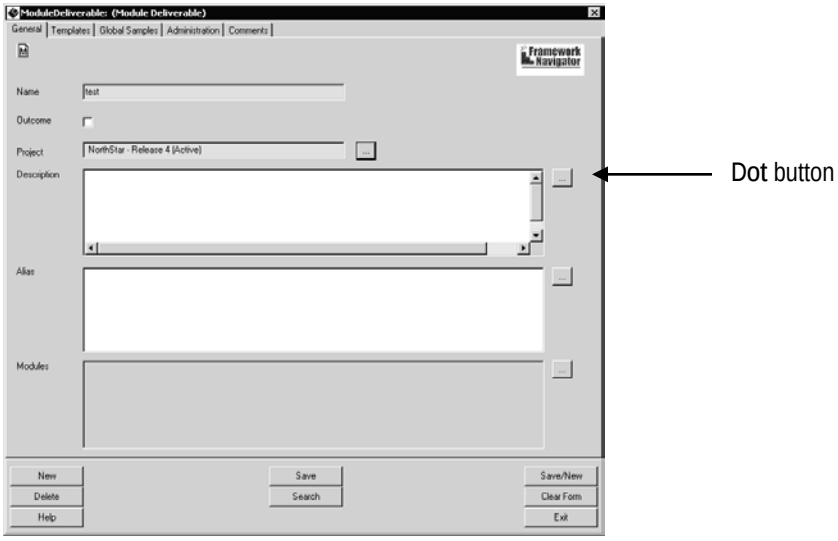
   Note: In some cases, you can select multiple items. For example, when you are associating tasks with a module, you can associate all the tasks in a single operation by selecting all the tasks for that module before clicking **OK**.

Text Editor

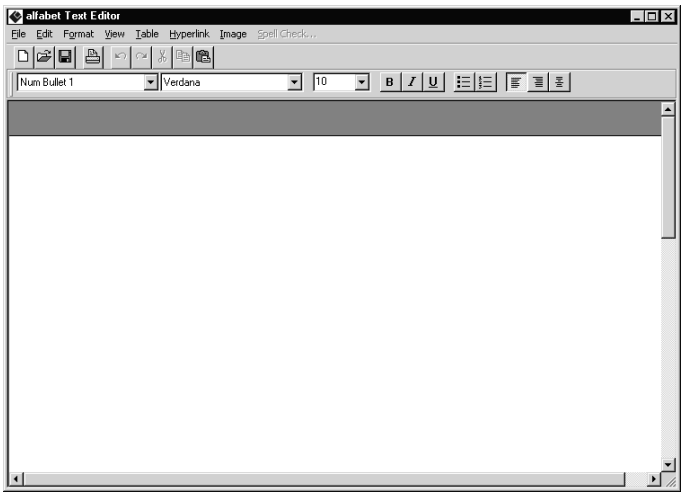
The text editor window is used to enter content in fields that require extensive or formatted text, such as Description, Objective, Approach, and Key Considerations. The formatting in these fields is enabled by rich-text format (RTF).

Follow this procedure to view the text editor window.

1. Open a dialog as described in the section *Dialog Windows*.
2. Click the **Dot** button ( ) that appears next to an RTF text field. On the screen depicted below, the button appears to the right of the Description field for a module deliverable.



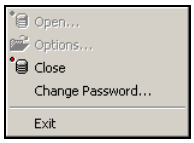
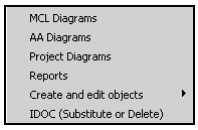
   The Text Editor window opens, as illustrated. See *Using the Text Editor* for detailed instructions on using the text editor.



3. Type the text in the Text Editor window, and then close the window. You can close the window by clicking the close button or choosing **File > Exit**. The text is saved.

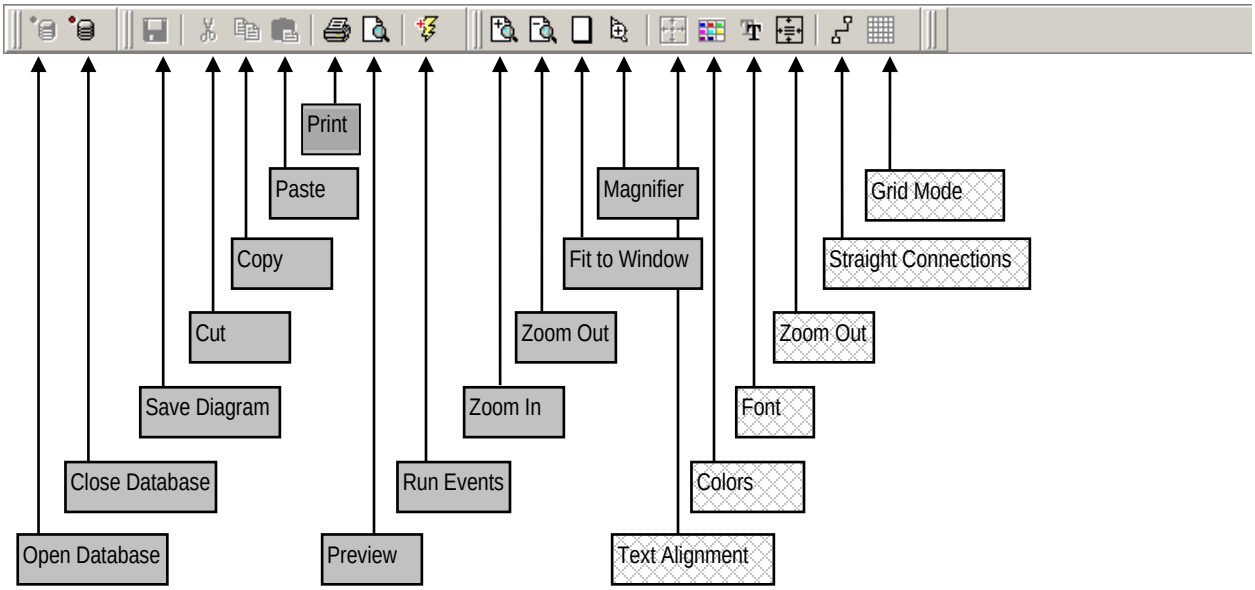
Framework Navigator Menus

The following table lists the main menu options that method analysts and developers will use. It also describes the functions they perform. This is not a comprehensive view of Framework Navigator menus.

Menu	Option	Use to
Modelbase 	Open	Open the modelbase.
	Options	Set options for modelbases.
	Close	Close the modelbase.
	Change Password	Change your password.
	Exit	Exit Framework Navigator.
Framework Navigator 	MCL Diagrams	Add, access, and edit MCL components. • Content Categories— content categories with global module mapping • Modules—create and global modules, which are organized by content category and mapped to phases • Phases—global phases • Threads—global threads
	AA Diagrams	Assemble methods, add and edit method-level content, add and edit local content. • Deloitte and Touche Methods • Deloitte Consulting Methods (for example, FastTrack, ValuePrint) • Methods Overview— NA • Workflows—Create AWFs
	Project Diagrams	NA
	Reports	Run reports.
	Create and Edit Objects	Create and edit MCL and AA method components. • MCL—Modules, tasks, module deliverables, task deliverables, roles, tools, detailed procedures, external inputs, alias roles, alias deliverables • AA—Modules, module deliverables, tasks, task deliverables • Admin—Deliverable Status
	IDOC (Substitute or Delete)	Replace an IDOC with a file of same name or delete an IDOC.

The Control Bar

The illustration below defines the functions of the Framework Navigator control buttons. Method analysts and content developers primarily use the buttons on the left (captions shaded). The buttons to the right (captions patterned) are used when creating diagrams.



The Toolbox

Toolbox features are used when working with Framework Navigator diagrams. The items that appear in the toolbox vary according to the functions available in a particular diagram. The list provided in the table below is not comprehensive; it shows the tools used to add a module to an MCL or AA diagram.

Button	Use to
Select	Select an object on a diagram.
Lock	Lock a tool to eliminate the need to select it each time you want to use it.
Module	Add a module to the diagram.
Method	Add a method to the diagram.
Content Category	Add a content category to the diagram.
Phase	Add a phase to the diagram.
Thread	Add a thread to a diagram.

Working with Attached Files (IDOCs)

Some method components include file attachments (see the following Component table). The alfabet term for an uploaded file attachment is “IDOC,” an abbreviation for “internal document,” because attached files are uploaded into the repository and become internal to the system.

Components that can include IDOCS

Component	IDOC Link Location
MCL Module Deliverable	– Template (limit two files) – Global Samples (limit five files)
MCL Task Deliverable	– Template (limit two files) – Global Samples (limit five files)
MCL Role	– Role screen
MCL Tool	– Tool screen
AA Module Deliverable	– Template (limit two files) – Local Samples (limit five files)
AA Task Deliverable	– Template (limit two files) – Local Samples (limit five files)

Several commands for working with IDOC files are accessed from a component screen (see the following Command table).

IDOC Commands

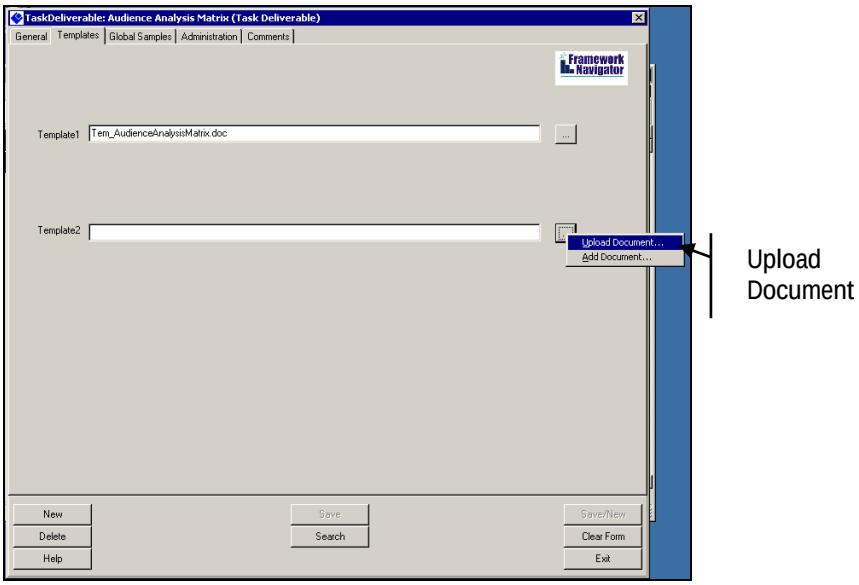
Command	Use to
Upload	Upload a file and associate it with the component. Selecting this command displays a standard Windows file browser, which enables you to locate the file on your local drive.
Add	Associate an existing IDOC with the component. Selecting this command displays a Select Instance window, which enables you to select the file from a list of IDOCs already in the system.
Delete Document Reference	Dissociate the existing IDOC from the component. This does not delete the IDOC from the system.
Substitute Document	Replace an existing IDOC with a newer version of the file. This can only be performed with an identically named file. This replaces the existing file content with the upload content.
Download Document	Download a copy of the IDOC to a local drive.

Uploading an IDOC to a Component

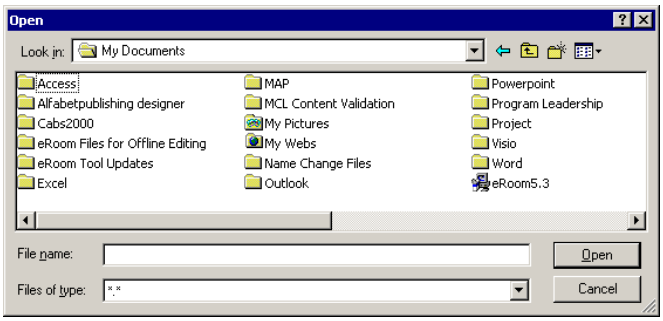
New attachment files are subject to the Framework Navigator *File-Naming Conventions*. Once the file name has been standardized, the file can be uploaded into Framework Navigator.

Follow this procedure to upload an IDOC.

1. Access the component dialog. The Template tab for a task deliverable is illustrated. Click ⬚ next to the attachment field, and then select **Upload Document**. The Open dialog appears



2. Select the <**file**> to be uploaded, and then click **Open**. The component dialog reappears.



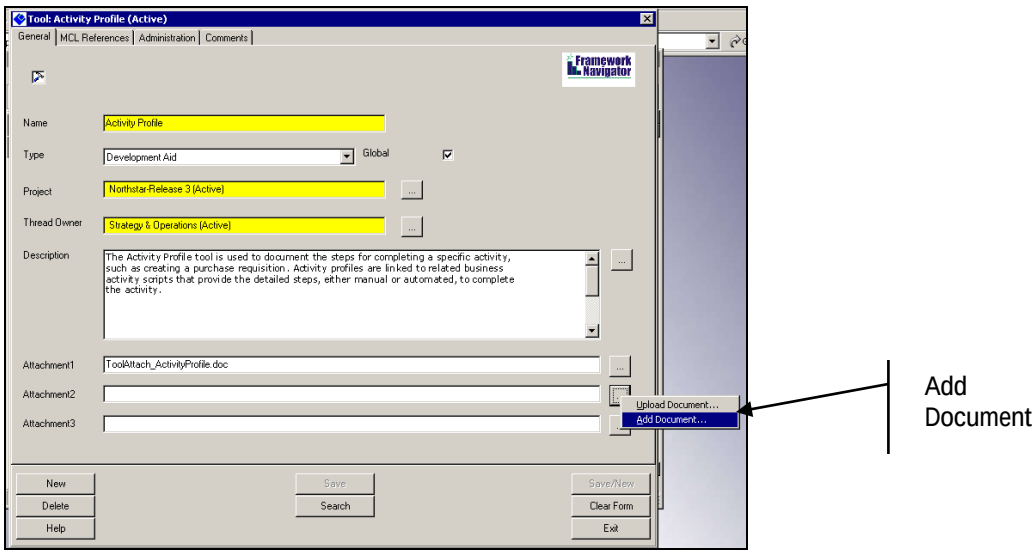
3. Verify that the correct filename has been loaded, and then click **Save**. The Upload dialog appears.
4. Click **OK**. The Success dialogue appears.
5. Click **OK**. The IDOC has been copied to the Framework Navigator repository and attached to the component.

Adding an Existing IDOC to a Component

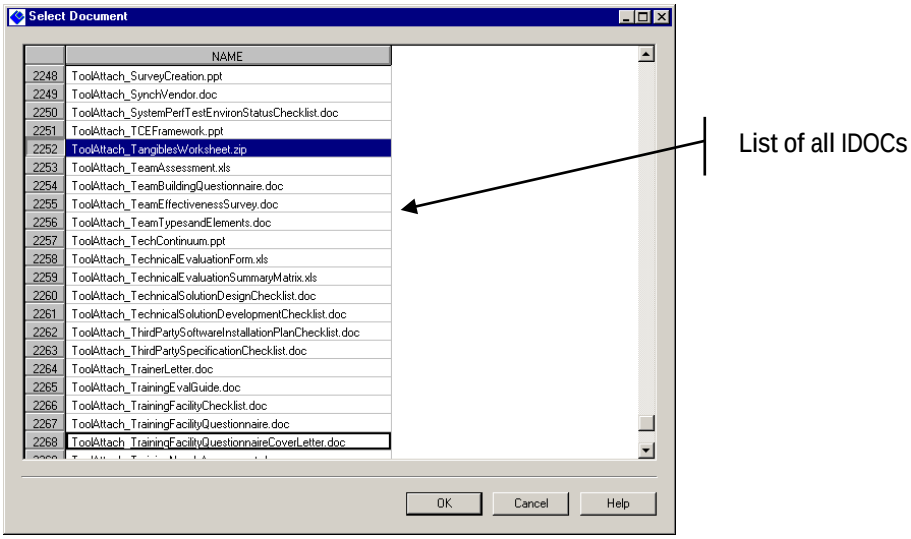
To add IDOCs that already exist in Framework Navigator, use the **Add Document** command.

Follow this procedure to add an attachment that already exists in Framework Navigator to a component.

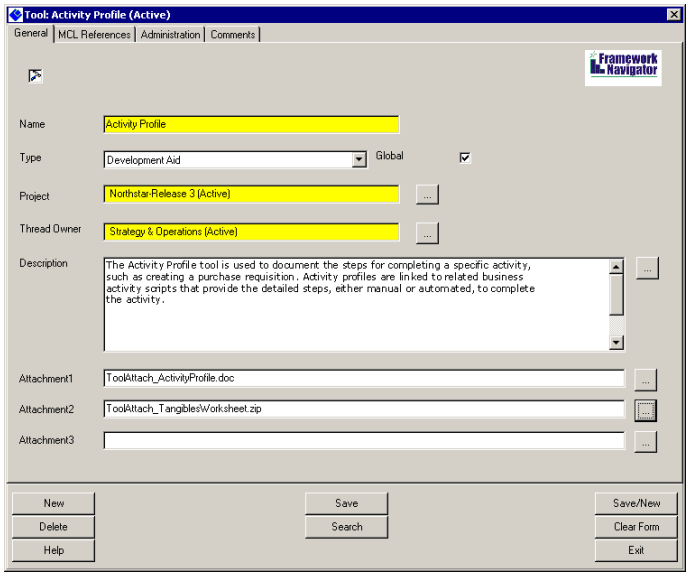
1. Open the component dialog. A tool General tab is illustrated.



2. Click [...] next to the attachment field, and then select **Add Document**. The Select Document dialog opens, displaying a list of all available IDOCs, as illustrated below.



3. Select the <**IDOC to be attached**>, and then click **OK**. The component dialog reappears with the new IDOC listed.



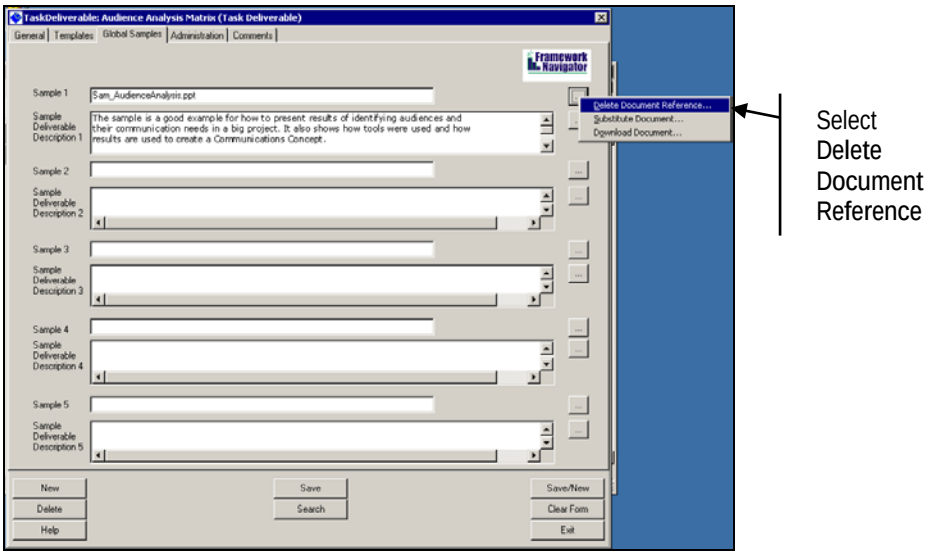
4. Verify that the listing is correct, and then click **Save**. The Success dialog appears.
5. Click **OK**. The IDOC has been attached to the component.

Deleting an IDOC Reference from a Component

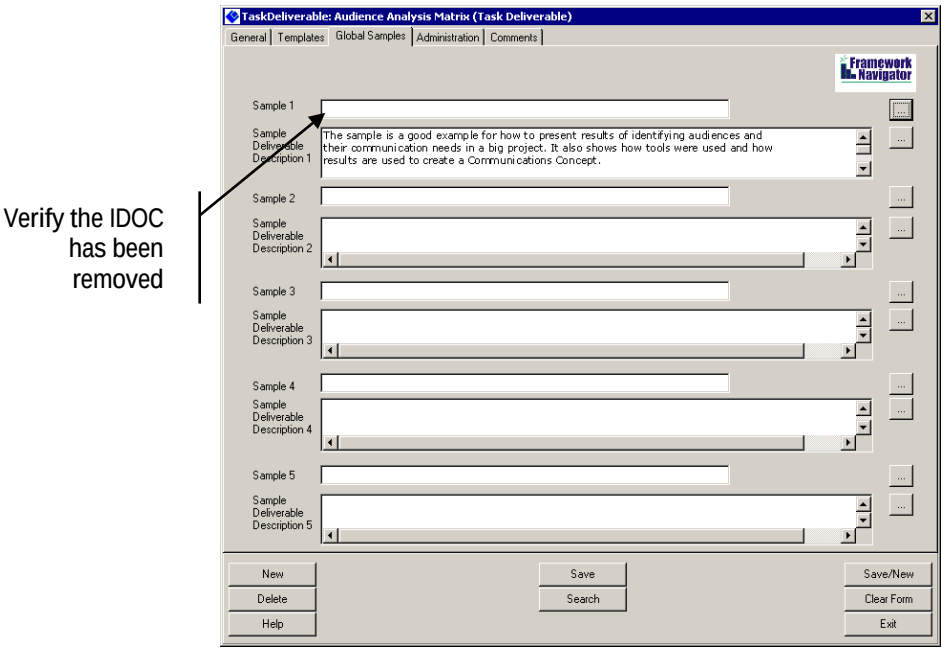
To remove the link between a component and an IDOC, use the **Delete Document Reference** command. Once the link is removed, the original IDOC is no longer associated with the component and a different IDOC can be uploaded.

Follow this procedure to remove an IDOC attached to a component.

1. Open the component dialog. A deliverable Global tab is illustrated.



2. Click [...] next to the attachment field. Select **Delete Document Reference**.
3. Verify that the IDOC has been removed, and then click **Save**. The Success dialog appears.



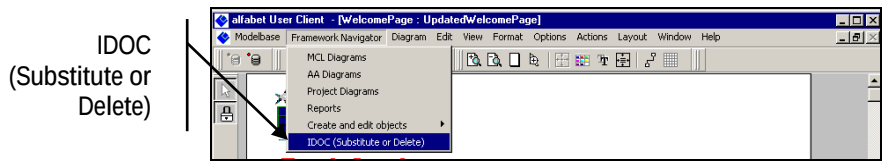
4. Click **OK**. The reference between the IDOC and the component has been removed; however, the IDOC is still in the Framework Navigator repository.

Removing an IDOC from Framework Navigator

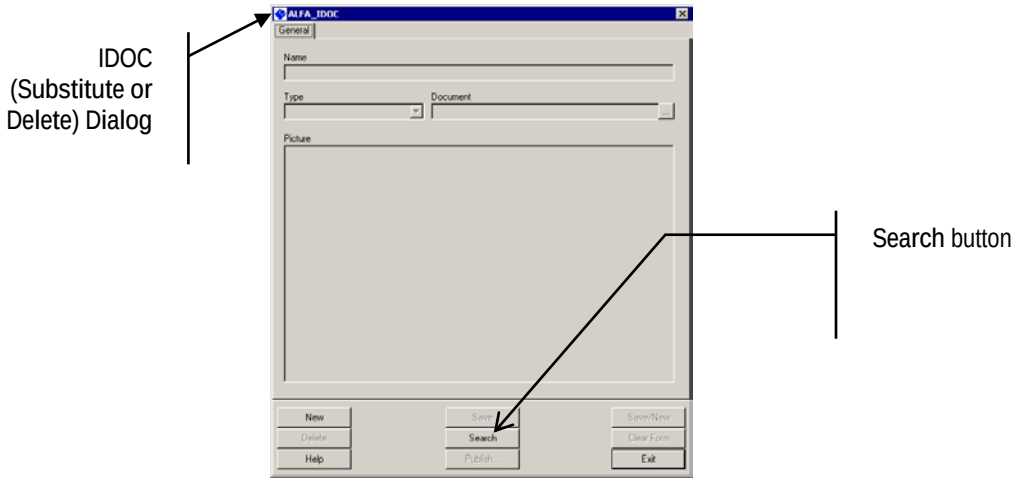
If the IDOC should be removed from the repository, follow these instructions. If you are not certain whether the IDOC is attached to other components, run a "Where-Used" report.

Note: Existing references to the document are not removed when the document is removed from the repository. If a document has been removed from the repository and subsequently accessed from a component, the user receive this Warning "Referenced document does not exist more in model?"

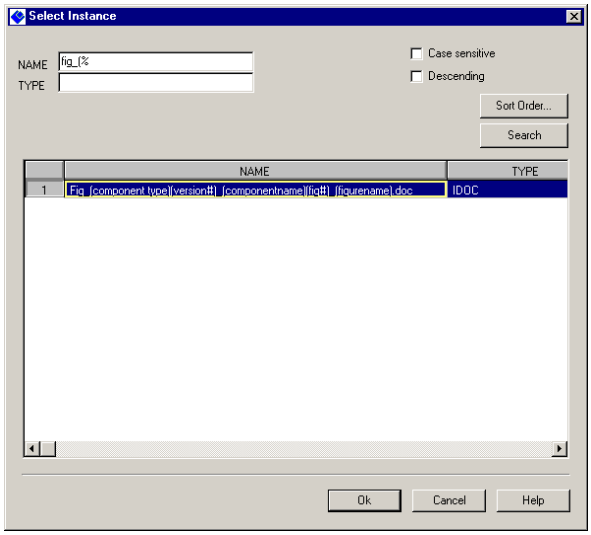
1. Click **Framework Navigator** > **IDOC (Substitute and Delete)**. The IDOC (Substitute and Delete) dialog appears.



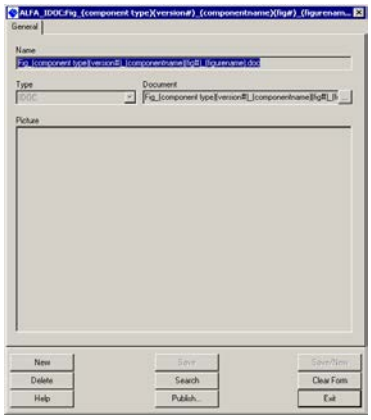
2. Click **Search**. The Select Instance dialog appears, as illustrated.



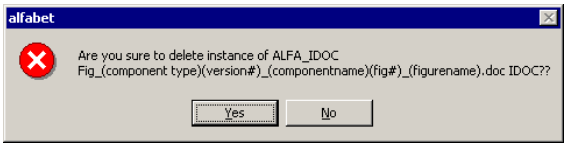
3. Enter the <**filename**> of the IDOC and click **Search**.



4. Select the **IDOC** and then click **Ok**. The Upload dialog reappears.



5. Verify that the correct filename appears in the Document window. Click **Delete**. A verification dialogue appears.



6. Take the appropriate action:
    - Click **Yes** if the correct IDOC is shown; The IDOC has now been removed from the Framework Navigator repository.
    - Click **No** if the incorrect IDOC is shown.

Substituting IDOCs

The procedure to follow for substituting an IDOC depends on whether the replacement file has the same file-name or is named differently.

Replacing an IDOC with a Differently Named File

The Delete Document command must be used first when replacing an IDOC with a differently named file. This command removes the association between the IDOC and the component. After deleting the document reference, the original file must be deleted using the IDOC (Substitute or Delete) dialog. Next, the new file is uploaded and attached using the Upload Document command from the component dialog. The new file must follow Framework Navigator *File-Naming Conventions*.

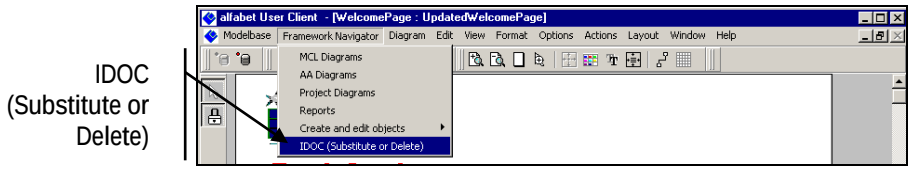
Substituting an Identically Named File for an IDOC

Updating the contents of an existing IDOC can be performed either from either the IDOC (Substitute or Delete) dialog or from a component's Substitute Document command. An IDOC's content can be updated by substituting a file with the same name for the existing IDOC file. This replaces the IDOC's content with the new file everywhere that IDOC exists on Framework Navigator.

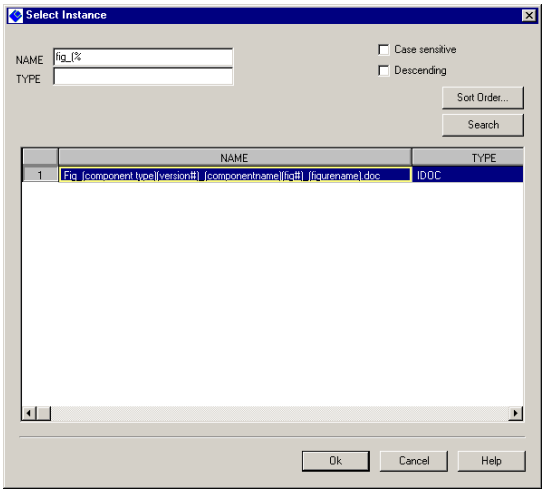
Follow either procedure to replace an existing IDOC with an identically named file.

Procedure A

1. Click **Framework Navigator > IDOC (Substitute and Delete)**. The IDOC Substitute or Delete dialog appears.

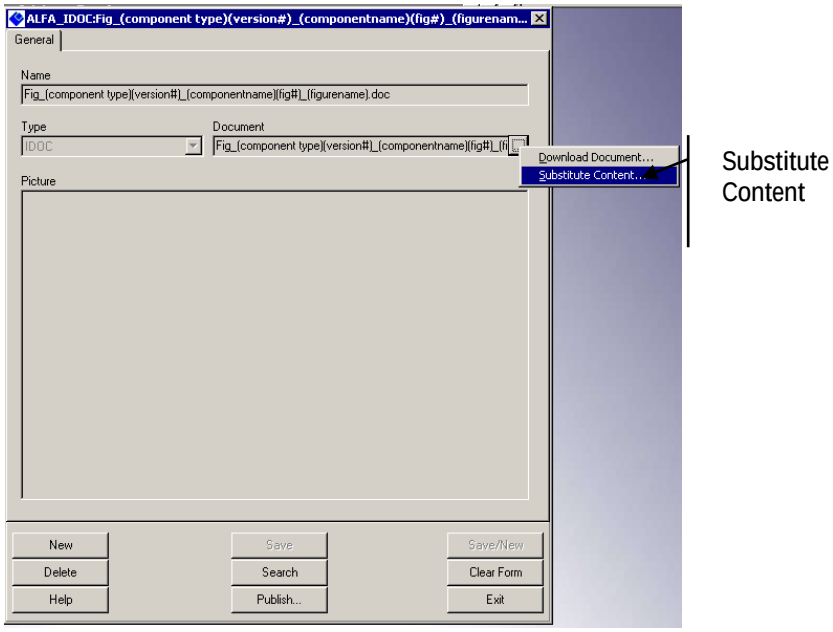


2. Click **Search**. The Select Instance dialog opens, as illustrated.



3. In the Name field, enter <**the filename**> of the IDOC and click **Search**.

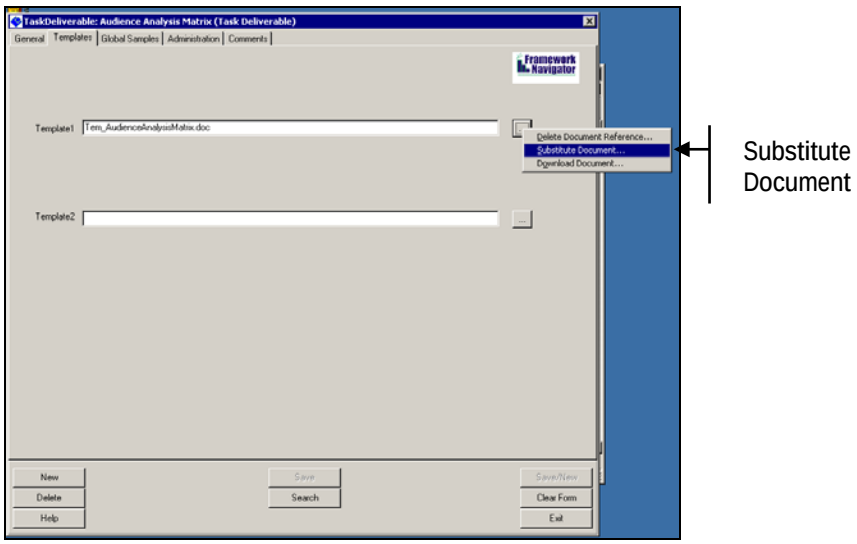
4. Select <**the IDOC**> and click **Ok**. The IDOC (Substitute and Delete) dialog appears; the Document field is populated with the selected IDOC filename.



5. Click [...] next to the Document field and select **Substitute Content**. The Open dialog appears.
6. Select <**the file**> to be uploaded and click **Open**. The IDOC (Substitute or Delete) dialog reappears.
7. Click **Save**. The Upload dialog appears.
8. Click **OK**. The Success dialog appears.
9. Click **OK**. The new file has replaced the original file.

Procedure B

1. Open the component dialog. A deliverable Templates tab is illustrated. Click [...] next to the attachment field. Select **Substitute Document**. The Open dialog appears.



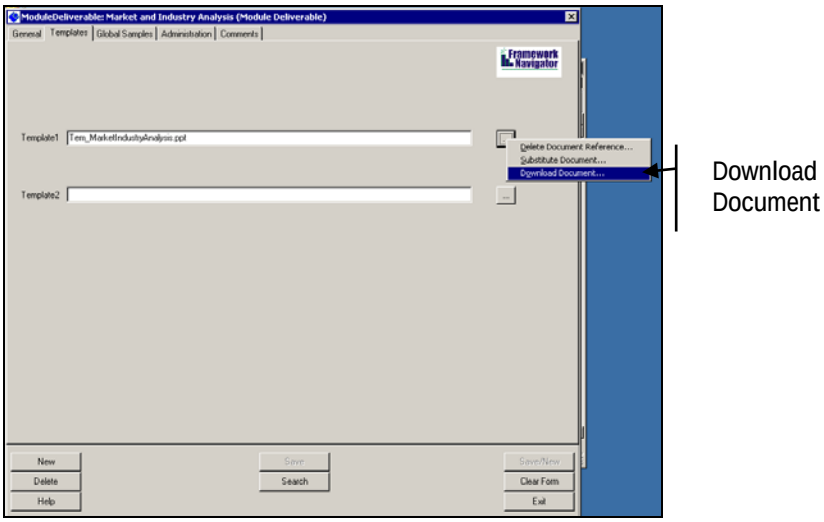
2. Select the <**IDOC file**> from the appropriate directory and click **Open**. Then click **Save**. The Upload dialog appears.
3. Click **OK**. The Success dialog appears.
4. Click **OK**. The new file has replaced the original file.

Downloading an IDOC from a Component (Viewing IDOCs)

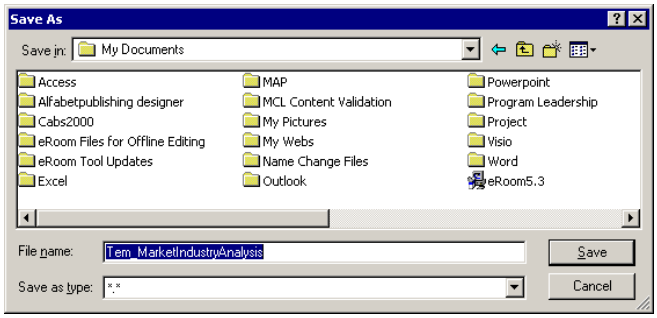
Follow this procedure to view an attachment file.

Note: IDOCs can also be downloaded using the IDOC (Substitute and Delete) command. From the dialog, click [...] next to the Document field, then select **Download Document.**

1. Open the component dialog. A deliverable Templates tab is illustrated.



2. Click [...] next to the attachment field and select **Download Document**. The Save As dialog appears.



3. Select <**the destination**> for the IDOC you want to download to your computer. Click **Save**. A system prompt asks if you want to open the document.
4. Click **No**. This functionality does not exist. View the file from the appropriate application on your computer.

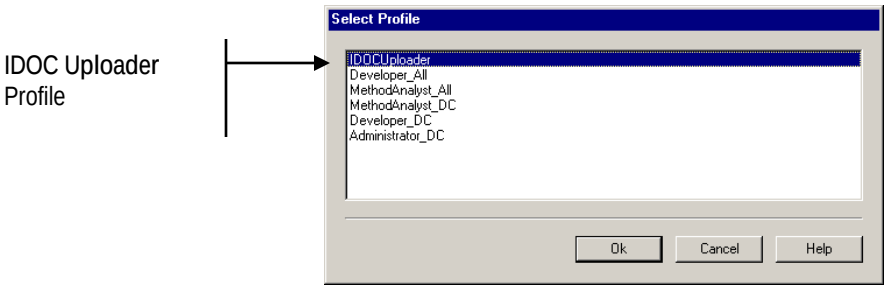
Using the IDOC Upload Command

The IDOC Upload is used to batch file uploads. The files added to the Framework Navigator repository are not automatically associated to method components. The next step for documents that are uploaded in this manner is to attach or hyperlink the IDOCs to the appropriate component.

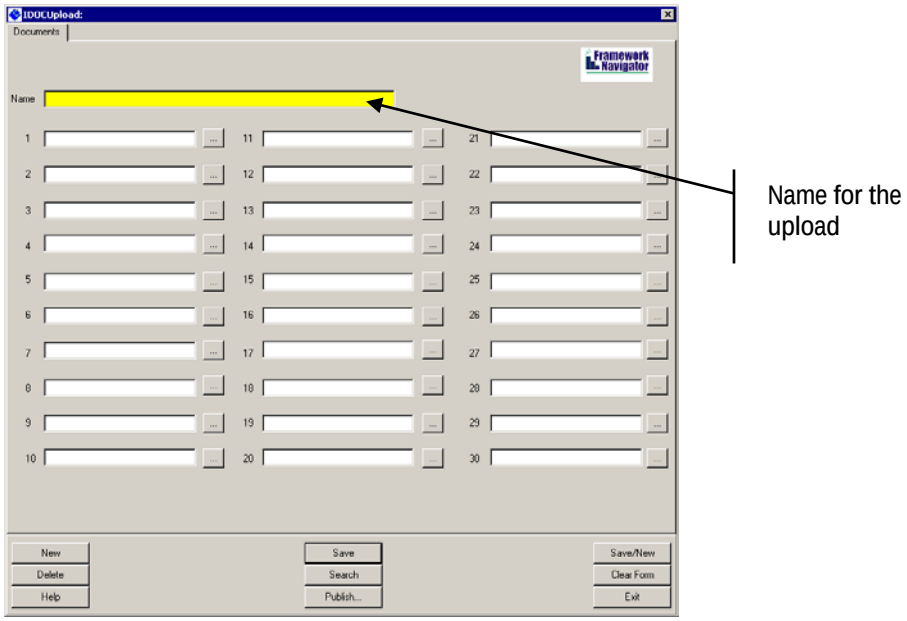
Note: Files uploaded using the IDOC Upload command must follow the Framework Navigator *File-Naming Conventions*. This is important because the filename shows the association between an IDOC and a component. For example, if an IDOC is referenced in multiple components, each reference must be a different file.

Follow this procedure to add IDOCs using the IDOC Upload command.

1. To access the IDOC Upload command, log on to Framework Navigator as an **IDOC Uploader** or an **Administrator**. Choose the appropriate profile from the Select Profile dialog. Click **OK**.



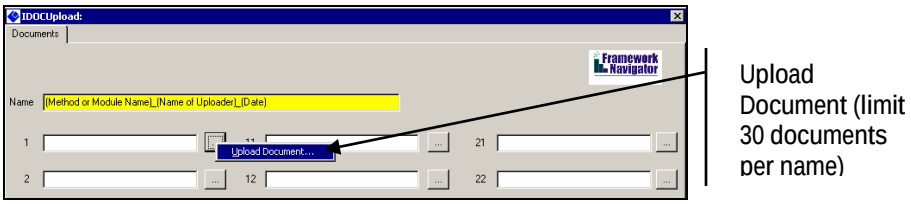
2. Click **Framework Navigator** > **IDOC Upload**. The IDOC Upload dialog appears.



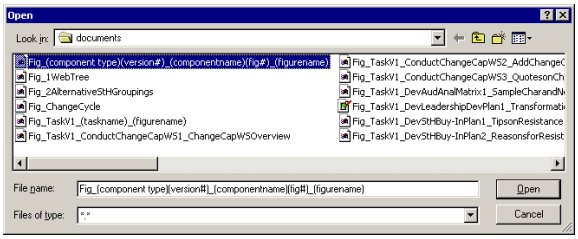
3. Click **New**. In the Name field enter a <**name.** for the upload. This name is used to group the files, similar to a folder, for future searches from this dialog.

   Note: A good name is one that references the method or component, the name of the person performing the upload, and the date of the upload.

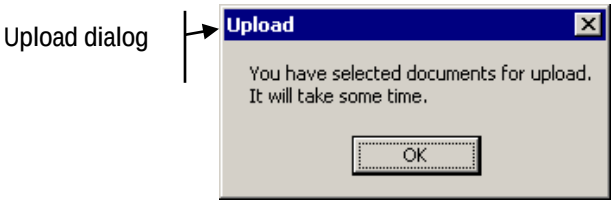
4. Click [...] next to Document 1 and then select **Upload Document**. The Open dialog appears.



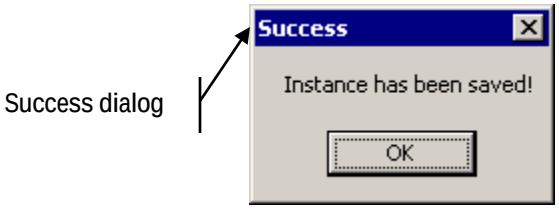
5. Select the document to be uploaded, and then click **Open**.



6. Repeat steps 3 through 5 until all documents are entered. Then click **Save**. The Upload dialog appears, as illustrated.



7. Click **OK** The Success dialog appears.



8. Click **OK**. The upload documents are now in the Framework Navigator repository. The next step is to associate the documents with method components.

   - To create an association using a hyperlink, see *Creating a Link Between an IDOC and a Component in an RTF Field*.
   - To create an association by attachment, see *Adding an Existing IDOC to a Component*.

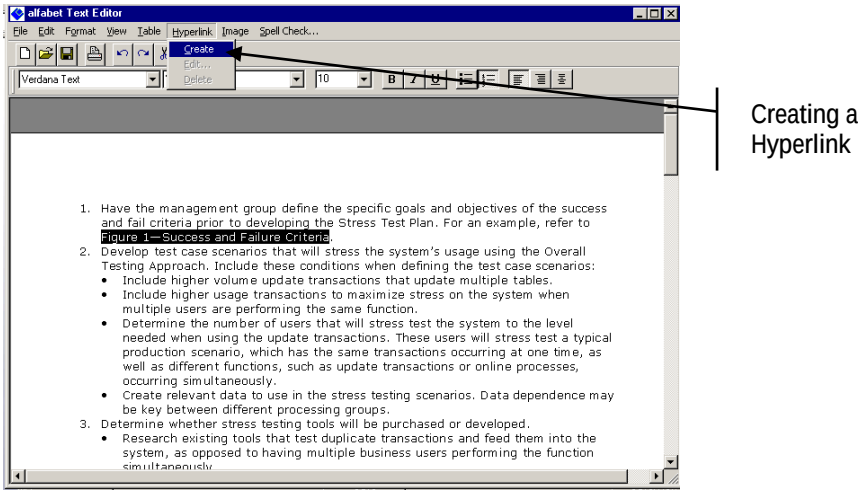
Creating a Link Between an IDOC and an RTF Field

Some IDOCs, such as figures, are referenced through a text field instead of being attached to a component. (See the following table for the locations of RTF fields.) After the file is uploaded to Framework Navigator, a link to the file must be created.

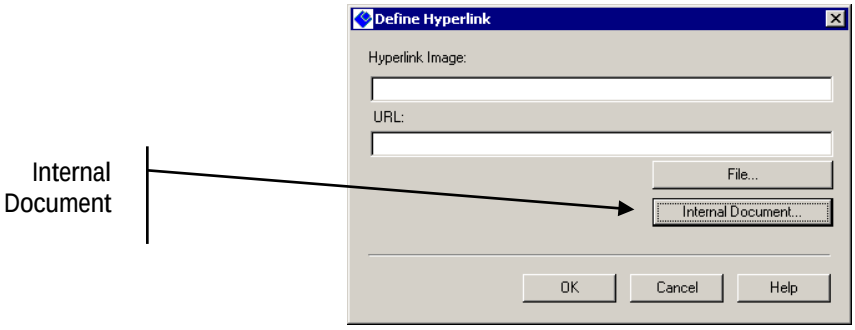
Component	RTF field where hyperlinks to IDOCS can be added
MCL Module	– Objective – Key Consideration
MCL Module Deliverable	– Description
MCL Task	– Objective – Approach – Key Consideration
MCL Task Deliverable	– Description
MCL Detailed Procedure	– Description – Procedure
MCL Role	– Description
MCL Tool	– Description
AA Module	– Key Consideration
AA Task	– Local Approach – Local Key Consideration

Follow this procedure to add a link to an RTF field.

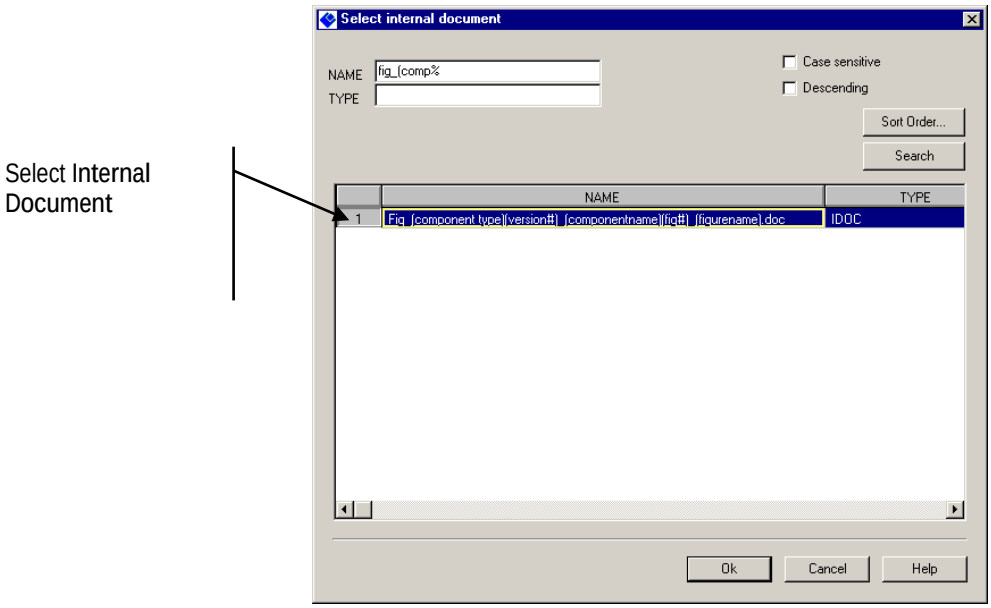
1. To reference a figure within a text field (such as in the Approach or Key Considerations) use the following text: Figure (#)—(FigureName).
2. Highlight the text reference for the figure. This text is used for the hyperlink.



3. Click **Create**. The Define Hyperlink dialog appears, as illustrated.

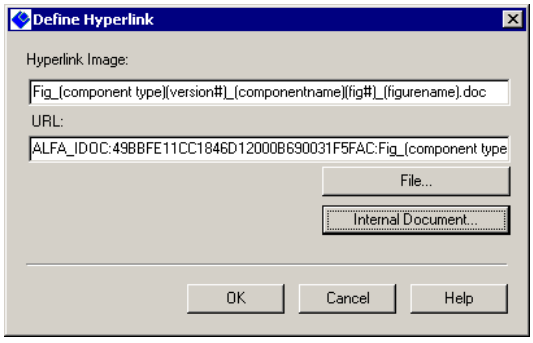


4. Click **Internal Document**. The Select Internal Document dialog appears, as illustrated.



5. Search for the IDOC (filename). Click the <**filename**> and then click **Ok**.

6. The Define Hyperlink dialog reappears, as illustrated. The Hyperlink Image and the URL fields are populated. Verify that this is correct, and then click **OK**. The Text Editor dialog reappears. The hyperlink should appear in blue



7. Close the dialog. Click **Save**.

File-Naming Conventions

The Framework Navigator repository contains thousands of IDOCs. The File-Naming Conventions provide easier IDOC reference and maintenance because associations are made between IDOCs and method components.

File Naming Tips

- Number files sequentially: Use numerals instead of spelling out the numbers, for example, Sam_Filename1.doc (correct) versus Sam_FilenameOne.doc (incorrect).
- Omit extra spaces and underscores in file names.
- Use the capitalization schemes shown in the chart above, exactly as written ("hp_Filename" sorts differently than "HP_Filename").
- Remember: Filenames have a 64 character limit, including the period and extension.

Home Page Attachments

Item	File Naming Convention	Example
ASA	HP_ASA_*{MethodAbbrev}*V*{version #}*	HP_ASA_ELV1.xls
DH	HP_DH_*{MethodAbbrev}*V*{version #}*	HP_DH_ ELV1.xls
Awareness Presentation	HP_AwarenessPresentation_*{MethodAbbrev}*V*{version #}*	HP_AwarenessPresentation_ELV1.xls
White Paper	HP_WhitePaper_*{MethodAbbrev}*V*{version #}*	HP_WhitePaper_ELV1.xls
Module Map	HP_ModMap_*{MethodAbbrev}*V*{version #}*	HP_ModMap_ELV1.xls
Roadmap	HP_Roadmap_*{MethodAbbrev}*V*{version #}*	HP_Roadmap_ELV1.xls
Release Notes	HP_RelNotes_*{MethodAbbrev}*V*{version #}*	HP_RelNotes_ELV1.xls

Tool and Role Attachments

Item	File Naming Convention	Example
Tool Attachment	ToolAttach_*{ToolName}{#}*	ToolAttach_ScoringWorkSheet1.xls
Role Attachment	RoleAttach_*{RoleName}*	RoleAttach_ProjectManager.doc

Templates

Item	File Naming Convention	Example
MCL	Tem_*{DeliverableName}{#}*	Tem_PreliminaryCustomerDataAnalysis1.doc
AA	TemLoc_*{DeliverableName}{#}_{MethodAbbrev}*V*{version #}*	TemLoc_DataAnalysis1_ELV1.doc

Samples

[Samples cleansed by KM (with "_c" after name) must be renamed to follow proper conventions.]

Item	File Naming Convention	Example
MCL	Sam_*{DeliverableName}{#}*	Sam_SurveyQuestionnaire1.doc
AA	SamLoc_*{DeliverableName}{#}_{MethodAbbrev}*V*{version #}*	SamLoc_SurveyQuestionnaire1_ELV1.doc

Figures Associated With Components

NOTE: Abbreviate as much as possible while being able to easily tell where the figure belongs. Use three to four underscores in names.

Figure Goes With:	File Naming Convention	Examples
Role	Fig_Role_{*role abbrev+fig#*}_{*FigureName*}	Fig_Role_ProjMgr1_MgrHats.ppt Fig_Role_ProjMgr2_MgrResp.xls *[in the Project Manager role]*
Detailed Procedures	Fig_DP{*DP abbrev+fig#*}_{*FigureName}*	Fig_DP_EstRes1_OrgStruct.ppt Fig_DP_EstRes2_OrgPieChart.ppt *[two organization diagrams in the detailed procedure, Estimating Resources]*
Tool	Fig_Tool_{*tool abbrev+fig#*}_{*FigureName*}	Fig_Tool_IndustryPrint1_IndustryTypes.ppt Fig_Tool_IndustryPrint2_Industrial.ppt *[in the IndustryPrint tool]*
MCL Modules	Fig_ModV*{module version #}*_{*module abbrev+fig#*}_{*FigureName}*	Fig_ModV2_DevBusCase1_BCDiagram.ppt Fig_ModV2_DevBusCase2_BCFlow.ppt *[a business case diagram and a flow chart in the second version of the module, Develop Business Case]*
AA Modules	FigLoc_ModV*{module version #}*_{*module abbrev+fig#*}_{*FigureName}_{MethodAbbrev}*V{*version #*}	FigLoc_ModV1_DevBusCase1_BCDiagram_ELV1.ppt FigLoc_ModV1_DevBusCase2_BCFlow_ELV1.ppt *[a business case diagram and a flow chart in the first version of the local module, Develop Business Case]*
MCL Tasks	Fig_TaskV{*task version #*}_{*task abbrev+fig#*}_{*FigureName*}	Fig_TaskV2_CondELWorkshops1_ClassSetup.ppt Fig_TaskV2_CondELWorkshops2_AVEquip.ppt *[classroom setup information in the second version of the MCL task, Conduct Enterprise Learning Workshops]*
AA Tasks	FigLoc_TaskV_{*task version #*}_{*task abbrev+fig#*}_{*FigureName*}_{*MethodAbbrev*}V{*version #*}	FigLoc_TaskV1_CondELWkshps1_StadiumClassSetup_ELV1.ppt FigLoc_TaskV1_CondELWkshps2_StadiumAVEquip_ELV1.ppt *[Stadium classroom setup information in the first version of the local task, Conduct Enterprise Learning Workshops]*

Method Abbreviations and Version Numbers

Method	Method Abbreviation and Version Number
Competitive Strategy	_CSV3
Customer Contact Center	_CCCV1
Enterprise Learning	_ELV1
FT for Oracle	_FTOV4
FT for PeopleSoft	_FTPV4
Middleware	_MWV1
Program Leadership	_PLV3
Project Management	_PMMV3
ValuePrint	_VPV4

Framework Navigator Features

This section contains information about several features of Framework Navigator that are broadly applicable to the whole system. Topics include

- User profiles
- Workflow
- Reuse and versioning
- Administration and comments
- Using the text editor

User Profiles

The user profile indicates the type of user and his or her access rights in Framework Navigator. The four user profiles are

- Method analyst
- Developer
- Method owner
- Administrator

Each profile is divided into three groups:

- **All**—Access to both Deloitte Consulting and Deloitte & Touche method content
- **DC**—Access only to Deloitte Consulting method content
- **DT**—Access only to Deloitte & Touche method content

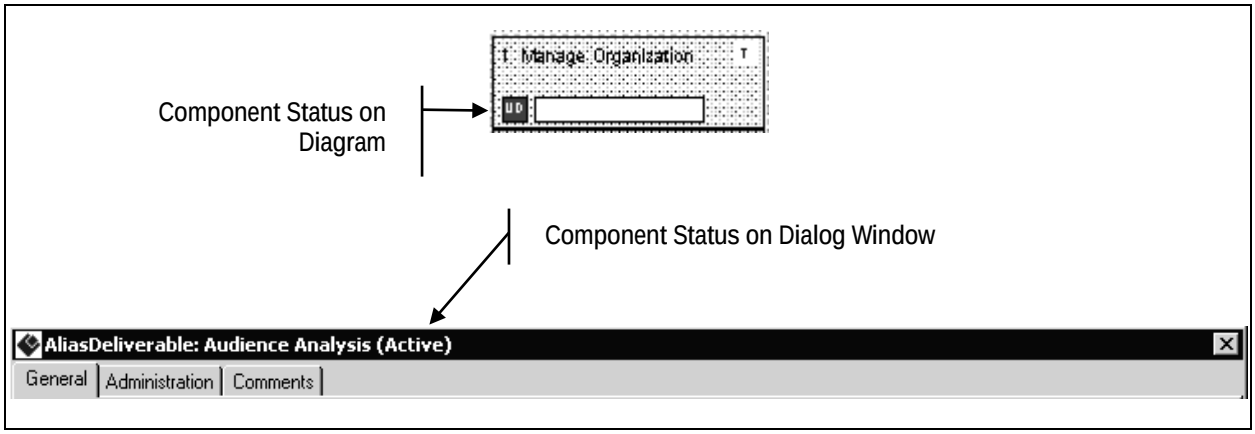
The table below identifies general access rights for method components in the method component library (MCL) and the assembly area (AA). It is organized by user profile and component development status. These rights may differ, however, depending on the specific component.

User Profiles and Access Rights

	MCL					AA						Method (AA)			Admin
User Profiles	UD	TE	CE	Act	Ret	UD	TE	CE	Act	Unc	Ret	UD	Act	Ret	
Method Analyst	C	C	C	C	C	R	R	R	R	R	D	C	C	C	V
Developer	E	V	V	V	V	R	V	V	V	V	V	V	V	V	V
Method Owner	V	V	V	V	V	R	V	V	V	V	V	E	V	V	V
Administrator	C	C	C	C	D	R	R	R	R	R	D	C	C	D	D
C = Create and edit; **R** = Reuse and edit; **D** = Create (or reuse if AA), edit, and delete; **E** = Edit only; **V** = View only															

Workflow

Content development workflow is tracked in Framework Navigator. Method analysts and developers set the status of a method component on the Administration tab of the component dialog. The figure below illustrates where the status appears on diagram map elements and on component dialog windows.



Status Options

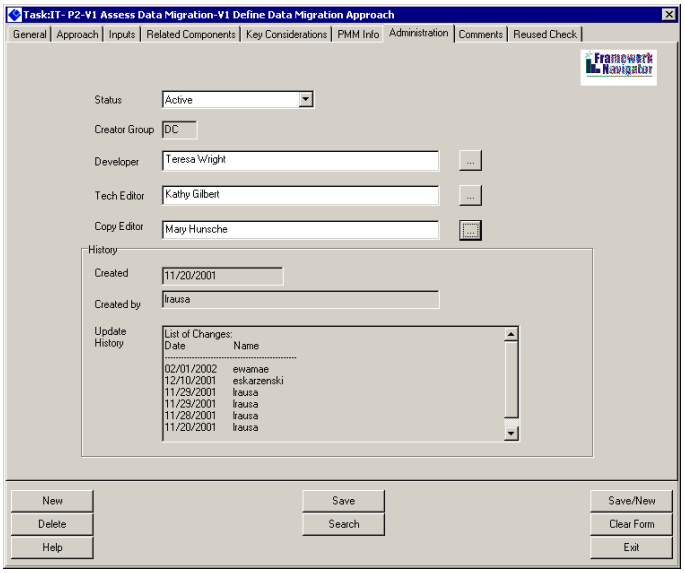
Status	Abbreviation	Description	Access	Comments
Under Development	UD	Default. The system automatically applies this status when a method component is created.	• Method Analyst • Developer	When developers finish entering content, they set the component status to Tech Edit (TE).
Tech Edit	TE	This status applies to method components that are in the Tech Edit stage.	• Method Analyst	When method analysts finish incorporating comments from the tech edit revise stage, they set the component status to Copy Edit (CE).
Copy Edit	CE	This status applies to method components that are in the Copy Edit stage.	• Method Analyst	When method analysts finish copy editing a method component, they set the status to Active (Act)
Active	Act	This status applies to method components that (under ideal conditions) have been copy edited.	• Method Analyst • Developer	
Retired	Ret	This status applies to method components that are retired.	• Method Analyst	Components must be set to Retired (Ret) before they can be deleted from the repository.

Administration and Comments

All method components in Framework Navigator have a subset of common set of fields. Some of these fields capture administrative information. Others are provided as space to enter comments about the use of the component.

Administration Tab

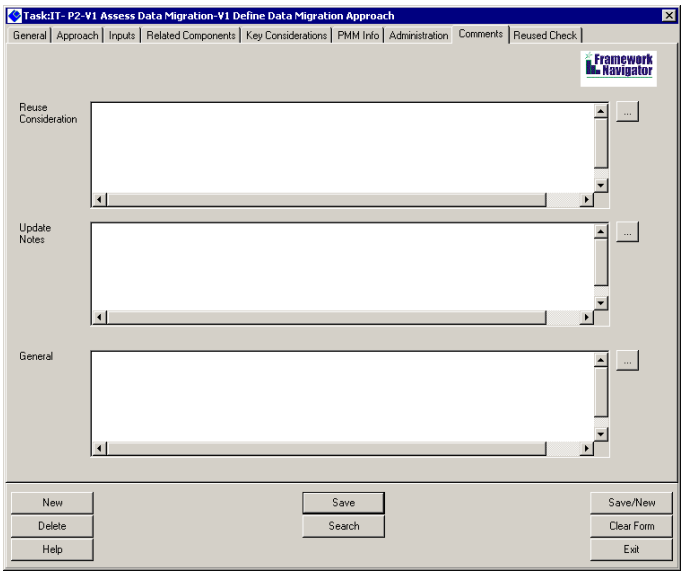
The Administration tab contains a mix of fields. Some are automatically populated by the system; others are for user entry. This information is used in reports, but is not published (for end-users).



Field	Populated by	Description
Status	User	Workflow status of the component. (For more information, see the section on Workflow.)
Creator Group	System	Possible values are DC, DT, and All. This information is populated automatically by the system based on the user profile of the person who created the component.
Developer	User	The person assigned to develop content for the component.
Tech Editor	User	The person assigned to technical editing for the component.
Copy Editor	User	The person assigned to copy editing for the component.
Created	System	The date the component was created.
Created by	System	The person who created the component.
Update History	System	A list of dates when the component was saved and the corresponding users.

Comments Tab

The Comments tab provides space for contextual information about the component.

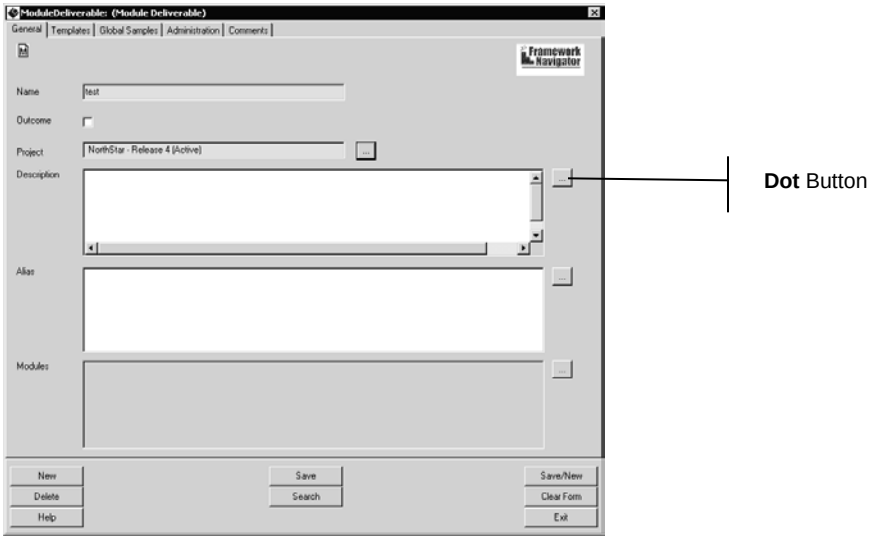


Field	Description
Reuse Considerations	For information regarding the component when it is reused. For example: • Repeating a module or task in multiple phases • Other components that provide critical inputs
Update Notes	For versioned components. This information is intended to provide a summary of key parts of the component that were changed since its previous version.
General	For all-purpose use during development. For example, content developers and method analysts can use this space to record notes to themselves or each other.

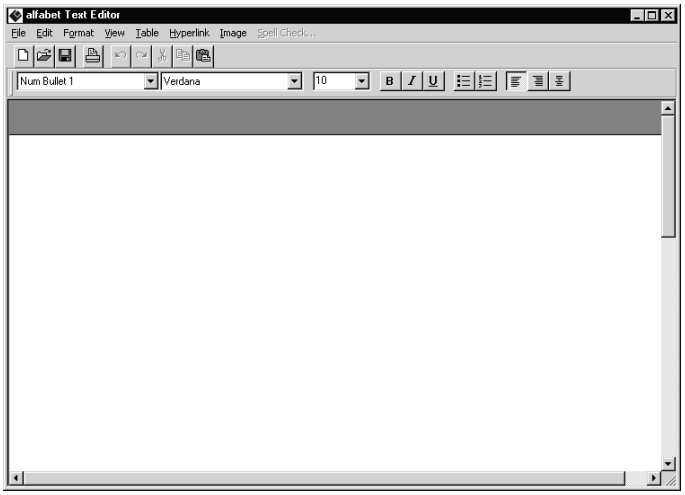
Using the Text Editor

As mentioned in the previous chapter, the text editor window is used to enter content in fields that require extensive or formatted text, such as Description, Objective, Approach, and Key Considerations. The formatting in these fields is enabled by rich-text format (RTF).

Open the text editor by clicking the **Dot** button ( ) that appears next to an RTF text field.



The text editor contains commands and features similar to a simple word processor. In addition to typing and formatting text, you can insert hyperlinks in these fields.



Formatting with Styles

Several default styles have been set up in Framework Navigator to provide a common format for published content. The following table lists the styles and when they are used.

Style	Usage
Verdana Text	Base font and size (Verdana 10)
Numbered Step	Use for Approach steps
Num Bullet 1	Use for 1st-level bullets under Approach steps
Num Bullet 2	Use for 2nd-level bullets under Approach steps
Bullet 1	Use for 1st-level bullets elsewhere (Key Considerations, Objective, etc.)
Bullet 2	Use for 2nd-level bullets elsewhere (Key Considerations, Objective, etc.)
Subhead	Use for headings within text fields (if you group Key Considerations under a heading, for example)

Copying and Pasting from Word

This is the suggested procedure for copying content that has been developed in another application (such as Word).

1. Make sure you have a copy of the content for reference.
2. Highlight all the text in the field (the open window) and set it to **Verdana Text**. This overrides all formatting that may have come in from Word and replaces it with correct settings for the font, size, and spacing.
3. Recreate numbered/bulleted paragraphs and subheads using the appropriate styles (based on reference copy you have from step #1).
4. Reapply any other miscellaneous formatting (mostly italics, for things like IndustryPrint, etc.) using the toolbar buttons.
5. Save and close.

Spacing between Paragraphs

For multiple paragraphs that are numbered or bulleted (such as in the Approach or Key Considerations fields), set the paragraphs "tight." This means there should be **no blank lines** between the paragraphs. For example:

6. This is step one. Press **Enter** once to go to the next step (or bullet under this step).
7. This is step two. Press **Enter** once to go to the next step (or bullet under this step).

- This is the first key consideration. Press **Enter** once to go to the next key consideration.
- This is the second key consideration. Press **Enter** once to go to the next key consideration.

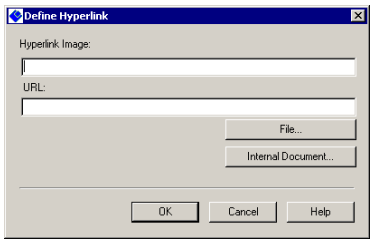
For multiple paragraphs that are set flush left (such as Objective or Description fields), separate them with a blank line by pressing the Enter key twice. For example:

> This is the first paragraph of a Role description. If there are bullets under it, press **Enter** only ONE time and begin the bullets on the next line. If there is another flush-left paragraph, however, press **Enter** TWO times to leave a blank line between the flush-left paragraphs.
>
> This is the second paragraph of a Role description.

Working with Hypertext Links

To create a hypertext link in the text editor, follow this procedure.

1. In the text editor, place the cursor in the location for the link.
2. On the **Hypertext** menu, click **Create**. The Define Hyperlink dialog appears.



3. In the **Hyperlink Image** field, enter the text that will be "hot" (blue and underlined).
4. Enter the target and click **OK**. The text entered in the Hyperlink Image field appears blue and underlined in the text editor.
   - **To link to a URL**–In the URL field, enter <**the URL**>.
   - **To link to an internal document** (IDOC)–Click **Internal Document** and select the document.

To change an existing hypertext link, follow this procedure.

1. Place the cursor somewhere in the link.
2. On the **Hypertext** menu, click **Edit**. The Define Hyperlink dialog appears.
3. Make changes as desired.
4. Click **OK**.

To delete an existing hypertext link, follow this procedure.

1. Place the cursor somewhere in the link.
2. On the **Hypertext** menu, click **Delete**. The hyperlink image (blue underlined text) remains in the text editor, but the link is removed. Reformat the text as desired.

Using the Spell Checker

The text editor includes a simple spell checker. To use it, click **Spell Check** on the menu bar.

Creating Global Components in the MCL

Global method elements are created and edited in the method component library (MCL) of Framework Navigator. This section describes how method analysts create components in the MCL. The components are usually specified in method framework documents (module map, activities by subject area, and deliverables hierarchy).

The following sections describe how to create the various types of method components. Certain components must be created before others in order to provide the appropriate data for required fields. The suggested order of completion follows:

1. Project
2. Content category
3. Thread
4. Phase
5. Module deliverable
6. Task deliverable
7. Task
8. Module

The remaining types of components can be created at any time, in any order:

- Tool
- Detailed Procedure
- Role
- Deliverable alias
- Role alias
- State change

Understanding Copy Schemes (New, Version, Copy)

Unless you are upgrading method content, you will usually create components in the MCL as new components. However, sometimes you will create a new component as a **version** or a **copy** of an existing component. These choices are called “copy schemes.” The following table describes copy schemes.

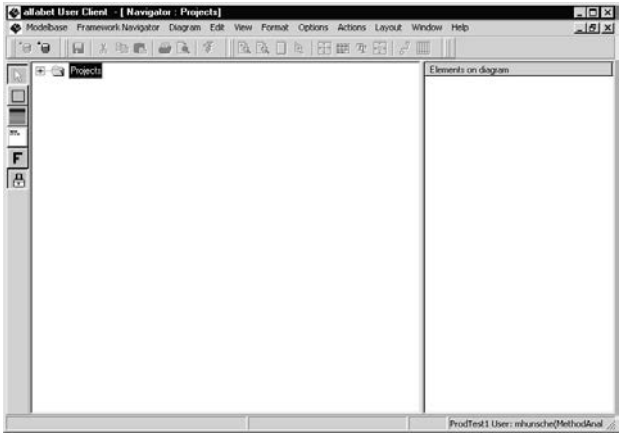
Note: Not all components have a choice of copy schemes; and only modules and tasks have the option for versioning.

Copy Scheme	Relevant Components	Uses
Create	All	**For any component to be created from "scratch."** When you create a new component, it contains no data (until you enter it) and has no relationship to anything else in the system (until you create the relationship).
Create New Version	Module Task	**For significant content upgrades to existing components.** When you create a version of another component, Framework Navigator tracks the relationship between those components to facilitate upgrades to methods where the previous version was reused. **For example:** FastTrack 4.0 reused the PM module "Manage Communications." Next month, global content in the Manage Communications module will be upgraded as part of a development cycle to create a new version of the PM method. By developing the content upgrades in new versions of the existing PM module/tasks, we keep a relationship between the old and new versions in Framework Navigator. When it is time to update FastTrack 4.0 to use the new PM content, a red "X" appears in the Assembly Area over the Manage Communications module to indicate that the version currently reused in the method is old–there is a newer version available. With a single click, Framework Navigator can change the reference from the old version of the global content to the newer one.
Create Copy	Module Deliverable Task Deliverable Tool Detailed Procedure Role	**To jump-start a new component that is similar to an existing one.** When you create a copy of a component, Framework Navigator makes a one-time copy of the content from the existing component you choose into a new one. There is no continuing relationship between the new component and the copied one. Making a copy in this way is exactly the same as if you simply created a new component, and then used Copy and Paste commands to copy the value of each field from an existing component into the new one. **For example:** FastTrack 4.0 reused the PM module "Manage Quality." This module has a global tool for the Quality Assurance Review Report. The tool attachment for was modified for FastTrack, but the other content (tool description, thread, etc.) did not need to be. To save time, the FastTrack Quality Assurance Review Report was created as a copy of the (global) Quality Assurance Review Report. Then the tool attachment file was replaced.

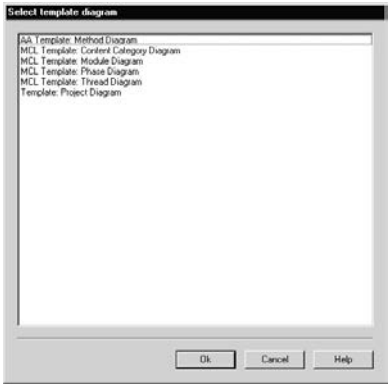
Creating Projects

In Framework Navigator, a **project** represents a content development project. Associating the project with the components under development enables project managers to use the project as a reporting filter. For example, the project manager for ValuePrint 4.0 can run a report that shows the workflow status of all components being modified during that development cycle. Method analysts create projects only at the start of new development projects, and only with the approval of the method manager.

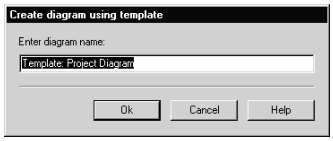
1. Click **Framework Navigator** > **Project diagrams**. The Project navigator opens, as illustrated.



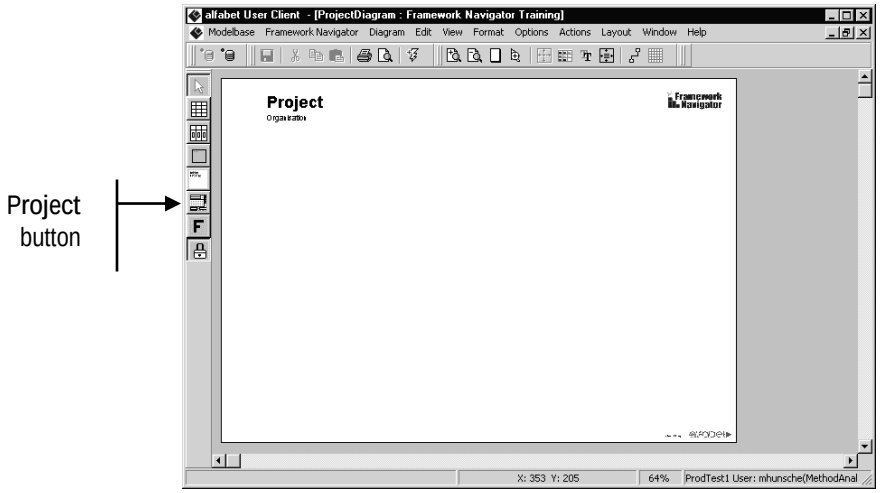
2. Right-click on the **Projects** folder, and then click **Create New Diagram Using Template**. The Select Template Diagram window opens, as illustrated.



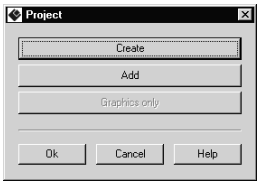
3. Click **Template: Project Diagram**, and then click **OK**. Framework Navigator prompts you to enter a diagram name, as illustrated.



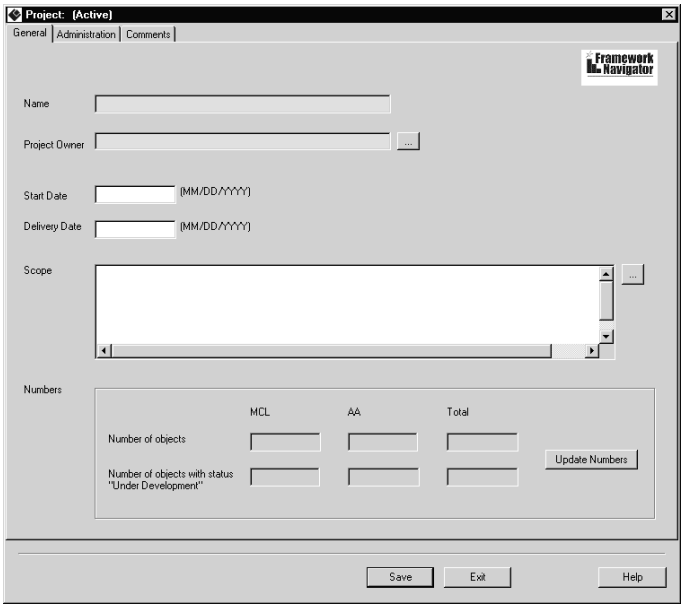
4. Enter the **project name** and click **OK**. The project diagram appears, as illustrated.



5. Click the **Project** button  , and then click on the empty page. This window opens.



6. Click **Create**. The Project dialog opens to the General tab, as illustrated. Required fields are highlighted in yellow.



7. Populate these fields; required fields are in bold text:

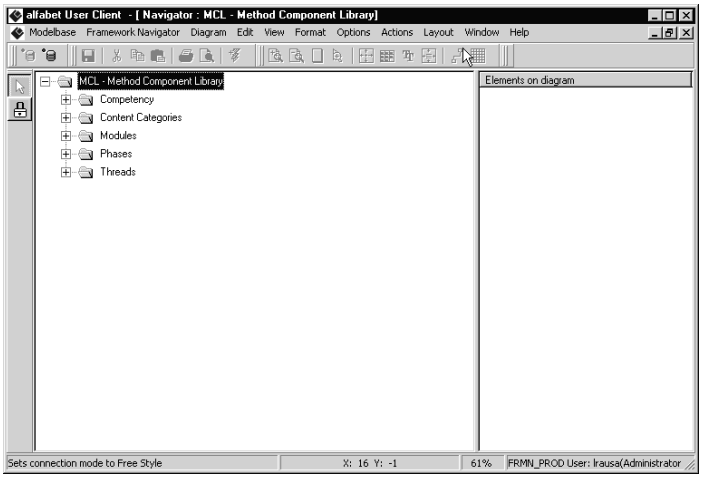
In this field	Enter
Name	The name of the project
Project Owner	The name of the project owner.
Start Date	The date the project starts.
Delivery Date	The date the method goes live.
Scope	Click [...] to add a description of the scope of the project.

8. Click **Save**. Framework Navigator adds the project to the diagram.
9. Close the window. Click **Yes** to save the diagram.

Creating Content Categories

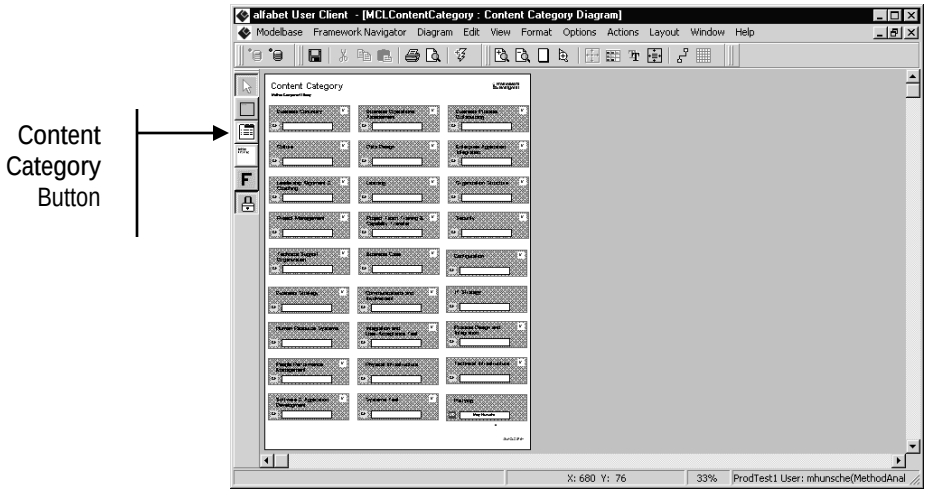
Content categories are groupings of modules within a work stream. The content categories are used to organize modules in the MCL and in published method libraries; they do not appear in published methods. Method analysts create content categories with the approval of the method manager.

1. Click **Framework Navigator** > **MCL diagrams**. The MCL navigator opens, as illustrated.

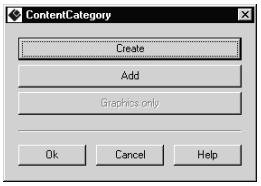


2. Click **Plus** [+] to expand the **MCL** folder.

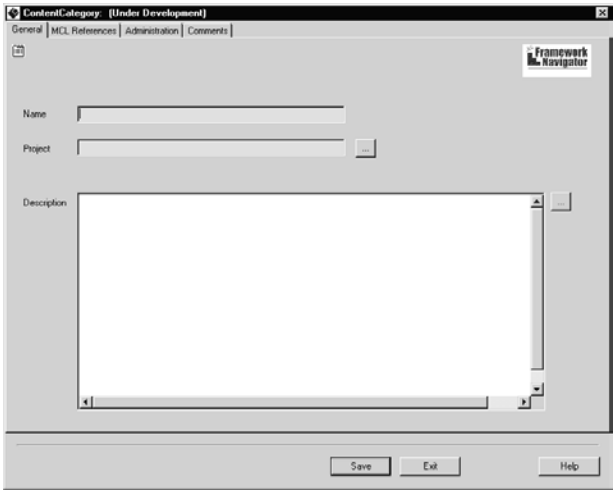
3. Expand the **Content Categories** folder and double-click **Content Category Diagram**. It opens, as illustrated.



4. Click the **Content Category** button  , and then click on the diagram. The following dialog appears.



5. Click **Create**. The Content Category dialog opens to the General tab, as illustrated. Required fields are highlighted in yellow.



6. Populate these fields; required fields are in bold text:

In this field	Enter
Name	The content category name.
Project	Click  to associate the content category with a project.
Description	Click  to add a description.

7. Click **Save**. Framework Navigator adds the new category to the diagram.
8. Repeat steps 4 to 7 until all new categories are entered.
9. Close the window. Click **Yes** to save the diagram.

Creating a Module Diagram for a New Content Category

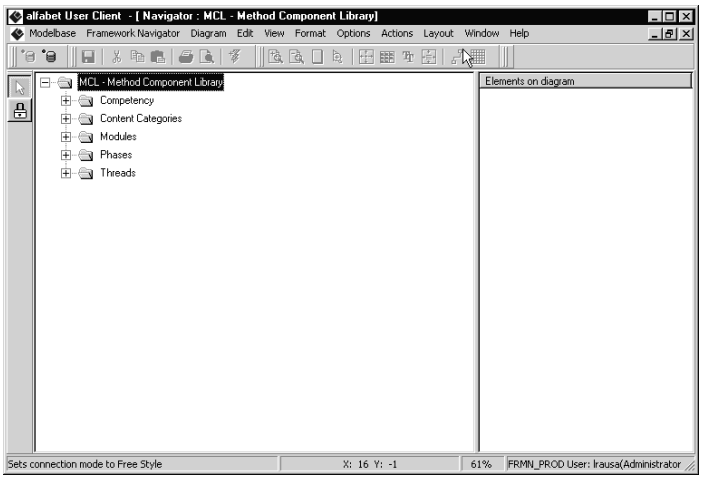
After you create a new content category, you must create a module diagram for it.

1. Click **Framework Navigator > MCL Diagrams**.
2. Click **Plus**  to expand the MCL folder.
3. Click **Plus**  to expand the Modules folder.
4. Right-click **Modules**, then click **Create** new diagram using template.
5. Click **MCL Template: Module Diagram**.
6. Enter the <**content category name**> as the diagram name. A new module diagram appears.
7. Make sure the arrow tool is selected, and then click the blank image table.
8. Right-click on the selected image table, then click **Design Table**.
9. On the **Rows** tab, select **Objects** (Type = Select-based).
10. Under Classes, select **Add**.
11. Highlight Content Category under Framework Navigator, MCL and add with ">" button (click **OK**).
12. Under Content, select **Add**.
13. Use the Search function to find your Content Category (click **OK**).
14. Click **OK** to Set Select Based Ref Content.
15. Click **OK** to save Image Table Attributes.
16. Update the title label on the diagram.
17. Save the diagram.

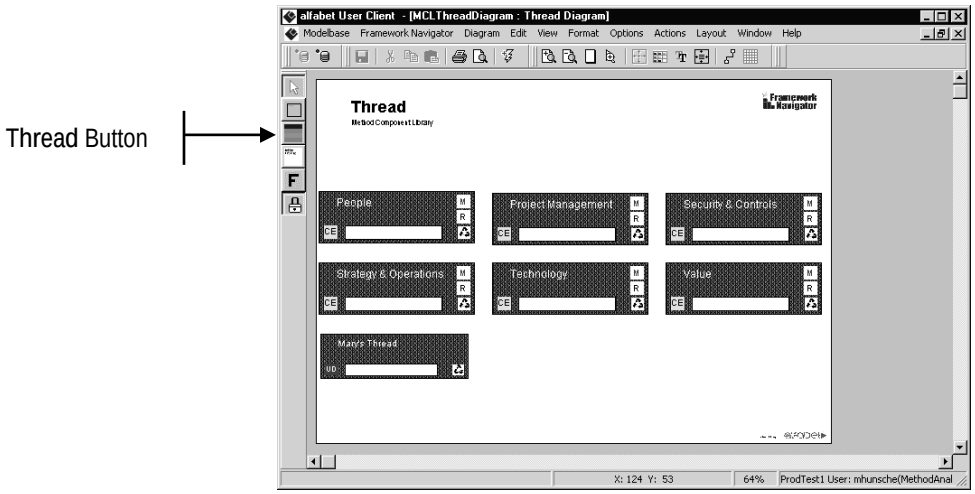
Creating Threads

Threads are groupings of modules within a work stream. They are used to organize modules in published methods. Method analysts create threads with the approval of a project manager.

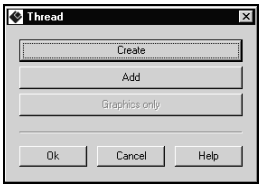
1. Click **FrameworkNavigator** > **MCL diagrams**. The MCL navigator opens, as illustrated.



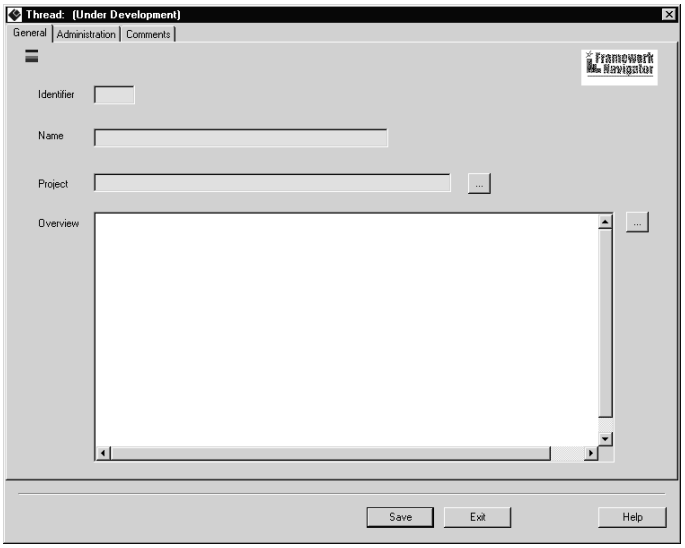
2. Click **Plus** [+] to expand the **MCL** folder.
3. Expand the **Threads** folder and double-click **Thread Diagram**. It opens, as illustrated.



4. Click the **Thread** button [ ], and then click on the diagram. This dialog opens.



5. Click **Create**. The Thread dialog opens to the General tab, as illustrated. Required fields are highlighted in yellow.



6. Populate these fields; required fields are in bold text:

In this field	Enter
Identifier	The two-letter abbreviation for the thread (provided by method manager).
Name	The thread name.
Project	Click ... to associate the thread with a project.
Overview	Click ... to add a description.

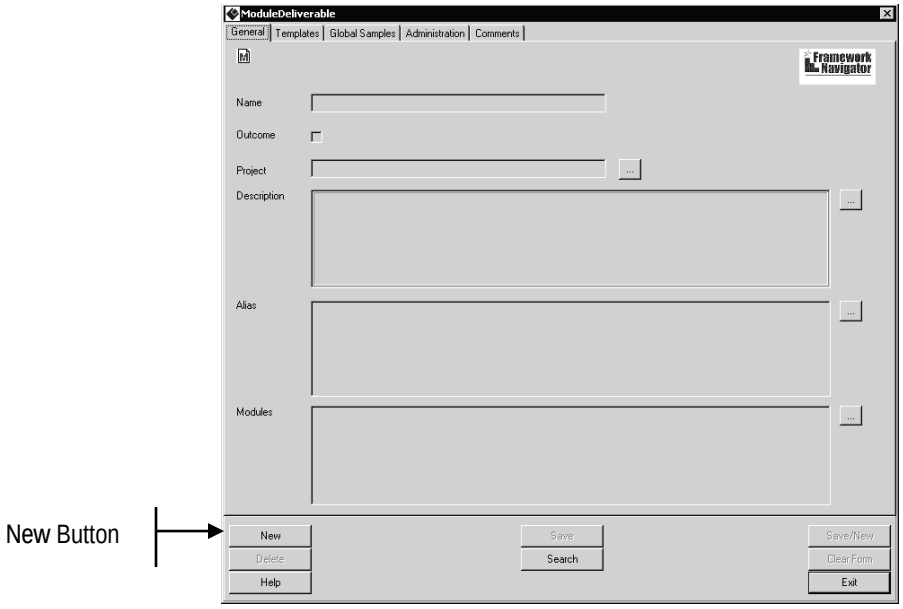
7. Click **Save**. Framework Navigator adds the new thread to the diagram.

   Note: To create additional threads, click **Save/New** and repeat steps 4–6.

8. Close the window. Click **Yes** to save the diagram.

Creating Module Deliverables

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Module Deliverables**. The Module Deliverables dialog opens to the General tab, as illustrated.



2. Click **New**. The Select Copy Scheme window opens, displaying these options:
   - Create Copy
   - Create
3. Select the desired copy scheme (usually **Create**), and then click **OK**. The General tab refreshes, highlighting required fields in yellow.
4. Populate these two required fields:

In this field	Enter
Name	The module deliverable name.
Project	Click [...] to associate the module deliverable with a project.

5. Click **Save**, and then click **OK**.

   Note: To create additional module deliverables, click **Save/New** and repeat steps 2–4.
6. Close the window when you finish creating module deliverables.

Creating Task Deliverables

Follow this procedure to add task deliverables to the MCL.

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Task Deliverables**. The Task Deliverable dialog opens to the General tab.
2. Click **New**. The Select Copy Scheme window opens, displaying these options:
   - Create Copy
   - Create
3. Select the desired copy scheme (usually **Create**), and then click **OK**. The General tab refreshes, highlighting required fields in yellow.
4. Complete the two required fields:

In this field	Enter
Name	The task deliverable name.
Project	Click  to associate the task deliverable with a project.

5. Click **Save**, and then click **OK.**

   Note: To create additional task deliverables, click **Save/New** and repeat steps 2–4.
6. Close the window when you finish creating task deliverables.

Creating Tasks

Follow this procedure to add tasks to the MCL.

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Tasks**. The Task dialog opens to the General tab.
2. Click **New**. The select copy scheme window opens, displaying these options:
   - Create Copy
   - Create
   - Create New Version
3. Select the desired copy scheme (usually **Create**), and then click **OK**. The General tab refreshes, highlighting required fields in yellow.
4. Complete these required fields:

In this field	Enter
Name	The module name.
Project	Click  to associate the task with a project.
Task deliverable	Click  to associate the task deliverable to a task.

5. Click **Save**, and then click **OK**.

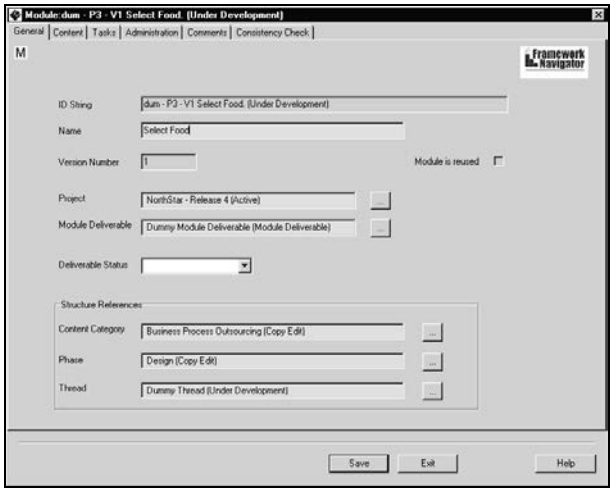
   Note: To create additional tasks, click **Save/New** and repeat steps 2 to 4.
6. Close the window.

Creating Modules

Follow this procedure to add modules to the MCL and associate tasks with the module.

1. On the **FrameworkNavigator** menu, click **MCL diagrams**. The MCL navigator opens.
2. Click **Plus** to expand the **MCL** folder.
3. Expand the **Modules** folder to view the list of MCL content categories.
4. Double-click the <**content category**> to which the new module is assigned. The MCL module diagram for that category opens.
5. In the toolbox, click the **Module** button  . Then click on the intersection in the diagram where the module belongs. The Select Copy Scheme window opens, offering three options:
   - Create New Version
   - Create
   - Create Copy

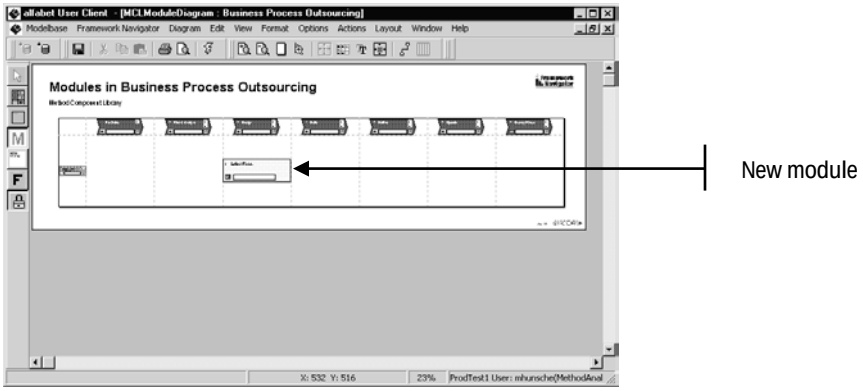
6. Select the desired copy scheme (usually **Create**), and then click **OK**. The General tab of the Module dialog opens, as illustrated.



7. Complete the required fields, which are indicated with bold text:

In this field	Enter
Name	The module name.
Project	Click [...] to associate the module to a project.
Module deliverable	Click [...] to associate the module deliverable to the module.
Structure References:	
Content Category	Click [...] to associate the module to a content category.
Phase	Click [...] to associate the module to a phase.
Thread	Click [...] to associate the module to a thread.

8. Click **Save**. The Module dialog closes, and the Module diagram displays the new module object in the phase you selected, as shown.

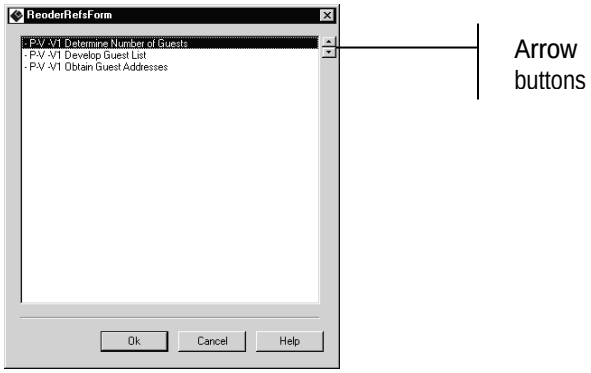


Associating Tasks with the Module

9. Double-click on the module in the diagram. The Module dialog opens.
10. Click the **Tasks** tab. It opens, as illustrated.

11. Click ⬚ to the right of the Tasks field, and then select **Add**. The Select Task window opens.
12. Select the tasks associated with the module.
    - Click **Search** to display all tasks in the MCL. You can limit or sort the list by using the controls in the top of the window.
    - Click the tasks to highlight them, and then click **OK**.
13. Click **Save**.

    Note: If the tasks do not appear in the correct order, click ⬚, and then select **Reorder**. The reorder window appears, as illustrated below. Click the name of any task that is out of order, and then use the arrow buttons to move the task up or down in the list.

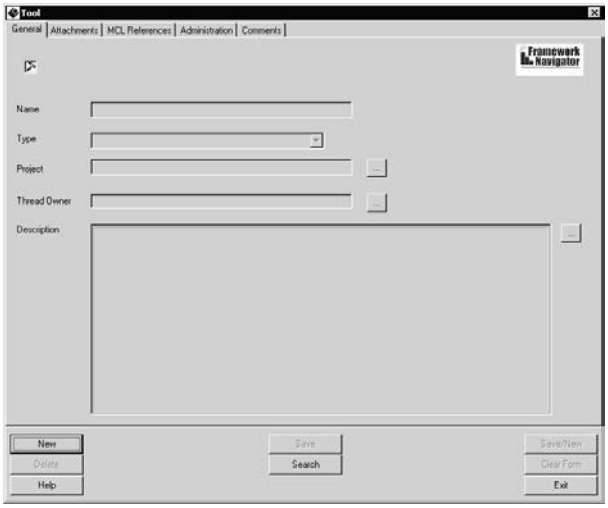


14. Click **Save**, and then click **Exit**. The new module appears in the content category diagram of modules.

Creating Tools

Follow this procedure to add tools to the MCL.

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Tools**. The Tools dialog opens to the General tab, as illustrated.



2. Click **New**. The Select Copy Scheme window opens.
3. Click **New**, and then click **OK**. The General tab refreshes; required fields are highlighted in yellow.
4. Complete the fields; required fields are in bold text:

In this field	Enter
Name	The tool name.
Type	Assign the tool to a category using the drop-down list. Categories include: Deloitte Consulting Proprietary, Reference Material, Repository, Training Material, Software, Development Aid.
Project	Click  to associate the tool to a project.
Thread Owner	Click  to associate the tool with the thread to which it is primarily related.

5. Click **Save**, and then click **OK**.

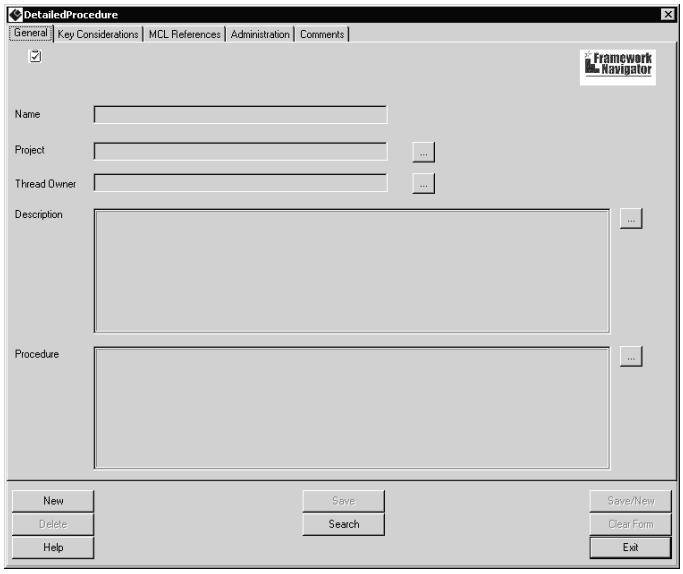
   Note: To create additional tools, click **Save/New** and repeat steps 2–4.

6. Close the window.

Creating Detailed Procedures

Follow this procedure to add detailed procedures to the MCL.

1. Open **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Detailed Procedures**. The Detailed Procedure dialog opens to the General tab, as illustrated.



2. Click **New**. The Select Copy Scheme window opens.
3. Click **New**, and then click **OK**. The General tab refreshes; required fields are highlighted in yellow.
4. Populate these required fields:

In this field	Enter
Name	The detailed procedure name.
Project	Click ... to associate the detailed procedure to a project.
Thread Owner	Click ... to associate the detailed procedure to a thread owner.

5. Click **Save**, and then click **OK**.

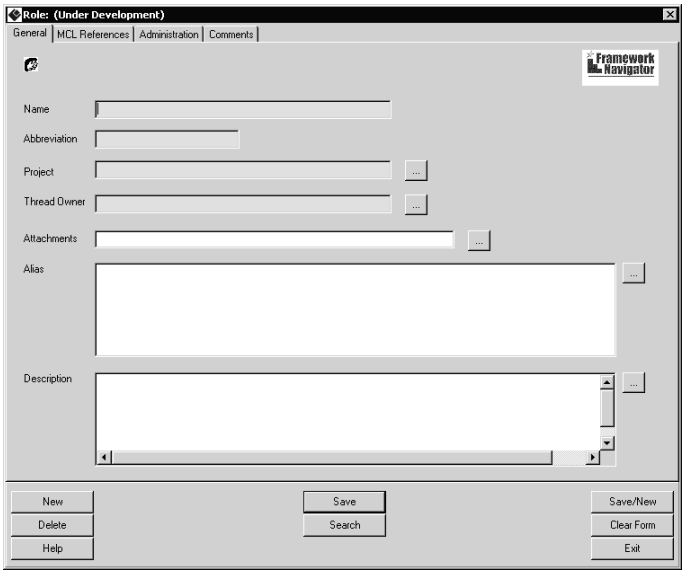
   Note: To create additional detailed procedures, click **Save/New** and repeat steps 2–4.

6. Close the window.

Creating Roles

Follow this procedure to add roles to the MCL.

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Roles.** The Roles dialog opens to the General tab, as illustrated.



2. Click **New**. The Select Copy Scheme window opens.
3. Click **New**, and then click **OK**. The General tab refreshes; required fields are highlighted in yellow.
4. Populate these required fields:

In this field	Enter
Name	The role name.
Abbreviation	An abbreviation for the role.
Project	Click ... to associate the role to a project.
Thread Owner	Click ... to associate the role to a thread owner.

5. Click **Save**, and then click **OK**.

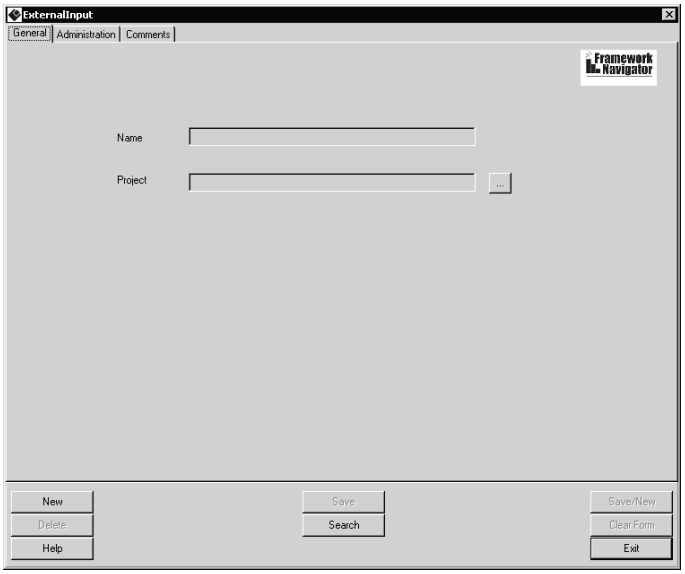
   Note: To create additional roles, click **Save/New** and repeat steps 2–4.

6. Close the window.

Creating External Inputs

Follow this procedure to add external inputs to the MCL.

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: External Inputs**. The External Input dialog opens to the General tab, as illustrated.



2. Click **New**. The General tab refreshes; required fields are highlighted in yellow.
3. Populate these required fields:

In this field	Enter
Name	The name of the external input.
Project	Click  to associate the external input to a project.

4. Click **Save**, and then click **OK**.

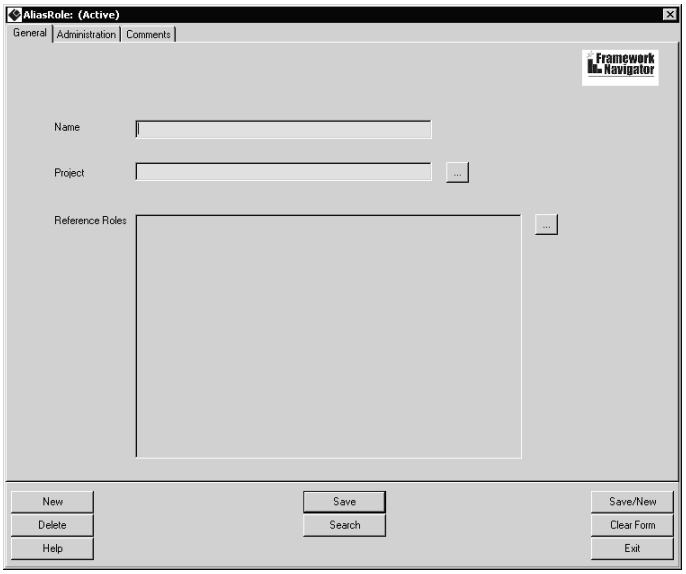
   Note: To create additional external inputs, click **Save/New** and repeat steps 2–3.

5. Click **Exit** to close the dialog.

Creating Role Aliases

Follow this procedure to add role aliases to the MCL.

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Alias Roles**. The Alias Role dialog opens to the General tab as illustrated.



2. Click **New**. The General tab refreshes; required fields are highlighted in yellow.
3. Populate these required fields.

In this field	Enter
Name	The role alias.
Project	Click [...] to associate the role alias to a project.

4. Click **Save**, and then click **OK**.

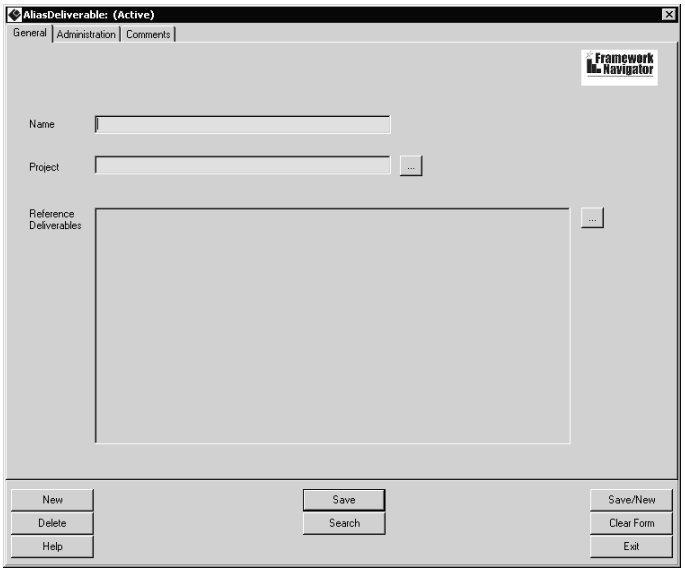
   Note: To create additional role aliases, click **Save/New** and repeat steps 2–3.

5. Click **Exit** to close the dialog.

Creating Deliverable Aliases

Follow this procedure to add deliverable aliases to the MCL.

1. Click **Framework Navigator** > **Create and Edit Objects** > **MCL: Alias Deliverables.** The Alias Deliverable dialog opens to the General tab, as illustrated.



2. Click **New**. The General tab refreshes; required fields are highlighted in yellow.
3. Populate these required fields:

In this field	Enter
Name	The deliverable alias.
Project	Click ... to add the project association.

4. Click **Save**, and then click **OK**.

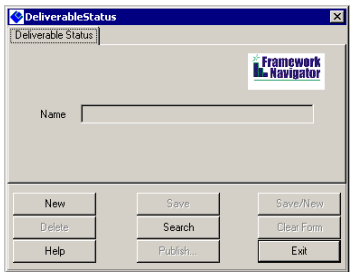
   Note: To create additional deliverable aliases, click **Save/New** and repeat steps 2–3.

5. Click **Exit** to close the dialog.

Creating a Deliverable Status

Follow this procedure to add a deliverable status to the MCL.

1. Click **Framework Navigator > Create and Edit Objects > Admin: Deliverable Status**. The Deliverable dialog opens, as illustrated.



2. Click **New**. The cursor appears in the Name field.
3. Type the **<state change>**.
4. Click **Save**, and then click **OK**.

   Note: To create additional deliverable aliases, click **Save/New** and repeat steps 2–3.
5. Click **Exit** to close the dialog.

Editing Global Components in the MCL

A method analyst must create all components in the MCL before content developers can add field-level content. Therefore, in this document, the term “editing” refers to developing *and* editing method components in the MCL.

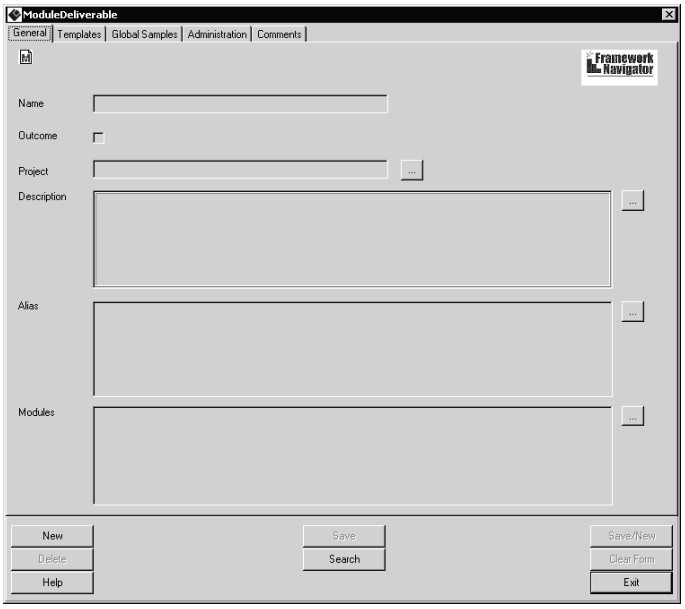
The method components can be edited in any order, and you can access a component through various related component dialogs.

Editing Module Deliverables

Follow this procedure to

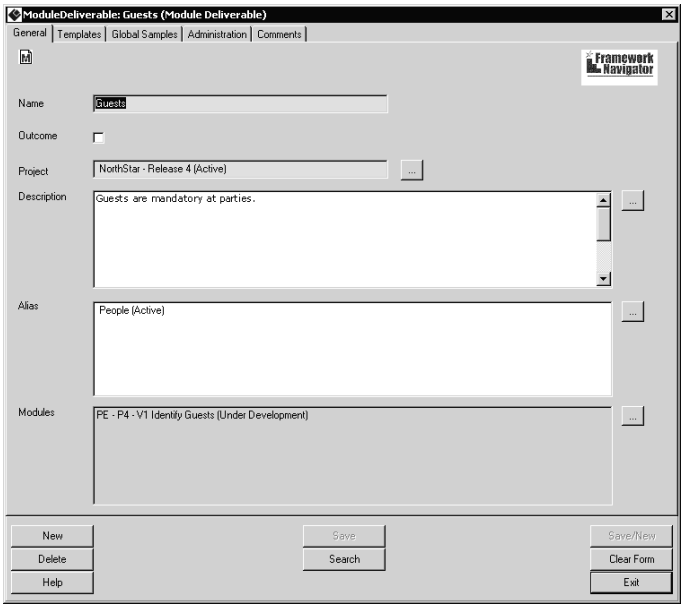
- Add the description
- Add deliverable templates
- Add sample deliverables
- Associate deliverable aliases to the module deliverable
- Enter and update administrative information
- Add comments

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Module Deliverables**. The Module Deliverable dialog opens to the General tab, as illustrated.



2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the module deliverable name, and then click **Search**. The deliverable appears in the selection window.

4. Click the deliverable name, and then click **OK**. The Module Deliverable dialog opens, as illustrated.

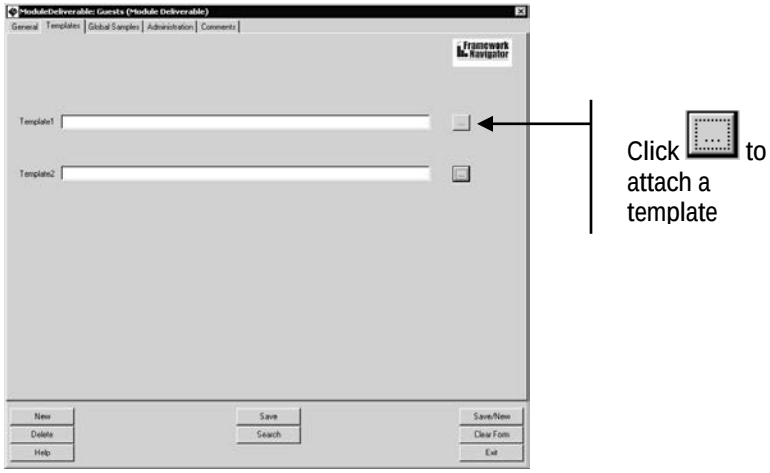


5. Complete these fields:

In this field	Enter
Outcome	Check the box if the module deliverable is an outcome.
Description	Click  . The text editor window opens. Enter a description of the module deliverable.
Alias	Click  to create or add a module deliverable alias.

Attaching Deliverable Templates

6. Click the **Templates** tab. It opens, as illustrated. You can attach up to two template files with a module deliverable.

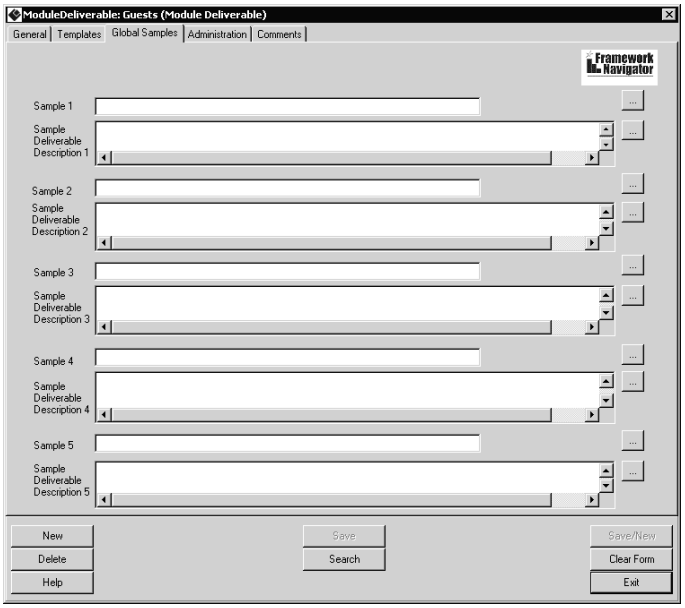


7. Upload the template file:
   - Click [...], and then click **Upload.** A Windows file browser opens.
   - Browse to the module deliverable template and click **Open**. The name of the file appears in the Template field.

   Important: To replace a file that has already been uploaded, you must use the **Substitute Document** command. Unlike a file system, uploading a file with the same name as an existing IDOC will not overwrite it; instead, Framework Navigator will contain two IDOCs with the same filename (which is confusing).
8. Click **Save**. The module deliverable is saved and the templates are uploaded.

Attaching Global Sample Deliverables

9. Click the **Global Samples** tab. It opens, as illustrated.



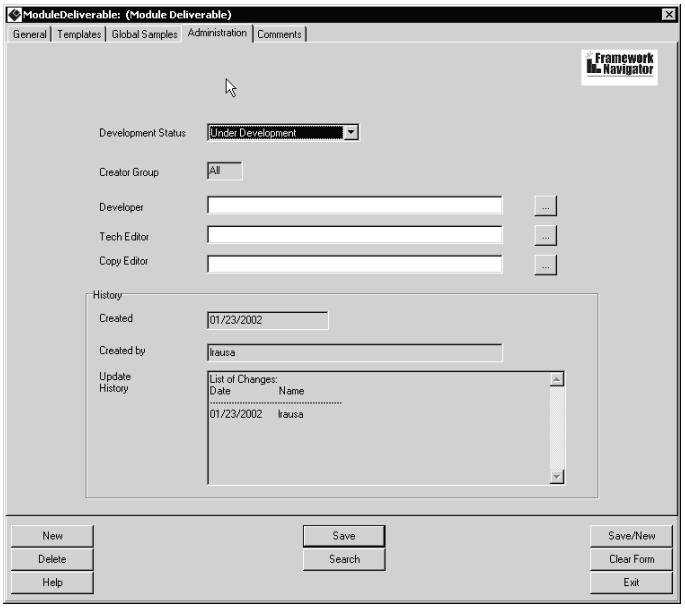
10. Complete these fields:

In this field	Enter
Sample 1	Click [...] to attach a global sample.
Sample Deliverable Description 1	Click [...] to add a description of the sample.
Sample 2	Click [...] to attach a second global sample.
Sample Deliverable Description 2	Click [...] to add a description of the sample.
Sample 3	Click [...] to attach a third global sample.
Sample Deliverable Description 3	Click [...] to add a description of the sample.
Sample 4	Click [...] to attach fourth global sample.

In this field	Enter
Sample Deliverable Description 4	Click [...] to add a description of the sample.
Sample 5	Click [...] to attach a fifth global sample.
Sample Deliverable Description 5	Click [...] to add a description of the sample.

Updating Administrative Information

11. Click the **Administration** tab. It opens, as illustrated.

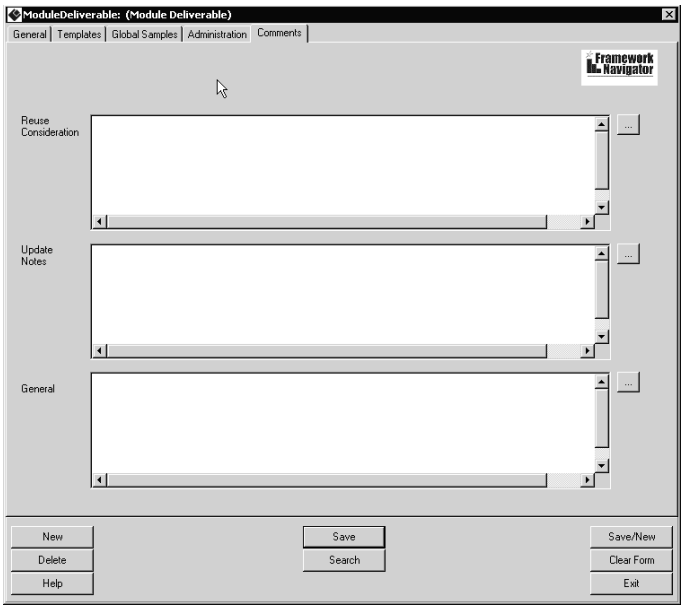


12. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the module deliverable is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click [...] and select the name of the developer.
Tech Editor	Click [...] and select the name of the tech editor.
Copy Editor	Click [...] and select the name of the copy editor.

Adding Comments

13. Click on the **Comments** tab. It opens, as illustrated.



14. Complete these fields:

In this field	Enter
Reuse Consideration	Click … to document any considerations regarding the reuse of this component.
Update Notes	Click … to document changes made to this component since the last version.
General	Click … to record and general information about this component that you do not want to lose.

Saving the Module Deliverable

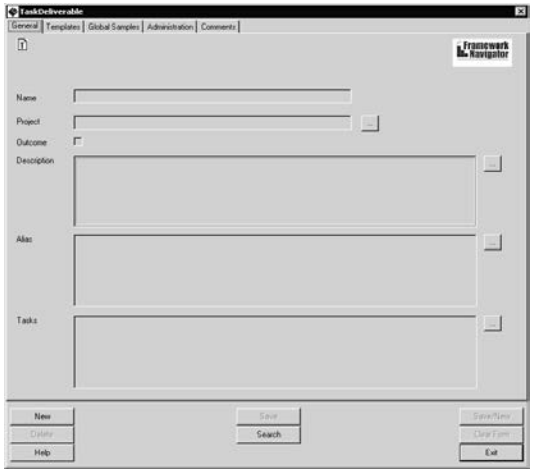
15. Click **Save**. Framework Navigator saves your work.

Editing Task Deliverables

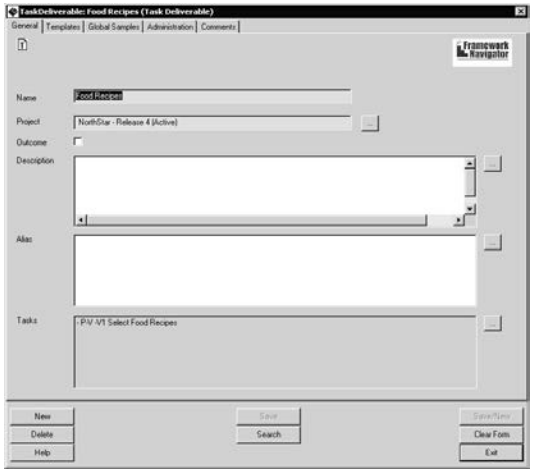
Follow this procedure to

- Add or edit the description
- Add, delete, or download deliverable templates
- Add, delete, or download sample deliverables
- Associate deliverable aliases with the task deliverable
- Enter and update administrative information
- Add comments

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Task Deliverables**. The task deliverable dialog opens to the General tab, as illustrated.



2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**task deliverable name**>. Then click **Search** or press **Enter**. The deliverable appears in the selection window.
4. Click the deliverable name, and then click **OK**. The Task Deliverable dialog opens, as illustrated.

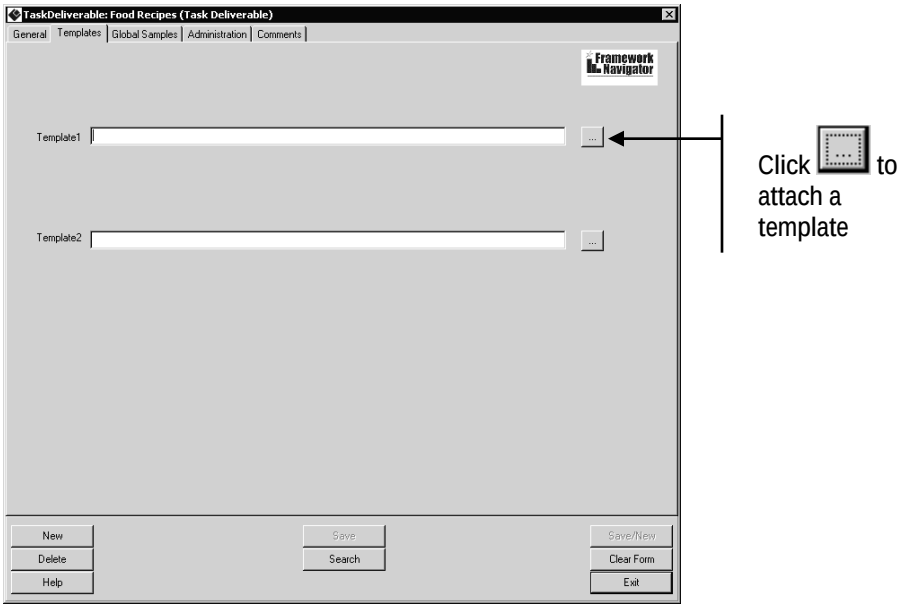


5. Complete these fields:

In this field	Enter
Outcome	Check the box if the task deliverable is an outcome.
Description	Click  to enter or edit the description of the task deliverable.
Alias	Click  to create or add a task deliverable alias.

Attaching Deliverable Templates

6. Click the **Templates** tab. It opens, as illustrated. You can attach up to two template files to a task deliverable.



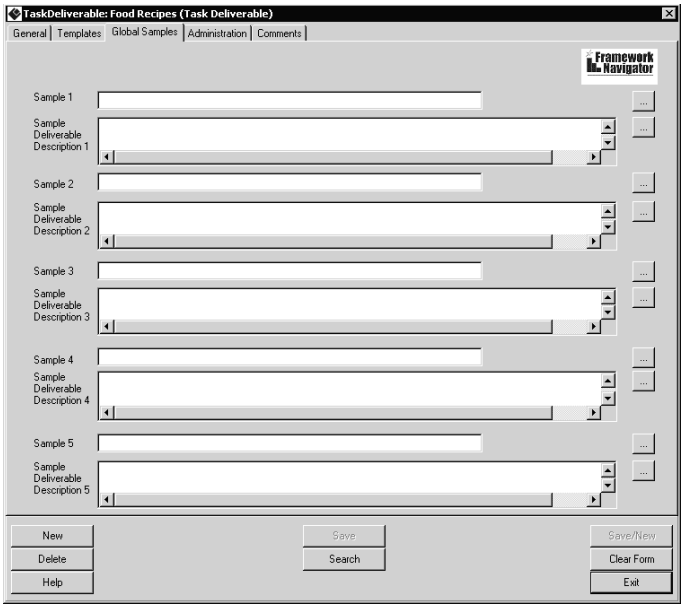
7. Upload the template file:
   - Click  , and then click **Upload.** A Windows file browser opens.
   - Browse to the task deliverable template and click **Open**. The name of the file appears in the Template field.

   Important: To replace a file that has already been uploaded, you must use the **Substitute Document** command and the filename must be identical to the original one.

8. Click **Save**. The task deliverable is saved and the templates are uploaded.

Attaching Global Sample Deliverables

9. Click the **Global Samples** tab. It opens, as illustrated.

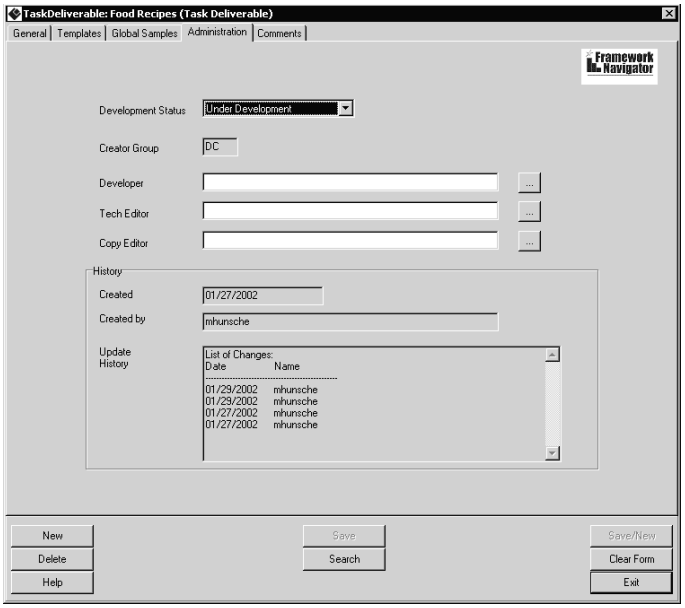


10. Complete these fields:

In this field	Enter
Sample 1	Click … to attach a global sample.
Sample Deliverable Description 1	Click … to add a description of the sample.
Sample 2	Click … to attach a second global sample.
Sample Deliverable Description 2	Click … to add a description of the sample.
Sample 3	Click … to attach a third global sample.
Sample Deliverable Description 3	Click … to add a description of the sample.
Sample 4	Click … to attach fourth global sample.
Sample Deliverable Description 4	Click … to add a description of the sample.
Sample 5	Click … to attach a fifth global sample.
Sample Deliverable Description 5	Click … to add a description of the sample.

Adding Administrative Information

11. Click the **Administration** tab. It opens, as illustrated.

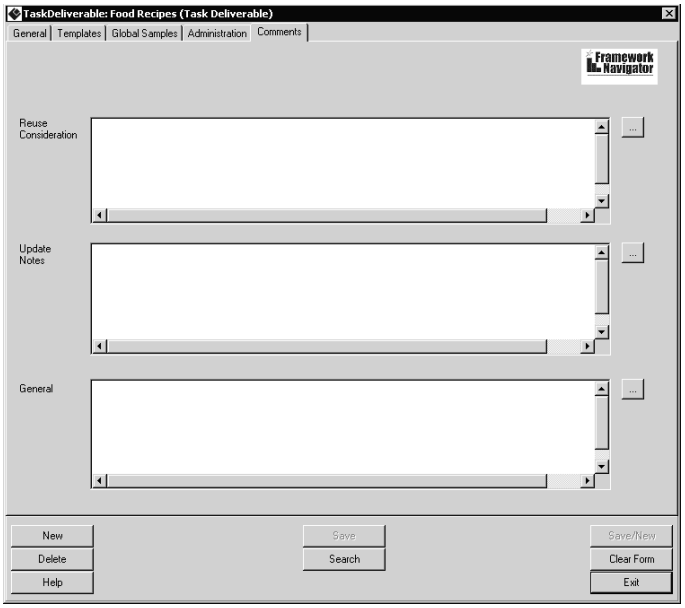


12. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the task deliverable is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click … and select the name of the developer.
Tech Editor	Click … and select the name of the tech editor.
Copy Editor	Click … and select the name of the copy editor.

Adding Comments

13. Click the **Comments** tab. It opens, as illustrated.



14. Complete these fields:

In this field	Enter
Reuse Consideration	Click ... to document any considerations regarding the reuse of this component.
Update Notes	Click ... to document changes made to this component since the last version.
General	Click ... to record and general information about this component that you do not want to lose.

Saving the Task Deliverable

15. Click **Save**. Framework Navigator saves your work.

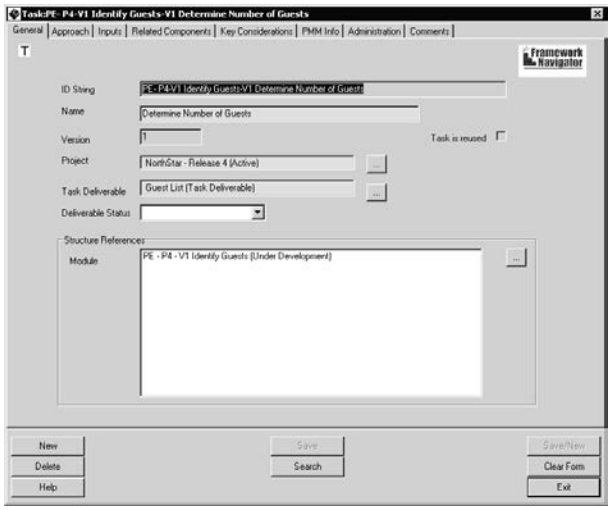
Editing Tasks

Follow this procedure to

- Add or edit the approach
- Add or edit inputs
- Add or delete references to related components (tools, detailed procedures, and roles)
- Add or edit key considerations
- Add or edit PMM information (scalability, dependencies)
- Add administrative information
- Add general comments

Note: You can also access tasks from the Tasks tab of the Module dialog.

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Tasks**. The Task dialog opens to the General tab.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**task name**>. Then click **Search** or press **Enter**. The task appears in the selection window.
4. Click the task name, and then click **OK**. The Task dialog opens, as illustrated.

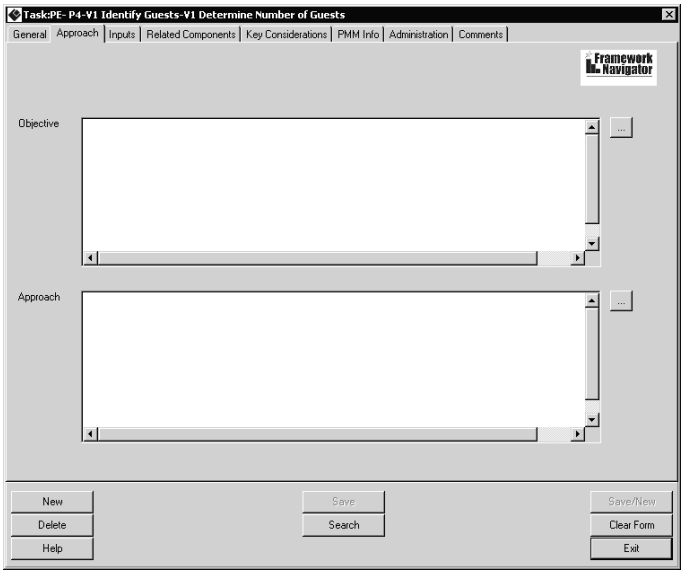


5. Complete these fields:

In this field	Enter
Task deliverable	Click ⬚ to show and edit the task deliverable dialog.
Deliverable Status	If a deliverable undergoes a state change when the task is completed, use the drop-down menu to select the status. If the status is not a selection, see Creating a Deliverable Status.
Structure References Module	Click ⬚ to show or edit the task's parent module.

Adding the Approach

6. Click the **Approach** tab. It opens, as illustrated.

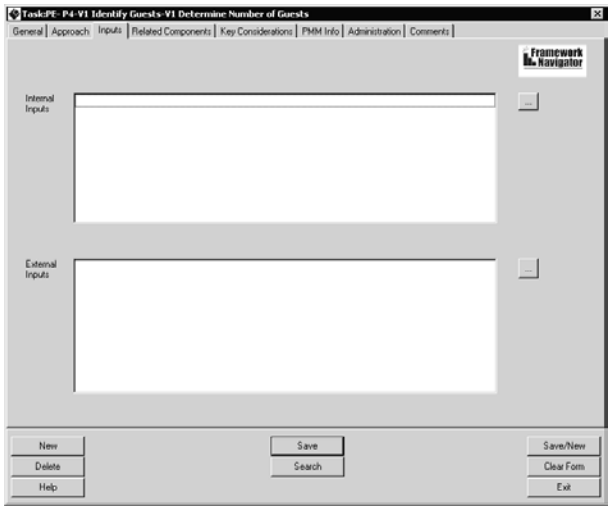


7. Complete these fields:

In this field	Enter
Objective	Click [...] to add the task objective.
Approach	Click [...] to add the task approach.

Adding Inputs

8. Click the **Inputs** tab. It opens, as illustrated.

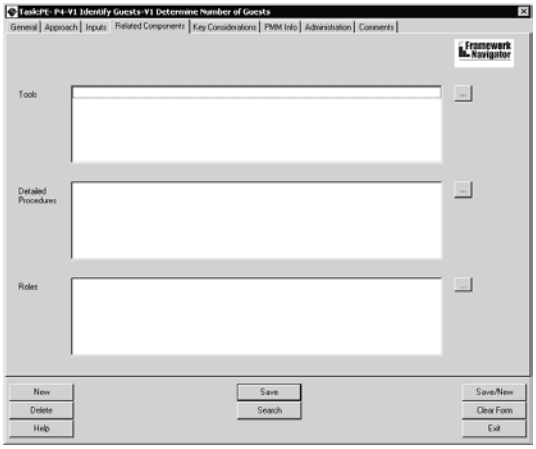


9. Complete these fields:

In this field	Enter
Internal Inputs	Click ... to add internal inputs.
External Inputs	Click ... to add external inputs.

Associating Tools, Detailed Procedures, and Roles

10. Click the **Related Components** tab. It opens, as illustrated.

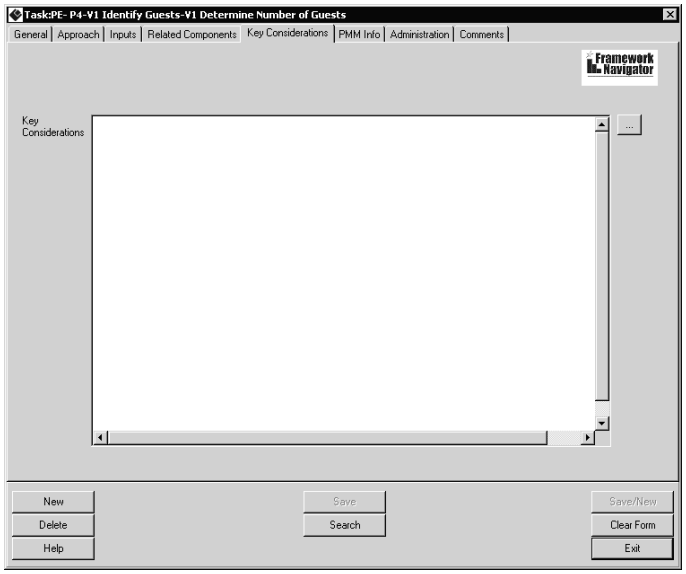


11. Complete these fields:

In this field	Enter
Tools	Click ... to associate a tool to the task and to show, edit, or detach an existing tool.
Detailed Procedures	Click ... to associate a detailed procedure to the task and to show, edit, or detach an existing detailed procedure.
Roles	Click ... to associate a role to the task and to show, edit, or detach an existing role.

Adding Key Considerations

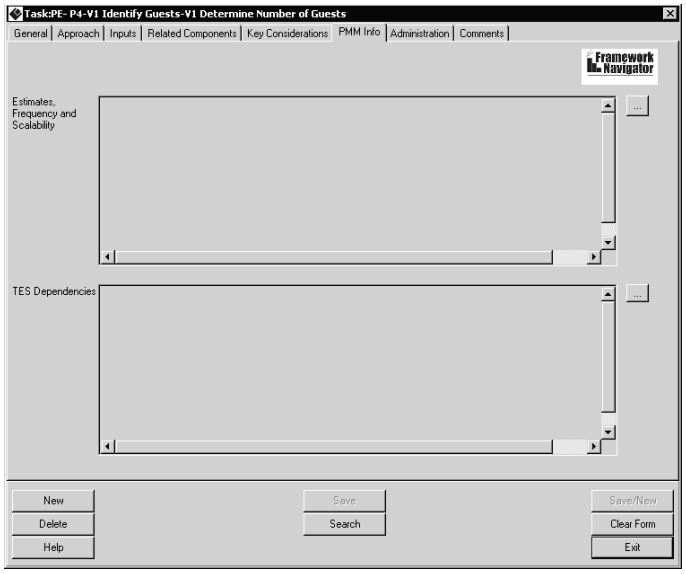
12. Click the **Key Considerations** tab. It opens, as illustrated.



13. Click ... to add and edit the task key considerations.

Adding PMM Info

14. Click the **PMM Info** tab to add and project management information related to estimates, frequency and scalability; and time-, event-, and sequence-driven dependencies. It opens, as illustrated.

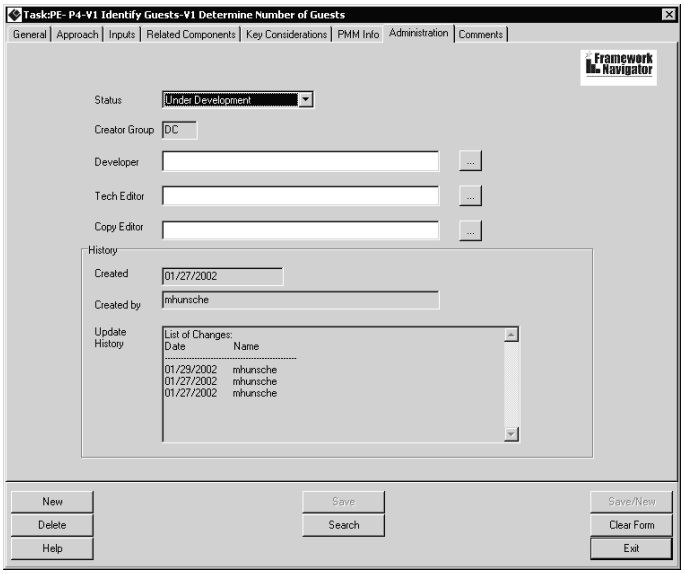


15. Complete these fields:

In this field	Enter
Estimates, Frequency and Scalability	Click [...] to add estimates, frequency and scalability considerations.
TES Dependencies	Click [...] to add time-, event-, and sequence-driven dependencies.

Adding Administrative Information

16. Click the **Administration** tab. It opens, as illustrated.

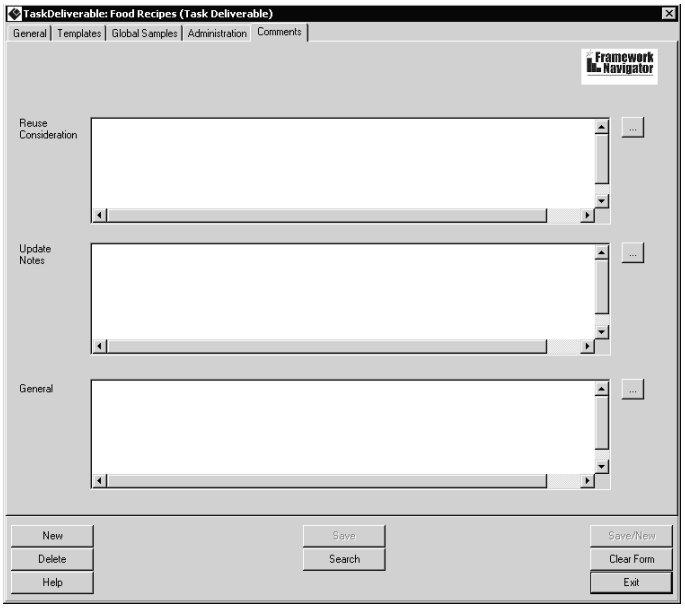


17. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the task is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click [...] and select the name of the developer.
Tech Editor	Click [...] and select the name of the tech editor.
Copy Editor	Click [...] and select the name of the copy editor.

Adding Comments

18. Click the **Comments** tab. It opens, as illustrated.



19. Complete these fields:

In this field	Enter
Reuse Consideration	Click [...] to document any considerations regarding the reuse of this component.
Update Notes	Click [...] to document changes made to this component since the last version.
General	Click [...] to record and general information about this component that you do not want to lose.

Saving the Task

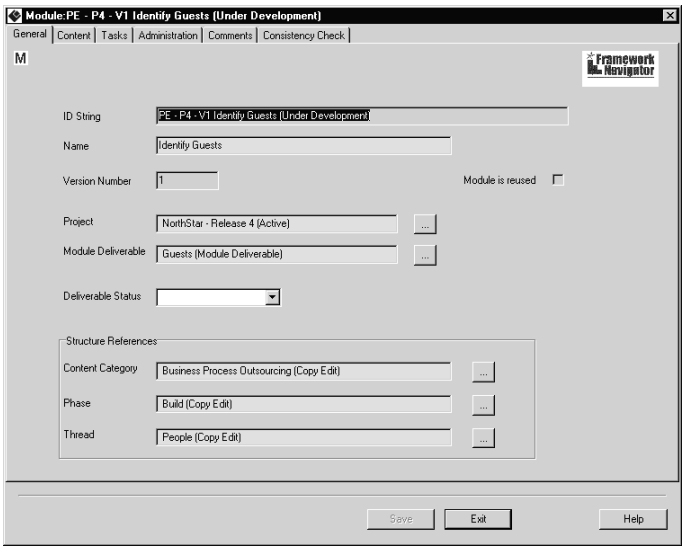
20. Click **Save**. The instance is saved.

Editing Modules

Follow this procedure to

- Add or edit module content
- View or edit the task list
- Add and update administrative information
- Add comments

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Modules**. The Task dialog opens to the General tab.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**module name**>. Then click **Search** or press **Enter**. The module appears in the selection window.
4. Click the module name, and then click **OK**. The Module dialog opens to the General tab, as illustrated.

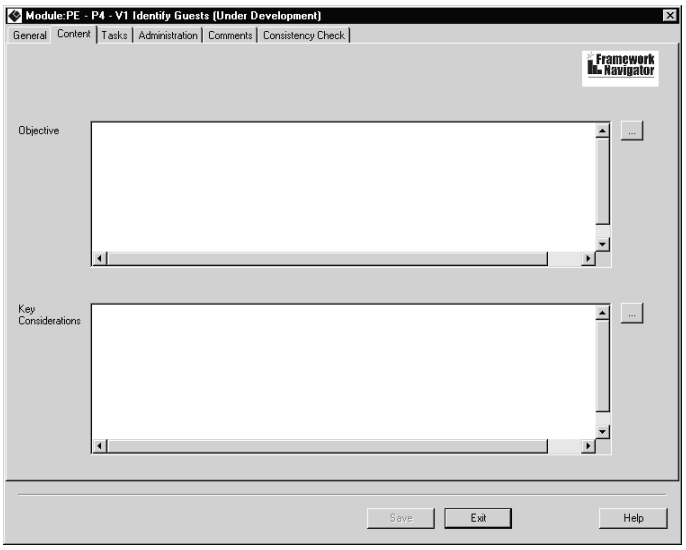


5. Complete these fields:

In this field	Enter
Module deliverable	Click  to show or edit the module deliverable.
Deliverable Status	If a deliverable undergoes a state change when the module is completed, use the drop-down menu to select the status.

Adding Content

6. Click the **Content** tab. It opens, as illustrated.

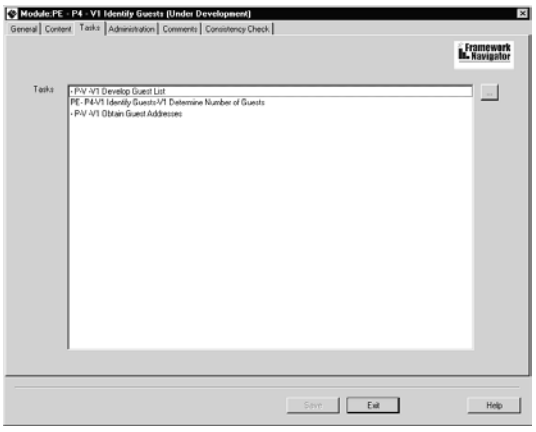


7. Complete these fields:

In this field	Enter
Objective	Click [...] to add the module objective.
Key Considerations	Click [...] to add the module key considerations.

Viewing the Task List

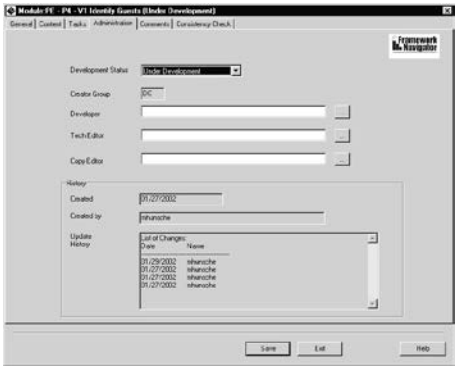
8. Click the **Task** tab. It opens, as illustrated. Tasks are listed in order.



9. Click [...] to Show, Edit, Duplicate, Create, Add, Detach, or Reorder tasks

Updating Administrative Information

10. Click the **Administration** tab. It opens, as illustrated.



11. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the module is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click [...] and select the name of the developer.
Tech Editor	Click [...] and select the name of the tech editor.
Copy Editor	Click [...] and select the name of the copy editor.

Adding Comments

12. Click the **Comments** tab. It opens.
13. Complete these fields:

In this field	Enter
Reuse Consideration	Click [...] to document any considerations regarding the reuse of this component.
Update Notes	Click [...] to document changes made to this component since the last version.
General	Click [...] to record and general information about this component that you do not want to lose.

Saving the Module

14. Click **Save**.

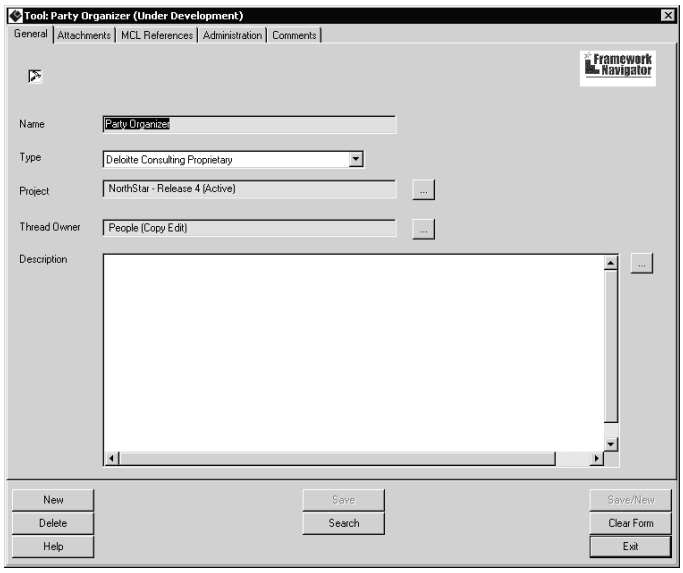
Editing Tools

Follow this procedure to

- Add or edit tool descriptions
- Attach, detach, or download tool files
- View MCL references to a tool
- Add administrative information
- Add comments

1. Click **FrameworkNavigator > Create and Edit Objects > MCL: Tools**. The Tool dialog opens to the General tab.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**tool name**>. Then click **Search** or press **Enter**. The tool appears in the selection window.

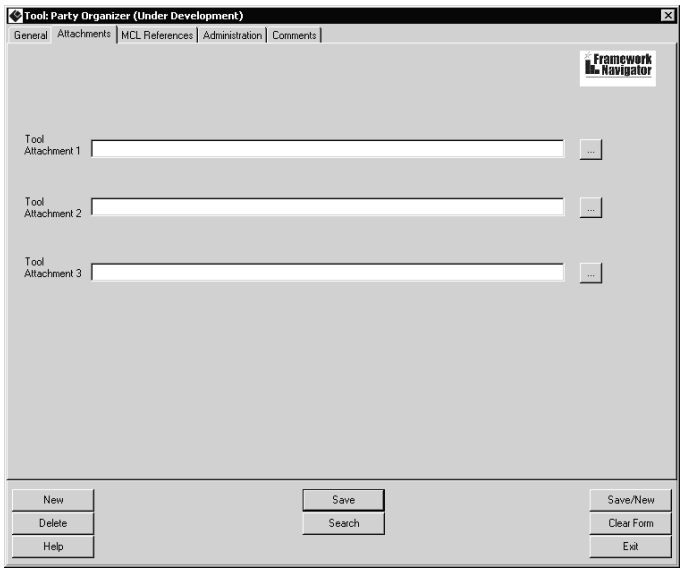
   Note: See *Select Windows* for alternative search approaches.
4. Click the <**tool name**> to highlight it, and then click **OK** or press **Enter**. The Tool dialog opens to the General tab, as illustrated.



5. Click  next to the Description field and add the tool description.

Attaching Tools

6. Click the **Attachments** tab. It opens, as illustrated. You can attach up to three files to a tool.



7. Upload the tool attachment file:

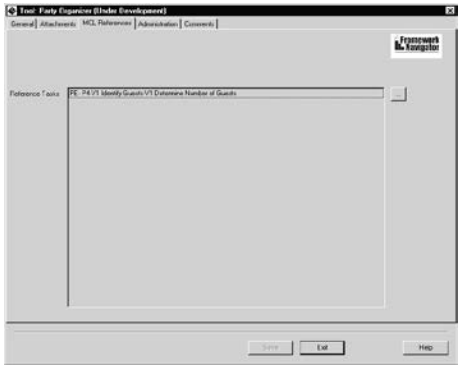
   - Click  , and then click **Upload.** A Windows file browser opens.
   - Browse to the file and click **Open**.

   Important: To replace a file that has already been uploaded, you must use the **Substitute Document** command and the filename must be identical to the original one.

8. Click **Save**.

Viewing MCL References to the Tool

9. Click the **MCL References** tab. It opens.



10. Highlight the task of interest and click to view the task dialog in which the tool is referenced.

Adding Administrative Information

11. Click the **Administration** tab. It opens.
12. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the tool is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click  and select the name of the developer.
Tech Editor	Click  and select the name of the tech editor.
Copy Editor	Click  and select the name of the copy editor.

Adding Comments

13. Click the **Comments** tab. It opens.
14. Complete these fields:

In this field	Enter
Reuse Consideration	Click  to document any considerations regarding the reuse of this component.
Update Notes	Click  to document changes made to this component since the last version.
General	Click  to record and general information about this component that you do not want to lose.

Saving the Tool

15. Click **Save**. The instance is saved.

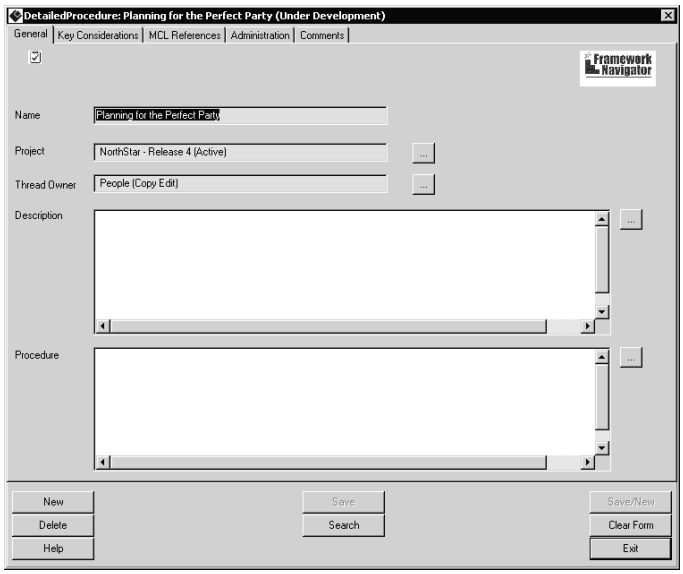
Editing Detailed Procedures

Follow this procedure to

- Add or edit the description
- Add or edit the procedure
- View MCL references to the detailed procedure
- Add administrative information
- Add comments

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Detailed Procedures**. The Detailed Procedure dialog opens to the General tab.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**detailed procedure name**>. Then click **Search** or press **Enter**. The detailed procedure is listed in the selection window.

   Note: See *Select Window* for alternative search approaches.
4. Click the detailed procedure to highlight it, and then click **OK** or press **Enter**. The Detailed Procedure dialog opens to the General tab, as illustrated.



5. Complete these fields:

In this field	Enter
Description	Click ⬚ to add and edit the description of the detailed procedure.
Procedure	Click ⬚ to create or edit the detailed procedure.

6. Click the **Key Consideration** tab. It opens.
7. Click ⬚ next to the Key Considerations field to create or edit them.

Viewing MCL References

8. Click the **MCL References** tab. It opens.
9. Highlight the task of interest and click ⬚ to view the task in which the detailed procedure is referenced.

Updating Administrative Information

10. Click the **Administration** tab. It opens.
11. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the detailed procedure is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click ⬚ and select the name of the developer.
Tech Editor	Click ⬚ and select the name of the tech editor.
Copy Editor	Click ⬚ and select the name of the copy editor.

Adding Comments

12. Click the **Comments** tab. It opens.
13. Complete these fields:

In this field	Enter
Reuse Consideration	Click ⬚ to document any considerations regarding the reuse of this component.
Update Notes	Click ⬚ to document changes made to this component since the last version.
General	Click ⬚ to record and general information about this component that you do not want to lose.

Saving the Detailed Procedure

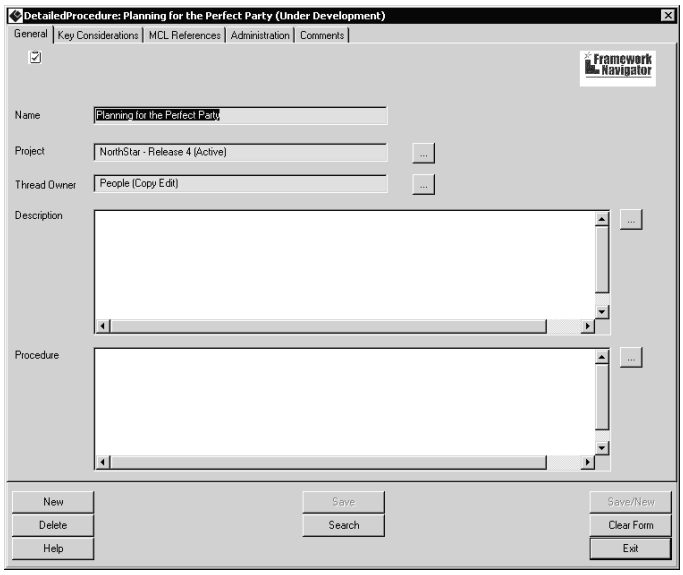
14. Click **Save**. The instance is saved.

Editing Roles

Follow this procedure to

- Add or edit the description
- Add detailed responsibilities as an attachment
- View MCL references to the role
- Add administrative information
- Add comments

1. Click **FrameworkNavigator** > **Create and Edit Objects** > **MCL: Roles.** The Roles dialog opens to the General tab.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**role name**>. Then click **Search** or press **Enter**. The role is listed in the selection window.
4. Click the role, and then click **OK** or press **Enter**. The Role dialog opens, as illustrated.



5. Complete these fields:

In this field	Enter
Abbreviation	A short abbreviation for the role.
Attachments	Click [...] to upload a file containing detailed responsibilities.
Alias	Click [...] to add a role alias.
Description	Click [...] to add the role description.

Viewing MCL References

6. Click the **MCL References** tab. It opens.
7. Click on the task of interest, and then click  to view the task in which the role is referenced.

Adding Administrative Information

8. Click the **Administration** tab. It opens.
9. Complete these fields:

In this field	Enter
Development Status	If appropriate, select the development status: Under Development—Default; automatically assigned when the role is created. Tech Edit—The method developer selects this status when the document is ready to be tech edited. Copy Edit—The method analyst selects this status when the document has been finalized and it is ready to be copy edited. Active—The method analyst selects this status when the document is ready to be reused. Retired—The method analyst selects this status to retire the document.
Developer	Click  and select the name of the developer.
Tech Editor	Click  and select the name of the tech editor.
Copy Editor	Click  and select the name of the copy editor.

Adding Comments

10. Click the **Comments** tab. It opens.
11. Complete these fields:

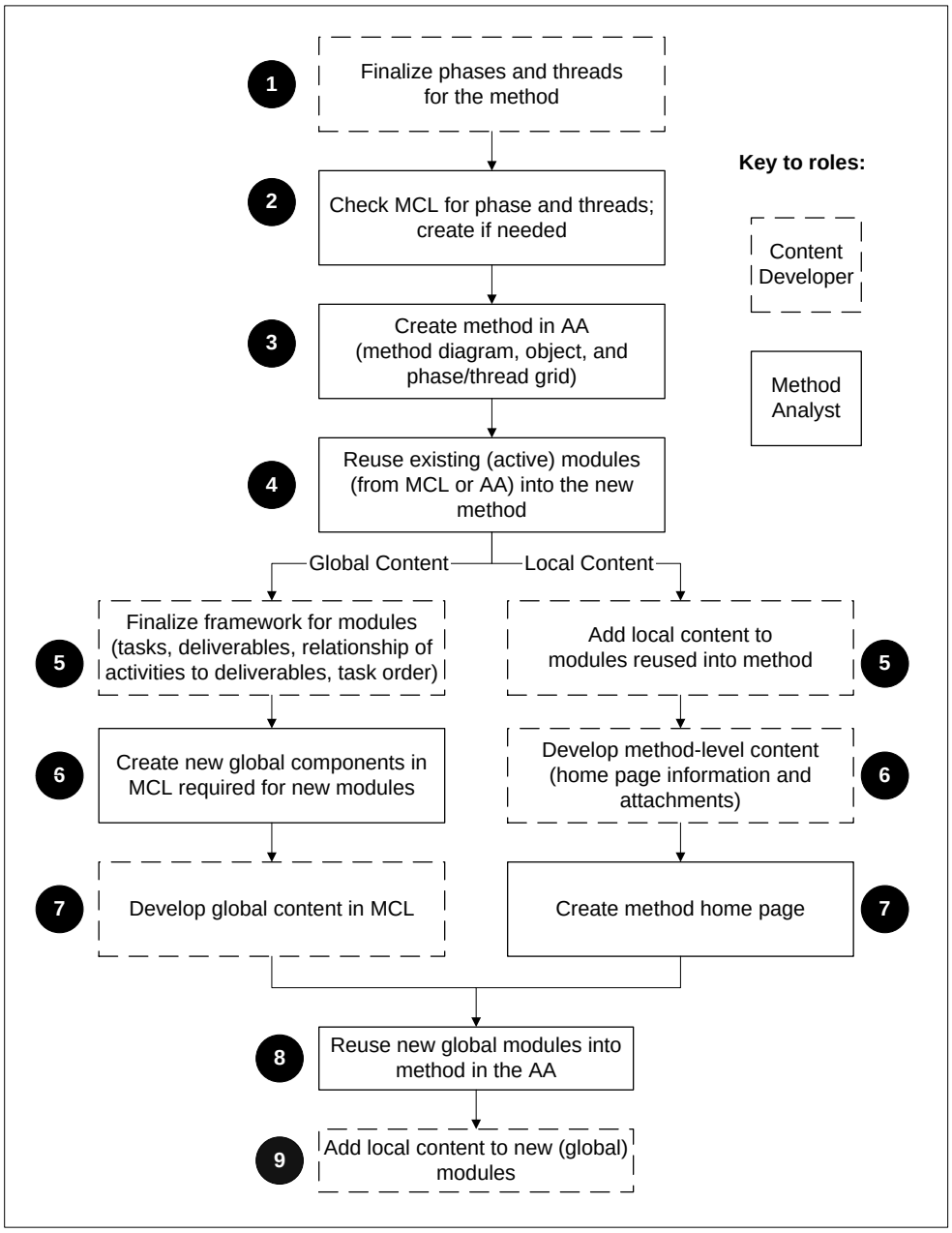
In this field	Enter
Reuse Consideration	Click  to document any considerations regarding the reuse of this component.
Update Notes	Click  to document changes made to this component since the last version.
General	Click  to record and general information about this component that you do not want to lose.

Saving the Role

12. Click **Save**. The instance is saved.

Assembling Methods in the AA

This section includes the procedures for assembling methods, which occurs in the assembly area (AA) of Framework Navigator. The following figure outlines the order in which a method is assembled and notes who is responsible for completing the task.



Assembling a Method

Typically, the method manager or method analyst lead creates the method in the assembly area. Initial setup of the method requires this information:

- Phases
- Threads
- Whether the method should be created as a version or copy of another method

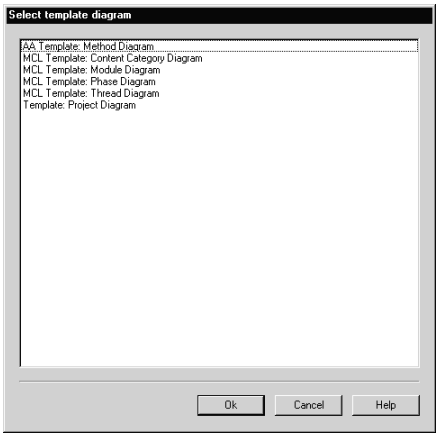
Other considerations:

- All phases and threads for the method must be in the MCL prior to assembly.
- There is no single best way of assembling the method. Method analysts need to determine the most efficient way to reuse components from the MCL.

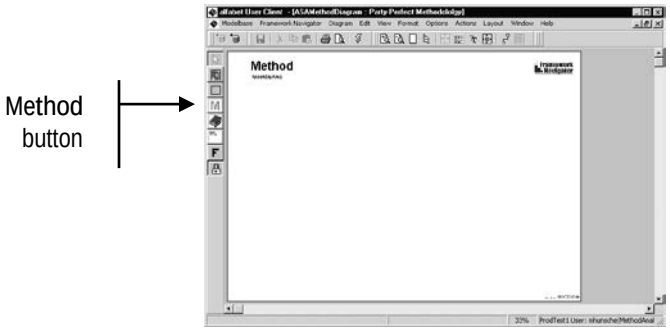
Setting up a New Method

Follow this procedure to set up the method.

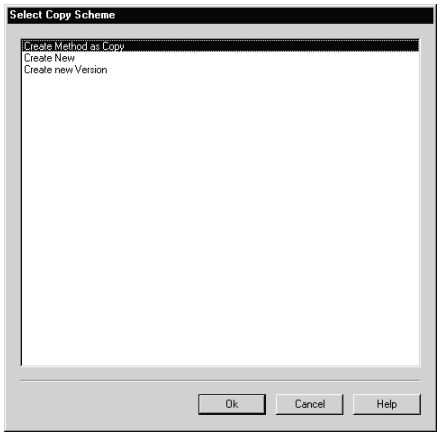
1. Click **FrameworkNavigator > AA Diagrams**. Click ⊞ to expand the Assembly Area.
2. Right-click **Deloitte Consulting Methods** and select **Create New Diagram Using Template**. The Select Template Diagram window opens, as illustrated.



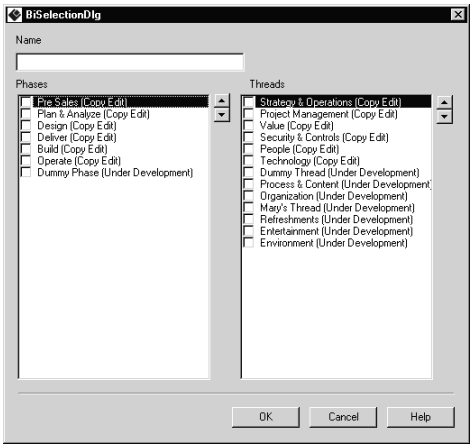
3. Click **AA Template: Method Diagram**, and then click **OK**. Framework Navigator prompts you to enter a diagram name.
4. Enter the <**method name**> and click **OK**. The Method diagram opens, as illustrated.



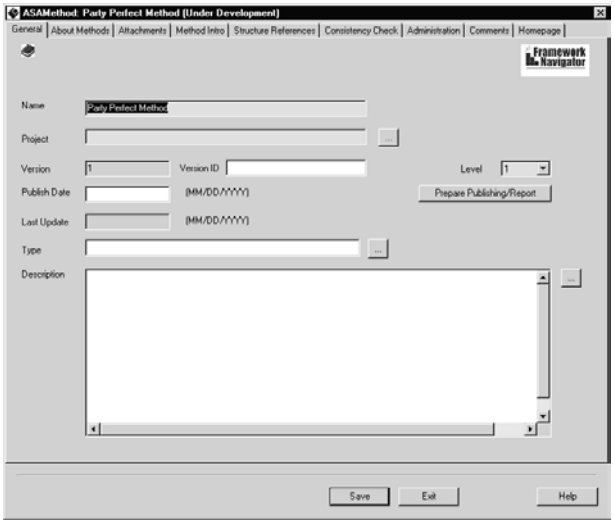
5. Click the **Method** button  in the toolbox. Then click on the empty page. The Select Copy Scheme window opens, as illustrated.



6. Select **Create New**, and then click **OK**. The BiSelection dialog opens, as illustrated.



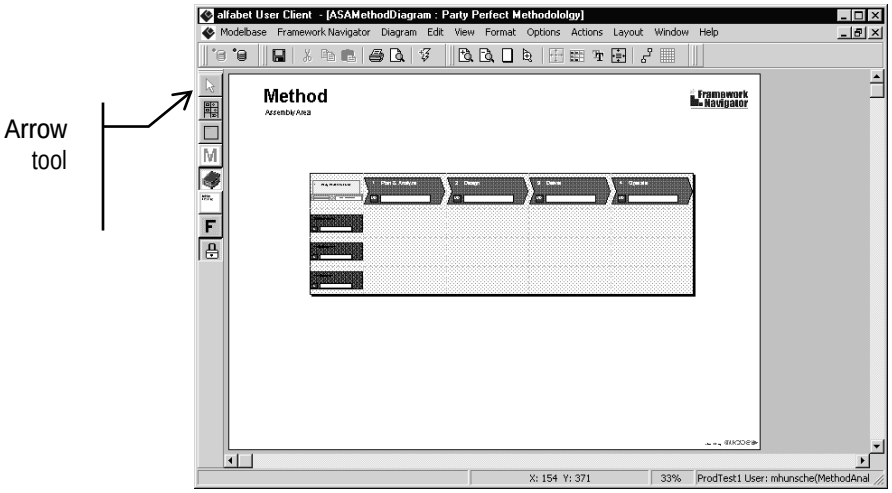
7. In the Name field, enter the <**method name**>.
8. In the Phases field, click the check boxes next to the phases included in the method. To specify a different order, click on a phase and use the reorder button () to move it up or down in the list.
9. In the Thread field, click the check boxes next to the threads included in the method. To specify a different order, click on a thread and use the reorder button () to move it up or down in the list.
10. Click **OK**. The Method dialog opens to the General tab, as illustrated. Required fields are highlighted in yellow.



11. Complete these fields:

In this field	Enter
Project	Click  to associate the method to a project.
Version ID	If necessary, enter a version number for the method.
Level	Select the level (1, 2, or 3) from the drop-down list. (This information is just for reference.)
Publish Date	Enter the date that the method is scheduled to go live.
Type	Click  to specify the type of method it is (Core Template, Custom Method, Method Template, Standard Method)
Description	Click  to add a brief description of the method.

12. Click **Save**. The Method diagram appears with threads and phases as illustrated.



13. Click the arrow tool, and then double-click the text heading in the diagram. Replace the default text heading (Method) with the name of the method.

14. Close the window. Click **Yes** to save the method diagram.

Reusing Modules

Before reusing modules, you must know where the modules will be reused from. There are two choices:

- **From the MCL** – brings the global content
- **From another method in the AA** – brings the global content and any local content entered in the other method

Reusing MCL modules

If the method includes any "new" modules (modules that were not in the MCL before the project began), modules from the MCL should be reused in two stages:

1. First, reuse existing modules from the MCL. This can be done at any time, in any order, and in any number of segments. Generally, existing modules have a status of Active, indicating they are complete and approved.

2. Later, reuse the new modules. New modules do not need to be fully populated before they are reused, but the following statements should be true before reuse:
   - The tasks are identified, associated with the module, and ordered correctly.
   - The module deliverable is identified.
   - All task deliverables are identified.

   If any of these conditions change after the module is reused, a new version of the module will have to be created in the MCL. Then the method must be updated with the new version of the module in the AA.

Reusing AA modules

When an AA module is reused, any local content associated with the module is copied into the new method. However, unlike the relationship of global content in that module to the MCL, there is no continuing relationship of the local content with its source. The local content that is copied from one place in the AA to another is therefore only a "snapshot in time."

Modules that repeat across phases

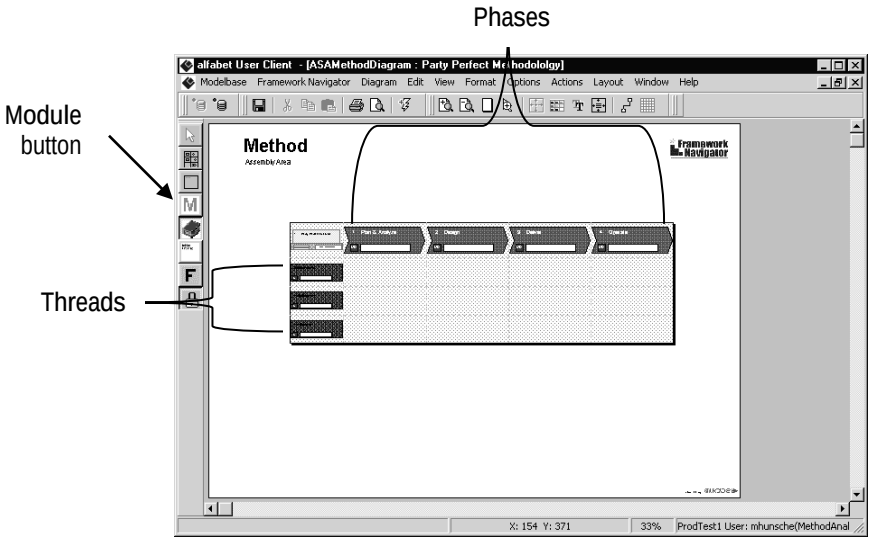
When modules "repeat" across phases in the new method (such as project management modules), the local content for them is typically the same, or almost the same in all phases in which the module appears. This is the most efficient way to repeat a module across phases:

1. Determine the source for the module to be reused (MCL or another method in the AA).
2. Reuse the module once in the method.
3. Add local content into the first occurrence of the module.
4. Reuse the module into subsequent phases, using as the source the module in that method (to which local content has already been added).

In this way, local content can be entered once and copied through the reuse function. Remember, however, if the local content is updated after the module is reused, the changes must be made to all instances of the module (because local content cannot be "inherited").

To reuse modules, follow this procedure.

1. Click **FrameworkNavigator > AA Diagrams**. Click ⊞ to expand the Assembly Area.
2. Double-click the <**desired method diagram**> to open it. The phases appear across the top of the diagram and the threads appear on the left side, as illustrated.

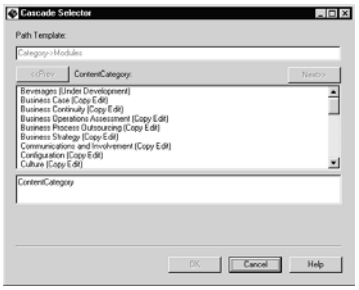


3. Click M on the toolbar, and then click on the method diagram at the intersection of a phase and thread. The Select Copy Scheme window opens. The options follow.

Reuse Option	Resulting Selection
Reuse from MCL (All modules)	Alphabetical list of all modules in the MCL
Reuse from MCL (Phase>module)	Alphabetical list of all modules in the MCL by phase
Reuse from MCL (Thread>module)	Alphabetical list of all modules in the MCL by thread
Reuse from MCL (Category>module)	Alphabetical list of all modules in the MCL by content category

Reuse Option	Resulting Selection
Reuse from ASA (Method>phase)	Alphabetical list of all modules associated with a phase from an assembled method.
Reuse from ASA (Method>thread)	Alphabetical list of all modules associated with a phase from an assembled method.

4. Choose the <**desired option**> and then click **OK**. The Cascade Selector opens, as illustrated.



5. Click the <**desired element**> in the list window. Then click **Next>>**. The selector displays the next choice. Drill down as needed.

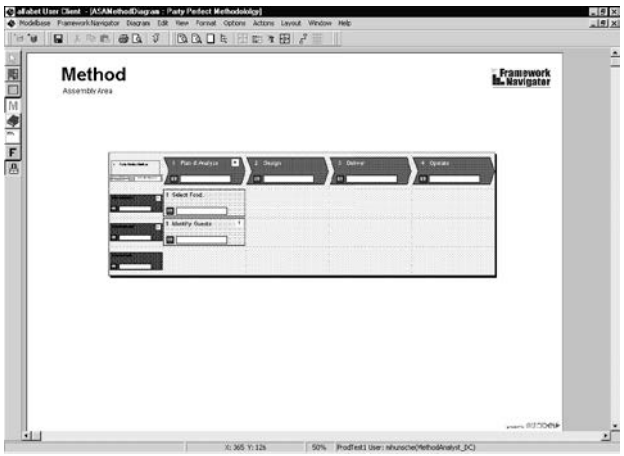
   For example, if you choose **Reuse from MCL (Category>module)**, the window displays all content categories. Choose the content category in which the module occurs, then click **Next>>**. Framework Navigator lists the modules in the chosen category.

6. Click the <**desired module**>, and then click **OK**. The module dialog opens to the General tab of the first module selected.

   Note: You can select multiple modules.

7. Click **Save**. The Module diagram refreshes. The module appears at the thread and phase intersection you clicked, as illustrated.

   Note: To reorder modules within a phase/thread intersection, right-click on one of the modules and select **Reorder**.



8. Repeat steps 3 to 7 to reuse modules in other phases and threads.
9. **Save** the diagram.

Adding Local Content to Components in the AA

This section describes how to add method-level content (information which will appear in the home page of the published method) and local content.

Adding Method-Level Content

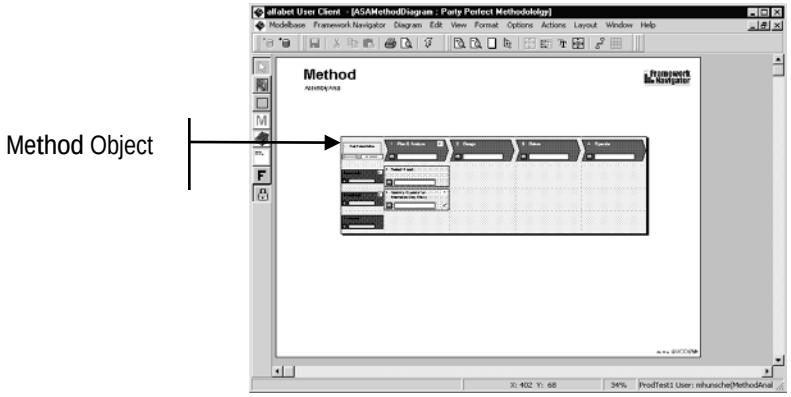
This section describes how to

- Edit phases and threads
- Create the Activities by Workflow (ASA)
- Create the home page

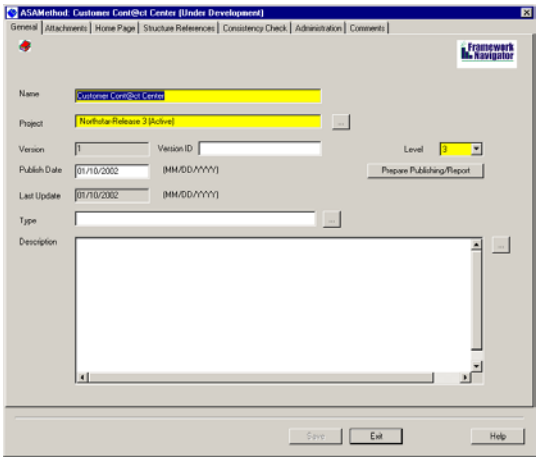
Editing Phases and Threads

Follow this procedure to edit phases in the Assembly Area.

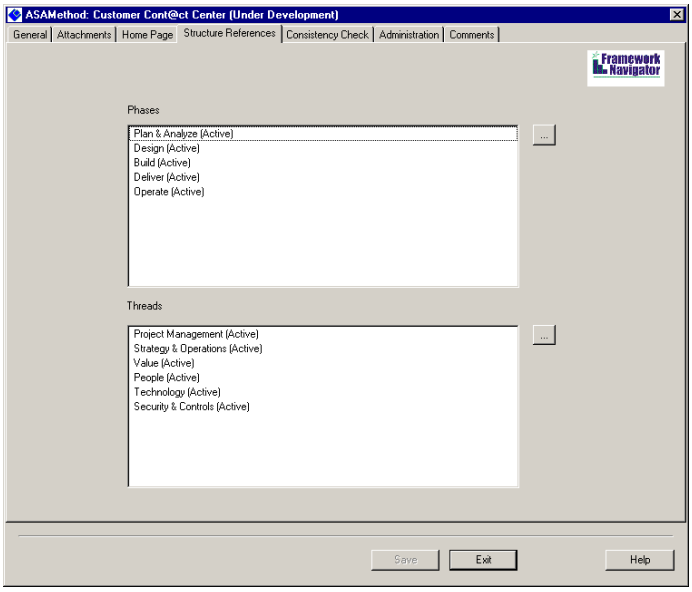
1. Click **FrameworkNavigator > AA Diagrams**. Expand the tree and double-click on the <**desired method**>. The method diagram opens, as illustrated.



2. Double-click the **method object**. The ASA Method dialog opens, as illustrated.



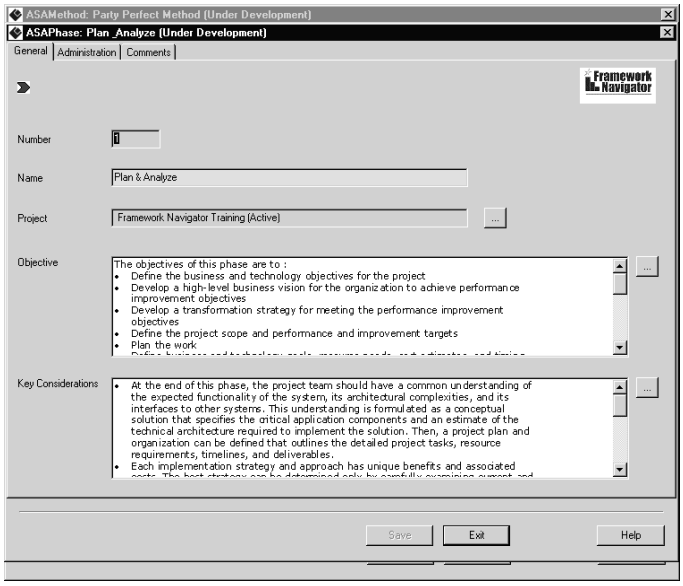
3. Click the **Structure References** tab. It opens, as illustrated.



Note: You can reorder phases and threads on this tab.

Editing phases

4. Double-click the <**phase**> you want to edit. The ASA Phase dialog opens to the General tab, as illustrated below. Required fields are highlighted in yellow.



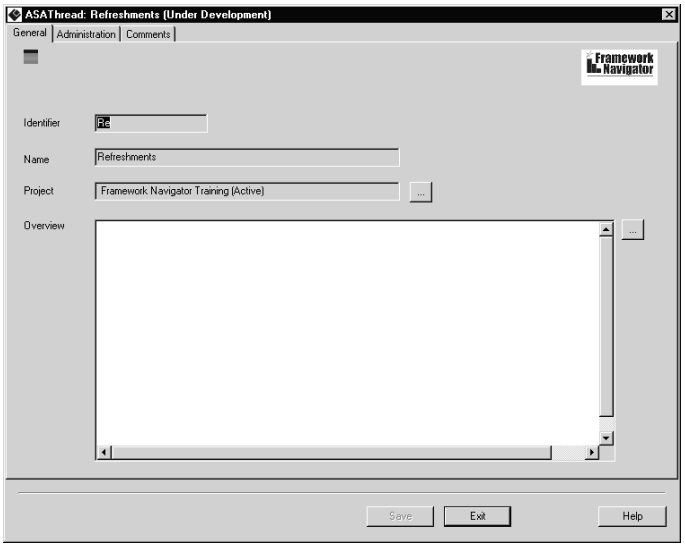
5. Complete these fields. Required fields are in bold text:

In this field	Enter
Name	Change the phase name if appropriate.
Objective	Click [...] to revise the phase objective.
Key Considerations	Click [...] to revise the phase key considerations.

6. Click **Save** to save your changes to the phase. The Structure References tab appears.

Editing threads

7. Double-click the <**thread**> you want to edit. The ASA Thread dialog opens to the General tab, as illustrated below.



8. Click [...] to rewrite and edit the Overview.
9. Click **Save** to save your changes to the thread. The Structure References tab appears.
10. Click **Save** to save all phase and thread changes to the method.
11. Close the window and click **Yes** to save the diagram.

Assembling the Method Home Page

Information about the home page is entered in the Method dialog.

1. Click **FrameworkNavigator > AA Diagrams**. Click ⊞ to expand the Assembly Area tree. Then, expand the Deloitte Consulting Methods tree.
2. Double-click the <**method**> you want to work on. The method diagram opens.
3. Double-click the **method object** in the top-left corner of the diagram. The method dialog opens to the General tab.
4. Click the **Attachments** tab.
5. Complete these fields:

In this field	Enter
Awareness Presentation	Click ⬚ to attach the Awareness Presentation.
White Paper	Click ⬚ to attach the White Paper.
Module Map	Click ⬚ to attach the Module Map.
DH Attachment	Click ⬚ to attach the Deliverables Hierarchy.
ASA Attachment	Click ⬚ to attach the Activities by Subject Area.
AWF Attachment	Click ⬚ to attach the Activities by Workflow.
What is New	Click ⬚ to attach the release notes.
Other 1-3	Click ⬚ to attach additional home page material.

Note: These fields are used only to manage the attachments as internal documents (IDOCs). They are not published on the home page of the method until the home page information is set up to include links to them on the Home Page tab.

6. Click the **Home Page** tab. In the Method Intro field, enter the information that will appear in the right frame of the home page. Typically, this includes these elements:

   - A graphical image chosen to represent the method
   - Links to all home page attachments (entered as IDOCs on the Attachment tab) plus the size of the attachment
   - A brief description of the method
   - The publishing date
   - Other standard verbiage (reference to help, KMS logo, etc.)

   Notes: Start composing the home page by copying all the information from another method and pasting it into the new one. This action will provide both the table and the standard text.

   The column and picture are sized in HTML after the method is published.

   To link the picture file, map a drive to the shared area on the Citrix server (\\uschfmcx011\Framework Navigator). Then copy the graphic to the \Home Page Graphics\ folder. The source for all home page graphics would be T:\Home Page Graphics\. Then in the Method Intro field, click **Image > Insert**, browse to the file, and open it.

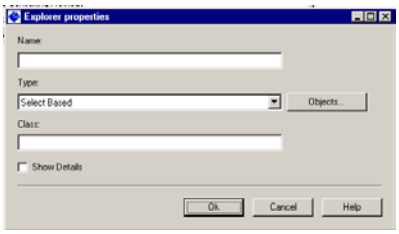
7. Click **Save**.

Developing the Activities by Workflow

This procedure describes how to create the AWF view in Framework Navigator. This view must be created in order for the published method to have an AWF option on the tree navigation.

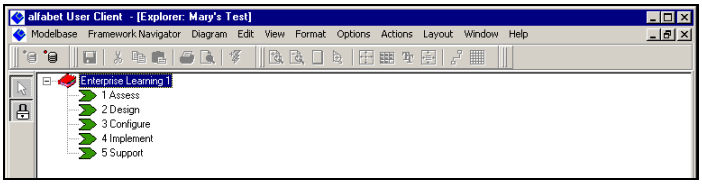
- When selecting tasks to associate with a workflow group, multiple tasks can be selected from the list at once. However, they may not appear in the diagram in the desired order. Use the Reorder option to correct this.
- After a task has been selected for a workflow group, it will no longer appear on the list for other workflow groups in that phase.
- Only tasks associated with a particular phase can be associated with a workflow group in that phase. Tasks cannot be associated with workflow groups in a separate phase.

1. Click **Framework Navigator > AA Diagrams** and expand the tree.
2. Right-click on the **Workflows** icon and select **Create New Explorer**. Then, select the class **WorkflowGroupExplorer** and click **OK**. The Explorer properties dialog opens.



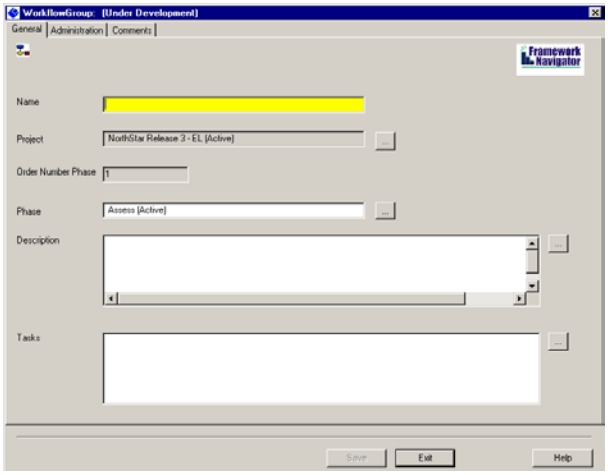
3. In the Name field, type the <**name of the method**>.
4. In the Type field, select **Select Based** from the drop-down list.
5. Click **Objects**. The Set Select Based Ref content dialog opens.
   - In the Classes field, add **ASAmethod** and click **OK**. Make sure *ASAmethod* appears in the right-hand pane.
   - In the Content field, add the **desired method**.
   - Click **OK**.

   An icon for the method appears on the Workflows list.
6. Double-click the **icon** to open the diagram from the tree. The method name should appear next to a book icon, with arrow icons and phase names below it.

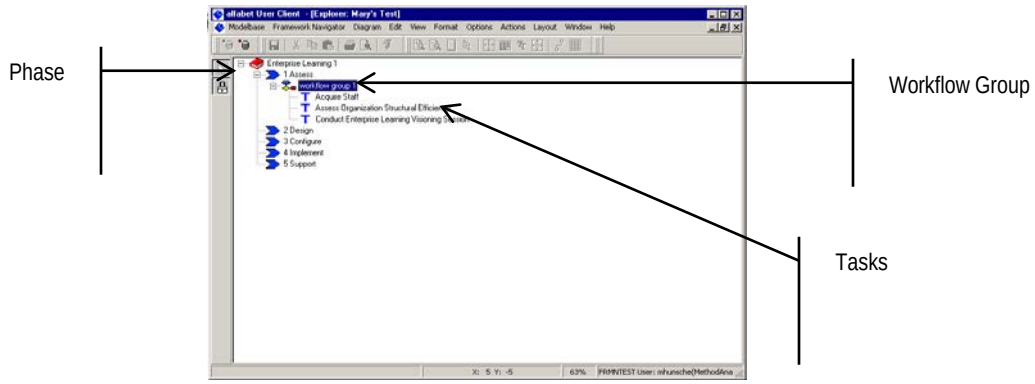


Creating Workflow Groups

7. Right-click on a phase and select **Workflow Group** > **Create**. The Workflow Group dialog opens, as illustrated.



8. Enter a name for the workflow group.
9. Click ⬚ next to the Description field and enter a description of the group.
10. Click ⬚ next to the Tasks field and select **Add**. The Select window opens, displaying all the tasks in the phase you selected.
11. Select the <**first task**> to be included in the workflow group.
12. Continue selecting tasks until all the tasks for the workflow group have been chosen. Reorder tasks if necessary.
13. Click **Save** and click **Exit**. The workflow group appears under the phase and the tasks appear under the workflow group.

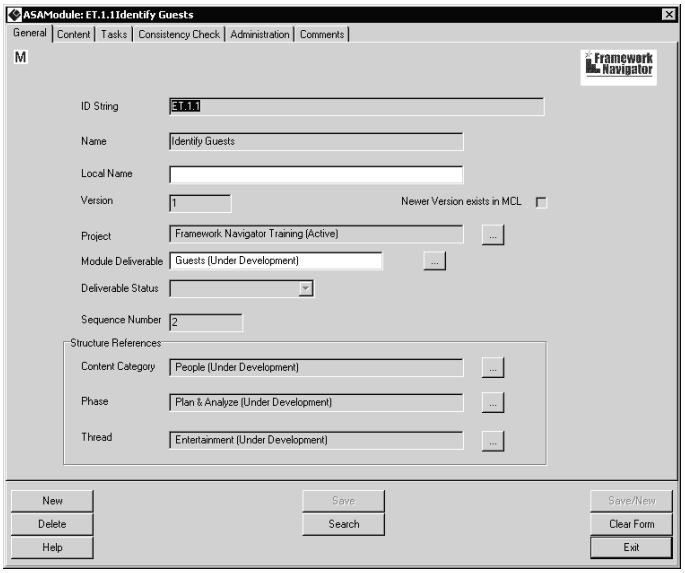


14. Repeat steps 7 through 13 until all workflow groups have been created.
15. Verify the diagram against the method AWF.
16. Save the diagram.

Adding Local Content to Modules

Follow this procedure to add and edit local module content.

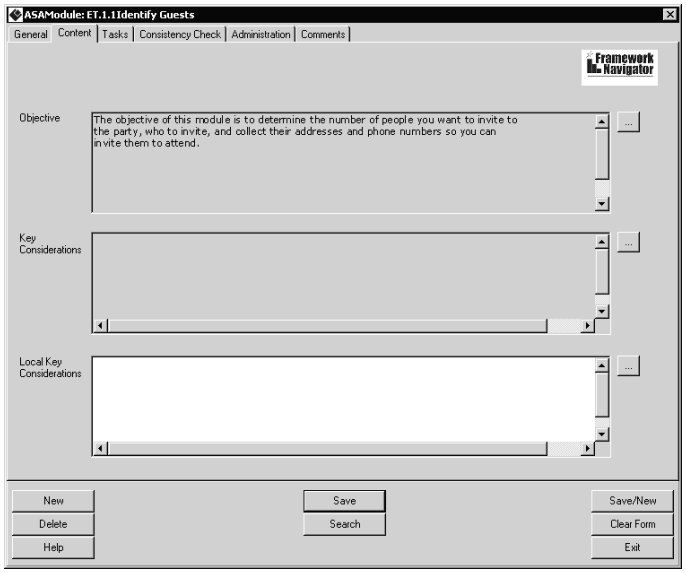
1. Click **FrameworkNavigator > Create** and edit objects. Then select AA Modules. The General tab opens.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**module name**> and click **Search**. Then click on the **module name** in the list window and click **OK**. The AA Module dialog opens to the General tab, as illustrated.



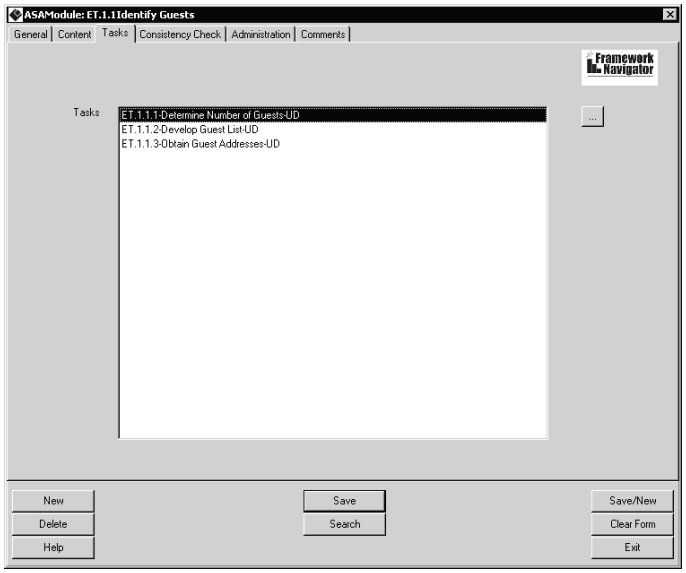
4. Complete these fields:

In this field	Enter
Local Name	Add a local name for the module. **Note:** A local module name is used very seldom. If you will be creating a local approach, it must be approved by the project manager.
Module Deliverable	Click  to view and edit the module deliverable dialog. For example, if you select edit, you can add local samples and templates to the module deliverable.
General	Click  to record and general information about this document that you do not want to lose.

5. Click the **Content** tab. It opens, as illustrated.



6. In the Local Key Considerations field, click  to add or edit local key considerations.
7. Save your changes.
8. Click the **Task** tab. It opens, as illustrated.



9. Highlight a task and click  to view, edit, or reorder it, if necessary.
10. Click the **Administration** tab to update the fields, if necessary.
11. Click the **Comments** tab to update the fields, if necessary.
12. Click **Save**, and then click **OK**.
13. Repeat steps 2 to 12 to add local content to another module.

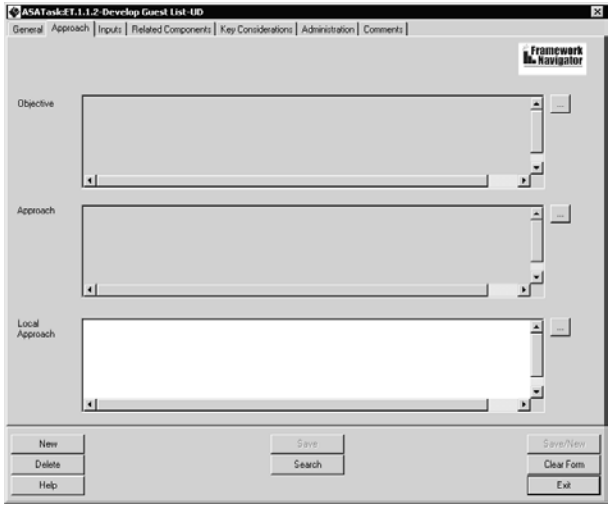
Adding Local Content to Tasks

1. Click **FrameworkNavigator > Create and edit objects**. Then select **AA Tasks**. The General tab of the AA Module dialog opens.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**task name**> and click **Search**. Then click on the **task name** in the list window and click **OK**. The AA Task dialog opens to the General tab.

Adding a Local Approach

Note: A local Approach is seldom used and must be approved by the method manager.

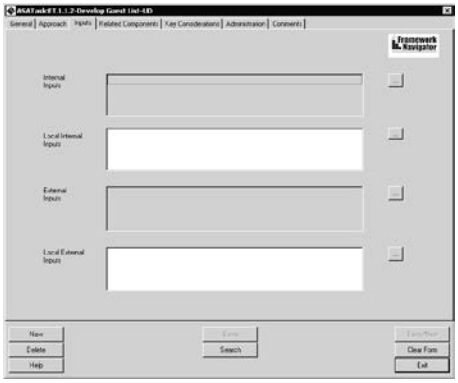
4. Click the **Approach** tab. It opens, as illustrated.



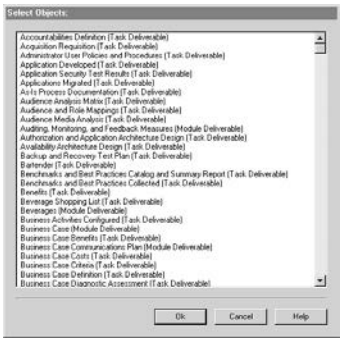
5. Click  next to the Local Approach field to add or edit the local approach.
6. Save your changes.

Adding Local Inputs

7. Click the **Inputs** tab. It opens, as illustrated.

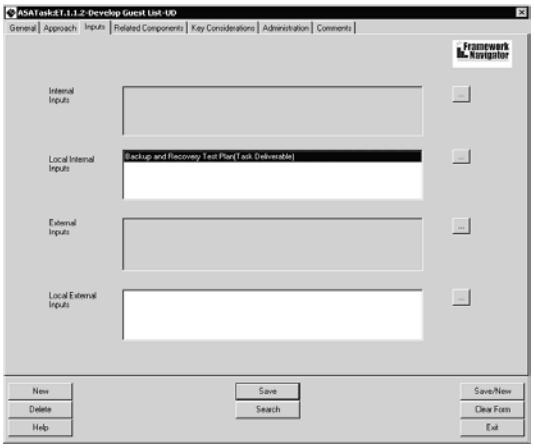


8. Click  next to the Local Internal Inputs field and select **Add** to add a local internal input. The Select Object window opens, as illustrated.



9. Select the <**internal input**> and click **OK**. The field is populated, as illustrated.

   Note: When this field is populated you can select an item and **Show**, **Edit**, or **Detach** it.

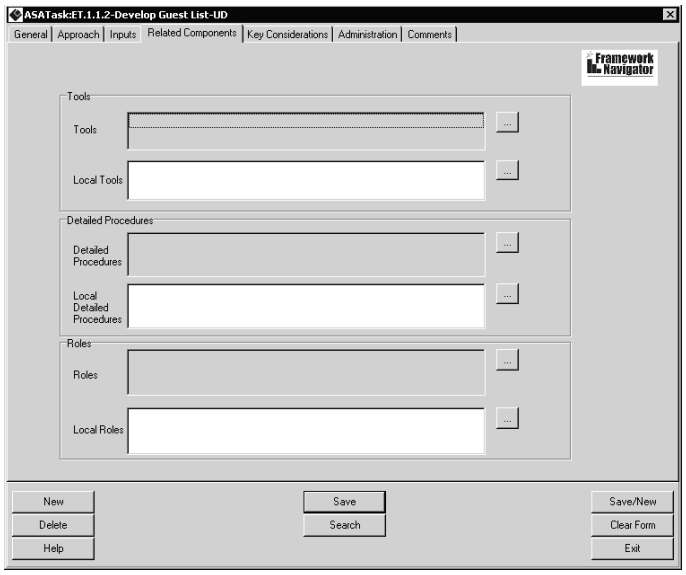


10. In the Local External Inputs field, click  and select **Add** to add a local external input. The Select Object window opens.
11. Select the **external input** and click **OK**. The local field is populated.

    Note: When this field is populated you can select an item and **Show**, **Edit**, or **Detach** it.

Adding Local References to Tools, Detailed Procedures, and Roles

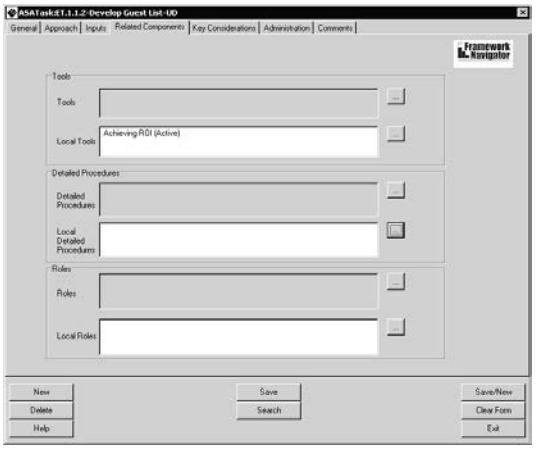
12. Click the **Related Components** tab. It opens, as illustrated.



13. To add local tools, click  next to the Local Tools field and select **Add**. The Select Objects window opens.

14. Click the <**tool**> you want to reference as local content, and then click **OK**. Framework Navigator populates the field, as illustrated.

    Note: When this field is populated you can select an item and **Show**, **Edit**, or **Detach** it.



15. To add local detailed procedures, click  next to the Local Detailed Procedures field and select **Add**. The Select Objects window opens.

16. Click the <**detailed procedure**> you want to reference as local content and then click **OK**. Framework Navigator populates the field.

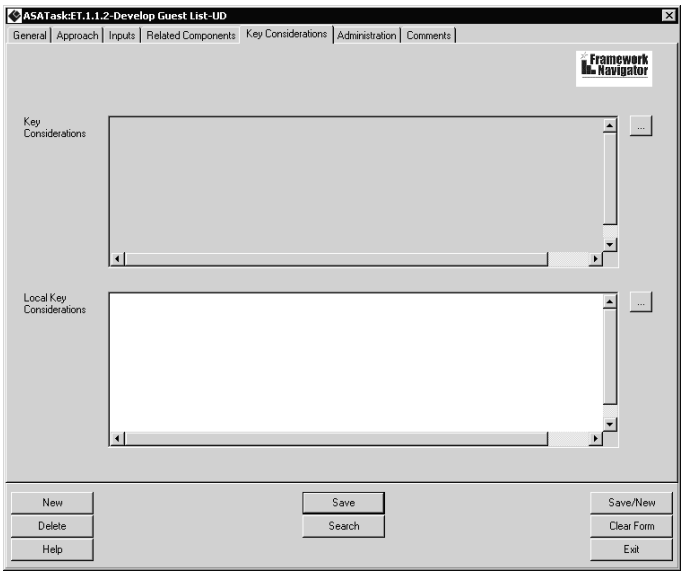
    Note: When this field is populated you can select an item and **Show**, **Edit**, or **Detach** it.

17. To add local roles, click  next to the Local Roles field, and select **Add**. The Select Objects window opens.
18. Click the <**role**> you want to reference as local content, and then click **OK**. Framework Navigator populates the field.

    Note: When this field is populated you can select an item and **Show**, **Edit**, or **Detach** it.

Adding Local Key Considerations

19. Click the **Key Considerations** tab. It opens, as illustrated.



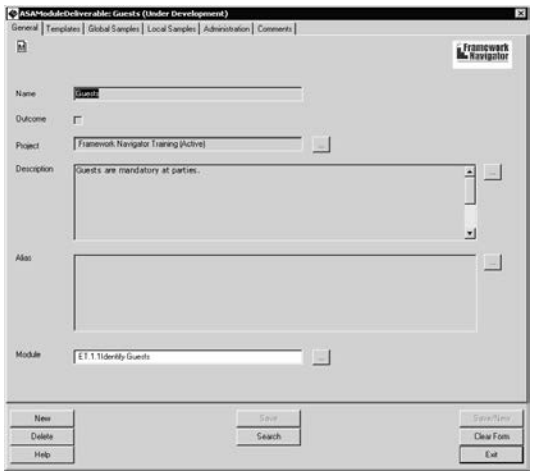
20. Click  next to the Local Key Considerations field, and add or edit local key considerations.

Updating Administrative Information

21. Click the **Administration** tab to update the fields, if necessary.
22. Click the **Comments** tab to update the fields, if necessary.
23. Click **Save**, and then click **OK**.
24. Repeat steps 2 to 23 to add local content to other tasks.

Adding Local Content to Module Deliverables

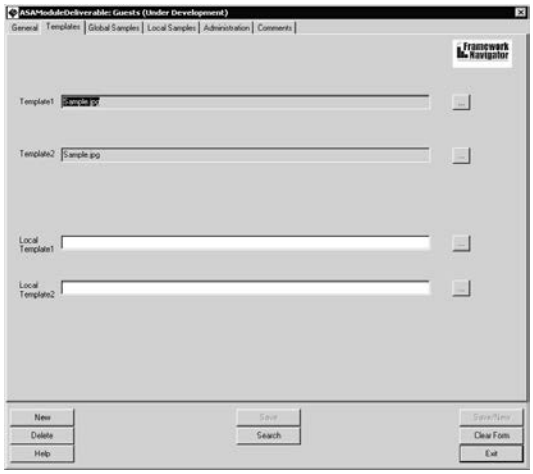
1. Click **FrameworkNavigator > Create and edit objects**. Then select AA Module Deliverables. The General tab opens.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**module deliverable name**> and click **Search**. Then click on the **module deliverable name** in the list window and click **OK**. The AA Module Deliverable dialog opens to the General tab, as illustrated.



4. Click  next to the Module field to view or edit the module dialog.

Adding Local Templates

5. Click the **Templates** tab. It opens, as illustrated.



6. Click  next to the Local Template field, and then choose **Upload Document** or **Add Document**. A browser or Select Document window appears.

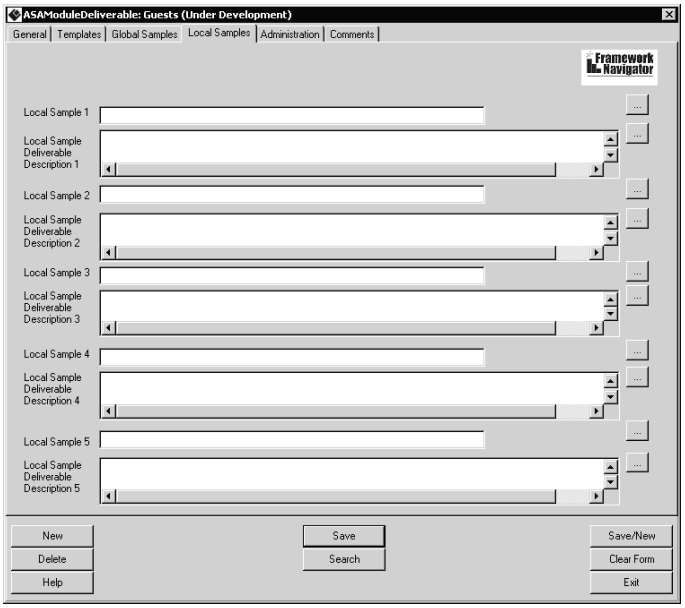
7. Select the <**file**> and click **OK**. Framework Navigator takes the appropriate action and populates the field.

   Note: When the field is populated, click  to remove the document reference.

Adding Local Samples

Framework Navigator can accommodate the addition of fives samples. Follow these steps for each addition.

8. Click the **Local Samples** tab. It opens, as illustrated.



9. Click  next to the Local Sample # field, and then choose **Upload Document** or **Add Document**. A browser or select document window appears.
10. Select the <**file**> and click **OK**.

    Note: When the field is populated, click  to remove the document reference.

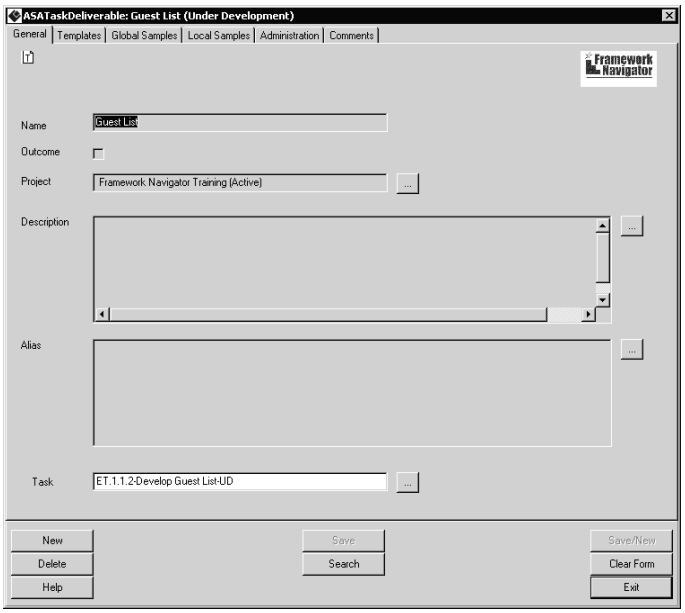
11. Click  next to the Local Sample Deliverable Description # field and add or edit the sample deliverable description.
12. Click **Save**.

Updating Administrative Information

13. Click the **Administration** tab to update the fields, if necessary.
14. Click the **Comments** tab to update the fields, if necessary.
15. Click **Save**, and then click **OK**.
16. Repeat steps 2 to 15 to add local content to other module deliverables.

Adding Local Content to Task Deliverables

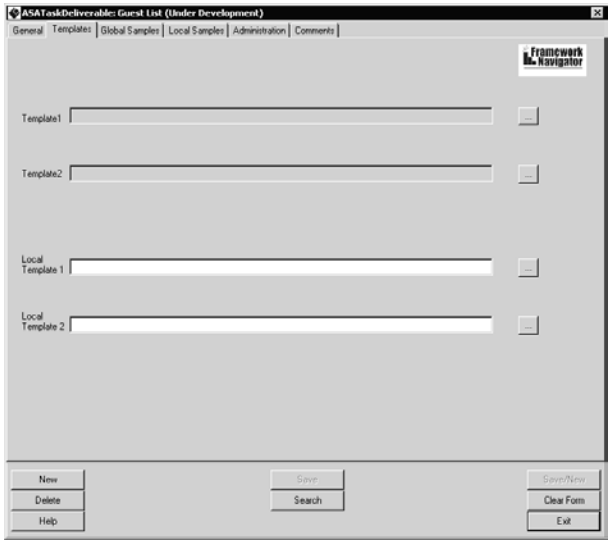
1. Click **FrameworkNavigator > Create and edit objects**. Then select AA Task Deliverables. The General tab opens.
2. Click **Search**. The Select Instance window opens.
3. In the Name field, enter the <**task deliverable name**> and click **Search**. Then click on the **task deliverable name** in the list window and click **OK**. The AA Task Deliverable dialog opens to the General tab, as illustrated.



4. Click  next to the Task field to view or edit the task dialog.

Adding Local Templates

5. Click the **Templates** tab. It opens, as illustrated.



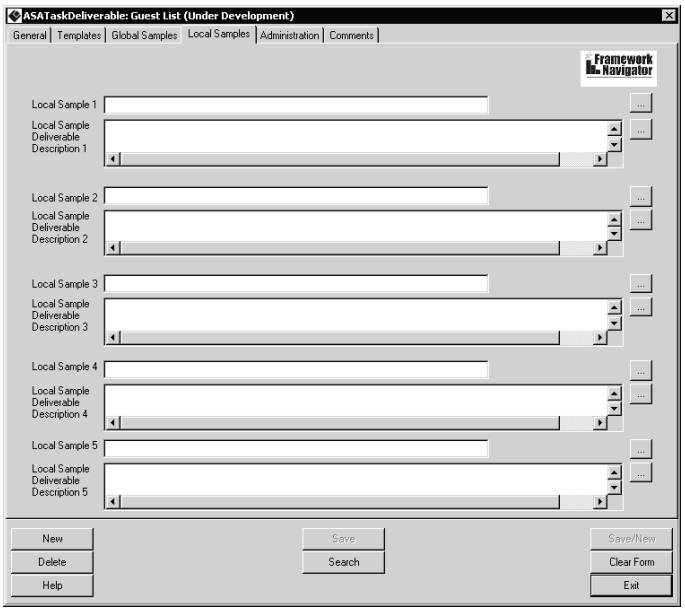
6. Click  next to the Local Template field, and then choose **Upload Document** or **Add Document**. A browser or Select Document window appears.
7. Select the <**file**> and click **OK**. Framework Navigator takes the appropriate action and populates the field.

   Note: When the field is populated, click  to remove the document reference.

Adding Local Samples

Framework Navigator can accommodate the addition of fives samples. Follow these steps for each addition.

8. Click the **Local Samples** tab. It opens, as illustrated.



9. Click  next to the Local Sample # field, and then choose **Upload Document** or **Add Document**. A browser or select document window appears.
10. Select the <**file**> and click **OK**.

    Note: When the field is populated, click  to remove the document reference.
11. Click  next to the Local Sample Deliverable Description # field and add or edit the sample deliverable description.
12. Click **Save**.

Updating Administrative Information

13. Click the **Administration** tab to update the fields, if necessary.
14. Click the **Comments** tab to update the fields, if necessary.
15. Click **Save**, and then click **OK**.
16. Repeat steps 2 to 15 to add local content to other module deliverables.

Using Reports

Framework Navigator includes 14 preset reports, which fall into four areas of inquiry:

- Activities
- Components
- Deliverables
- Team Member Assignments

Note: In three of these four areas, you can inquire and report on either the assembly area (AA) or the method component library (MCL). The following tables list each report name, its general utility, and some suggested uses.

Reports Related to Activities

Report Name	General Use	Suggested Use
Activities_by_Subject _Area_ AA	Create the final ASA for a method	Run for one method at a time
Activities_by_Subject_Area_MCL	Create ASA for • content category • competency • thread • phase • set of modules	Create for entire MCL (sorted by Content Category) after new method is published. Copy to MAP (MCL Framework tool)
Activities_by_Workflow_AA		

Reports Related to Components

Report Name	General Use	Suggested Use
Components_Changed_List_Since_ Method_Published	A versioning report: lists all AA method components and indicates if component has changed since last publishing	Run before starting a project to upgrade existing method.
Property_Values_by_Component	Lists all components of a selected class with their editable entries	View change histories with narrow criteria (only common fields, for example)
Component_Status_for_Entire_Class	Reports status	Assess status
Component_Status-AA	Reports status	Assess status
Component_Status-MCL	Reports status	Assess status
Component_Where_Used_List	Identifies which AA/MCL objects have been reused or referenced within the AA or MCL.	Run before retiring or deleting a component. **Caution:** Report may take a long time to run and produce results.

Reports Related to Deliverables

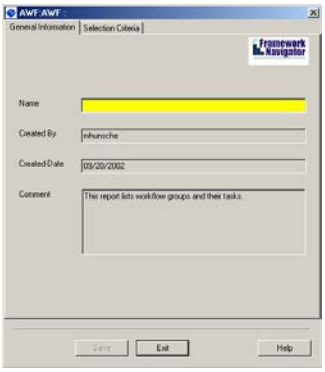
Report Name	General Use	Suggested Use
Deliverables_Hierarchy_by_Method	Create DH for a Method	Only run for one Method at a time
Deliverables_Hierarchy_by_Content_ Category	Create DH by Content Category	Create periodically for entire MCL and keep copy in eRoom
Deliverables_Hierarchy_by_Thread	Create DH by thread	Create periodically for entire MCL and keep copy in eRoom

Reports Related to Team Member Assignments

Report Name	General Use	Suggested Use
Person_Assigned_to_AA_ Components	Reports on assigned responsibilities	Determine who (developer, TE, or CE) has been assigned to what AA component
Person_Assigned_to_MCL Components	Reports on assigned responsibilities	Determine who (developer, TE, or CE) has been assigned to what MCL component

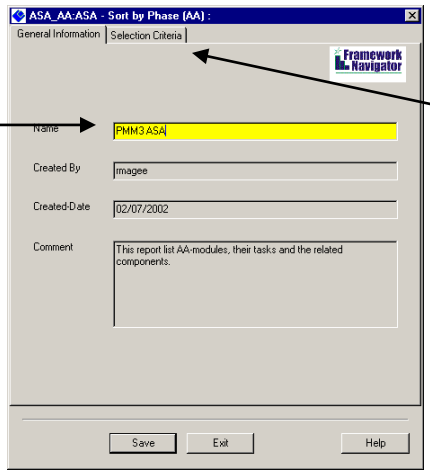
Creating a Framework Navigator Report

1. Click **FrameworkNavigator > Reports**.
2. Double-click the **Reports** folder to expand it.
3. Double-click the <**folder with your name**>. Your Reports explorer opens.
4. Right-click on your folder, select the report you want to create, then click **Create**. The report dialog opens to the General Information tab, as illustrated.

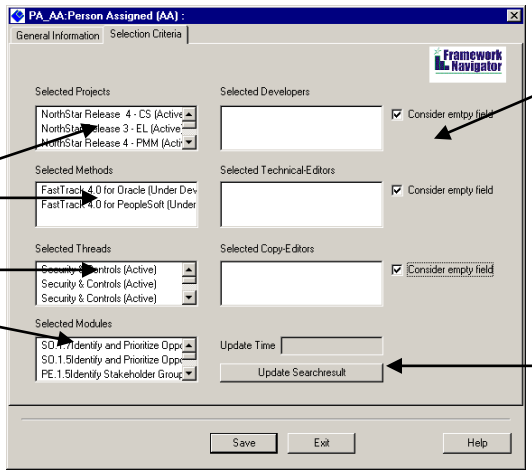


5. In the Name field, enter a <**name**> for the report. This name will appear on the tree of reports in your Reports explorer.
6. Click the **Selection Criteria** tab and choose the selection criteria for your report.
7. Click **Update SearchResult** to run the report based on the selection criteria.
8. **Save** the report.
9. **Exit** the report dialog.
10. To view the report, you must export it (to HTML).

1. Enter a name for the report



2. Click Selection Criteria tab



3.

- Right-click each field and select Add
- Click Search and select criteria
- Save the selected criteria

Note: Some Selection Criteria menu screens include a Consider Empty Field option. Check the box if you want to include blank and empty fields in your search.

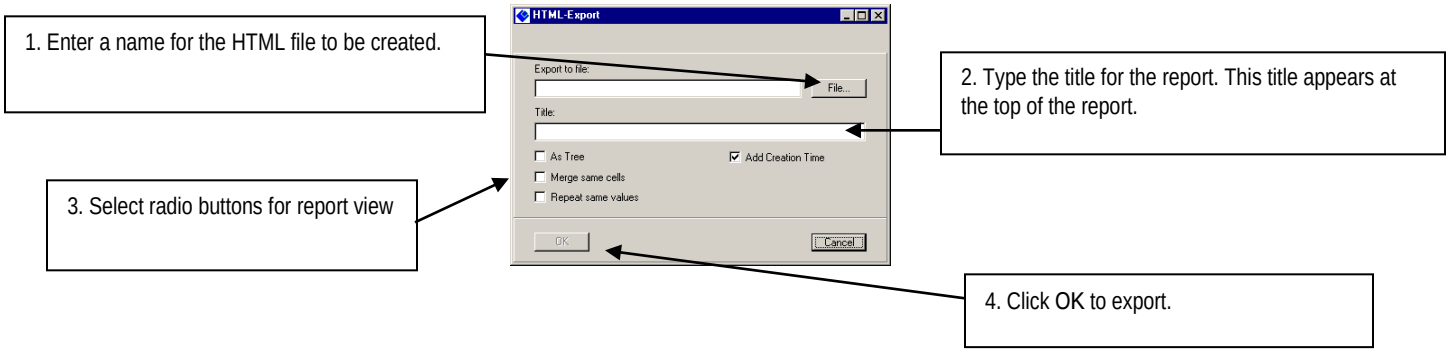
4. Click Update SearchResult to run (or rerun) the report.

Exporting a Report to HTML

After you create a report, you need to export it to HTML to see the data. You can open the HTML file with Internet Explorer or Excel.

Follow this procedure to export a report to HTML.

1. In the Reports explorer, right-click <**the report**> and select **Export to HTML**. The HTML Export dialog appears.
2. Enter a filename, title, and other options for the export.
3. Click **OK** to create the HTML report file.
    - **Note:** Framework Navigator does not store report data between sessions. You must export the report to HTML to retain data.

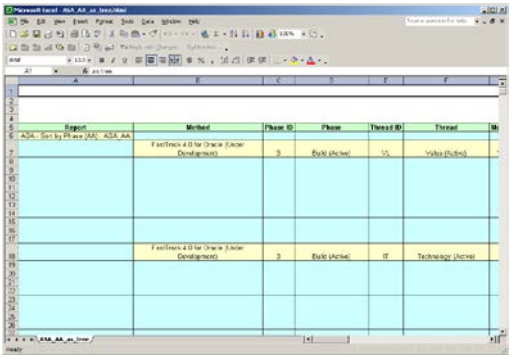


Options for Report Views

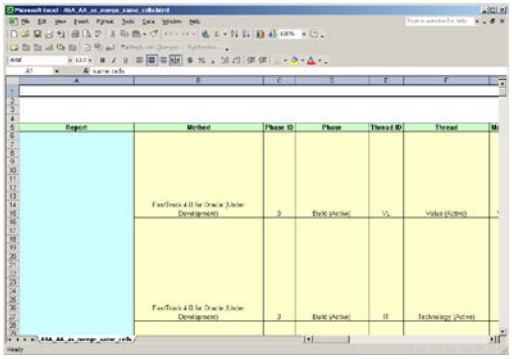
Framework Navigator provides six different report views for output. The report views dictate the appearance and presentation of your report data. The options are

- No export options (default)
- As Tree
- Merge Same Cells
- Repeat Same Values
- Combination of As Tree and Merge Same Values
- Combination of As Tree and Repeat Same Values

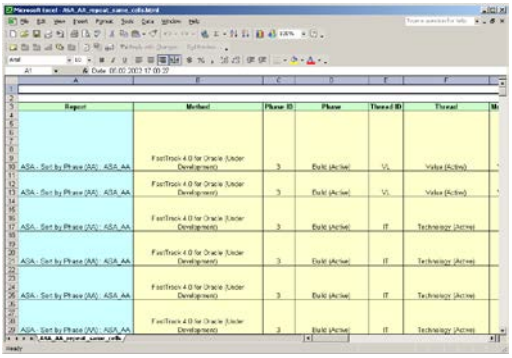
As Tree



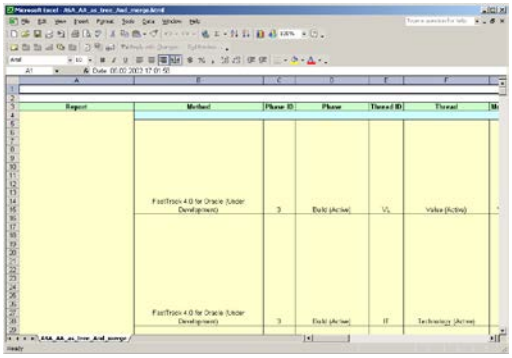
Merge Same Cells



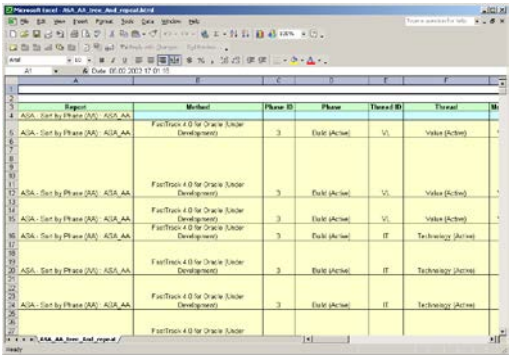
Repeat Same Values



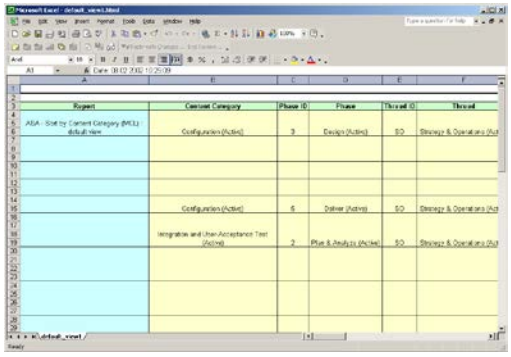
Combination: As Tree, Merge Same Cells



Combination: As Tree, Repeat Same Values



Default View (No options selected)



Publishing Procedures

Framework Navigator Environment

The following tables contain information about the location of servers, files, and applications involved in the publishing process.

alfabet Server Information

Server Type	Server Name	Server IP Address
Oracle Database	USCHFMOR003	10.24.0.187
IIS Server	USCHFMIN012	10.24.0.188

Location of Files on the Publishing Server (USCHFMIN012)

Type	Directory	DNS Name
Published Methods – Test	USCHFMIN012/Site_Review	DCMethodsReview
Published Methods – Production	USCHFMIN012/Site_Prod	DCMethods
Published Methods – Archived	USCHFMIN012/Site_Archive	
GSX Support Files	USCHFMIN012/Site_Prod/GSX_Support	
Help Files	USCHFMIN012/Site_Prod/Help	
Home Page Graphics	USCHFMOR003/clientinstall/home page graphics	

Publication Software Location

Software	Description	Location
DeloitteExport.EXE	The Deloitte Publisher executes the XML export.	This file is located in the **Programs** directory of the alfabet user client software, which is launched through the Citrix software.
Publishing Designer	The Designer software is used to convert XML files into HTML files.	The master copy of this software is located in this directory: **uschfmor003/clientinstall/ Publishing Software/alfabet publishing designer**
alfabet Meta Tag Program	This software was written by Rob Mauceri to • Add Meta Tags to the published html files • Italicize outcomes • Attach a style sheet	The master copy of this software is located in this directory: **uschfmor003/clientinstall/ Publishing Software/alfabet meta tagging software**
Dreamweaver	A html editor is needed to manually modify the method after it is published.	
Java RunTime Version 1.3.1_01	This is needed to run the Publishing Designer software	Uschfmor003_clientinstall/ j2sdk-1_3_1-win.exe

Publishing Method Content

This section describes how to publish method content. Three types of products are published from Framework Navigator:

- Modules and their related components (for review) – from the MCL or the AA
- Methods (published on DCconnect)
- Competency Libraries (published on DCconnect)

Publishing method content requires several steps, but not every step is required for every product.

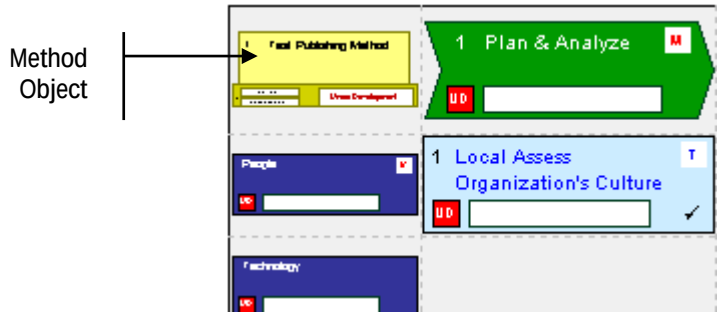
Step	MCL Module	AA Module	Method	Competency Library
1. Prepare the method for publishing		X	X	
2. Export the content to XML	X	X	X	X
3. Convert the XML files to HTML	X	X	X	X
4. Run the alfabet Meta Tagging software			X	X
5. Make manual changes to the method			X	X
6. Move files to production			X	X

Some additional steps are required to put set up the method to run on a CD.

Prepare the Method for Publishing

If you are publishing an MCL module or a competency library, skip this step and begin at Export the Method to XML.

1. Click **FrameworkNavigator > AA Diagrams**. Double-click the method you want to publish. The method diagram opens. The following illustration denotes the location of the method object on the diagram.



1. Double-click the method object. The Method dialog opens to the General tab.
2. In the Publish Date Field, enter the <**publishing date**>.
3. Click **Prepare Publishing/Report**. Updates in MCL method components are reflected in the AA method components.
4. Click **Save**.
5. Close the diagram.

6. Close the application (alfabet User Client).

Export the Method to XML

Note: Before performing this step, create this directory structure on your PC:

- c:\alfabet publishing designer\method name\ xml
- c\alfabet publishing designer\method name\ html

7. Launch DeloitteExport File Name = DeloitteExport.EXE

1. Log onto the Production database. Click **Modelbase > Open Modelbase**.
2. Open **Export > Export**. The Instance Selector dialog opens.
3. In the Profile field, click **Select** and choose a profile. The following table gives you a description of each profile.

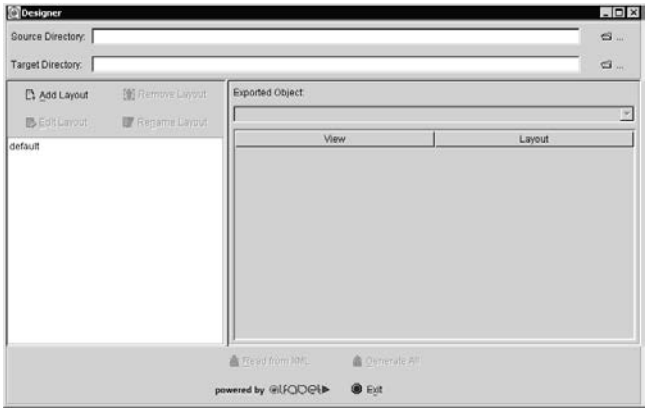
Profile Name	Profile Description
AA_Module_Export	Publish one or more modules from the Assembly Area
MCL_Module_Export	Publish one or more modules from the Method Component Library
Competency Export	Publish a Competency Library.
MethodExportLevel3_no_AWF_slim_Tree	Publish a Level 3 method from the Assembly Area without Work Flow. Detailed Procedures, Roles and Tools will not display on the tree.
MethodExportLevel3_no_AWF_full_Tree	Publish a Level 3 method from the Assembly Area without Work Flow. Detailed Procedures, Roles and Tools will display on the tree.
MethodExportLevel3_full_Tree	Publish a Level 3 method from the Assembly Area with Work Flow. Detailed Procedures, Roles and Tools will display on the tree.
MethodExportLevel3_slim_Tree	Publish a Level 3 method from the Assembly Area with Work Flow. Detailed Procedures, Roles and Tools will not display on the tree.
MethodExportLevel2_no_AWF_slim_Tree	Publish a Level 2 method from the Assembly Area without Work Flow. Detailed Procedures, Roles and Tools will not display on the tree.
MethodExportLevel2_no_AWF_full_Tree	Publish a Level 2 method from the Assembly Area without Work Flow. Detailed Procedures, Roles and Tools will display on the tree.
MethodExportLevel2_full_Tree	Publish a Level 2 method from the Assembly Area with Work Flow. Detailed Procedures, Roles and Tools will display on the tree.
MethodExportLevel2_slim_Tree	Publish a Level 2 method from the Assembly Area with Work Flow. Detailed Procedures, Roles and Tools will not display on the tree.
MethodExportLevel1_no_AWF_slim_Tree	Publish a Level 1 method from the Assembly Area without Work Flow. Detailed Procedures, Roles and Tools will not display on the tree.

Profile Name	Profile Description
MethodExportLevel1_no_AWF_full_Tree	Publish a Level 1 method from the Assembly Area without Work Flow. Detailed Procedures, Roles and Tools will display on the tree.
MethodExportLevel1_full_Tree	Publish a Level 1 method from the Assembly Area with Work Flow. Detailed Procedures, Roles and Tools will display on the tree.
MethodExportLevel1_slim_Tree	Publish a Level 1 method from the Assembly Area with Work Flow. Detailed Procedures, Roles and Tools will not display on the tree.

4. In the Classes field, click the <**class**>, and then click **Add**.
5. Search for the method, module, or competency you want to publish. Click the <**object name**> and click **OK**. The Instances field is populated.
6. Click **Export**.
7. Select a location on your local drive for the XML files and click **OK**. The export process begins.
   - Capture the XML export in this directory: c:\alfabet publishing designer\method name\ xml
8. When the export is complete, close the application.

Convert XML Files to HTML

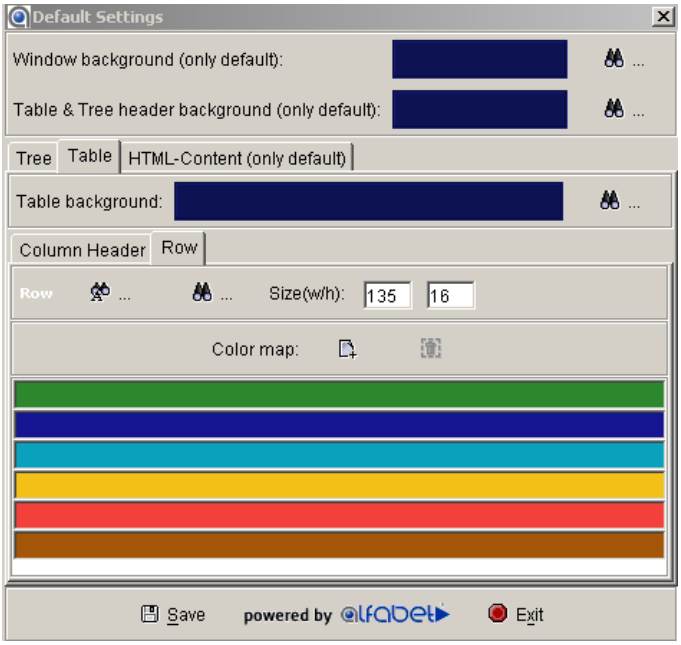
9. Open **alfabet Designer**. The Choose Designer work directory dialog opens.
10. Open **S:\program files\alfabet publishing designer.** Highlight the **layouts** folder and click **Open**. The Designer dialog opens.



11. Complete these fields:

In this field	Enter
Source Directory	Click  to select the source location of the XML files you created on your C: drive.
Target Directory	Click  to select the target directory of the HTML files you created on your C: drive.

12. If publishing a method, set the Thread colors. Select the Table Tab and then select the Row Tab. The colors must appear in the same order as the Threads appear on the AA diagram in Framework Navigator.



Thread	Color
Project Management	Green
Value	Teal
Strategy & Operations	Dark Blue
Technology	Red
Security & Controls	Brown
People	Yellow

13. Click Read from XML.

    Note: This process could take up to 30 minutes.
14. Click Generate All.

    Note: This process could take up to 1 hour. The egg timer does not appear during this process.
15. You have successfully published when you get this message.

16. Click **OK**, and then click **Exit**.

Run the alfabet Meta Tagging Software

If you are not publishing a method or competency, skip this step.

17. Launch **AlfaMeta**. The alfabet META Tag Generator dialog opens.
18. In the XML field, browse to the directory containing the XML files.
19. In the HTML field, browse to the directory containing the HTML files.
20. Click on the following options:
    - Add META tag for verity search
    - Italicize Outcome
21. Click Generate.

Make Manual Changes to the Method

After method is published, make the following manual changes to the method.

Note: If you are not publishing a method or competency, skip this step.

22. Update the **_combo…htm** file to change the view names. The view names should be
    - Activities by Subject Area by Phase
    - Activities by Subject Area by Thread
    - Deliverables Hierarchy by Phase
    - Deliverables Hierarchy by Thread
    - Tools by Phase
    - Tools by Thread
    - Detailed Procedures by Phase
    - Detailed Procedures by Thread
    - Roles by Phase
    - Roles by Thread

23. Update the **home page file**, that is, the method serial number.htm file.
    - Resize the table from 80% to 100%
    - Eliminate the extra spacing around the table
24. Update the **_top…htm** file.
    - Update links
    - Align Method Name with Home Page
25. Copy **Release Notes** Folder into the **method** folder.
26. Add this HTML code in the HEAD section of the _export…htm file. This solves the frameset issue with DCconnect. <SCRIPT src="http://dcsearch:8080/search97/WinCtrl.js"></SCRIPT>
27. Add HTML code to _top…htm file as described in this table.

Link	Code

Print	**In between the <head> </head> tags:**
	<script language='javascript'>
	function printIt(){
	window.top.docframe.focus();
	window.print();
	}
	</script>
	
	The <a> tag for the 'print' link:
	<a href='javascript:printIt();'>

Help	href="help/introduction.htm" target=docframe>
Support	href="support/gsx_support.htm" target=docframe>

Search	**In between the <head> </head> tags:**
	<script language="JavaScript">
	function search(){
	searchform.QueryText.value = SearchForm.SearchField.value;
	searchform.submit();
	}
	</script>
	
	After the head tag:
	<form action="http://dcsearch:8080/search97cgi/s97is.dll?"
	method="POST" name="searchform" style="padding-left: 18px;" target=docframe>
	<INPUT type="hidden" name="Action" value="search">
	<INPUT type="hidden" name="Directory" value="dcip_tree">
	<INPUT type="hidden" name="Collection" value="alfabet">
	<INPUT type="hidden" name="Method" value="FastTrack 4.0 for Oracle">
	<INPUT type="hidden" name="ResultTemplate" value="alfabetresults.hts">
	<INPUT type="hidden" name="SourceQueryText" value="FT_Oracle<in>method">
	<INPUT type="hidden" name="ShowGroups" value="false">
	<INPUT type="hidden" name="QueryText" id="QueryText" value="">

	<INPUT type="hidden" name="ChannelSearch" value=""> </form> **Note: Method Specific values are:** <INPUT type="hidden" name="SourceQueryText" value="FT_Oracle<in>method"> Value = the Method folder name on the production server. <INPUT type="hidden" name="Method" value="FastTrack 4.0 for Oracle"> Value = The Method Title **HTML on the Search button =** href="javascript:search();"

Move Files to Production

To copy files to the web server:

Run/Start \\uschfmin012\d$ account = alfaadmin, password = letters

Extra Changes for CD Files

28. Update _top…htm to include the Under Construction Page for the Search button.
29. Update the Readme.doc.
30. Create short cut.
31. Move files to the GSX cd burner.

    Note: Be sure you move the Help, Support and Search folders from the production server.