USER GUIDE

Parallel

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Parallel is a procedure management system that gives enterprises control of their procedures to maximize outcomes.

This document details Parallel's capabilities & functionality.

CREATING A PLAYBOOK

A Parallel Playbook is a private website where your team can share & view procedures as well as communicate.

1

YOUR NEW PLAYBOOK

2

YOUR TEAM'S NEW PLAYBOOK

3

CREATING MORE PLAYBOOKS

1

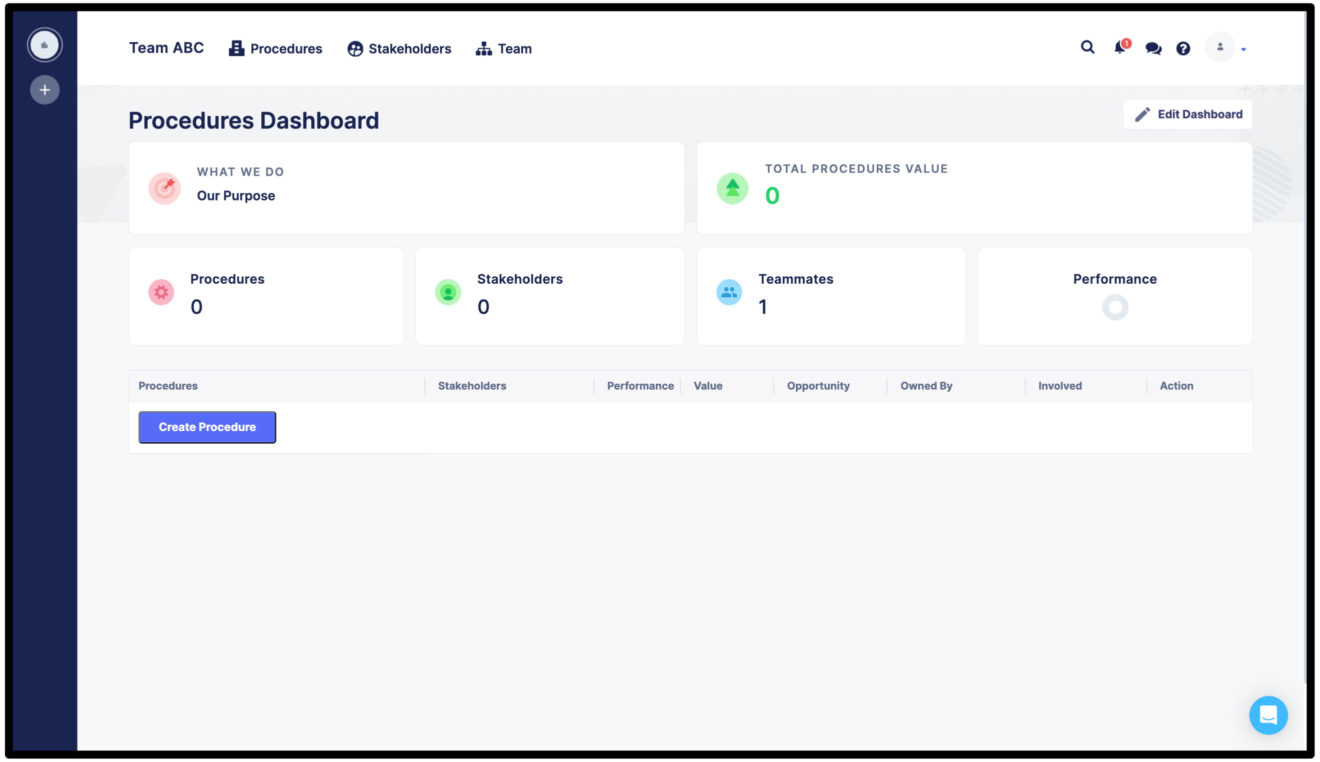
YOUR NEW PLAYBOOK

Contains:

ZERO PROCEDURES

ZERO STAKEHOLDERS

1 TEAM MEMBER



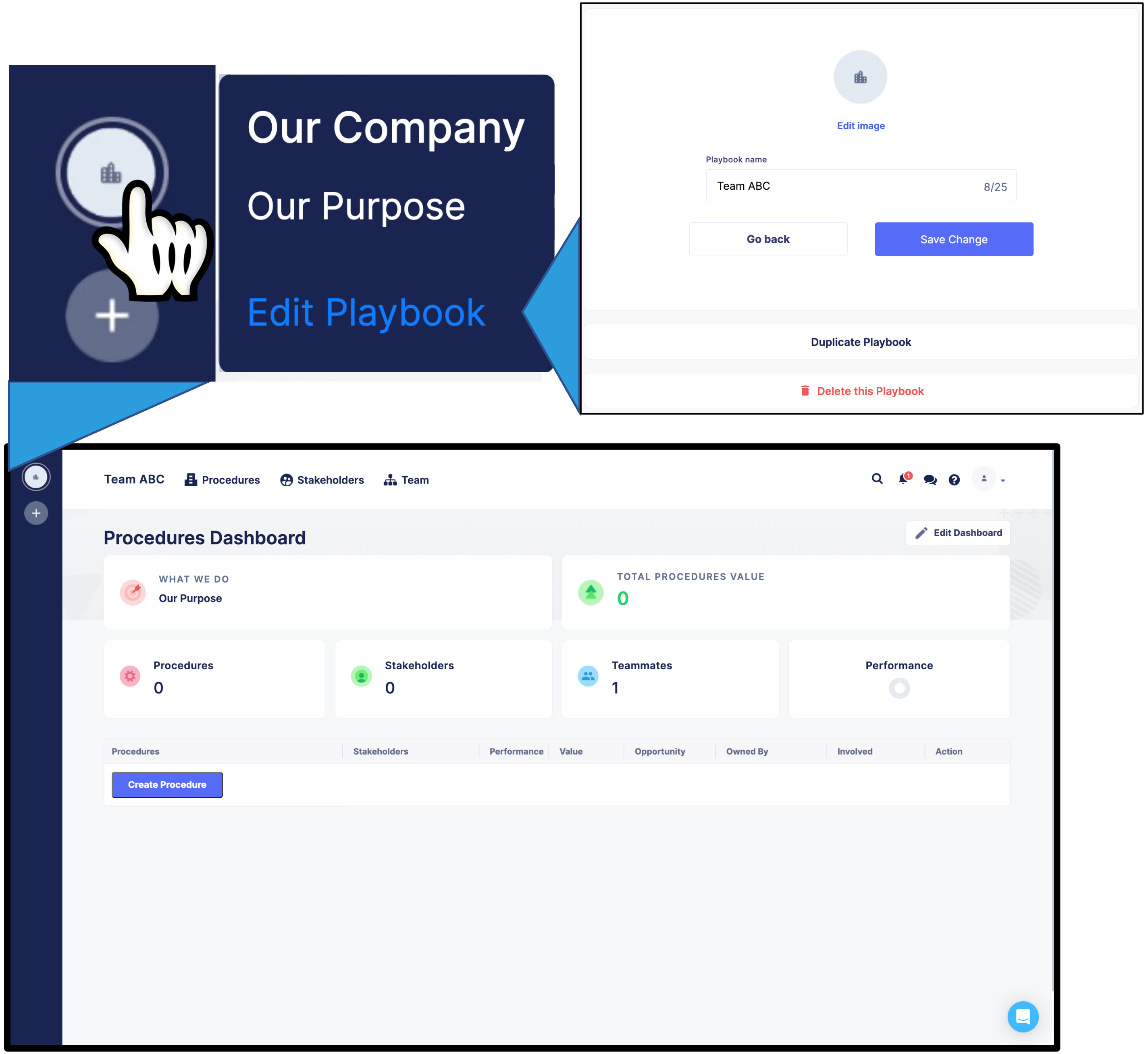
NEW PLAYBOOK

2

YOUR TEAM’S NEW PLAYBOOK

The dark blue bar on the left is your playbook manager.

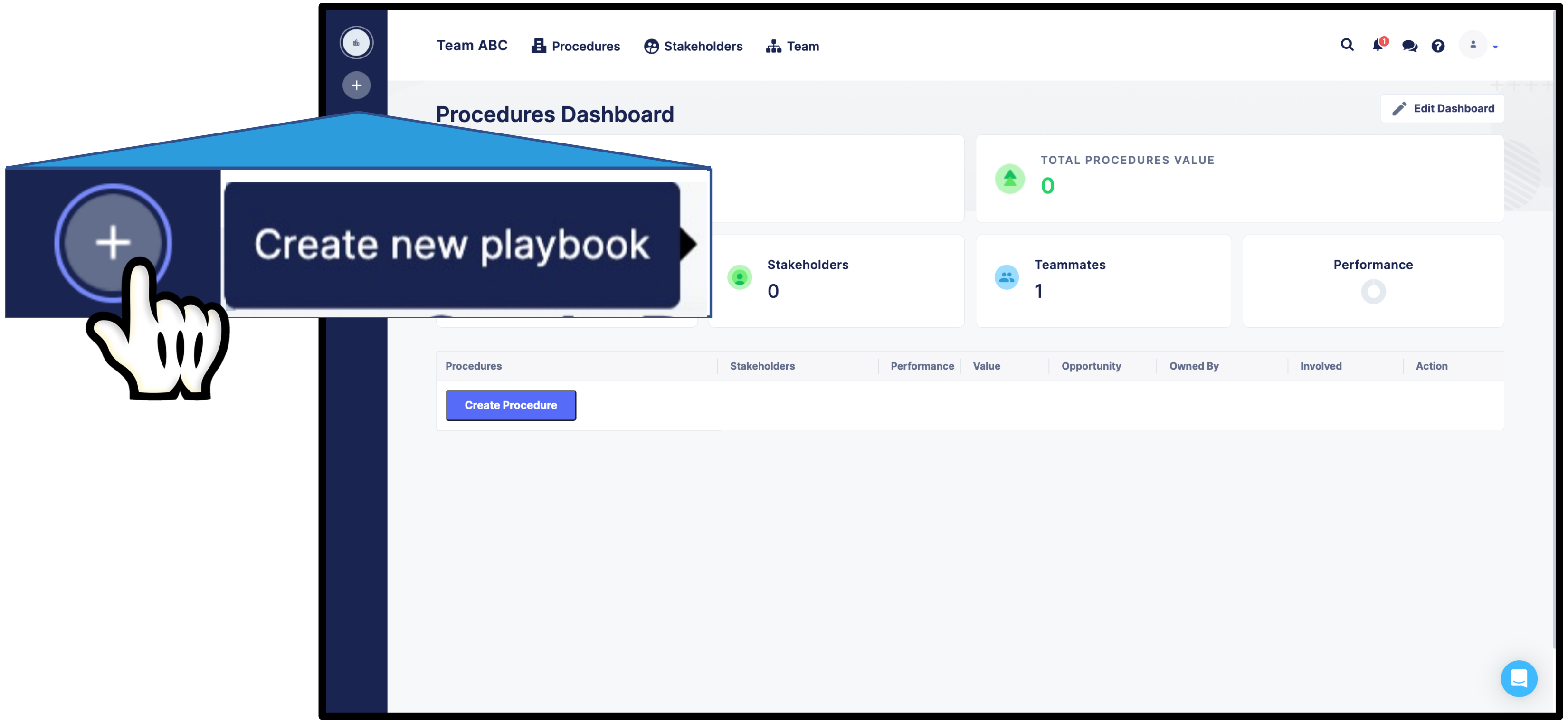
Rolling over the top circle reveals your playbook’s name & purpose and provides a link to add your team’s name and logo.



NEW PLAYBOOK

CREATING MORE PLAYBOOKS

Clicking the circle with the + creates new playbooks.



NEW PLAYBOOK

DESIGNING A PLAYBOOK

Parallel helps leaders share procedures, edit procedures & communicate change in a single motion.

1	2	3	4
CREATING PROCEDURES	ADDING PROCEDURE SUB-GOALS	ADDING SUB-GOAL INFORMATION	ADDING STAKEHOLDER INFORMATION

1

CREATING PROCEDURES

On the ***Procedures Dashboard***, users can create a procedure and have the **option** to catalog the procedure by:

THE STAKEHOLDER BEING SERVED

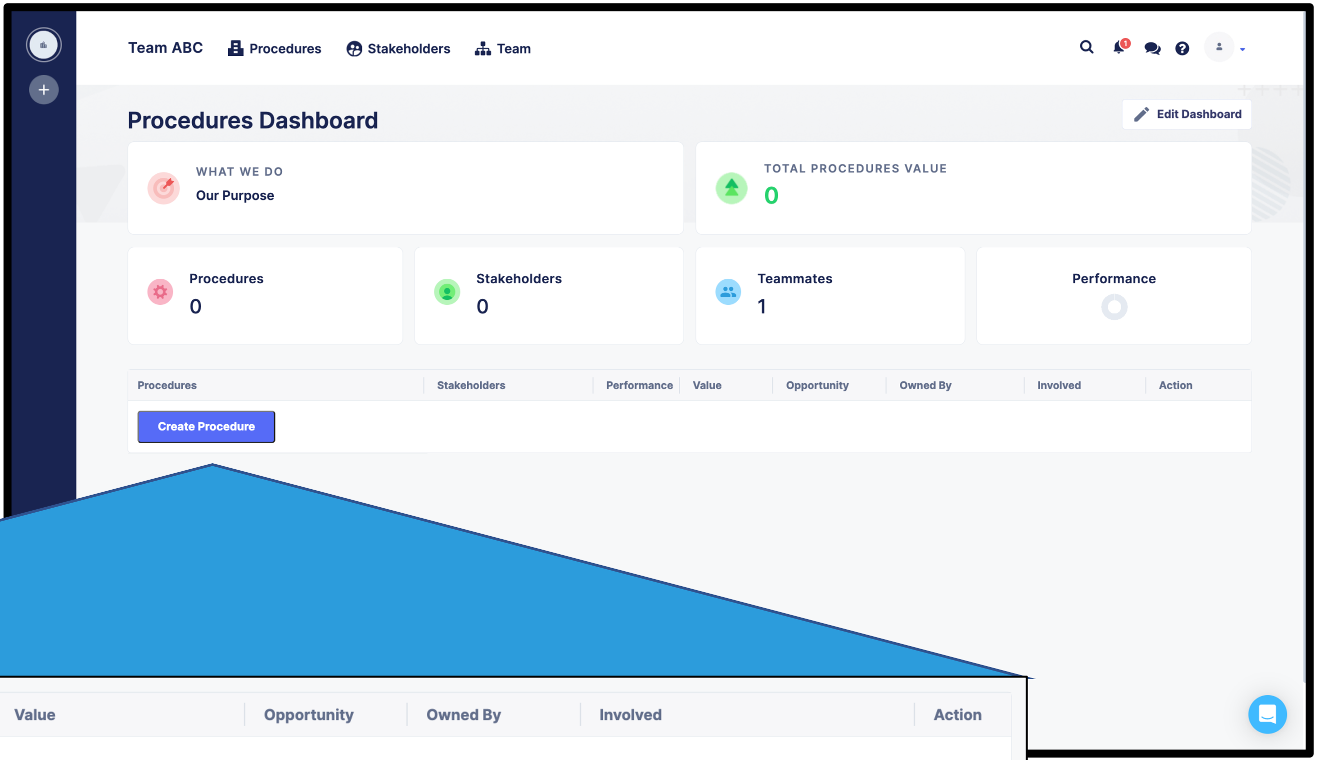
CURRENT PERFORMANCE

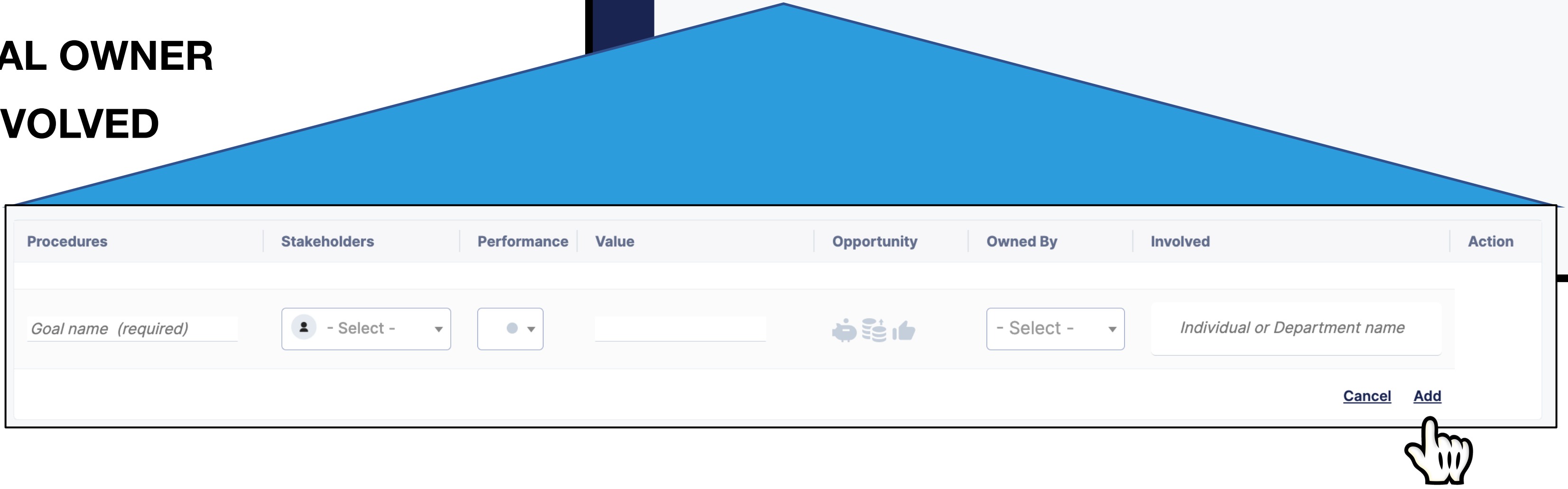
MONETARY VALUE

OPPORTUNITY

TEAM/INDIVIDUAL OWNER

WHO ELSE IS INVOLVED



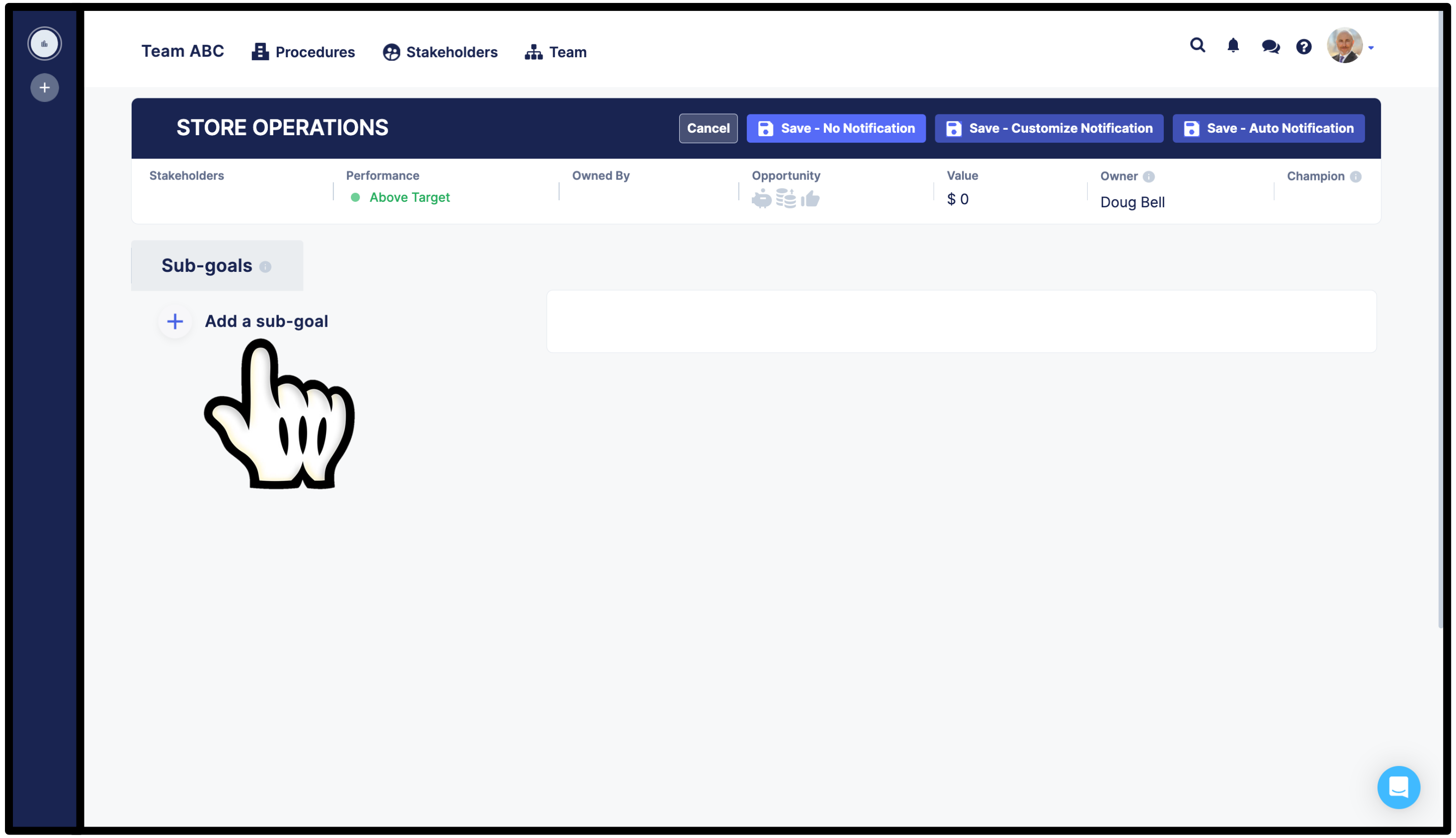


2

ADDING PROCEDURE SUB-GOALS

On a ***Procedure's page***, users can add procedure sub-goals that would need to be achieved for overall procedure success:

BY CLICKING ***Add a sub-goal***



THE 'STORE OPERATIONS' PROCEDURE

3

ADDING SUB-GOAL INFORMATION

After adding a sub-goal, users have the **option** to add sub-goal information:

SUB-GOAL TEAM OWNER

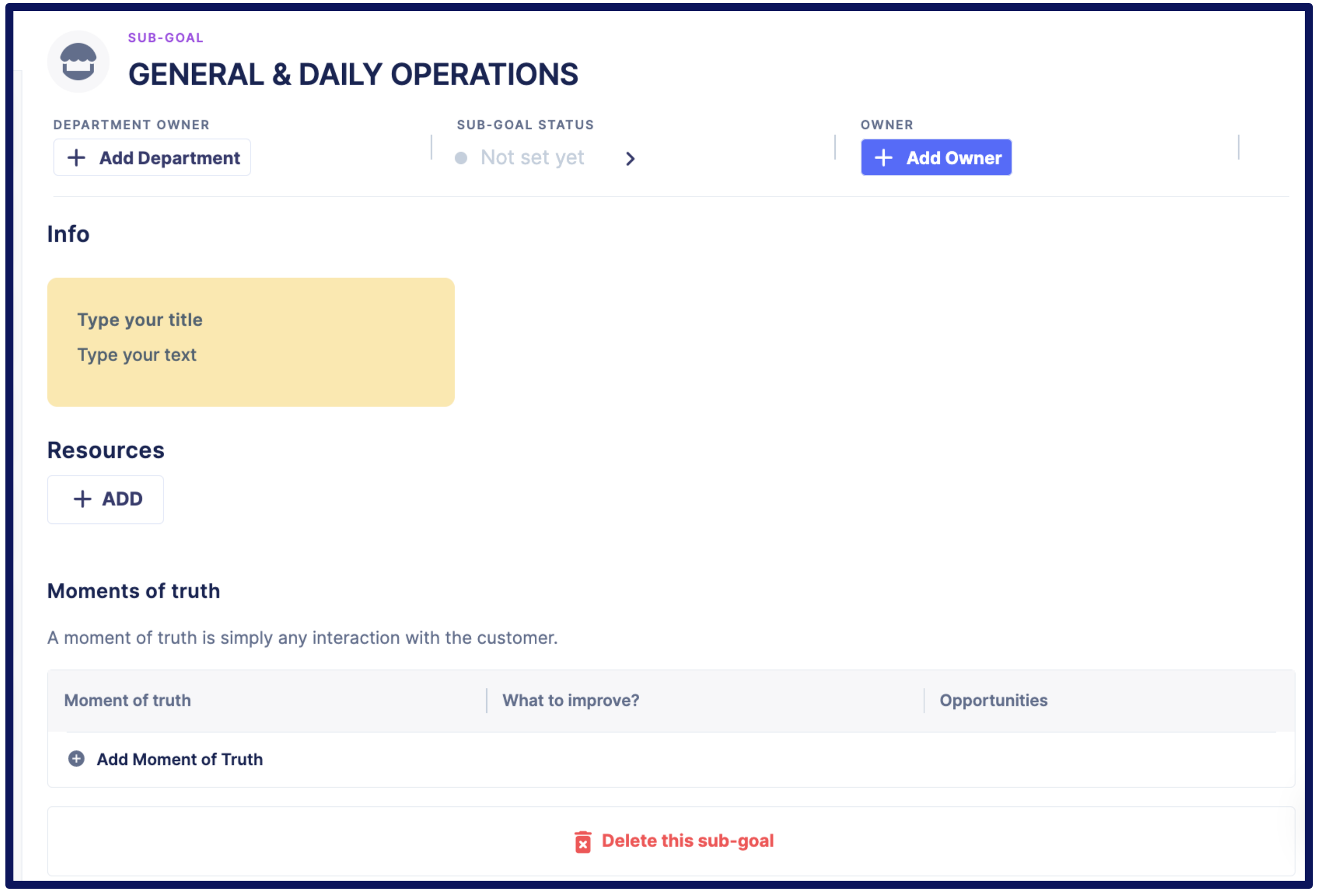
SUB-GOAL STATUS

SUB-GOAL OWNER

SUB-GOAL TEXT

SUB-GOAL RESOURCES (FILES & LINKS)

SUB-GOAL MOMENTS OF TRUTH



EDITING SUB-GOAL INFORMATION

4

ADDING STAKEHOLDER INFORMATION

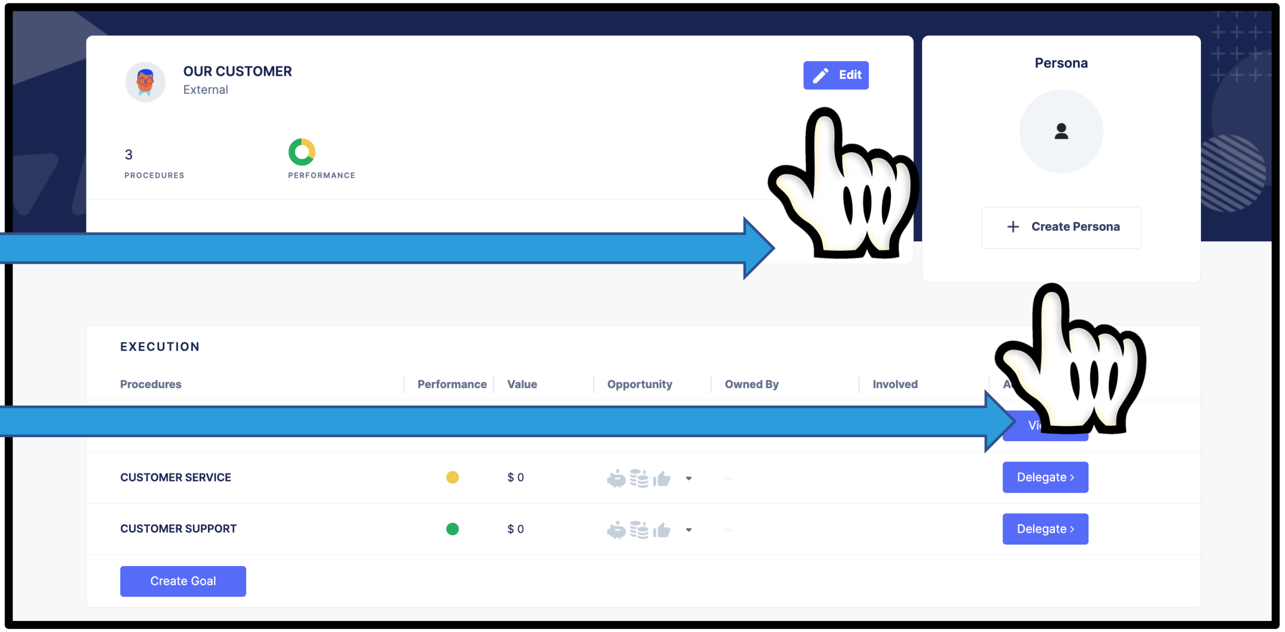
On a ***Stakeholder Page***, users have the **option** to share information about the stakeholder:

STAKEHOLDER STRATEGY

BY CLICKING ***Edit***

A STAKEHOLDER PERSONA

BY CLICKING ***Create Persona***



A STAKEHOLDER PAGE

SHARING A PLAYBOOK

By inviting your team into your playbook, you can always keep everyone in-sync.

1

INVITING YOUR TEAM

2

GRANTING PERMISSIONS

3

ASSIGNING ROLES

1

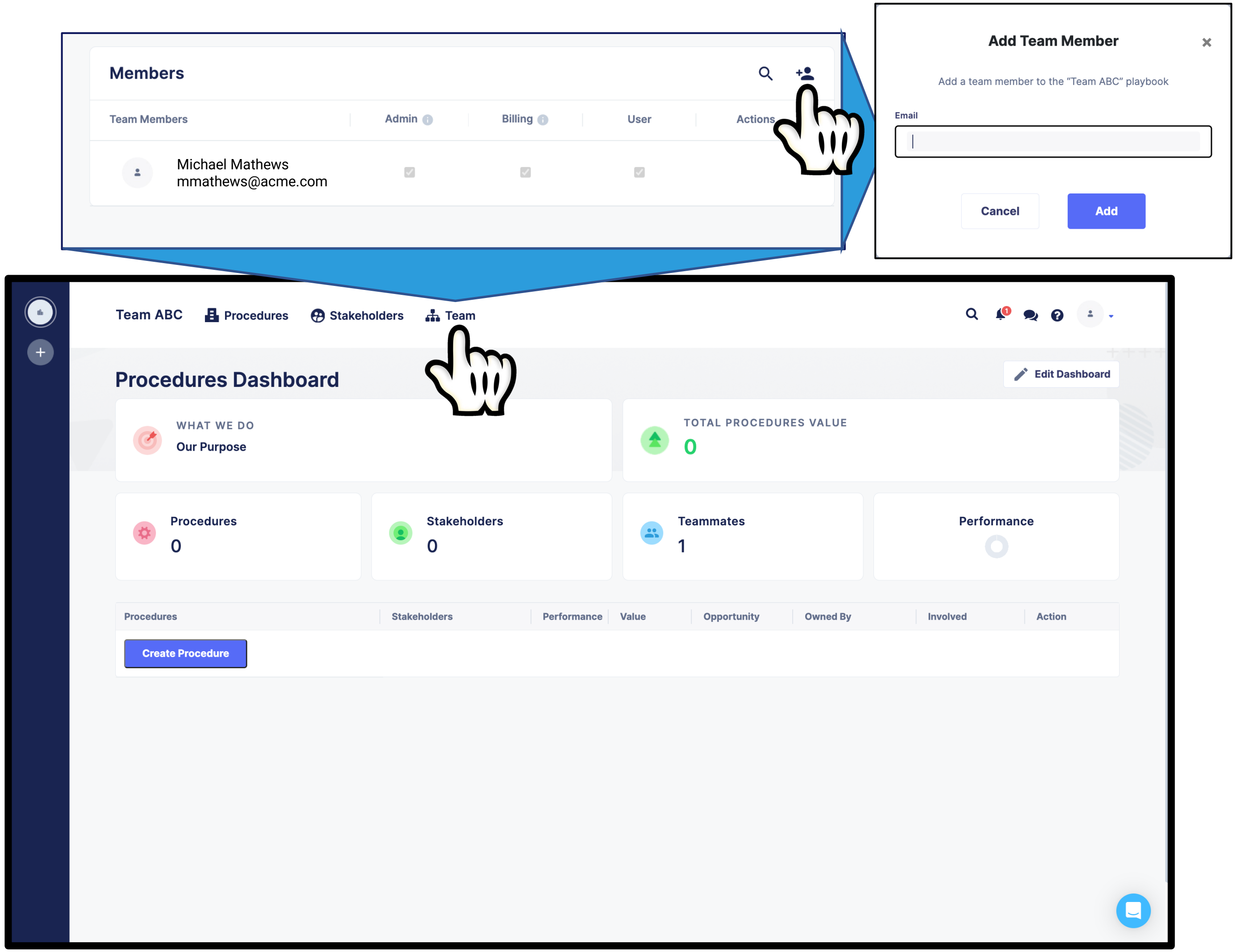
INVITING YOUR TEAM

Clicking on ***Team*** opens the ***Team*** page where new members can be added by:

CLICKING ON THE ***Add Member*** icon**.**

TYPING ***an email address***.

CLICKING the ***Add*** button.



NEW PLAYBOOK

2

GRANTING PERMISSIONS

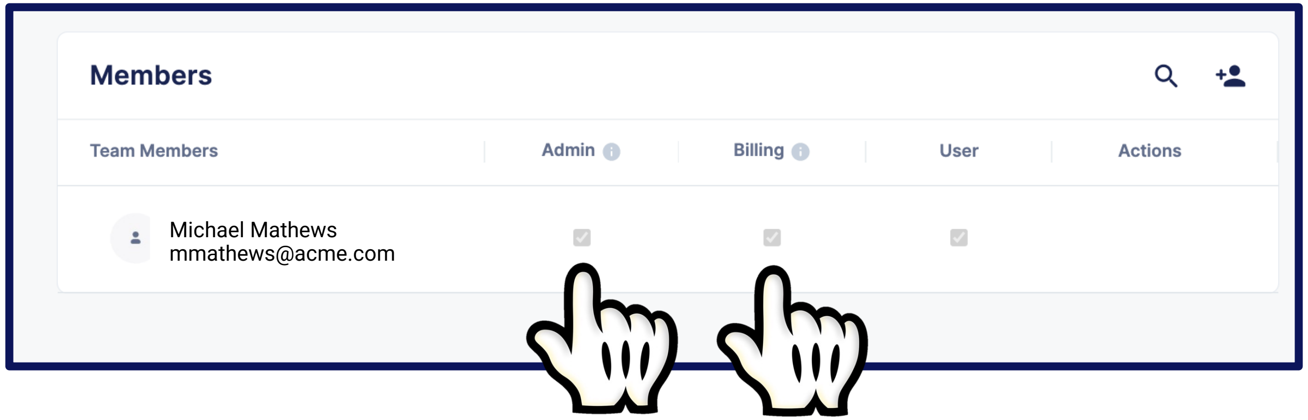
On the ***Team*** page, the following playbook permissions can be granted:

ADMIN

HAS FULL PLAYBOOK CONTROL. THEY CAN EDIT EVERYTHING, ADD/REMOVE USERS, AND MANAGE USER PERMISSIONS & ROLES.

BILLING

HAS FULL ACCESS TO BILLING. THEY CAN ADD AND UPDATE PAYMENT & SUBSCRIPTION TYPES. THEY ALSO HAVE ACCESS TO VIEW INVOICES AND SEE PAYMENT HISTORY.



TEAM PAGE

3

ASSIGNING ROLES

For **each** procedure, leaders can be assigned roles:

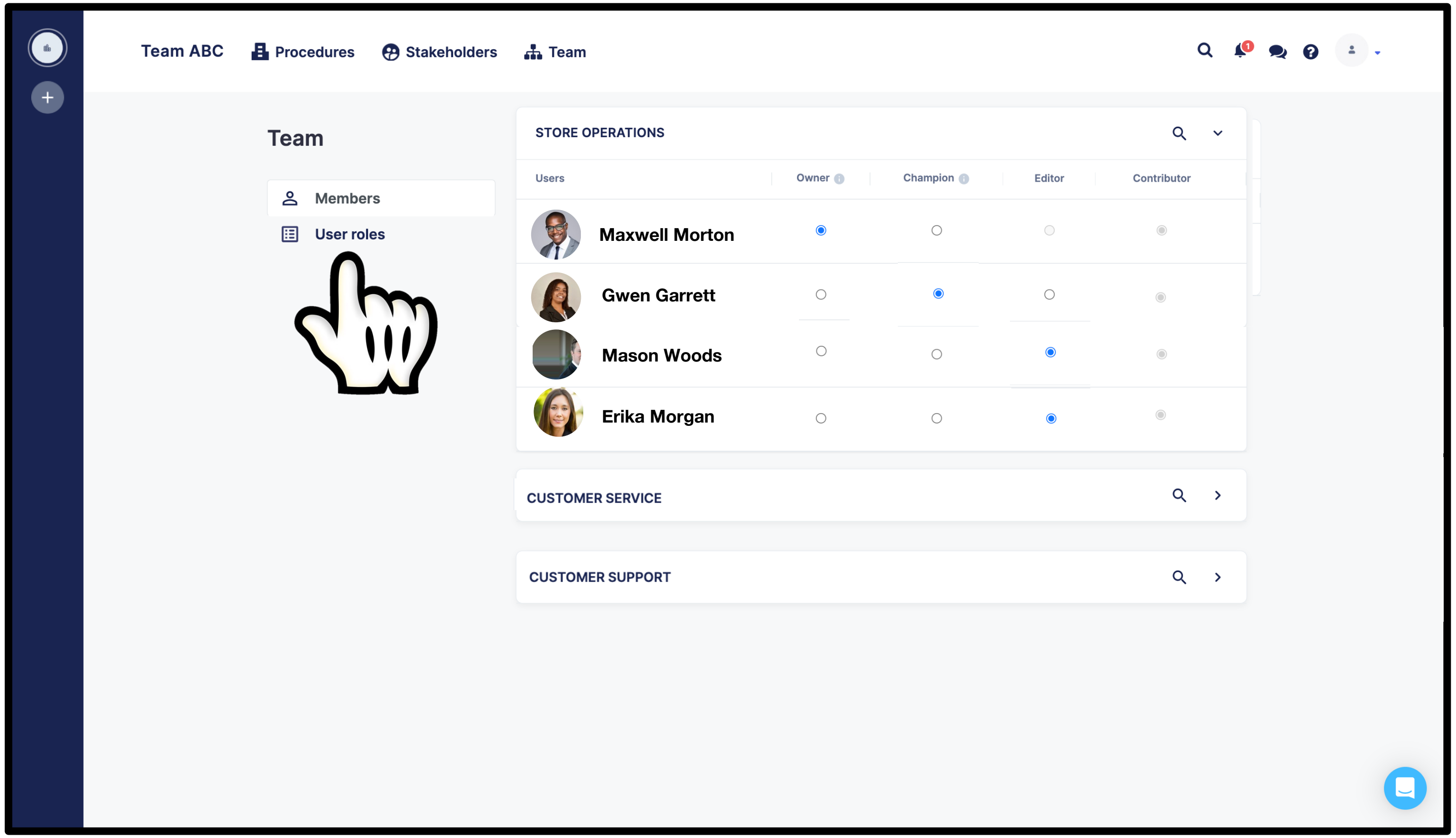
OWNERS & CHAMPIONS

WHO ARE RESPONSIBLE FOR THE SUCCESS OF THE PROCEDURE

AND

EDITORS

WHO CAN EDIT THE PROCEDURE



USER ROLES FOR THE ‘STORE OPERATIONS’ PROCEDURE

VIEWING A PLAYBOOK

Team Members can view their team's procedures by name, stakeholder, or search making them easy to find when they are needed.

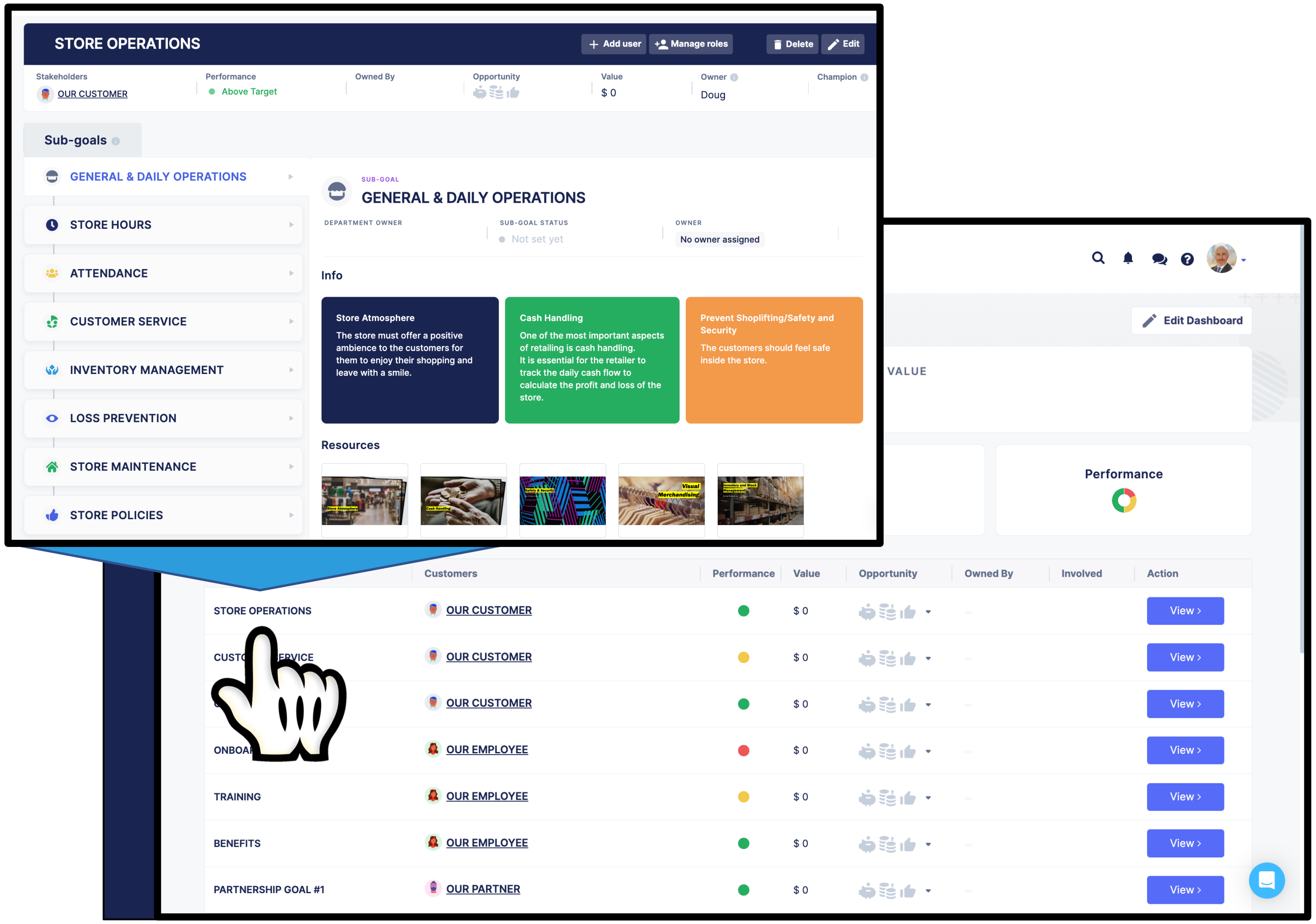
1. YOUR PROCEDURES DASHBOARD
2. YOUR STAKEHOLDERS DASHBOARD
3. SEARCH

1

YOUR PROCEDURES DASHBOARD

Your ***Procedures Dashboard*** is your landing page when logging into Parallel.

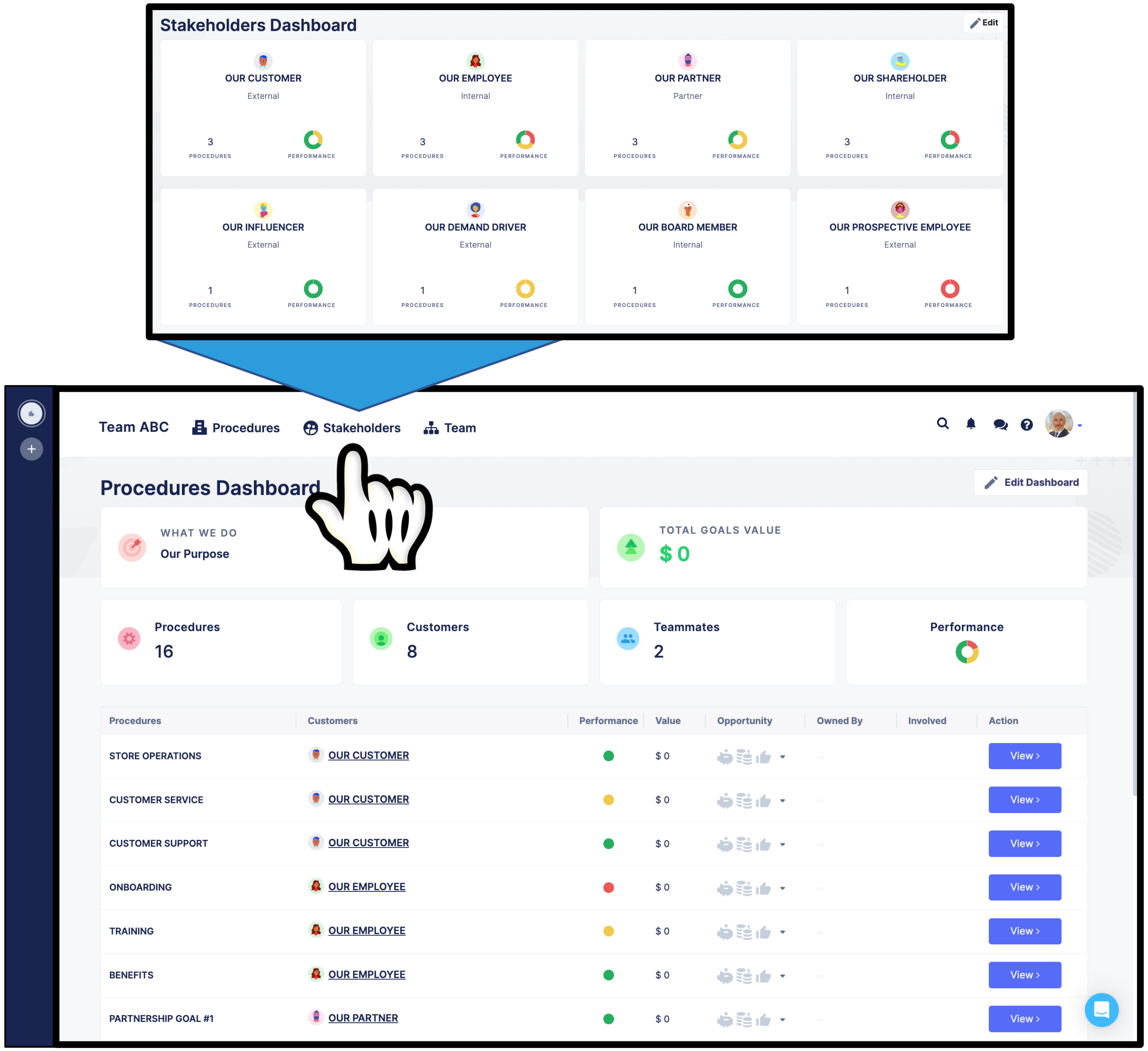
Clicking on any procedure on your ***Procedures Dashboard*** takes you to that procedure's page.



2

YOUR STAKEHOLDERS DASHBOARD

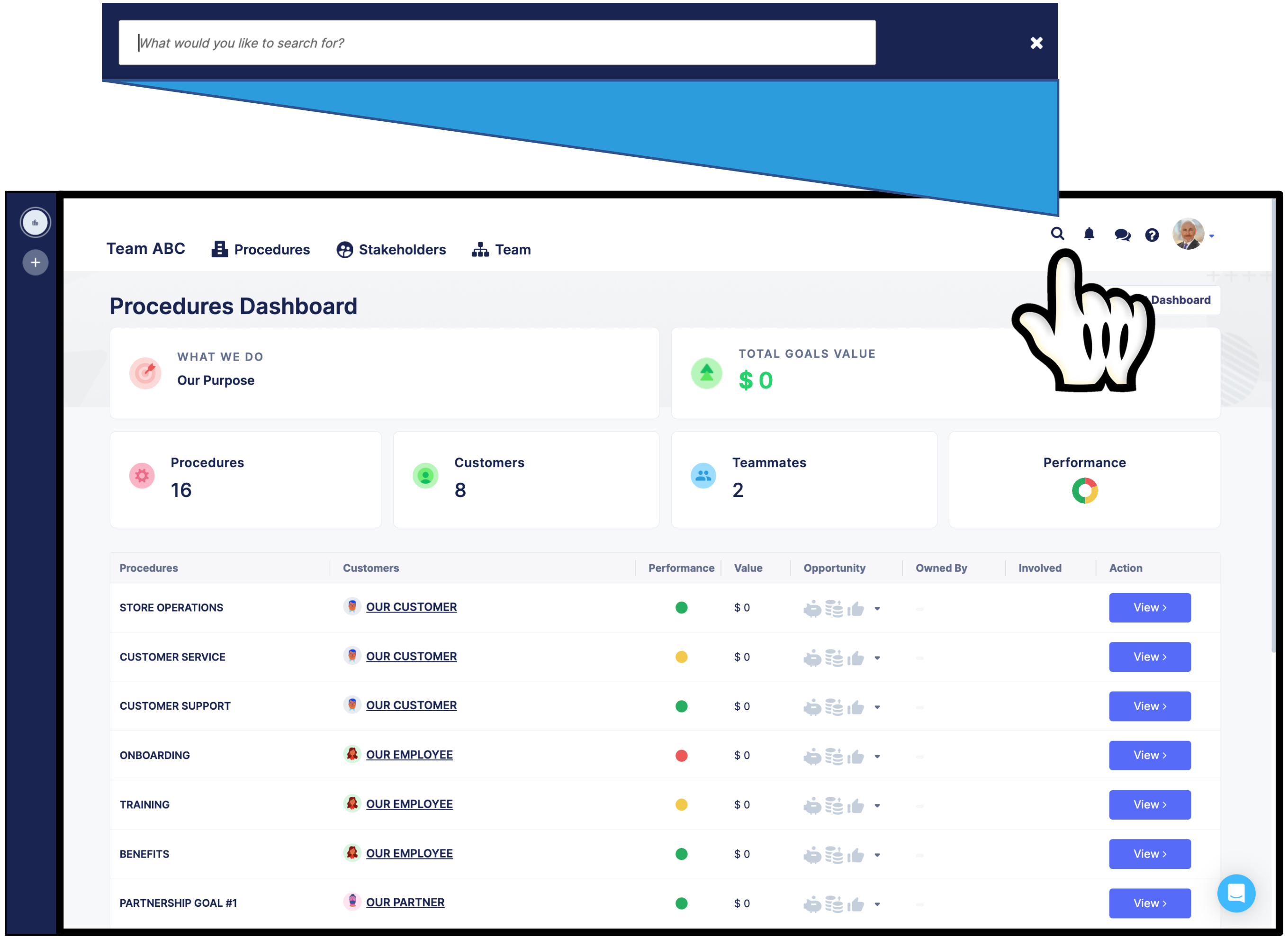
Clicking on ***Stakeholders*** opens your ***Stakeholders Dashboard*** where you can find & view the procedures you need by stakeholder.



3

SEARCH

Team members can search by procedure name or procedure sub-goal to find & view the information they need.



CHANGING A PLAYBOOK

Each user receives notifications of the procedure changes that are important & relevant to them in their roles making it incredibly easy to stay in-sync.

1

CREATING NOTIFICATIONS OF CHANGES

2

IN-APP NOTIFICATIONS

3

DAILY ‘CHANGE NEWS’

1

CREATING NOTIFICATIONS OF CHANGES

As they save changes to procedures or stakeholders, users have the **option** of:

NO NOTIFICATION

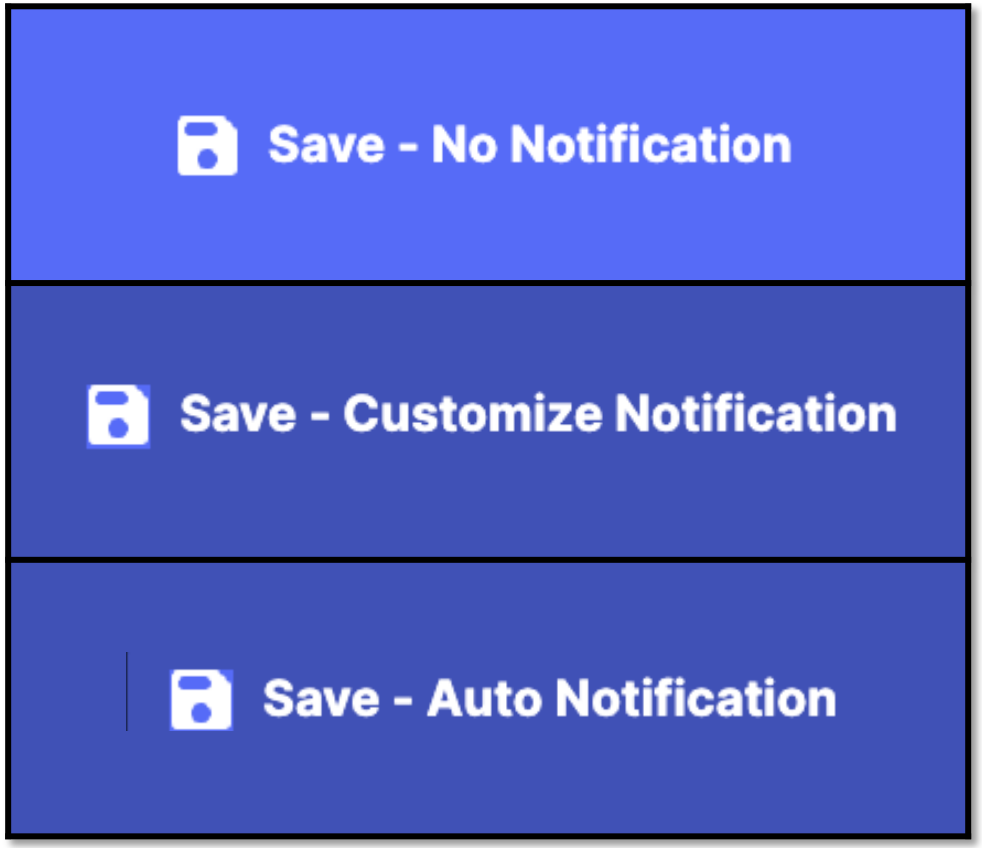
FOR CHANGES THAT DON'T REQUIRE COMMUNICATION

A CUSTOM NOTIFICATION

TELLING THE TEAM EXACTLY WHAT THEY NEED TO KNOW AND POINTING THEM TO THE CHANGE MADE

AN AUTO NOTIFICATION

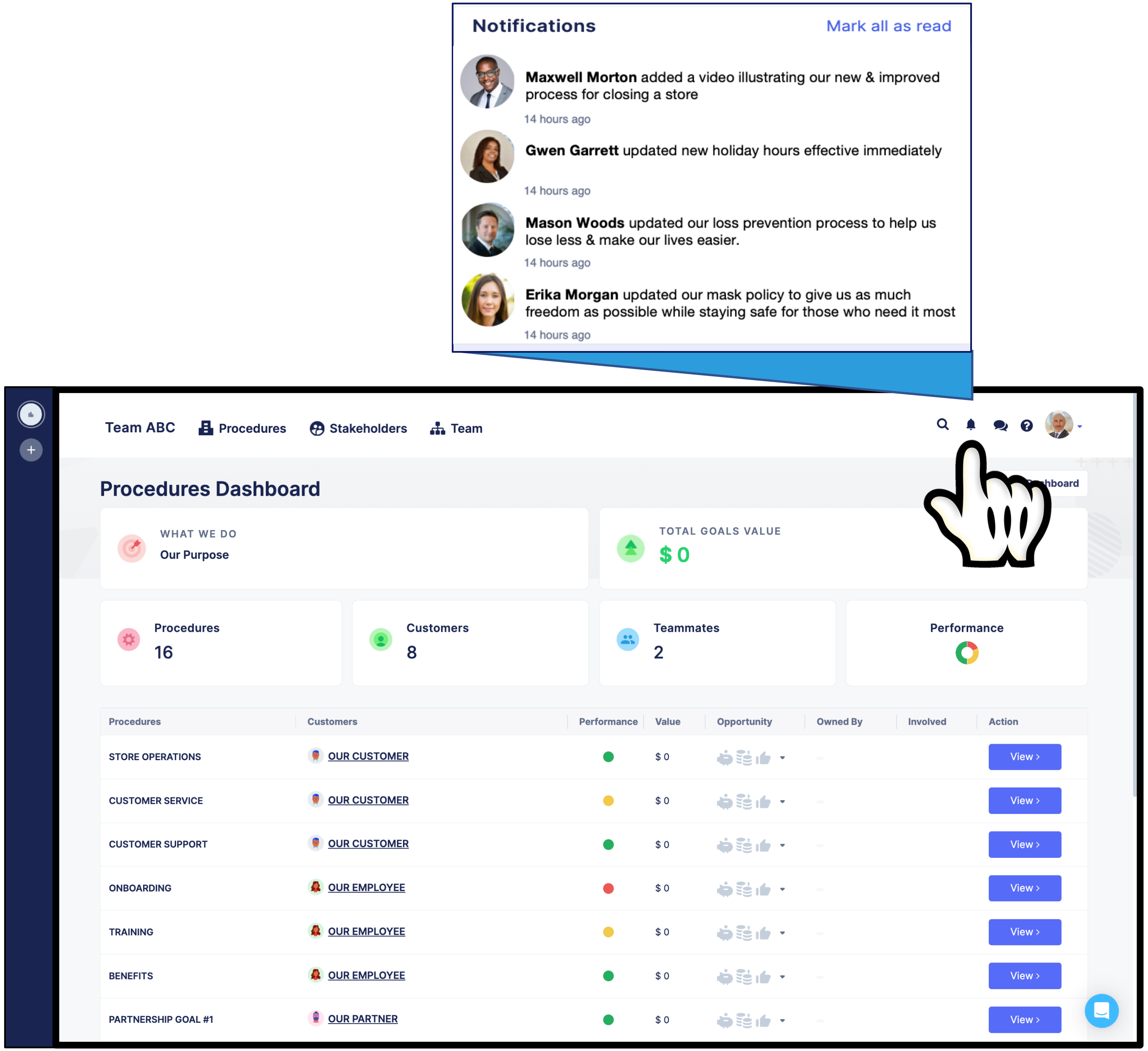
THE SYSTEM NOTIFIES THE TEAM AND POINTS THEM TO THE CHANGE MADE



2

IN-APP NOTIFICATIONS

When in Parallel, users receive notifications of changes as they are communicated in real time.



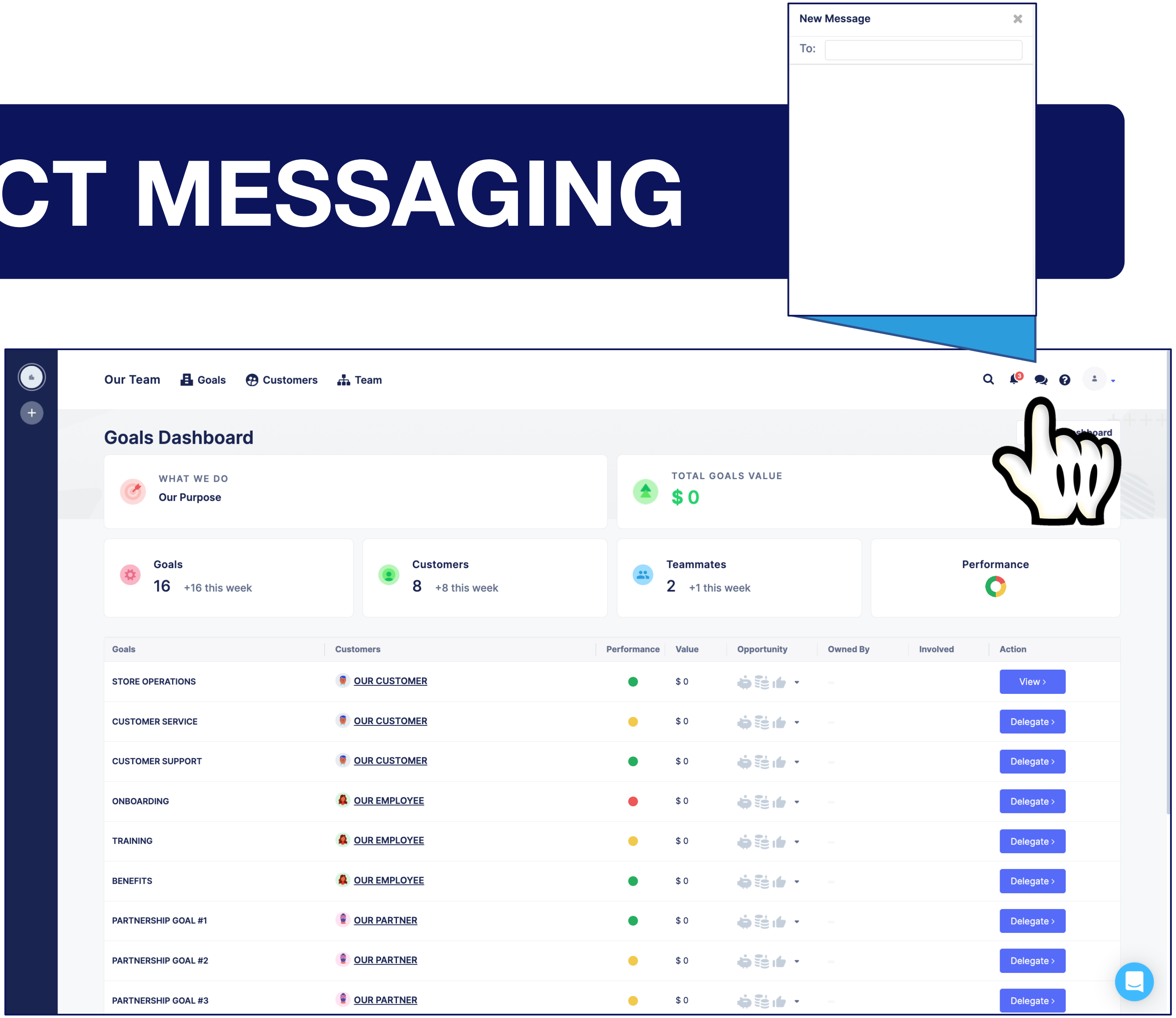
DAILY ‘CHANGE NEWS’

Outside of Parallel. Users receive a daily **CHANGE NEWS** email with an aggregated list of change communications.

Each communication links to the detailed procedure change made in Parallel.

IN-APP DIRECT MESSAGING

Parallel users can message each other directly inside the app.



USER ACCOUNTS

Parallel users can manage their accounts with ease.

1

PROFILE & PASSWORD

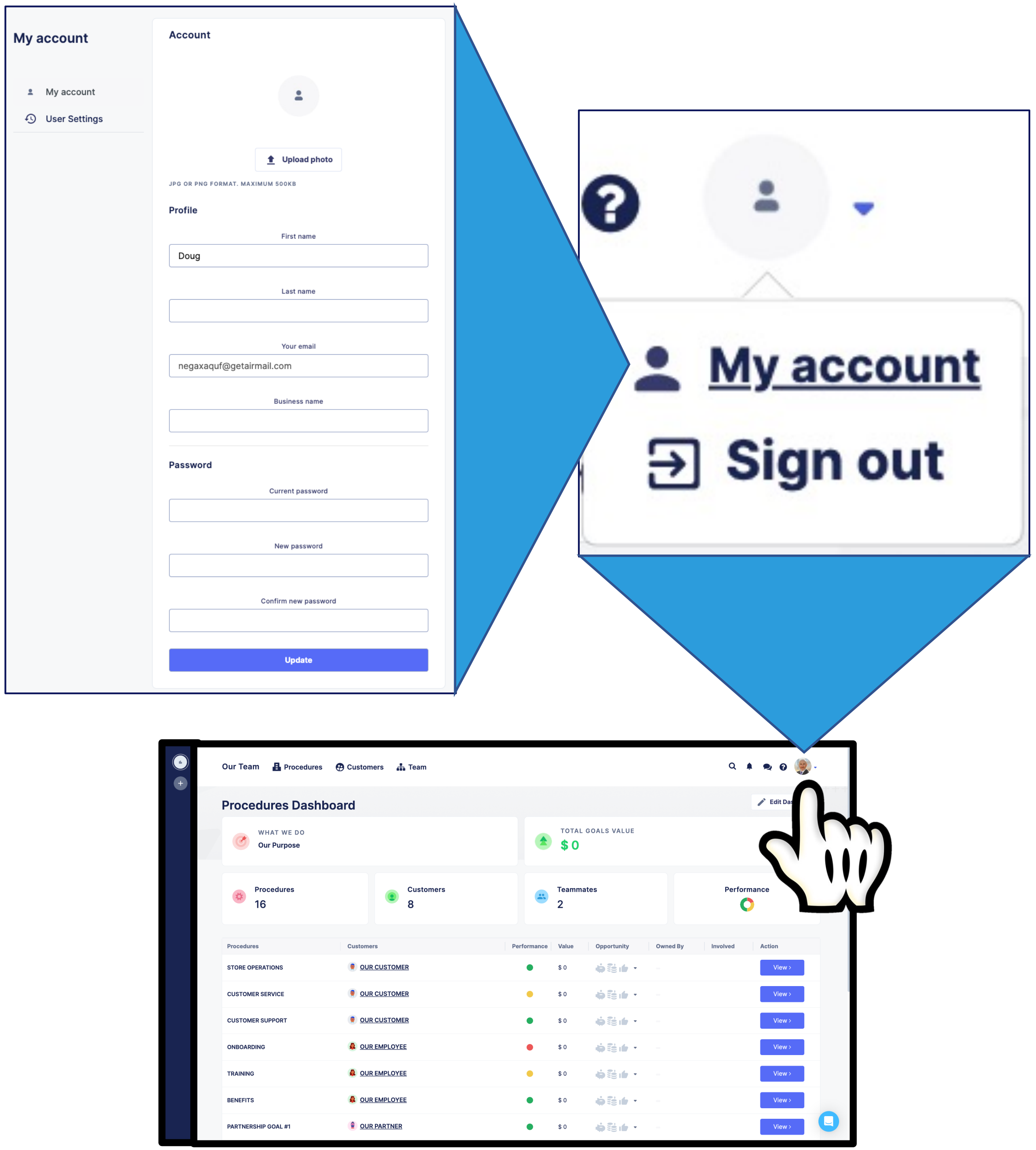
2

USER SETTINGS

1

PROFILE & PASSWORD

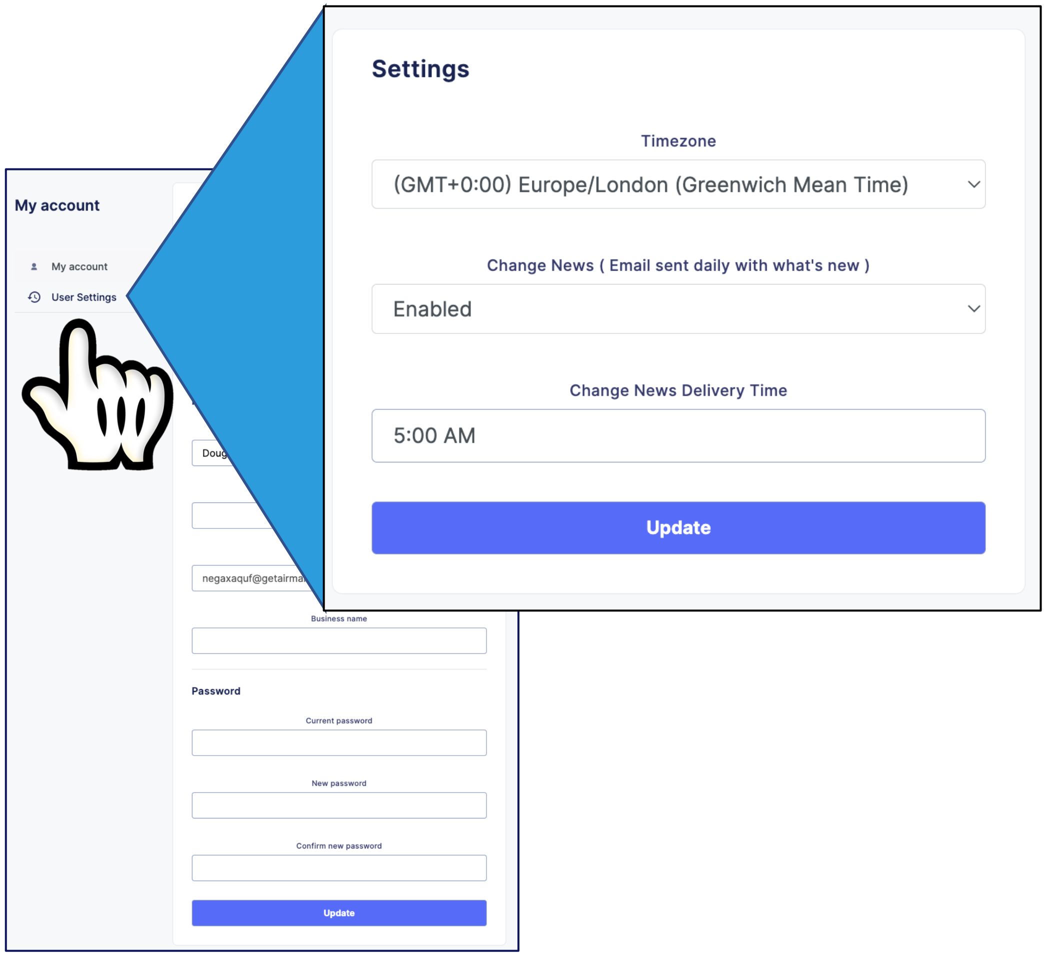
Change your profile or update your password by clicking on ***the personal icon*** in the top right corner and then by clicking ***My account***.



2

USER SETTINGS

Update your time zone & schedule the delivery of your daily CHANGE NEWS email by clicking on ***User Settings*** from the ***My account*** screen.



IN-APP HELP

Users have direct access to the Parallel Team by clicking the the bright blue button that always appears in the bottom right corner of the screen.