1. PositiveWare Release Notes 2.1.1 (23/07/2007)

Release 2.1.1 combines some new features with some enhancements and corrections to existing features:

- New permission functionality allowing users to set custom permissions for each of the plans and clients they own
- New Activity Report providing a breakdown of activity by client, plan and task
- Add Action option has been moved to Plan tab
- Billing tab has been renamed Money
- Department functionality has been fully-implemented to allow more effective management of multiple clients by individual users
- Users will now receive notifications on actions below strategies to which they have subscribed

2. Employee Permissions

The Employee Permissions screen is a new addition to the Setup options.

It enables the owners of clients and plans to create customized permission profiles for each employee.

2.A. Configuring Employee Permissions

The Employee Permission screen is accessed through the Setup page:

Figure 2-1

You are presented with a list of clients and plans, each of which has a set of permissions:

Figure 2-2

To view the complete list of plans for a client, click on the arrowhead icon next to the client's name:

Figure 2-3

2.A.1. Enabling Custom Employee Permissions

At the top of the screen, you can see the name of the employee whose permissions you are viewing.

In the left-hand column of the permissions table, the signifies that the default global permissions are in force for that combination of plan or client and employee.

The means that a custom set of permissions are in place.

You can only modify the permissions on clients and plans that have custom permissions enabled.

To switch between custom and global permissions for a client or plan, simply click on the / symbols. You will notice that the check boxes associated with the permissions for that plan are grayed-out or enabled, according to your choice:

Figure 2-4

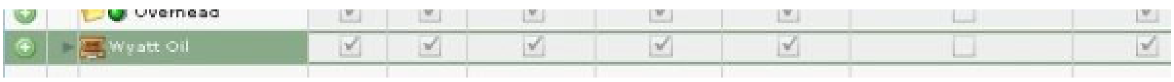
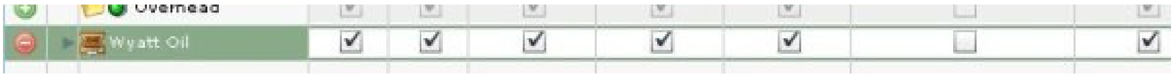


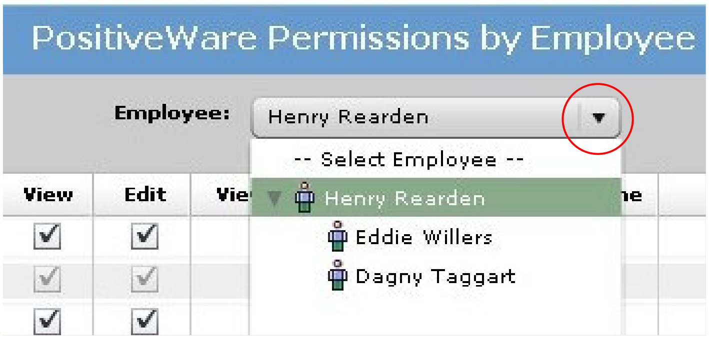
Figure 2-5



2.A.2. Setting Permissions for an Employee

The first step is to select the employee whose permissions you want to change. A list of all employees associated with plans you own is generated in a pull-down list at the top of the page:

Figure 2-6



Click on the arrowhead to expand the list and then select the appropriate employee. The page will automatically reload to show only the clients and plans relevant to that employee.

You can now modify the permissions for that employee by checking and clearing the tick boxes:

Figure 2-7

You will only be able to modify permissions in cases where a custom permission set has been enabled (see Section 2.A.1).

There are seven permissions that can be set:

- **View** - allow employee to view details of the client or plan
- **Edit** - allow employee to edit the details of the client or plan
- **View Docs** - allow employee to view the documents attached to the client or plan

- **Edit Docs** - allow employee to edit the documents attached to the client or plan
- **Track Time** - allow employee to allocate time to the client or plan
- **Subscribe** - allow employee to subscribe to notification emails for a plan
- **Edit Budget** - allow employee to edit the budget for a client or plan

2.A.3. Saving & Canceling Permission Changes

After you have modified the permissions of an employee, you can choose to Save, Apply or Cancel your changes:

Figure 2-8

The Save, Apply and Cancel buttons are located in the top-right area of the screen:

- **Save** - your changes will be saved and you will be returned to your previous page
- **Apply** - your changes will be saved and you will remain on the employee permissions change
- **Cancel** - your changes will be canceled and you will be returned to your previous page

3. Activity Report

The Activity Report allows you to see a breakdown of all activity by client, plan and task.

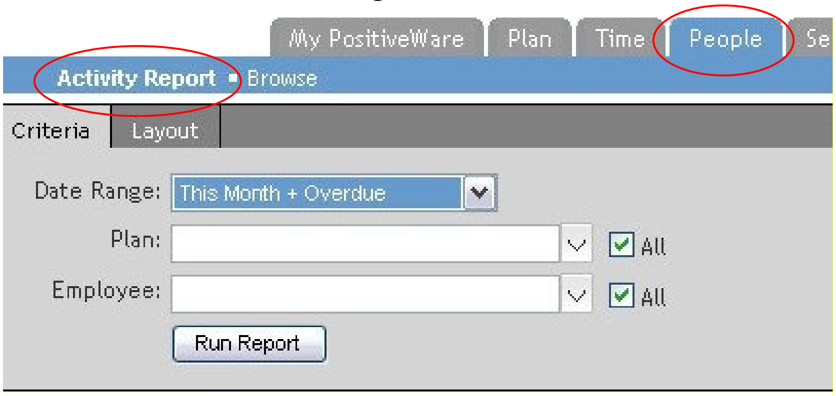
The report includes:

- Start & Due dates
- Owner
- Status
- Description

3.A. Running the Activity Report

The Activity Report is accessed from the People tab:

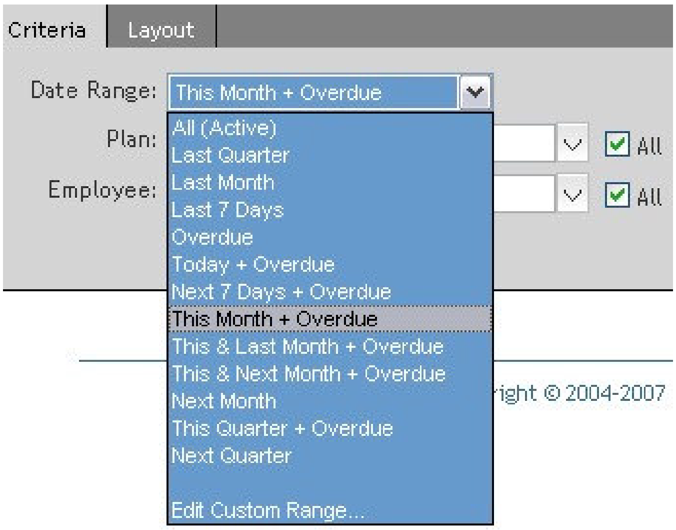
Figure 3-1



3.A.1. Criteria

You are then required to select a date range for the report:

Figure 3-2



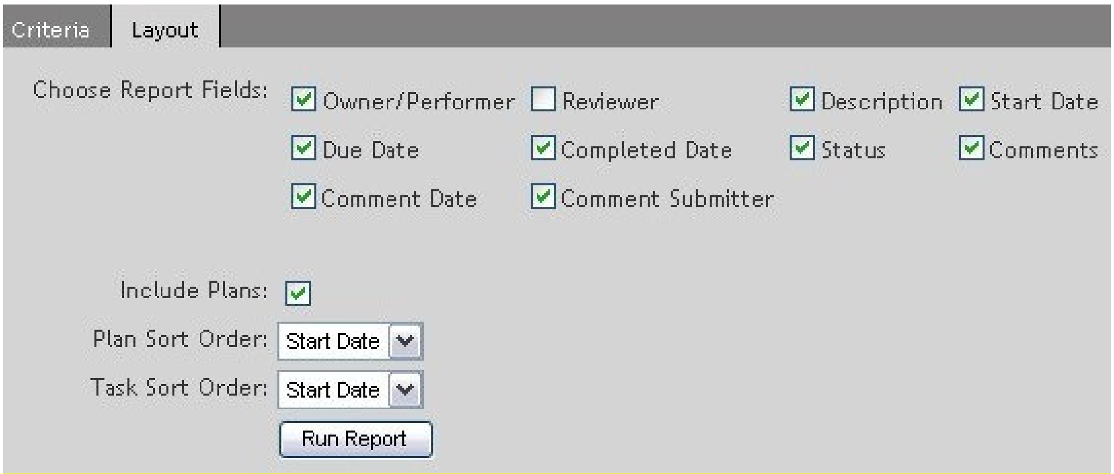
Optionally, you can choose which plans and employees are included in the report, or can opt to see all plans and/or employees:

Figure 3-3

3.A.2. Layout

You can customize the Activity Report using the options on the Layout screen:

Figure 3-4

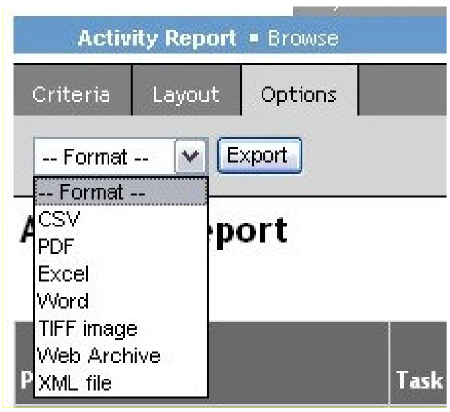


Select the Report fields (columns) you would like to be displayed and the order you would like the report to be sorted in, then click "Run Report".

3.A.3. Options

The Options page allows you to export your report into a number of standard file formats:

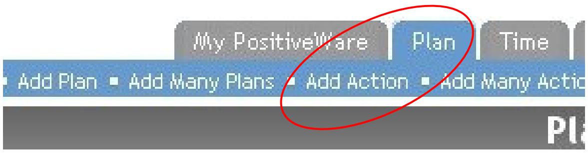
Figure 3-5



4. Add Actions Option

The "Add Actions" option has been moved to the Plans tab. This option allows users you add actions to Plans and Tasks.

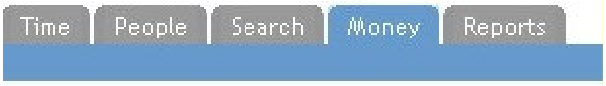
Figure 4-1



5. Billing Tab Renamed

The Billing Tab has been renamed "Money". No changes have been made to billing functionality.

Figure 5-1



6. Department Functionality Improved

Department functionality allows users with multiple clients to give each of those clients full access to their own PositiveWare plans, without allowing them to see any of the parent user's other clients.

This functionality is particularly aimed at executive coaches, who frequently work with multiple clients within one PositiveWare account.

6.A. Activating Department Functionality

To activate department functionality, you should contact PositiveWare support (support@positiveware.com) for specific instructions.

7. Notification Functionality Enhanced

The email Notification functionality has been improved so that users receive notifications for all actions below strategies to which they have subscribed.

Previously this did not happen.