



1. PositiveWare Release Notes 2.1.4 (09/02/2007)

Release 2.1.4 includes a mixture of feature enhancements and corrections to existing features:

- Flexible billing and budgeting has been implemented so that it is possible to start and end bills and budgets on any day in any month
- Administrative users are now automatically prompted to set new users' privileges as part of the user creation process. This avoids issues with incorrect privileges for new users
- Context-sensitive help system introduced

2. Flexible Billing & Budgeting

2.A. Flexible Billing

It is now possible to specify billing periods with any start and end dates.

In previous releases, billing periods were restricted to single calendar months only.

To create a new bill covering the required billing period, simply specify the billing start and end dates when creating a new bill in the Billing Manager.

The Billing Manager is accessed through the **Money** tab:

Figure 2-1



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Click the **Add Client Bill** button to create a new bill:

Figure 2-2

New Client Bill

Bill Details

Choose your client:

Enter your billing period: to

Choose your rate:

Do you have any adjustments to make to this bill?
For example, a project for this client billed at a different rate? Yes No

Select the billing start and end dates using the calendar dialogs (circled).

Click **Continue** when you are ready to create the bill (it can be adjusted later).

2.B. Flexible Budgeting

As with billing, it is now possible to create client budgets with custom periods.

In previous releases, budgetary periods were restricted to single calendar months only.

To create a new budget covering your required period, simply specify the budget start and end dates when creating your budget.

The **Budget Manager** is accessed through the **Money** tab:

Figure 2-3

My PositiveWare Plan Time People Search Money Reports

Billing Manager > Rate Manager > Budget Manager

Resource Manager
<< June 2007 | July 2008 >>

Existing Budgets

Client	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Totals
Hammond Motors	\$6,000	\$3,000	\$0	+	+	+	+	+	+	+	+	+	\$9,000
Wyatt Oil	\$0	+	+	+	+	+	+	+	+	+	+	+	\$0
	\$6,000	\$3,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,000

To add a budget for a Client, select the Client, enter the time period, and click Add Budget:

Client: Billing Period: to

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To create a budget with a custom period, use the form at the bottom of the **Budget Manager** screen to select the client, start and end dates for the budget (circled).

Click the **Add Budget** button to continue adding detail to the budget in the normal manner.

3. Permissions for New Users

When creating a user, it is necessary to manually set the permissions for that user. Previously, this was not part of the user creation process and consequently was often missed out, causing problems for the new user.

The user creation process has now been updated so that after a new user has been added, the administrator is automatically prompted to set the new user's permissions.

Here's a screenshot of the Employee Permissions screen through which users' permissions can be set:

Figure 3-1



PositiveWare Permissions by Employee										
		Employee:								
Expand All								Save	Apply	Cancel
	Client / Plan	View	Edit	View Docs	Edit Docs	Subscribe	Edit Budget			
[-]	Global Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
[+]	D'Anconia Copper	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
[-]	▶ Hammond Motors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
[+]	Overhead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
[+]	▶ Wyatt Oil	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			

4. Context-Sensitive Help System

A context-sensitive help system has been added to PositiveWare.

By clicking on the **Help** link in the top-right corner of every page, you can access help information relevant to the page you are working on:

Figure 4-1



Help information is displayed in a new window, allowing you to continue working in PositiveWare while you refer to the help document.

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Figure 4-2

