

## 1. PositiveWare Release Notes 2.1.6 (10/13/2007)

Release 2.1.6 includes two major enhancements:

- Plan Manager technology upgrade
- Enhanced Account payment facilities

These improvements provide PositiveWare with enhanced scalability and flexibility.

## 2. Plan Manager

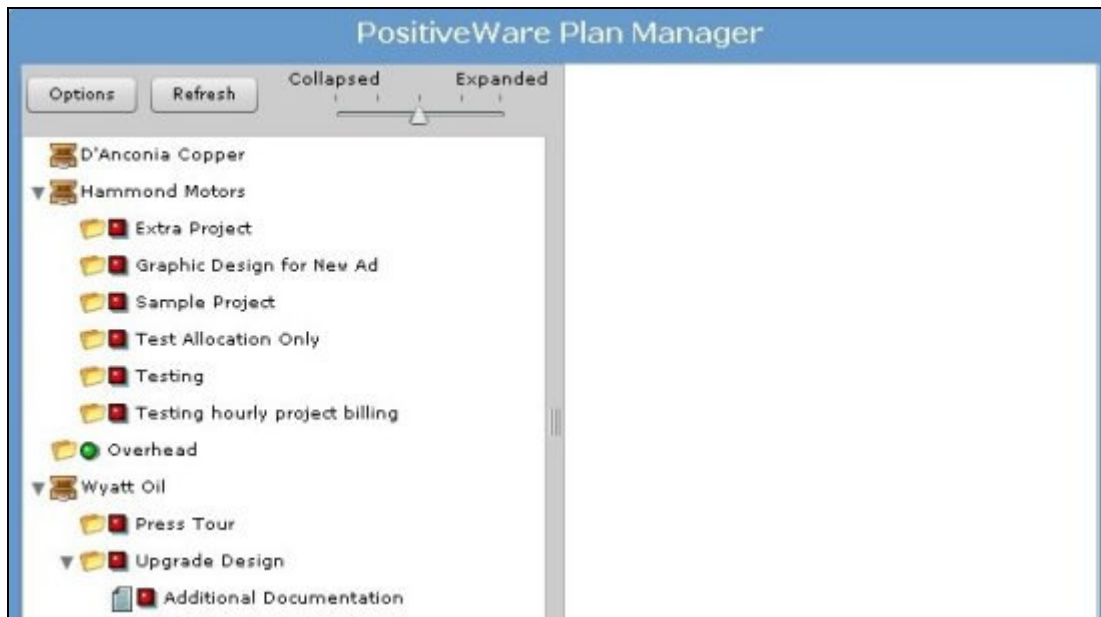
The PositiveWare Plan Manager now uses new Adobe Flex technology to provide a more flexible and dynamic page navigation and composition. Flex has been designed specifically for rich internet applications and allows highly consistent and interactive interfaces to be run within web browsers.

This technology is already used in PositiveWare's Time Card facility.

### 2.A. Plan Manager Interface Overview

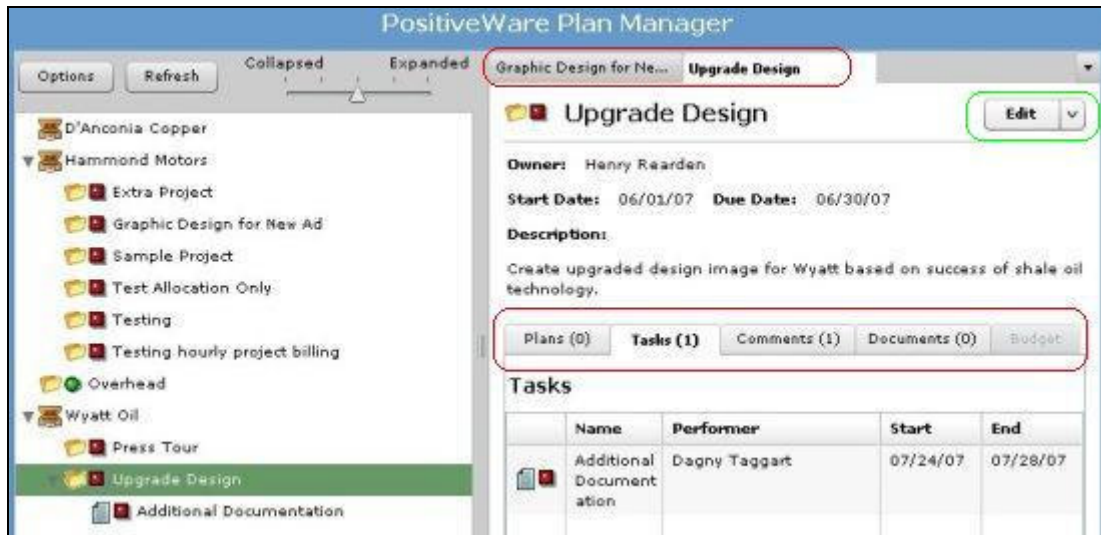
The new Plan Manager interface is very similar in functionality to its predecessor, but behaves slightly differently.

Figure 2-1



Clicking on any of the clients, plans or tasks listed in the tree view on the left will load the details for that item into the right-hand pane:


Figure 2-2



The right-hand pane provides access to all the available information about a client, plan or task. It also provides access to related actions, through the Edit button.

Circled **red** in Figure 2-2, are two important features:

1. **Tabbed browsing:** Each client, plan or task that is clicked on in the left-hand pane will open in a new tab in the right-hand pane. By clicking on one of the tabs (circled) you can switch between tabs.

When you hover over a tab, a small red cross icon appears - click on this to close the tab: 

2. **View Associated Information:** Tabs are used again to provide access to plans, tasks, comments, documents and budgets that are associated with the client, plan or task being viewed.

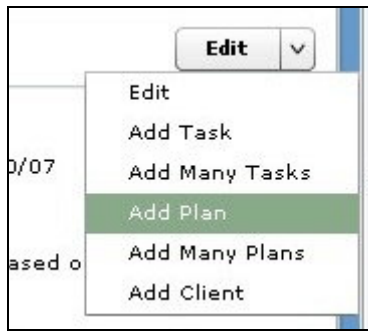
In this example, the (1) on the **Tasks** tab indicates that the plan being viewed has one associated task, named Additional Documentation. Its allocated Performer is Dagny Taggart and its start and end dates are also shown.

Simply click on a tab to view its associated information.

3. **Edit Button:** Circled **green** above, the **Edit** button provides access to all of the actions you can perform on the client, plan or task you are viewing.

Clicking on the arrowhead on the right-hand side of the **Edit** button allows you to opt to add a task, plan or client:

Figure 2-3



Clicking directly on the **Edit** button will open a new window allowing you to edit the task:

Figure 2-4

<p><b>What do you want to do?</b></p> <p><input checked="" type="radio"/> <b>Add Comment</b> Add a comment about this plan.</p> <p><b>Comment:</b></p> <p><input type="text"/></p> <p><input type="button" value="Add Comment"/> <input type="button" value="Cancel"/></p> <p><input type="radio"/> <b>Track Time</b> Track time for this plan.</p> <p><input type="radio"/> <b>Track Expense</b> Track an expense for this plan.</p> <p><input type="radio"/> <b>Attach Document</b> Attach a document to this task.</p> <p><input type="radio"/> <b>Complete</b> This plan is complete, enter the completed date.</p> <p><input type="radio"/> <b>Hold</b> Put this plan on hold until further notice.</p> <p><input type="radio"/> <b>Delete</b> Permanently remove this plan from the system.</p> <p><input type="radio"/> <b>Edit Budget</b> Edit a budget for this plan.</p> <p><input type="radio"/> <b>Edit Permissions</b> Edit the permissions for this plan.</p> <p><input type="radio"/> <b>Return</b> Return to the previous page.</p>	<p>1. Select the activity you would like to perform by checking the radio button.</p> <p>2. Then enter the required details and click on the <b>Add...</b> button to save your changes.</p> <p>3. When you are finished, choose the <b>Return</b> option to return to the main <b>Plan Manager</b> view.</p> <p><i>Note: As always, some options may not be available to you, depending on the user permissions you have been granted.</i></p>
---	--

The following actions are possible:

## Release Notes – PW PSA 2.1.6

- a. **Add Comment** - Add a comment to the plan/task record. This will be emailed to all users who are subscribed to notifications for the plan/task.
- b. **Track Time** - Record details of time spent working on this plan/task. You will be prompted for a work category, time spent, date and any comment. You can also indicate whether the work was billable or not.
- c. **Track Expense** - Record details of expenses incurred while working on this plan/task
- d. **Attach Document** - Upload a document to the plan/task record. The document will only be available to users who have the required permissions
- e. **Complete** - mark this plan/task as complete and stop tracking time against it. You will be prompted for the completion date in order that schedule compliance can be assessed.
- f. **Hold** - pause time tracking against this plan/task. You will be prompted to enter a reason for the hold.
- g. **Delete** - delete this plan/task. You will be prompted for a deletion reason before the plan/task is permanently removed from the system.
- h. **Edit Budget** - edit the budget for this plan/task. If you have the necessary permissions, you will be able to edit current and previous monthly budgets, so long as they have not been frozen.
- i. **Edit Permissions** - alter users' permissions for this plan/task *only*.
- j. **Return** - stop editing the plan/task and return to the Plan Manager screen. Choosing the **Return** action will close the Edit window and return you to the main **Plan Manager** screen.

### 2.B. Customizing the Plan Manager

The Plan Manager allows you to customize the way in which your information is displayed.

There are two elements to this customization:

Figure 2-5

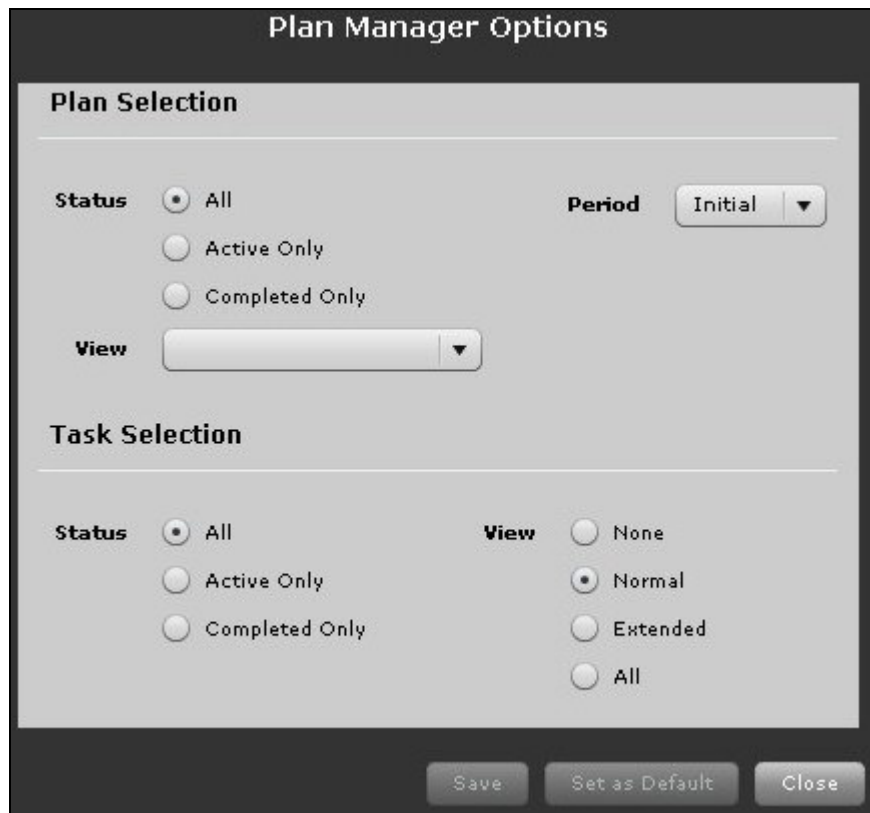


- **Collapsed - Expanded:** Changing the position of this slider causes the tree view in the left-hand pane to be gradually expanded or collapsed. When collapsed completely, only your list of clients will be visible (although you can expand them manually).

When expanded fully, every client, plan and task will be visible, subject to your choice of **Options**.

- **Options:** The **Options** button provides you with access to the display options for the **Plan Manager**:

Figure 2-6



The following options are available:

#### Plan Selection

- **Status:** Choose whether to display **All** plans, or only **Active** or **Completed** plans
- **Period:** Choose which time period to display plans from
- **View:** Choose to display **All** plans to which you are subscribed, only plans for which you have **Ownership**, or only plans from a specific **Department**:

Figure 2-7



#### Task Selection

- **Status:** Choose whether to display **All** tasks, or only those that are **Active** or **Completed**
- **View:** This allows you to control how and if tasks are displayed:
  - **None:** No tasks will be displayed, only clients and plans
  - **Normal:** Active tasks which you own or are assigned to will be displayed
  - **Extended:** Show active tasks you own or are assigned to with additional information

## Release Notes – PW PSA 2.1.6

- **All:** Display all tasks with their parent plans - regardless of whether you own them or are assigned to work on them

Once you have made your option choices, you can choose from three **Save** options:

- **Save:** Save your choices for the current session only
- **Set As Default:** Make your choices the default for your future sessions
- **Close:** Close the **Options** dialog without saving your changes


### 3. Setup -> Accounts

The **Account** page allows your payment and billing details to be updated.

Your next charge is also displayed and this is automatically updated when users are added or removed from the system.

To enter your **Account Information** for the first time, fill in the **Account Information** form on the left of the page:

Figure 3-1

Account Information	
Account Type:	<input checked="" type="radio"/> Monthly (\$30.00/mo) <input type="radio"/> Annual (\$300.00/yr)
Billing Contact:	Henry Rearden
Name on Credit Card:	<input type="text"/>
Address Line1:	<input type="text"/>
Address Line2:	<input type="text"/>
City:	<input type="text"/>
State:	- Select State -
Zip Code:	<input type="text"/>
Credit Card Number:	<input type="text"/>
	
Credit Card Expiration Date:	Month / Year
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

*Choose between Monthly & Annual Billing*

*Select the billing contact name for your organization*

*Enter your credit card details. This need not be the same person as the billing contact.*

*Click **Save** to confirm your details or cancel to revert any changes you have made.*

Once you have completed entering your payment details, click the **Save** button. You will now be shown your confirmed details and the details of your next charge:

## Release Notes – PW PSA 2.1.6

Figure 3-2

Account Information	Next Charge								
<b>Account Type:</b> Monthly <b>Billing Contact:</b> Henry Rearden  <b>Name on Credit Card:</b> Henry Rearden <b>Address Line 1:</b> 3, Any Street <b>Address Line 2:</b> <b>City:</b> Some Town <b>State:</b> CO <b>Zip Code:</b> 80202 <b>Credit Card Number:</b> 4111111111111111 <b>Credit Card Expiration Date:</b> 08/2008	<table border="1"><thead><tr><th>Date</th><th># of Users</th><th>Amount</th><th><a href="#">View</a></th></tr></thead><tbody><tr><td>10/13/2007</td><td>3 @ \$10.00/ea</td><td>\$30.00</td><td></td></tr></tbody></table>	Date	# of Users	Amount	<a href="#">View</a>	10/13/2007	3 @ \$10.00/ea	\$30.00	
Date	# of Users	Amount	<a href="#">View</a>						
10/13/2007	3 @ \$10.00/ea	\$30.00							
<input type="button" value="Edit"/>									

*If you have previously entered your details, you may be shown this view immediately. Click the **Edit** button to change your Account Information.*

By clicking on the **View** link (circled red above), you can access a copy of your next invoice:

Figure 3-3

PositiveWare Invoice		
<a href="#">Export to PDF</a>		
<b>Bill To:</b>		
Henry Rearden 3, Any Street Some Town, CO 80202		
<b>Charge Description</b>	<b>Quantity</b>	<b>Amount</b>
PositiveWare User Account	3	\$10.00
	Total:	\$30.00
<input type="button" value="Return"/>		

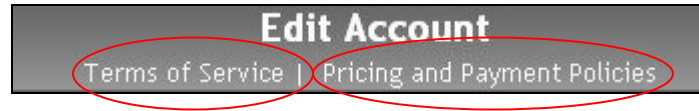
Click on the **Export to PDF** link (circled red) to save this to a read-only, printable PDF format file.

## Release Notes – PW PSA 2.1.6

**Note:** PositiveWare charges on a per-user basis.

To view the PositiveWare **Terms of Service** and **Pricing and Payment Policies**, click on the appropriate link at the top of the **Accounts** screen:

**Figure 3-4**



The documents will load in a new window in a format suitable for printing or reading online.