

1. PositiveWare Release Notes 2.1.9 (01/10/2008)

PositiveWare Release 2.1.9 introduces five new features that will help to increase your productivity and allow PositiveWare to reflect and track more accurately your goals and hopes:

- Date shortcuts for entering week-to-week actions
- New Activity Report option to show current and next weeks' actions
- New Goal data type - less specific and restrictive than plans
- Two new Goal reports, allowing you to track progress against your goals
- Option to remove requirement to specify change reasons when deleting actions/plans/goals

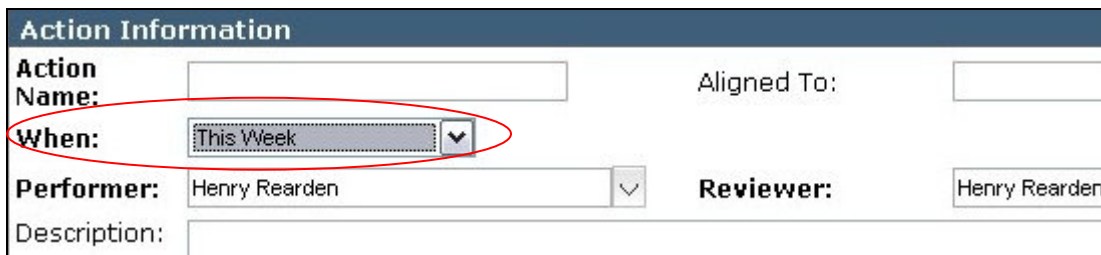
2. Date Shortcuts for Entering Week-To-Week Actions

Many actions have fairly short, immediate start and end dates - 'next week', for example. Configuring such actions in PositiveWare has previously required you to enter start and end dates manually, regardless of duration.

We have now introduced a new feature that allows you to specify an action's duration from a list of pre-configured durations, helping you to save time when setting up multiple actions.

Here's how the new feature looks on the **Add Action** screen:

Figure 2-1



Action Information			
Action Name:	<input type="text"/>	Aligned To:	<input type="text"/>
When:	<input type="text" value="This Week"/>		
Performer:	<input type="text" value="Henry Rearden"/>	Reviewer:	<input type="text" value="Henry Rearden"/>
Description:	<input type="text"/>		

To enable this feature, you will need to make a small change to your account setup:

1. Go to the **Setup / Attributes** screen.

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2. Select **Personal Goal Shortcuts** from the drop-down list, enter **On** as the value and clear the **Transient** check box to make the change persistent

Click **Set** to enable **Personal Goal Shortcuts**:

Figure 2-2

The screenshot shows a web interface for configuring attributes. At the top, there is a section titled "Attribute" with a dropdown menu set to "PersonalGoalShortcuts", a text input field containing "On", and an unchecked checkbox labeled "Transient". A "Set" button is located below these fields. Below the "Attribute" section are two tables:

Configured Employee Attributes

Name	Value		
PersonalGoalSeeAll	On	Edit	Delete
PersonalGoalEditAll	On	Edit	Delete
StartPageURL	~/TimeTracking/TimeCard.aspx	Edit	Delete
EasyStart	Off	Edit	Delete

Configured Organization Attributes

Name	Value
ActivityTrackingDefaultCategoryID	-1
ActivityTrackingForClient	On
Billing	On
BillingAdministrator	On

You will now be able to select pre-configured date ranges when creating new tasks/actions.

If you need to specify a custom date range for a particular action, just select **Custom** in the **When** field. This will allow you to select the start and end dates you need from a calendar.

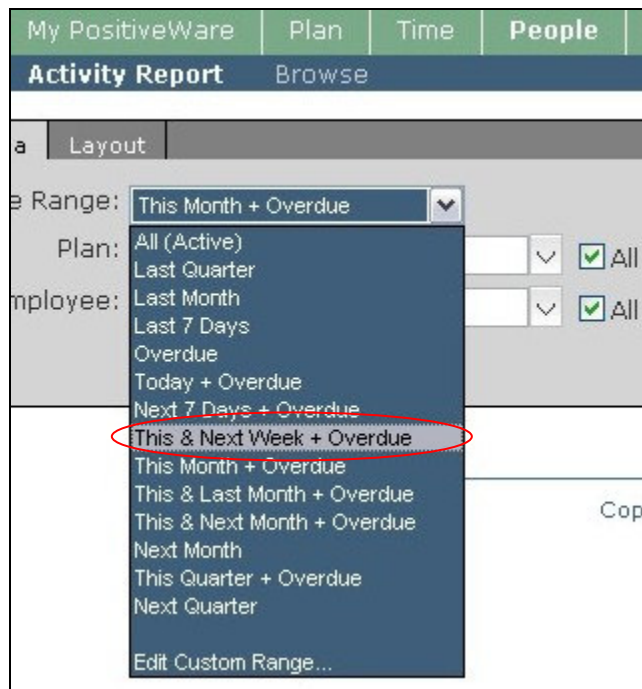
3. Updated Activity Report

The activity report on the **People** tab is a quick and useful way of viewing and tracking the plans your employees are working on.

We've now added a new date range to the report to help you manage day-to-day workloads - '**This Week & Next Week + Overdue**'.

You can access this in the same way as usual - just select it from the **Activity Report** date range list:

Figure 3-1



4. New 'Goal' Data Type - Manage Your Goals

PositiveWare's **Plan** and **Action** data types give you powerful, detailed control over your business' project and task-oriented work.

However, we understand that sometimes that isn't enough - sometimes you need to be able to track and progress high-level initiatives, without having to restrict yourself to an exact schedule.

That's why we have created the **Goal** data type - it's like a **Plan**, but with no restrictions. You don't have to specify dates, performers or an owner. Instead, just describe your goal and align it to a client - that's it.

Actions can be aligned with **Goals** in exactly the same way as they are with **Plans** - allowing you to assign discrete, measurable tasks to your overall **Goal**.

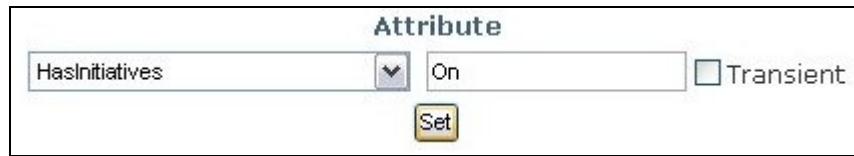
Here's how to enable **Goals**:

1. Go to **Setup / Attributes**.
2. Select the **HasInitiatives** attribute, set the value to **On** and clear the **Transient** check box.

Click **Set** to update your attributes:

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Figure 4-1



Attribute

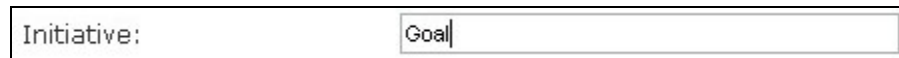
HasInitiatives ▼ On Transient

Set

By default, **Goals** are labeled as **Initiatives** in PositiveWare. If you would prefer the term **Goals**, you can now configure this:

1. Go to **Setup / Terminology**.
2. Scroll down until you reach the Term '**Initiatives**'. In the **Selected Term** field on the right, enter **Goal** in place of **Initiative**:

Figure 4-2



Initiative: Goal

3. Click the **Save** button at the bottom of the screen to save your changes.

4.A. Creating Goals

Creating a goal in PositiveWare is quick and simple:

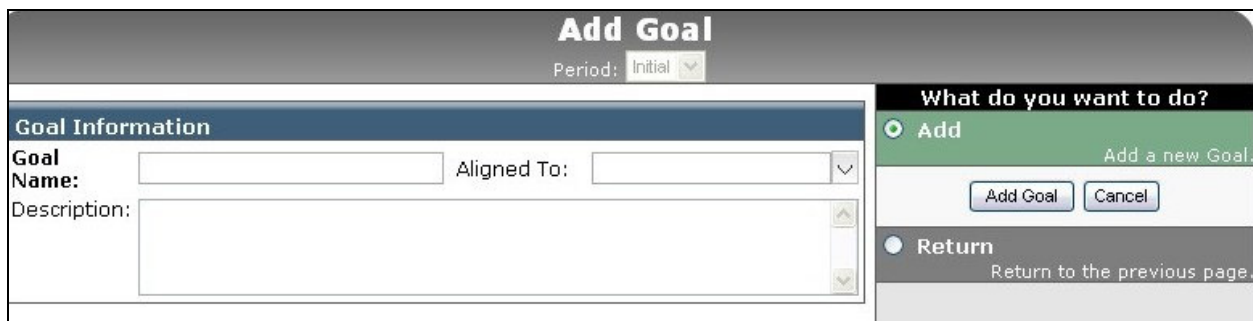
1. Go to your **Plan Manager**.
2. Click on **Add Goal** on the blue sub-menu bar:

Figure 4-3



3. Enter a name for your goal, choose a client with which to align your goal and enter your goal's description:

Figure 4-4



Add Goal

Period: Initial ▼

Goal Information

Goal Name: Aligned To: ▼

Description:

What do you want to do?

Add Add a new Goal.

Add Goal Cancel

Return Return to the previous page.

Click Add Goal to activate your goal

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- Click on the **Add Goal** button to activate your goal. Goals are distinguished by a blue flag in your Plan Manager:

Figure 4-5



To add actions to a goal, follow exactly the same procedure as you would to add actions to a plan.

5. Goal Reports

To help you make productive use of PositiveWare's new **Goal** data type, we have introduced two new reports focusing on Goal-related data. These can be accessed on the **People** tab alongside the **Activity Report**:

Figure 5-1



5.A. Goal Report

The **Goal Report** provides you with an overview of the status of all Goals and Goal Actions within the selected date range:

Figure 5-2

Activity Report Goal Report Goal Alignment Report Browse							
Criteria	Layout	Options					
Goal Report							Rearden PR, 1/ Goal / Plan: All -- O
Goal / Plan	Action	Owner/Performer	Description	Start Date	Due Date	Completed Date	Status
Test Goal	Test Action	Henry Rearden	Demonstrating actions aligned to goals.	1/6/2008	1/12/2008		Assigned

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5.B. Goal Alignment

The **Goal Alignment Report** provides you with an overview of the number of Goals you have with assigned Actions - allowing you to gauge how much active progress is being made on your Goals:

Figure 5-3



Activity Report Goal Report Goal Alignment Report		
Criteria	Options	
Goal Alignment Report		
	Assigned	Total
Test Goal	1	1
Total	1	1

6. Option to Remove Change Reasons

When deleting or placing on hold an **Action** or **Plan** in PositiveWare, users have always been prompted to enter a reason for this change. This feature was implemented to help clients maintain audit trails of activity - especially irreversible activity such as deletions:

Figure 6-1



Delete
Permanently remove this goal from the system.

Delete Reason:

[Text Input Field]

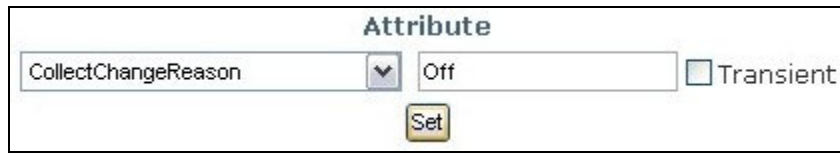
[Delete Goal] [Cancel]

However, we understand that for some clients this isn't ideal, so we have now introduced the ability to eliminate the requirement for a 'change reason'.

Here's how to do this:

1. Go to **Setup / Attributes**.
2. Select **CollectChangeReason** from the drop-down list, enter a value of **Off** and clear the **Transient** check box:

Figure 6-2



Attribute

CollectChangeReason ▼ Off Transient

Set

*Click **Set** to save the new attribute value*

3. Click the **Set** button to implement this change. The effects of the change are visible when deleting or placing on hold **Actions, Plans and Goals**:

Figure 6-3



Delete
Permanently remove this goal from the system.

Delete Goal Cancel

Compare this to Figure 6-1