

## 1. PositiveWare Release Notes 2.3 & 2.3.1 (07/08/2008)

PositiveWare 2.3 and 2.3.1 introduced several much-requested new features, improving both the usability and scalability of the system:

- **Bill Editor** - make adjustments to line items in client bills
- New, more user-friendly **Setup** screen
- **Status** indicator provides three customizable status levels for **Plans**
- **Archive** plans and billable plans without any data loss

## 2. Bill Editor

The **PositiveWare Bill Editor** allows you to edit individual line items in client bills. This is available for all bills that have not been finalized.

To access the **Bill Editor**, navigate to the **Billing Manager** interface on the **Money** tab, and select the bill you would like to **Edit**:

Figure 2-1



Client	Rate Schedule	Billing Period	Last Modified	
Wyatt Oil	Base	June 2008	8/7/2008 4:40 AM	View Edit Delete
Wyatt Oil: Press Tour	Third One	May 2008	8/7/2008 3:45 AM	View Edit Delete
Wyatt Oil	Base	February 2008	8/7/2008 3:44 AM	View Edit Delete

Next, select **Yes** when asked if you would like to make adjustments, and then click **Continue**:

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Figure 2-2

The screenshot shows a 'Bill Details' form with the following fields and options:

- Choose your client: Wyatt Oil (dropdown menu)
- Enter your billing period: 6/1/2008 (calendar icon) to 6/30/2008 (calendar icon)
- Choose your rate: Base (dropdown menu)
- Do you have any adjustments to make to this bill? For example, a project for this client billed at a different rate? (Radio buttons: Yes (selected), No)

You can also access the **Bill Editor** using the **Make Adjustments** button when viewing a bill:

Figure 2-3

The screenshot shows the 'Bill Editor' interface with the following elements:

- Criteria | Layout | Options (tabs)
- Review the client's bill below. In order to prevent users from entering any additional time and want to prevent all changes to the bill, click Finalize Bill.
- Buttons: Make Adjustments (circled in red), Stop Time Tracking, Finalize Bill

### Billing Report

Plan	Action	Description	Date
Wyatt Oil		Henry Rearden	6/10/2008

Once in the **Bill Editor**, you can view the details of each line item in the selected bill:

Figure 2-4

The screenshot shows the 'Wyatt Oil: June 2008' Bill Editor with the following details:

- Buttons: Expand All, Collapse All, Save, Apply, Cancel
- Instructions: To edit a line item, click on the time, rate or comments, make the change and click Apply. To see the details behind a given line item, expand it by clicking the plus icon. Note that time and comment adjustments are highlighted in green.
- Table:

Client / Strategy	Action	Description	Date	Billable	Time	\$/hr	Amount	Comments
Wyatt Oil		Henry Rearden	06/10/08	Yes	6.00	\$200.00	\$1,200.00	Planning engineering schedule.

Each line item in a bill is displayed separately. The following fields can be edited:

- Time
- Rate
- Comments

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To edit a field, click on it, make your change and then click **Apply**. When changing rates, select the appropriate rate by clicking on the drop-down list that appears:

Figure 2-5

Wyatt Oil: June 2008

Save Apply Cancel

Make the change and click Apply. To see the details behind a given line item, expand it by clicking on the line item that is highlighted in green.

	Billable	Time	\$/hr	Amount	Comments
/08	Yes	6.00	Base (\$200.00)	\$1,200.00	Planning engineering schedule.
/08	Yes	6.00	Base (\$200.00)	0.00	Planning engineering schedule.
			Crisis (\$250.00)		
			Third One (\$400.00)		
			International (\$450.00)		

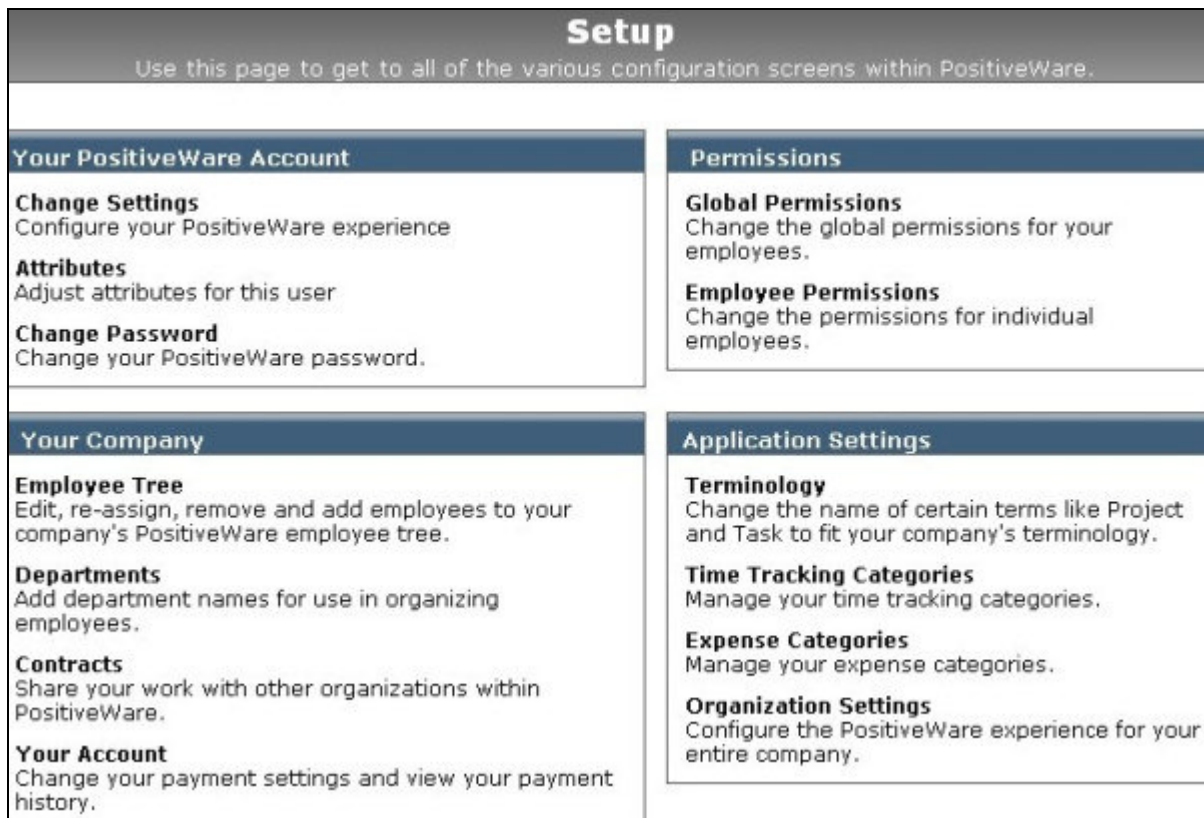
When you have completed all changes to a bill, click **Save** in the top-right corner to save your changes and return to the **Billing Manager** screen.

Click the **Cancel** button in the top-right corner at any time to abandon any changes you haven't saved or applied.

### 3. Setup Screen

In this release, we have improved the **Setup** screen to provide a clearer description of the purpose of each option. We have also made the navigation of this page more user-friendly:

Figure 3-1



To access a **Setup** page, click on the appropriate heading - e.g. **Change Settings**

(For more help with **Setup**, see the [Online User Manual](#).)

## 4. Plan Status Indicator

Previous releases of PositiveWare have provided automatic indication of the schedule status of plans and tasks - whether they are overdue or not.

We have now refined this functionality to allow users to override the default red/green/complete status indicator with a flag indicating one of three status levels.

The default options are Low, Medium or High Risk, but these can be customized by your PositiveWare system administrator through the [Organization Settings](#) page of PositiveWare Setup.

To set the status indicator of a plan, use the **Plan Manager** to select the plan and then choose the **Edit** option.

Next, select **Change Status** from the list of options on the right side of the screen:

Figure 4-1



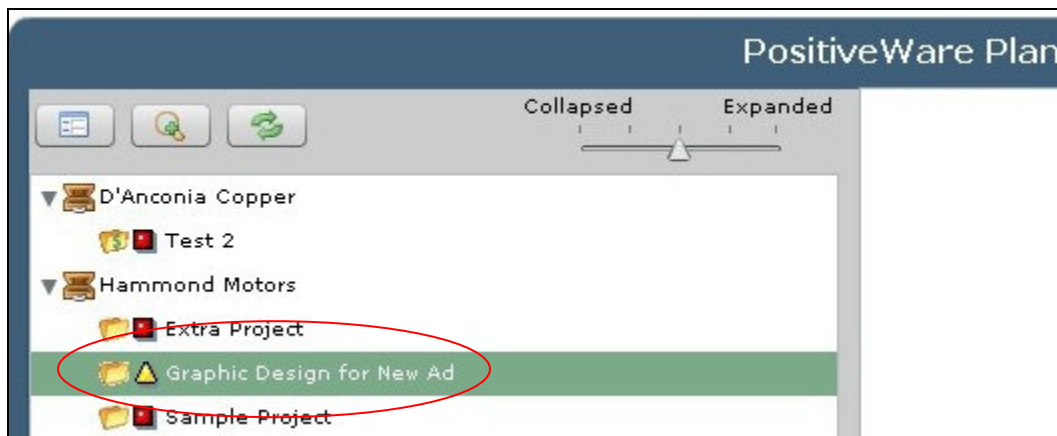
Choose the status level you would like to apply:

Figure 4-2



When you return to the **Plan Manager** screen, you will see that the icon by your plan's name has now changed to indicate its new status:

Figure 4-3



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**Note:** The **Change Status** option is only available for plans - not clients or tasks.

*The **Change Status** feature needs to be activated in users' **Attributes** settings before it is available - see your PositiveWare System Administrator for assistance with this.*

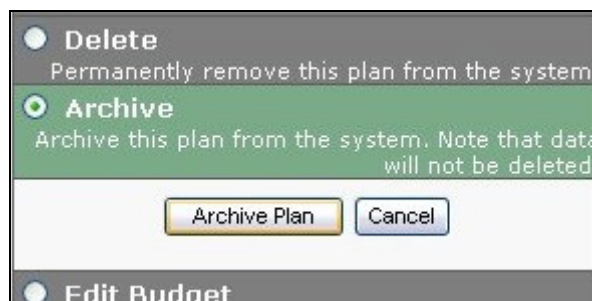
## 5. Archiving Plans and Billable Plans

It is now possible to archive **Plans** and **Billable Plans** in PositiveWare. This enables you to remove old plans from user's work environments without losing any data about past activities.

Archiving a **Plan** or **Billable Plan** is very simple. Using **Plan Manager**, select the plan you wish to archive and view it in **Edit** mode:

Select the **Archive** option from the list on the right-hand side:

**Figure 5-1**



Click **Archive Plan** to complete the archival of this plan.

No data is lost when archiving a plan and archived plans can still be accessed if needed.