



1. PositiveWare 2.4.1 Release Notes (01/16/2009)

PositiveWare release 2.4.1 introduces a wide range of new features and resolves some minor issues from previous releases.

Key elements of the new functionality in the 2.4.1 release are:

- Strategy (Plan) Map can now be customized and exported in PDF format
- Managers now have full rights to their subordinates' projects
- Search within Plan Manager and hide the navigation tree
- Create plan templates
- Automatically complete child actions when completing a plan

2. Report Enhancements

2.A. Strategy (Plan) Map Report - Customizing & Exporting

Users told us that they wanted greater control over the output of the Plan Map report. We have now made improvements to the Plan Map report to allow this:

- Export reports to PDF
- Specify report period
- Specify specific employee
- Include or exclude Actions

Here is the new Plan Map report screen:

Figure 2-1

Use the Period and Employee drop-down lists to specify criteria for the report
To Export to PDF, click on the PDF logo (circled red)

2.B. Timesheet for Employee Report

The Timesheet for Employee Report now includes the a drop-down list enabling you to select the employee for whom to run the report:

Figure 2-2

Select an employee from the drop-down list (click **Criteria** if the drop-down list is not visible)

3. Plan Owner Rights for Managers

Employees' managers are now automatically given owner rights to the plans and actions of their employees. This enables them to update, complete and delete plans and actions on their employees' behalf, where necessary.

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4. Plan Manager Updates

4.A. Search Plan Manager

You can now search within Plan Manager for clients, plans, actions and for *any text* that appears within a plan or actions' description.


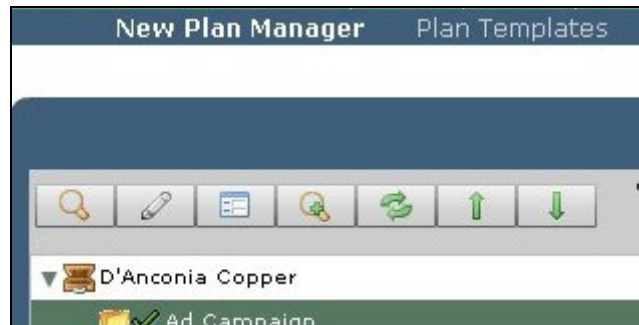
To access the search facility, click on the  button on the left of the screen:

Figure 4-1



Next, enter the term you would like to search for and hit Enter:

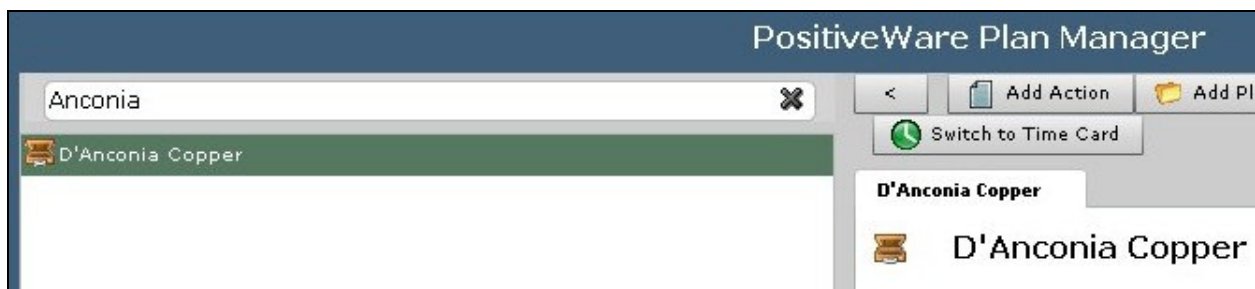
Figure 4-2



You can search by client, plan or action name or description

Once you have found the item you are looking for, just click on it to open the details in the right-hand pane:

Figure 4-3

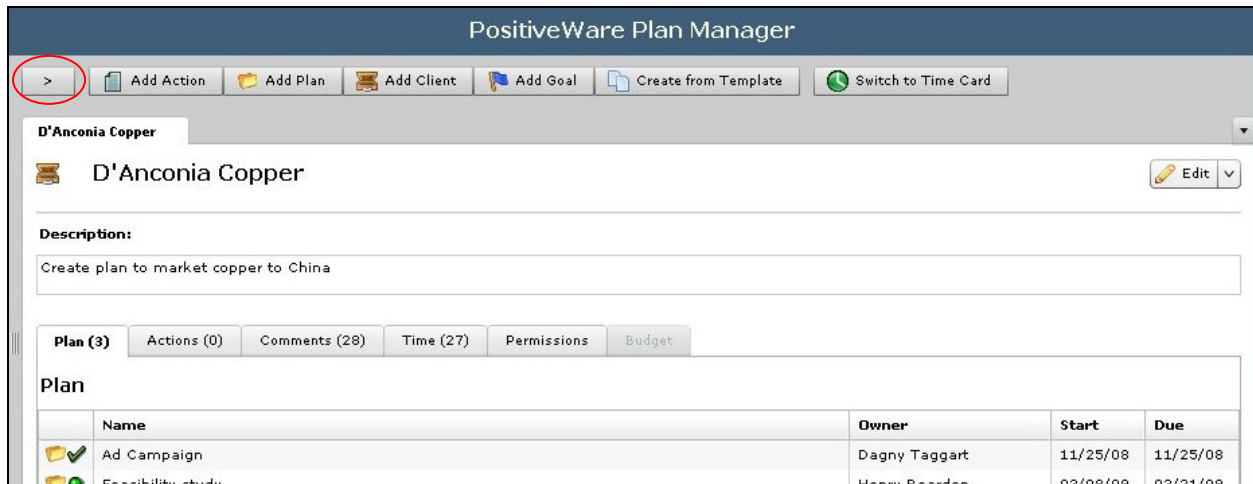


4.B. Hide Plan Manager Navigation Tree

You can now hide the Plan Manager navigation tree and extend the right-hand pane to fill the whole width of the screen.

To hide the navigation tree, just click on the  button in Plan Manager:

Figure 4-4



To expand the navigation tree again, click on the > button on the left (circled red)

5. Create Plan Templates

You can now save individual plans as templates for future plans.

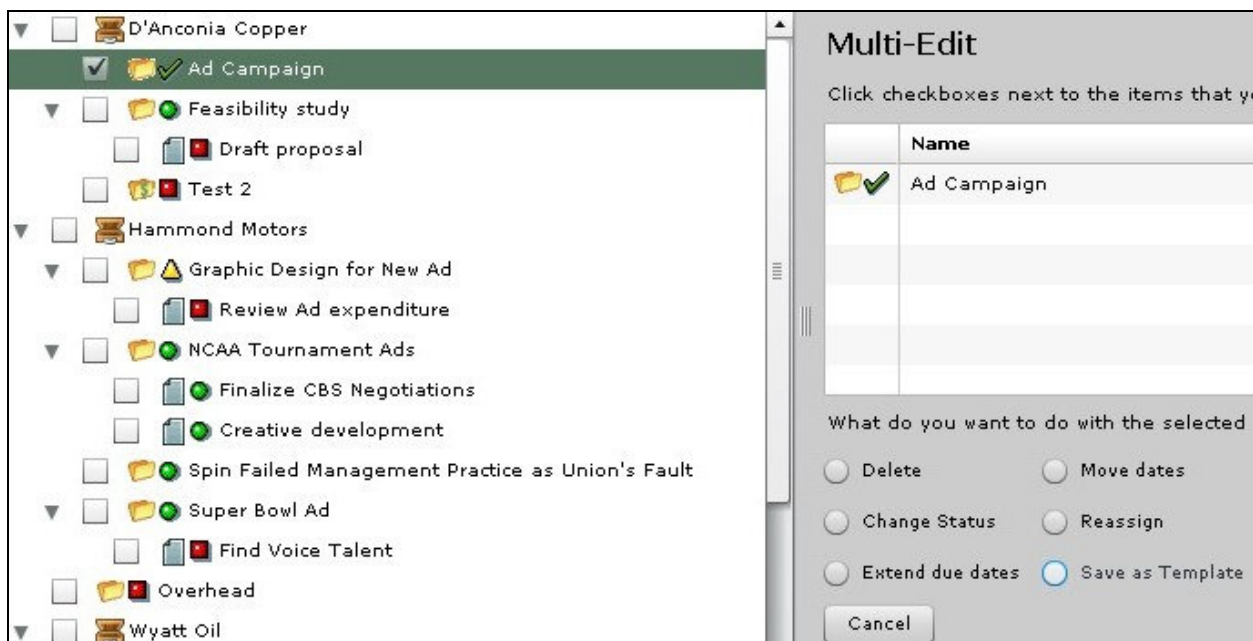
To do this, use the Multi-Edit feature that was introduced in release 2.4 (circled red):

Figure 5-1



In the navigation tree, select the plan you want to use for your template (the original plan will remain unchanged). Next, select the **Save as Template** option in the right-hand pane:

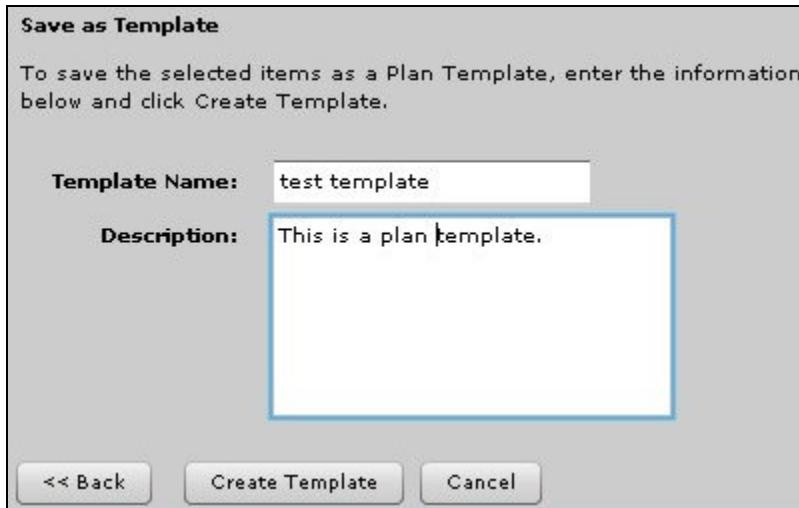
Figure 5-2



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You will then be prompted for additional information about your new template. Complete this and then click **Create Template**:

Figure 5-3



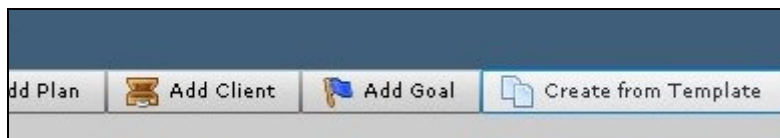
The screenshot shows a dialog box titled "Save as Template". The text inside reads: "To save the selected items as a Plan Template, enter the information below and click Create Template." There are two input fields: "Template Name:" with the text "test template" and "Description:" with the text "This is a plan template." At the bottom, there are three buttons: "<< Back", "Create Template", and "Cancel".

Your template is now available for use.

5.A. Creating Plans Based on Templates

To create a new plan based on a template, use the **Create from Template** button that appears in the right-hand pane:

Figure 5-4



Select the template you wish to use and complete the other required information using the drop-down lists:

Figure 5-5

Create from Template
Select the template and fill out the following form and click Save to use this template.

Template: -- Select template -- ▾

Aligned To: -- Not Aligned -- ▾

Performer / Owner: -- Select Employee -- ▾

Reviewer: -- Select Employee -- ▾

Start Date:

Save Cancel

Your new plan will be an exact replica of the template plan - you can then customize it as you wish.

5.B. Managing Templates

To view and manage existing templates, click on the **Plan Templates** link on the navigation bar:

Figure 5-6

PositiveWare Plan Template Manager

Use this page to edit or delete your existing Plan Templates. To create a new one, use the New Plan Manager

Your Plan Templates

Name	Description
test template	This is a plan template.

Edit Delete

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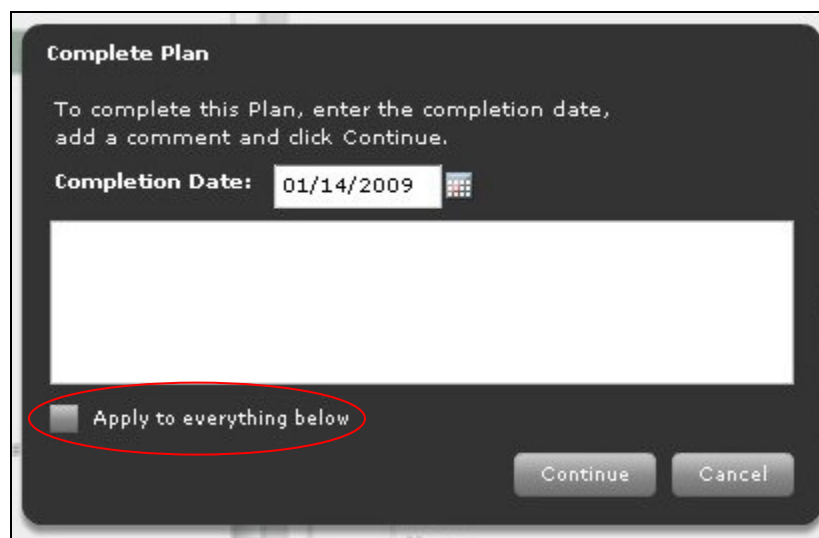
Select the template you wish to **Edit** or **Delete** and then click the appropriate button to begin.

6. Autocomplete Child Actions

Until this release, you have always needed to manually mark actions complete in addition to marking their parent plan complete.

To save time on this repetitive task, we have now introduced an option to **Apply to everything below** when completing a plan - meaning that all child actions will be automatically marked as complete as well:

Figure 6-1



7. Goal Status

You can now set the status of Goals, in the same way as for Plans. To do this, select the status you wish to apply to the Goal from the **Edit** menu in the right-hand pane:

Figure 7-1

