



System Release Note: Version 2.7.0

System Version: 2.7.0
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Introduction

This document details the changes introduced to the Escendency System as a result of the release of version 2.7.0 of the system software.

Details are split into four sections:

- New functionality, which details new features that have been added. A fuller description is included in the version 2.7.0 Administrator's or User's Guide as appropriate
- Modifications to existing functionality, which describes functional changes to previous versions of the system
- Support issues addressed, which pre-existing bugs and anomalies have been resolved in this release
- Known Issues and Omissions, any bugs or anomalies which have been discovered between the final release candidate build and the issuing of this release note, that are not of a sufficient severity to warrant delaying the current release

For reference purposes, the Escendency issue/reference number is included alongside each description along with a customer support ticket reference where relevant.

New Functionality

- (12) Staff Appraisal Tasks And Appraisal Tracking

This new feature allows line managers to record appraisal comments for those that they manage.

For users who have a date recorded in the 'Next Appraisal Date' field (on the User edit page), a new task will show on the line manager's task list when that date is reached.



Figure 1: Appraisal task

Clicking on this task will open the performance appraisal page, this allows the line manager to enter appraisal comments and select a date for the next appraisal to occur.

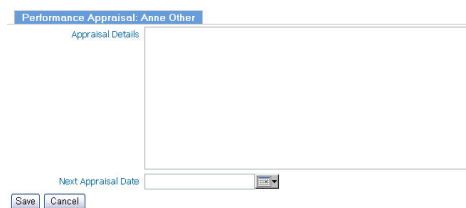


Figure 2: Appraisal Page

Only users who have been assigned a next appraisal date will appear for appraisal on their line managers task list.

This current appraisal functionality is very much an initial release and Escendency will be actively seeking feedback as to how it can be enhanced through further functionality and reports.

- (31) Forward Measurement Planner And Forward Entry

At the top left of each users task page is a new calendar icon, clicking on this opens a new measurement planner window.

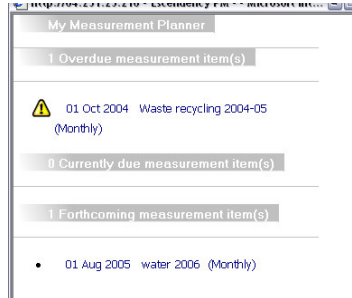


Figure 3: Measurement Planner window

This window lists the next measurement task due date for all active targets for which the user has measurement responsibility.

Tasks are split into three groups, overdue and due items contain the same task information as is shown on the tasks panel. A third group shows tasks that are not yet due for measurement.

By clicking on a task (including future tasks) the user is taken to measurement entry page and the planner window closes.

- (32) Target Collation By Type/Category/Perspective

This new report allows performance progress reports to be listed in a similar way to the corporate performance plan; however, the selection of targets displayed can be filtered by category (targets can be restricted to a single category), type (targets restricted to a single type) and perspective (targets can be restricted to one or more perspectives). Additionally, a target-on-target trend graph can be displayed for each item.

Users can also enter a date for which they wish to run reports. The latest performance information for all targets active on this date will be displayed. The report defaults to the current date.

To run this report, select 'Indicator/Target List Reports' from the reports control panel.

This report is only available to members of groups that have the 'Target List Reports' access rights. This is a new access right.

Modifications To Existing Functionality

- (25) Addition of related documents feature to strategy map items

It is now possible to add a related document link to individual strategy map items in the same way as for Action Plans. Links are created via the 'Edit strategy map item' page.

- (30) Ability to restrict access to organisation based views of performance

A new access right 'Organisation View' has been added. Users who are not a member of a group with this access right will not be able to drill-down to organisation or post information from the CPO and other performance reports.

- Enhanced usability for related documents feature
 - (27) Added user friendly title

Related documents can now be given a descriptive title.
 - (48) Ability to edit related document links

Related document links can now be edited after they have been created
 - (47) Related documents added to CPO

Document links related to strategy map items can now be shown and accessed from the CPO report.
- (49) Ability to directly edit contribution score from within strategy map

It is now possible to edit an individual strategy map items contribution from the item edit page.
- (54) Improved handling of non-assessed items in overnight performance calculation

Not assessed items, which are not yet due for initial assessment no longer affect performance further up the strategy map.
- (33) Addition of historic performance trend graphs to CPP

A checkbox next to the CPP link on the reports control panel allows the CPP to be generated including a target-on-target trend graph for each item.

Support Issues Addressed

- (53) CPO report not always returning items in logical order

Items are now returned in alphabetical order
- (23) Incorrect calculation of next measure date for targets lasting less than measure interval
- (39) Scorecard report showing blue text on blue background for certain system configurations
- (40) Erratic behaviour on excel data import
- (43) Incorrect 'to' date showing on measurement entry page
- (44) Date formatting on excel import template
- (55) Tuned overnight status calculation

To provide more logical status 'roll-up'

Known Issues And Omissions

- (4) Organisation/Post view of performance. In order for version 2.7.0 to be released to the previously published roadmap schedule and to ensure the highest standards of testing, the organisation view of performance has not been included in this release. This feature will be issued in an additional maintenance release, version 2.7.1, in August 2005.
- (63) Forward measurement entry planner. When viewed via the 'All Users' function by a System Administrator, this displays the administrator's tasks, not the user being viewed.
- (61) Ending target measurement as of last measurement date. If no measurements have been entered, this results in an empty end-date being assigned which causes the overnight status calculation to fail. This issue was present before version 2.7.0 and will be resolved in version 2.7.1
- (57) 'By Date' reports. Unless the user is a member of a group with certain access rights, they will receive a permission denied error when trying to access their personal performance 'by date'. This issue will be resolved in version 2.7.1