



## **System Release Note: Version 2.8**

System Version: 2.8

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## Introduction

This document details the changes introduced to the Escendency System as a result of the release of version 2.8 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 2.8 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.

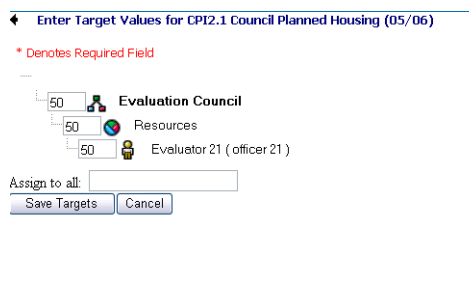
## New Functionality

- (37) Target editing.

System Administrators can now edit the performance target values directly, without needing to contact technical support.

All current and future targets can be edited, performance targets which have already passed their end date cannot be edited.

To edit a target, right-click on the relevant strategy map item, then select 'Add/View Responsibility' from the pop-up menu. Select the 'Edit Targets' option for the relevant performance target. This will open the 'Edit Target Values' page.



The screenshot shows a web interface titled "Enter Target Values for CPI2.1 Council Planned Housing (05/06)". A red asterisk indicates that fields with an asterisk are required. The interface displays a list of targets with their current values:

Target	Value
Evaluation Council	50
Resources	50
Evaluator 21 (officer 21)	50

Below the list is an "Assign to all:" field and two buttons: "Save Targets" and "Cancel".

**Figure 1: Edit Target Values**

This page shows the part(s) of the organisation tree that have been assigned responsibility for measuring/achieving the required target with their current target in the text boxes alongside.

To edit a target for a part of the organisation, simply enter a new value into the relevant text box.

If all parts of the organisation are to have the same target value (as would be the case if there is only one post with measurement responsibility), entering a value in the 'Assign to all' field will force all items to this target.

When targets have been assigned, clicking the 'Save Targets' button will update the target values and return the user to the 'add/view responsibility' page.

WARNING: The system does not check that assigned targets are consistent across all items within the organisation. It is possible for post-level targets to be greater or less than their parent items. This behaviour is by design.

- (72) Unmeasured Targets Report.

This new administrative report lists all current performance targets that have had no measurement responsibility assigned. It also lists targets where measurement responsibility is currently assigned to a vacant post – and whether measurement responsibility has been delegated to another post.

Only System Administrators have access to this report, which can be run by selecting 'Unmeasured Targets' from the Administrative Reports section of the reports tab on the control panel.

## Modifications To Existing Functionality

- (66) One-click expand/contract of CPO report structure. The CPO now includes '+' and '-' buttons in the 'display options' panel. These buttons expand and contract the entire strategy map structure respectively.
- (68) Enhanced usability of CPO drill-down options. When drilling-down from the CPO to sub-reports, it is no longer necessary to check the 'drill-down' check box in the 'display options' panel. Instead, for items that can be drilled-down from, a grey triangle appears to the right of the strategy map item. Clicking on this triangle will cause the drill-down options for the item to be displayed in a pop-up menu.



**Figure 2: Report drill-down pop-up**

It is still possible to use the drill-down checkbox to cause drill-down options to be displayed alongside strategy map items. This is to allow users to have access to the old method of drilling-down whilst becoming familiar with the new. The old drill-down behaviour will be removed from the system in a future version.

- (71) Measurers comments have now been added to the performance progress report. Allowing officers and members access to commentary when reviewing progress.
- (76) Extra comparison fields have been added to performance targets. These are called 'Benchmark value 2' and 'Forecast value 3 & 4'.

- (81) Editing of Performance Indicator reference field. It is now possible to edit the reference field of a PI when there is an active target that uses that PI.
- Enhancements have been made to the overnight status calculation process, to improve accuracy when working with phased-targets. There is no change to the appearance or behaviour of the system from user's perspective as a result of this modification.

## **Support Issues Addressed**

- (52) Scorecard Report. Targets no longer show twice for a given perspective.
- (80) Using the '&' character in perspective names no longer causes perspective report and scorecard report to fail.

## **Known Issues And Omissions**

- (37) Target editing – Edits to target values are not yet fully audit trailed in human readable form. This will be rectified in the next release of the software.
- (3) Generic Data Import – Release of this module has been deferred to allow better integration with the equation builder functionality scheduled for version 2.9. Further information regarding the equation builder and import functions will be made available separately from this release note.