

System Release Note: Version 2.9

System Version: 2.9
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Contents

Contents.....	2
Introduction.....	3
New Functionality.....	3
Modifications To Existing Functionality	6
Support Issues Addressed.....	7
Known Issues And Omissions	7

Introduction

This document details the changes introduced to the Escendency System as a result of the release of version 2.9 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 2.9 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

- (83) Dashboard.

The dashboard is a major new piece of functionality that is designed to allow manager level users to obtain an at a glance view of key areas of performance without having to do any more than login to the Escendency system.

Access to the dashboard is in the form of a new control panel. The system administrator will need to configure relevant users to have access to the dashboard panel.

Once a user has been set up with access to the dashboard it will appear as the first tab on their control panel. Until personal settings have been configured the default dashboard will appear, this shows three pie chart graphs, the first displaying the overall breakdown of performance through the organisation, the second and third showing personal performance for owned and measured targets. These charts can be clicked on to drill through to the existing 'Indicator Status Distribution' reports.



Figure 1: Default dashboard configuration

Users can customise the information that is displayed on the dashboard by clicking on the artists palette icon on the top left of the dashboard, this will open the customise dashboard display page.

Customise Dashboard Display

Strategy Map Items - These display as gauges on your dashboard

Click to select strategy items

Performance Breakdowns - These display as pie charts on your dashboard

All Active Targets
 Active Targets That I Own
 Active Targets That I Measure

Display Settings

Standard Gauge/Graph size

3 Graphs/Gauges Per Row

Show gauges as percent instead of absolute score

Figure 2: Customise Dashboard Page

This page is split into a number of sections:

Strategy Map Items: Clicking on the select item will open a new window displaying the full strategy map. Users can select which items they would like to see displayed as gauges on the dashboard.

Performance Breakdowns: Users can select which, if any, of the default pie charts are displayed.

Display Settings: Users are able to configure how large graphs and gauges are displayed (from a range of settings) and how many gauges are displayed per row. In this way users can configure settings that are optimal for their screen resolution.

Note: Graph sizes are not set in absolute size terms, but as a proportion of the actual screen resolution, this means that a user's settings should remain suitable if they log on from a machine with a different screen resolution.

It is also possible to select how data ranges display on gauges, the options being to show the scale as a percentage of possible achievement, or to show the actual performance score as calculated by the system.

The following illustrations show some of the possible layouts for the dashboard

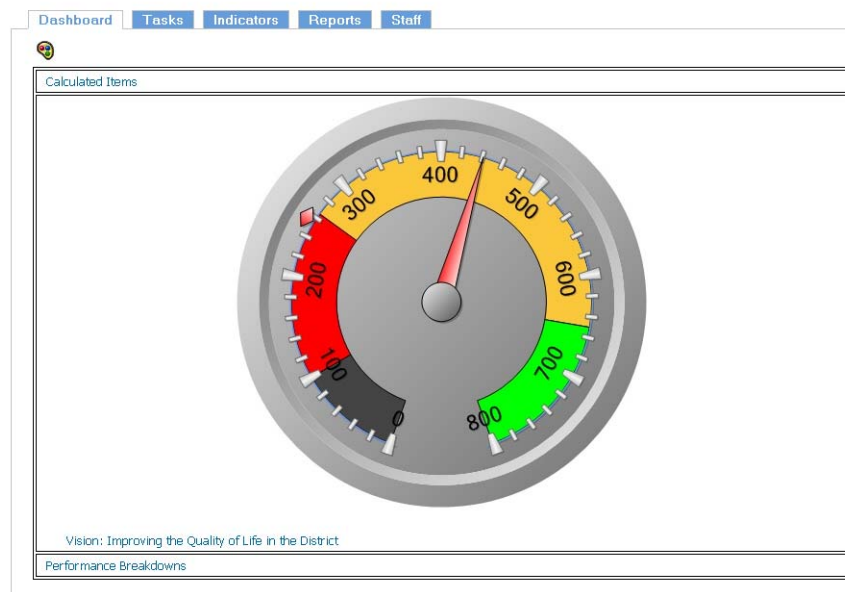


Figure 3: One large gauge showing the overall performance at the top level of the strategy map

In figure three the main needle pointer shows the current performance score as calculated by the system. On the outside of the coloured gauge is a diamond shaped pointer. This displays the previous performance score (if there has been a change), which makes it possible to see if performance is improving or deteriorating without having to wait for a change in overall status.

It should be noted that the scores attached to performance gauges are a reflection of the internal calculations performed by the system in order to assign a status to non-measurable parts of the strategy map. It does not follow that (for example) a score of 50% at the mission level implies that 50% of measurable items have been achieved.



Figure 4: Small gauges showing a number of strategy map items along with pie charts

Modifications To Existing Functionality

- (74) Bar charts on Performance Report are now coloured according to status. A number of EPM users have complained of being confused by the use of colour on bar charts on the Performance Progress Report, with orange bars for non-validated measurements being confused for the under-achieving status and blue bars for validated measurements being confused for over-achieving status.

Graph display has now been changed such that validated measurements are now coloured according to the corresponding status of the performance target, while non-validated measurements are shown as outline bars only. This enables the user to unambiguously assess the current status of a target whilst still being able to differentiate between validated and non-validated measurements.

- Risk Scoring addition to targets. Two new fields have been added to the performance target creation progress; 'Risk: Likelihood' and 'Risk: Impact'. These fields can accept any whole number value, thus allowing simple risk assessment to be added to strategic targets. At present, risk scores are reported on group reports. It is envisaged that risk scores will be added to other reports in further releases.
- Addition of extra fields to group reports. The following changes have been made to the fields displayed on the group report:
 - New fields added:
 - Risk scoring
 - Last measurers comment – shows the last comment entered by a measurer
 - Last validators comment – shows the last comment entered by the measurement validator.

- Forecast 3 & 4
- Other fields have been modified to simplify the display of information (e.g. owner name and post have been split into separate fields)

It is recognised that these report changes may cause some concern about the risk of confusion to users (particularly members). For this reason a mechanism has been incorporated to allow customers (on a system wide basis) to choose to remain with the old format group report if desired. This is a configuration setting that is managed by Escendency. Customers who would like to retain the old report style should inform Escendency Support.

Support Issues Addressed

- (100) & Showing as & amp; on comments section of performance progress reports. This issue has been resolved, the & symbol now displays correctly.

Known Issues And Omissions

- (110) Pie charts on displayed on the dashboard always display three to a row, regardless of the number of items to a row selected on the dashboard customisation page. This will be resolved in a future release of the system.
- (112) When creating a new target with an indicator which is measured as a date, the new risk fields appear as date input fields and do not allow a number to be entered. This fault will be rectified in a patch release.
- The word 'Fish' appears on the title field for the current performance column. This fault will be rectified in the patch release for issue 112.