

System Release Note: Version 3.0

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Contents

Contents.....	2
Introduction.....	3
New Functionality.....	3
Modifications To Existing Functionality	7
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 3.0 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 3.0 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

- (35) Equation Builder: This new functionality allows system administrators to define formulae for measuring complex performance indicators without having to calculate measurements manually before entry into the system.

Performance indicators that are calculated using equations will not require direct measurement. Instead, measurement of the component parts of equations will be entered to allow the system to calculate performance. Component measurement parts can be used by multiple equations, thus reducing data entry and the risk of errors.

To access the equation builder functionality, select '*Equation Builder*' from the left hand menu bar. This will open the Equation Builder options page, which lists three options: Measurements, parameters and equations.

Measurements: These form the components of equations that are entered on a regular basis.

When the measurement option is selected, a list page showing all currently defined measurements is shown, this behaves in the same manner as other list pages in the system. Selecting an existing measurement or clicking 'add' will open the measurement definition-editing page (fig 1).

Figure 1: Measurement definition

A measurement definition consists of a title and description, along with a start-date from which the measurement will be collected in the system. An interval for measurement is also specified along with the post-holder who will be responsible for entry of the measurement data.

Once a measurement is created, the responsible post holder will be prompted with a measurement task to enter the relevant measurement value.

Measurements do not have a target value or end date; they are merely recordings of an actual statistic. As such they remain active until deleted from the system.

Parameters: Some items of data that are relatively static are required for use in equation (an example might be population or household count). Parameters allow such items to be defined once with a value that can then be used in several equations without needing to be redefined in every equation.

To define and edit parameters, select the 'parameters' option from the equation builder options.

A parameter definition consists of a title and an optional reference (which must be unique if supplied), together with the actual value of the parameter and an optional unit of measure

Figure 2: Parameter definition page

Parameter values remain static until modified by a system administrator.

Equations: Once measurements and parameters have been defined, they can be used in multiple equations. To define and edit equations, select 'equations' from the equation builder options.

The screenshot shows the 'Equation Builder' window. At the top left, there is a red asterisk and the text '* Denotes Required Field'. The interface includes several fields and buttons:

- Title:** A text box containing '% of waste recycled' with a red asterisk to its right.
- Reference:** A text box containing '%wr'.
- Measurement:** A dropdown menu showing 'test title' with a 'Select' button below it.
- Parameter:** A dropdown menu showing 'Population' with a 'Select' button below it.
- Constant:** An empty text box with a 'Select' button below it.
- Equation:** A text box containing the formula $\frac{\{\text{sum}\}\text{Household Waste Recycled}}{\{\text{sum}\}\text{ Household waste collected}} \times 100$.
- Status:** A dropdown menu showing 'Open'.
- Buttons:** 'Save', 'Clear', and 'Cancel' buttons are located at the bottom of the window.

Figure 3: Equation definition page

An equation definition consists of a title and optional reference, along with the equation formula.

A formula is built using the measurement, parameter and constant fields. To add a measurement to an equation, select the relevant measurement and click the 'select' button alongside (or beneath) the measurement. The same process is used for adding parameters.

Constant values can be added to equations by typing the required number into the constant field and clicking the relevant select button.

Clicking on the mathematical operators (+ - / x) or the sum or bracket buttons will add them to the equation. Brackets are used to give precedence of calculation to parts of an equation – items within brackets are evaluated first.

The equation field shows a description of the equation with the elements selected so far.

At the bottom of the page are save and cancel buttons, along with a 'clear' button. This button clears the currently defined equation, allowing a new definition to be entered.

Example Equation: Consider an equation to measure the average percentage of waste recycled. The component parts of this equation are:

- Quantity of waste recycled (a measurement)
- Total quantity of waste collected (a measurement)

Create the two measurements identified above; it would be sensible (though not essential for them to have the same measurement interval).

Click 'add' on the equation list page to create a new equation definition, enter the desired title and reference.

The correct equation for the average amount of waste recycled is:

The sum of all waste recycled divided by the sum total of all waste collected, all multiplied by 100.

To create this in the system, first click on the 'sum' button – this will cause the system to use the sum total of the next item defined.

Now select the quantity of waste recycled measurement and click select.

Next click the '/' button

Now click the 'sum' button again, then select the total waste collected measurement and click select again.

Finally click, the 'x' button then enter 100 into the constant field and click the relevant select button.

The equation description should look like this:

{sum}waste recycled / {sum}waste collected x 100

Click save to save the equation and return to the equation list.

To link an equation to a performance indicator, select the relevant performance indicator from the PI list page. A new field has been added to the PI edit page 'Indicator Measurement Type'. This can be either 'simple' or 'equation'. Simple indicators are those where the measurer enters the actual PI value. Equation indicators are those where the PI is calculated from an equation.

If the indicator measurement type is set to equation, and an equation is selected from the equation drop down, associated targets will not appear for measurement, instead they will have their values calculated using the relevant equation.

When defining equation based indicators, the measurement type should be set to 'numeric (floating point)' and the measurement interval should be no more frequent than the least frequent measurement in the associated equation.

- (70) Manually execute overnight calculations: It is now possible for a System Administrator to trigger the system status calculations that normally run overnight, at any time.

To trigger the calculations, select '*System Tools*' from the main navigation menu. This will open a page with a number of options. Select the '*Recalculate Overnight Reports*' option and then follow the onscreen instructions. When the recalculation process has finished, a message will inform the user whether or not the process completed successfully.

Note: Recalculating status is a computationally intensive process that may take several minutes and impact system performance for other users. It is recommended that this function be used sparingly and if possible, during periods of low usage.

- (50) Manual Year End Roll-Over: In previous releases of the system, part of the overnight process included the suspension of targets which had passed their end-date along with the activation of targets which have reached their start date. This would result in the corporate performance overview report in particular showing all targets as not assessed

The roll-over process is now under the control of system administrators and can be run at any time. This will mark targets that have passed their end date as completed and activate targets that have reached their start date.

To run the rollover process, select '*System Tools*' from the main navigation menu.

This will open a page with a number of options. Select the '*Update Target Activity*' option and follow the onscreen instructions.

Modifications To Existing Functionality

- (2) PI duplication: It is now possible to create a duplicate copy of a performance indicator, without having to re-enter the entire indicator. This enables a new indicator to be easily created when a definition changes (without having to wait for currently active targets to complete before the definition can be changed). Creating new copies of an indicator also ensures that PI definitions stay consistent for previous performance targets.

To create a duplicate performance indicator, simply select an existing indicator from the PI list page and press the '*Save New*' button at the bottom of the PI edit page (if the indicator has a reference, this must be change first, as references must be unique). It will now be possible to edit any field for the duplicated PI.

Support Issues Addressed

- (127) Organisation Performance Overview, organisation titles over 50 characters in length caused report generation to fail.
- (129) Performance target titles were truncated to 50 characters.
- (135, ticket 153) & character in measurer or validator comments caused group report generation to fail.
- (136) Returning to control panel from measurement / action plan task screens routed to 'all users' control panel for certain users.

Known Issues And Omissions

- (141) Date picker field not working on measurement edit page. In the new equation builder measurement creation page a new type of date control has been used (after some users have experienced issues with the current date picker control used). This control does not behave correctly on the hosting server. A workaround is to type the desired start date directly into the relevant text field (in format dd-mmm-yyyy). This issue will be resolved in a future release.
- (142) Equation builder, equation textbox is editable. This field is for information only and should not be editable. This issue will be resolved in the next system release.
- Equation builder, overnight processes for evaluating performance data based on equations has not yet completed final testing. This is a standalone component that does not affect the definition of equations and entry of measurements, thus it has not been deemed necessary to delay the release of version 3.0. The overnight process will be released when final testing has been completed, this will be transparent to users.
- Escalation notifications. The overnight process to notify line managers when a subordinate has significantly overdue measurement tasks has not yet completed testing. This is a standalone component that does not affect the operation of the system. The escalation component will be released when final testing has been completed, this release will be transparent to users.
- Parameter definition/edit page entitled 'Measurement Edit'. This will be rectified in the next release of the system.