

System Release Note: Version 4.1

System Version: 4.1 Build 2
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Contents

Release Introduction	3
New Functionality	3
Enhancements	10
Known Issues Addressed	10
Help File Changes	10

Release Introduction

This document details the changes introduced to the Escendency System as a result of the release of version 4.1 of the system software. Release 4.1 is the first of a series of releases that will lead up to Release 5.0 that will see the final elimination of all top ranking and previously scheduled but not completed system issues brought up by users and Escendency.

This document is split into four parts: 1. New Functionality, 2. Enhancements, 3. Known Issues Addressed and 4. Help File Changes that cover improvements in the Escendency system such as action planning workflow and data tags that were not part of any formal release and so have not been covered in previous system release notes.

1. New Functionality

1.1: Strategy map searching.

This resolves JUDI 204: Search strategy map for measurable strat map item and / or target location and JUDI 556: Strategy map: search option stop gap - add 'expand all' + (as in CPO)

The new strategy map window now has a search function and also a full tree or tier view option (figure 1).



Figure 1: Alt tags on the new strategy map search and view functionality.

Clicking on the search icon brings up a search field and results on pressing the search button (figure 2).

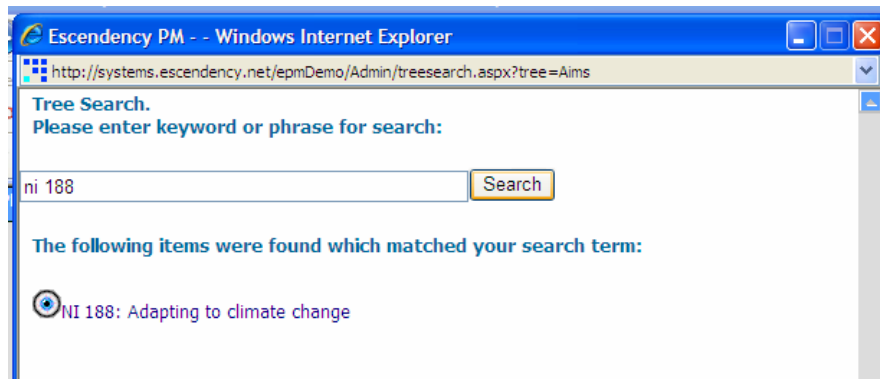


Figure 2: Example strategy map search result.

Clicking on the returned item will open the strategy map at that location (figure 3.1).

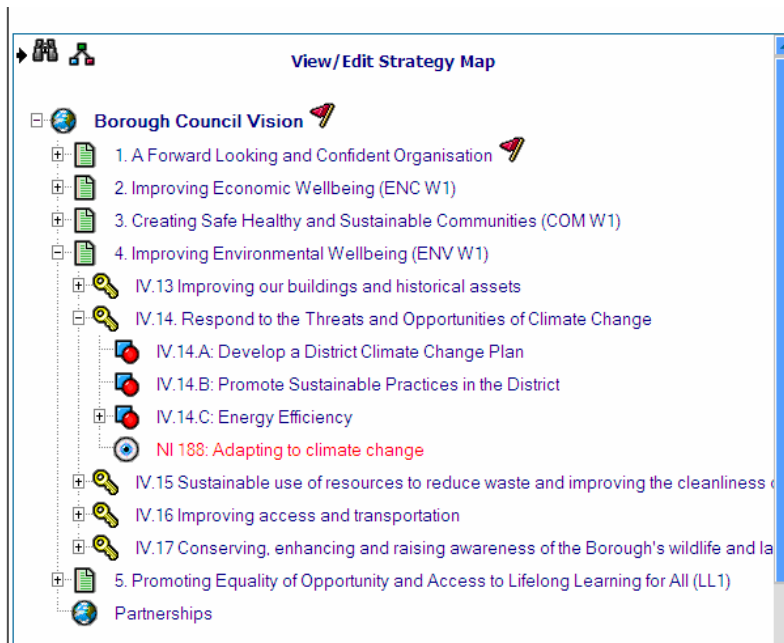


Figure 3.1: Full tree view of strategy map search result.

If the toggle full tree/tier view button is clicked the results show only that node expanded (figure 3.2). The default status of the toggle full tree/tier view is full tree.



Figure 3.2: Tier view of strategy map search result.

1.2: Comment Editing.

This resolves JUDI 551: Allow measurement/validation comment edit facility to user (and audit trail it).


Measurer and validator comments can be edited from the Edit Measurement option from the Add/View target window (accessed by right clicking on a strategy map item with a target) and clicking on the icon  (figure 4.1 and 4.2).

Figure 4.1: Edit Measurement window accessed from Add/View target option on a measurable strategy map item showing Edit measurer/validator comment speech bubbles. Clicking on these accesses the comment edit window (figure 4.2).

Figure 4.2: Edit comment window example. Comments made here generate an audit trail (user name, change made and date/time change is made).

1.3: Sort Group report by date.

This resolves JUDI 223: Group reports, allow run by date: e.g. similar to historic CPO.

The By Date option can be see in the group report tabs (figure 5.1 and 5.2).

Figure 5.1: By Date option in example group report. Clicking on this option accesses a date filter (figure 5.2).

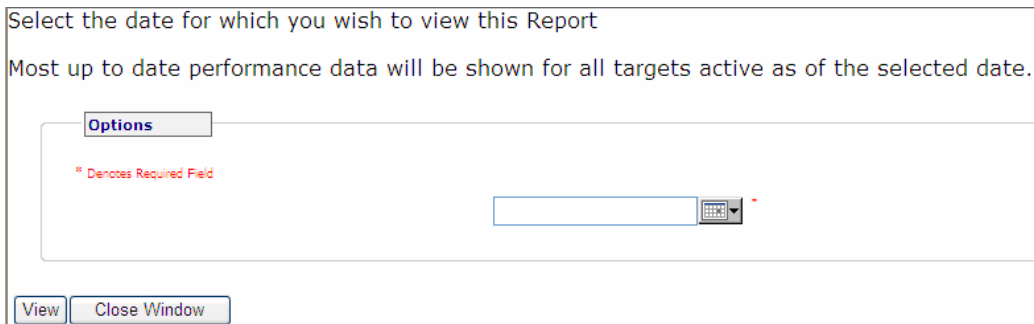


Figure 5.2: Date Filter for group reports.

1.4: Strategy Map Data Tag and Report.


This option has been beta tested by Cedar House School since 3.4 and is now being released to all users in the online documentation.

Overview:

Data tags are a way to add qualitative data and information to strategy map items and also performance targets. They are particularly useful for bridging the gap between assessment reports and quantitative performance reports where the latter are linked to assessments (e.g. targets that require completion of checklists), school reports on individual students, reporting on groups and/or departments/services within an organisation, or linking reports at a service level to a corporate level for example where a corporate target comprises the results of performance targets for departments within that organisation (e.g. departments in schools, schools in colleges and services within local councils).

Tags are set up in the Data Tag tool option and added to relevant parts of the strategy map. Data tags, if attached, are reported in the Strategy Map Search by Tag report and in performance target reports.

Setting up Data Tags:

On new systems, there are no preloaded tags. Users with the relevant access levels can create as many types of tags as required. Access the system tools palette from the  button in the control panel (or from the toggle menu option) and click on the Tags option (figure 6).

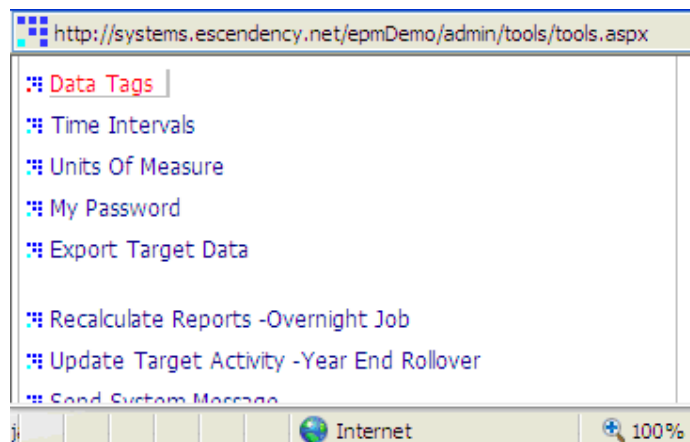


Figure 6: Data Tags option in tools menu.

From the list of data tags (figure 7) either select one to edit or click Add to add a new data tag (note: new systems have no default data tags, these have to be set up by the organisation).

Tags

Displaying Records 1-8 of 8 Show Records Per Page

Name	Status	Edit	Delete?
Assessment Project Related to this Performance Indicator	Open		
Auditor Name	Open		
Audit Date	Open		
Planning Applications: Major	Open		
Planning Applications: Minor	Open		
Planning Applications: Other	Open		
Budget Related to this Performance Target	Open		

Show Deleted, Suspended, Pending

Add

Figure 7: Example of a list of data tags.

There are three possible types of data tags, numeric, text and list. List items are separated by a comma (figure 8).

Edit Tags: NI 188: Adapting to climate change

NI 188: Climate Change Preparedness
 - Level Achieved

Assessment Project Related to this Performance Indicator

Auditor Name

Audit Date

Budget Related to this Performance Target

Figure 8: Example set up of a data tag using list option.

Attaching Data Tags to Performance Targets:

Data tags are added to strategy map items and are then reported to performance targets related to the map item. Locate the performance target in the strategy map and click on the data tag icon (figure 9) then enter data for the data tags relevant to that part of the map (figure 10).

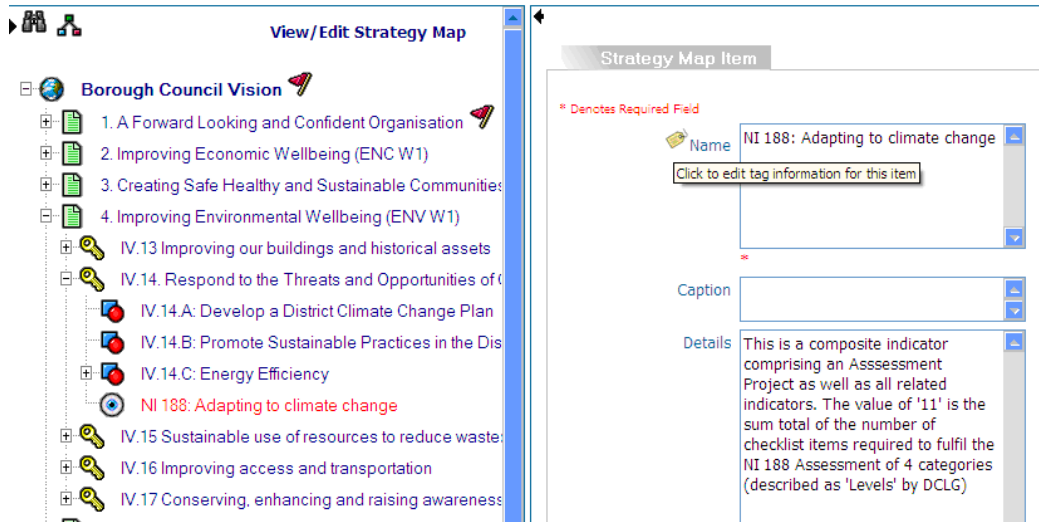


Figure 9: Accessing data tag attach option for strategy map item with an active performance target.

Edit Tags: NI 188: Adapting to climate change

NI 188: Climate Change Preparedness Level 1 ▼
 - Level Achieved

Assessment Project Related to this
Performance Indicator

NI 188: Climate Change Preparedness Assessment. ▼

Auditor Name

Audit Date

Budget Related to this
Performance Target

Figure 10: Examples of tag editing for a strategy map item with an active performance target.

Reporting Data Tags:

The data added to relevant data tags for a strategy map item will be displayed at the bottom of performance targets related to a particular strategy map item (figure 11) or in the Strategy Map Search by Tag report (figure 12.1 and 12.2).

Related Data Tags

Strategy Map Item
NI 188: Climate Change Preparedness - Level Achieved: Level 1
Assessment Project Related to this Performance Indicator: NI 188: Climate Change Preparedness Assessment.
Budget Related to this Performance Target: 750000

Performance Indicator

Report Generated: 07 Jul 2008 14:55:03
 Report Generated By: SysAdmin

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Figure 6: Base of a performance graph showing related Data Tag information.

Tag Value Search: Strategy map

Enter search values for up to three tags

Options

Budget Related to this Performance Target	=	<input type="text" value="70000"/>
--Select Tag--	=	<input type="text"/>
--Select Tag--	=	<input type="text"/>

Match All Tags
 Match Any Tags

Figure 7.1: Tag Value Search from Search Strategy Map by Tag in Reports tab.

Strategy Map Overview By Tag

Options

Show Contributions Show Quartile Info Show Navigation Icons

Borough Council Vision (100%)

- 1. A Forward Looking and Confident Organisation
 - IV.13 Improving our buildings and historical assets
 - IV.13.1 working in partnership to minimise new build on green field sites and ensure that new development has minimal environmental impacts and mainta
 - IV.13.2 working in partnership to protect, enhance and enjoy the Borough's unique architectural heritage and historical assets
 - IV.14. Respond to the Threats and Opportunities of Climate Change
 - IV.14.A: Develop a District Climate Change Plan
 - IV.14.B: Promote Sustainable Practices in the District
 - IV.14.C: Energy Efficiency
 - IV.14.1 Working in partnership to increase the proportion of energy produced from renewable resources
 - IV.14.2 Support new developments to address energy conservation issues
 - IV.14.2.1: To promote and develop effective energy control policies in Council owned buildings and in the wider community
 - IV.14.2.1a: Increase the average SAP rating of homes and businesses across the Borough
 - IV.14.2.1b: Increase the number of insulation measures installed
 - IV.14.2.1c: Increase the number of new boilers installed with 'A' Grade energy rating
 - IV.14.2.1d: Increase the number of home energy check forms completed by the EEAC
 - IV.14.2.1e: Increase the number of energy efficiency promotion events held in the Borough
 - IV.14.2.1f: Increase the number of EEAC conducted school visits
 - IV.14.3 Develop initiatives which increase awareness and understanding of energy efficiency
 - NI 188: Adapting to climate change
- V.18 Learning and skills development
 - V.18.1 working with Partners to maximise access to opportunities for learning and development and extend the range of further and higher education
 - V.18.2 working with Partners to ensure that they are aware of the needs of the community and that provision is targeted where shortages occur

Report Generated: 16 Jul 2008 10:22:48
 Report Generated By: SysAdmin

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Figure 7.2: Example Strategy Map Overview by Tag report.

2. Enhancements

In all the system windows the second scroll bar has been removed making within page navigation easier. This is a part resolution of JUDI 482 Action plan tab doesn't have scroll bar for large number of actions but also improves overall look and feel of the system.

3. Known Issues Addressed

JUDI 630: Assessment module: assessor defaulting as validator despite validator assigned elsewhere FIXED

JUDI 629: Assessment module: Duplicate tasks showing (baseline and assessment) FIXED

JUDI 627: Assessment module: Cancel buttons should be relabeled 'Exit'. PENDING

JUDI 608 Assessment module category task completion: labels not showing FIXED

4. Help File Changes

New page on Data Tags can be accessed from the context help online, the glossary, help index or directly online at: http://help.escendency.net/tags_help.html.

Action plan help has been simplified and updated moving focus to the dashboard action plan graphic and action plan summary report.

Strategy map help has been updated to include the new search and tree view options.

Report help has been updated to include new reports but also all available videos on the reports.

Videos both for training and demonstration have been added to the online help.