



RELEASE NOTES

Performance Manager 5.0.5

Release Date: October 5, 2015

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Introduction

The Performance Manager 5.0.5 release delivers enhancements to the Document Sign-off feature, the ability to view employee enrollments while performing appraisals, and impersonation for clients with integrated Performance Manager and NetLearning solutions.

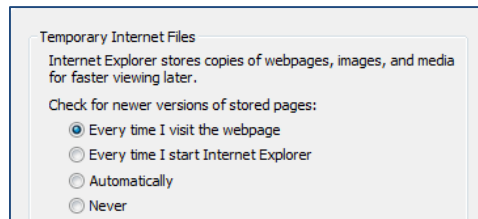
Appraisal reports have also received updates to provide more granular scoring data, and the online help system was overhauled to offer an improved interface and increased functionality.

System Requirements

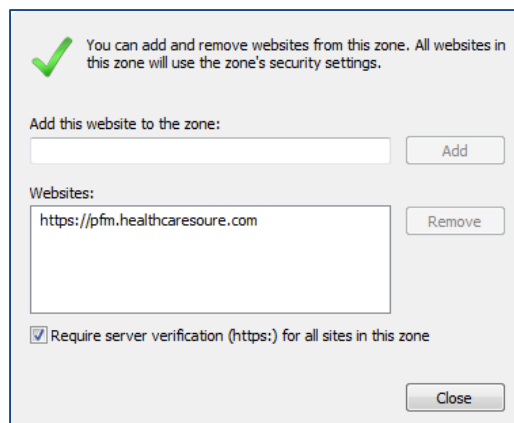
The following system specifications are the recommended minimum requirements for using Performance Manager. HealthcareSource is constantly working to expand these minimum specifications to include additional systems and browsers to ensure our customers are able to access Performance Manager from a wide range of computer setups.

Browsers: Internet Explorer 8.0 (not in Compatibility Mode)
 Internet Explorer 9.0 (not in Compatibility Mode)
 Safari 5+
 Chrome 16+
 Firefox 10+

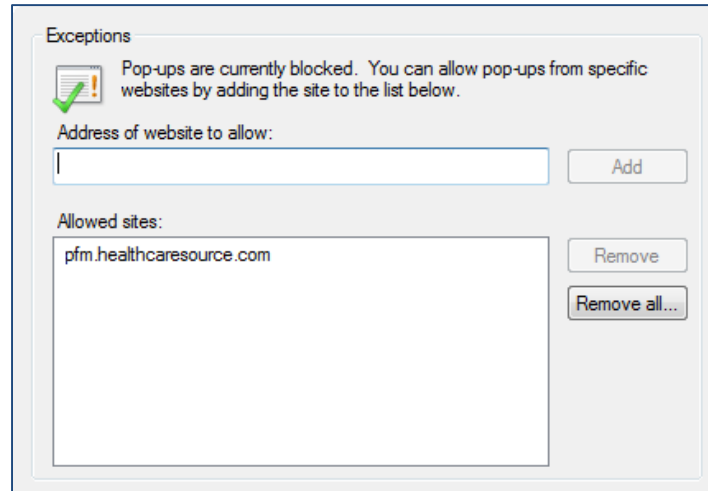
For security reasons, on shared machines you should ensure Internet Explorer is checking for a new version of the webpage with every visit. The *Every visit to the page* option should be checked under **Temporary Internet Files** settings (found on the **General** tab).



Under **Trusted Sites**, enter *pfm.healthcaresource.com* to ensure full functionality.



Under the **Privacy** setting you will have an option to adjust your **Pop-up Blocker Settings**. Make an allowance for *pfm.healthcaresource.com* by entering the web address in the field **Address of Web site to allow** and clicking **Add**.



Release Details

The enhancements listed below for Performance Manager are controlled by system-wide permission settings. Not all users will have access to the functionality as described.

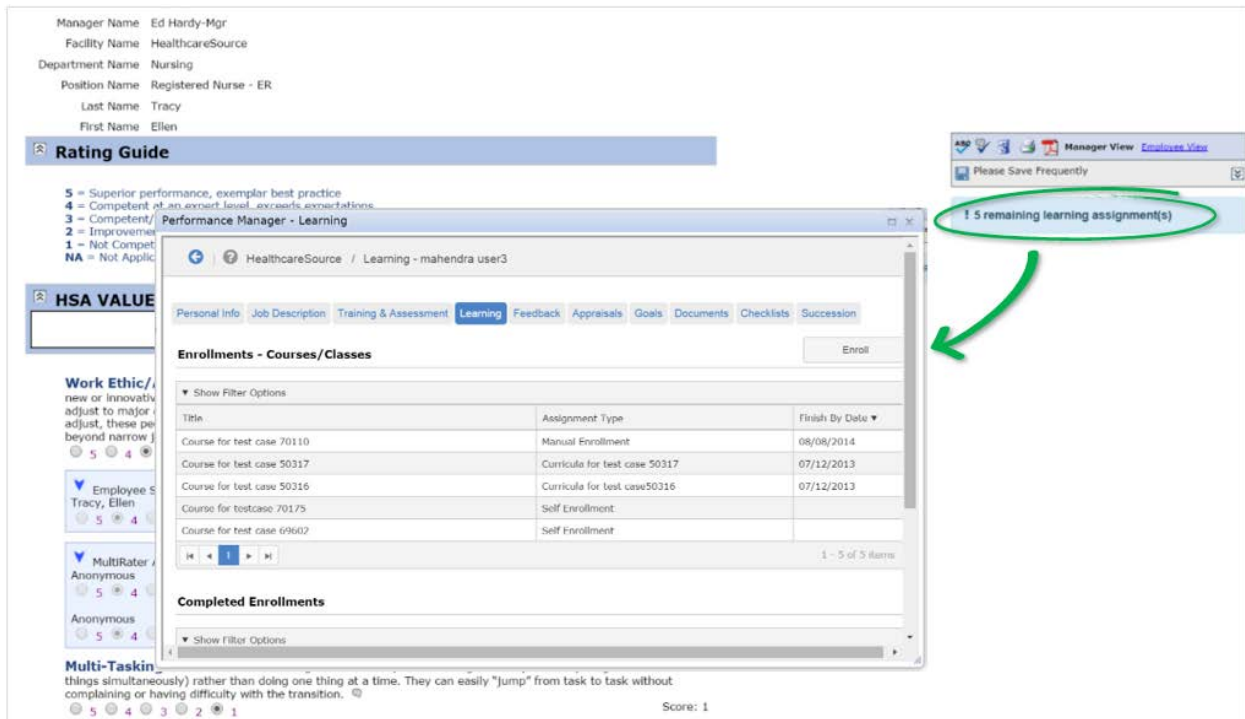
Enhancements – Integrations

Item 1: Enrollments on appraisals

Ref# 101360

For integrated clients, managers performing appraisals for employees are now able to view the number of learning enrollments yet to be completed by the employee directly from the appraisal page in Performance Manager. This allows managers to view enrollment information without having to navigate away from the appraisal.

A new notification area has been added under the standard toolbox on the right side of the appraisal page. This area displays the number of outstanding course/class enrollments for the employee. Clicking the notification opens the employee file window and displays the Learning tab, where additional details about the outstanding items can be reviewed.



The screenshot shows the Performance Manager interface. On the left, there is a 'Rating Guide' section with a scale from 1 to 5. The main area displays the 'Performance Manager - Learning' window for employee Tracy, Ellen. A notification bubble in the top right corner indicates '1 5 remaining learning assignment(s)'. A green arrow points from this notification to the 'Learning' tab in the employee file window, which displays a table of enrollments.

Title	Assignment Type	Finish By Date
Course for test case 70110	Manual Enrollment	08/08/2014
Course for test case 50317	Curricula for test case 50317	07/12/2013
Course for test case 50316	Curricula for test case 50316	07/12/2013
Course for test case 70175	Self Enrollment	
Course for test case 69602	Self Enrollment	

Item 2: Impersonating in integrated solutions

Ref# 103770

Impersonation is now available for all clients with integrated Performance Manager and NetLearning solutions.

Users with necessary permissions to the Impersonation feature can view integrated pages while impersonating a user. This includes viewing learning opportunities, learning assignments, and reports.

Clients with integrated systems can continue to use the same Performance Manager URL they have today (<https://pfm.healthcaresource.com/performance/login.aspx?c=clientname>). The system automatically redirects to a new URL (<http://login.healthcaresource.com/clientname/logon>) to log in and access the integrated solution.

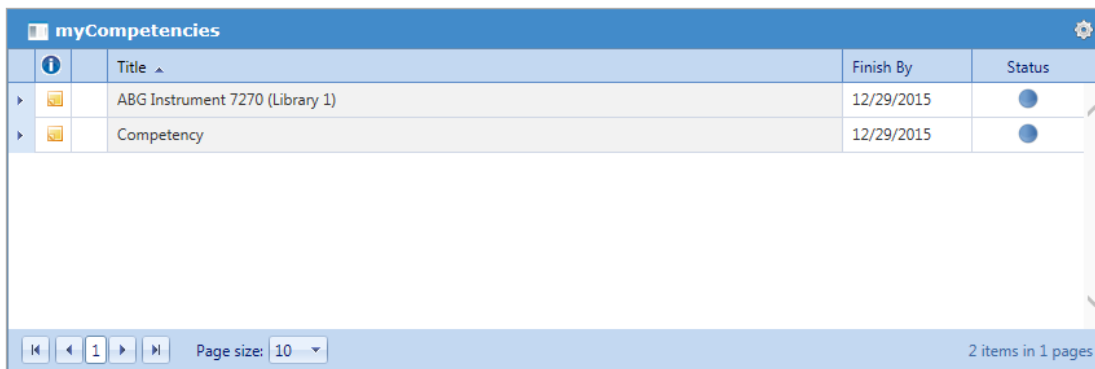
Note: Participating clients need to whitelist the new integrated URL.

Item 3: myCompetencies widget

Ref# 102528

The myCompetencies widget is now available in Performance Manager, allowing learners to access their assigned competencies.

The myCompetencies widget is found on the *Learning* page under the **My Folder** menu. This feature is available to clients who are integrated and have licensed NetCompetency functionality.



Enhancements

Item 1: Document sign-off notifications

Ref# 101194

Several new notifications have been added to Performance Manager to support the Document Sign-off feature delivered in the 5.0.4 release.

The *Message Center* page under **Admin** contains a new Documents category.

The new notifications under this category include:

- Notification when Task Created
- Reminder on Task Due Date
- Reminder every date after Task Due Date
- Reminder # days before due
- Reminder # days after due

Category	Contact	
▶ Appraisals		
▶ Checklists		
▶ Feedback		
▶ Goals		
▶ Job Descriptions		
▶ License and Certification		
▶ 360 Reviews		
▼ Documents		
Message Event	<input type="checkbox"/> Assigned To	<input type="checkbox"/> Manager of Assigned To
Notification when Task Created	<input type="checkbox"/>	<input type="checkbox"/>
Reminder on Task Due Date	<input type="checkbox"/>	<input type="checkbox"/>
Reminder every day after Task Due Date	<input type="checkbox"/>	<input type="checkbox"/>
Reminder <input type="text"/> days before due (separate multiple by comma)	<input type="checkbox"/>	<input type="checkbox"/>
Reminder <input type="text"/> days after due (separate multiple by comma)	<input type="checkbox"/>	<input type="checkbox"/>

Item 2: Reporting on appraisal scores

Ref# 101426

Custom reports have been updated to include both section scores and averages for self, multi rater and manager appraisals.

Note: *These fields only appear for appraisals completed from release day forward. Scores cannot be calculated retrospectively.*

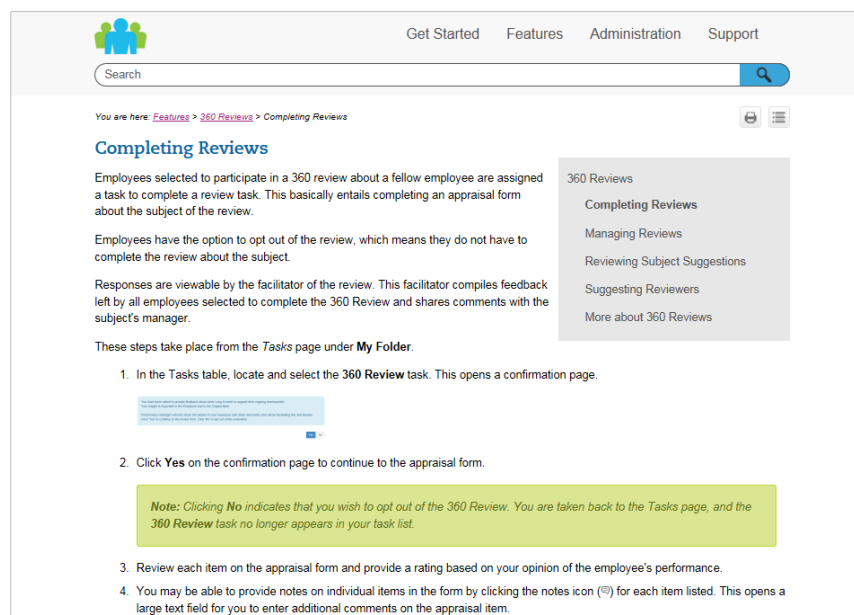
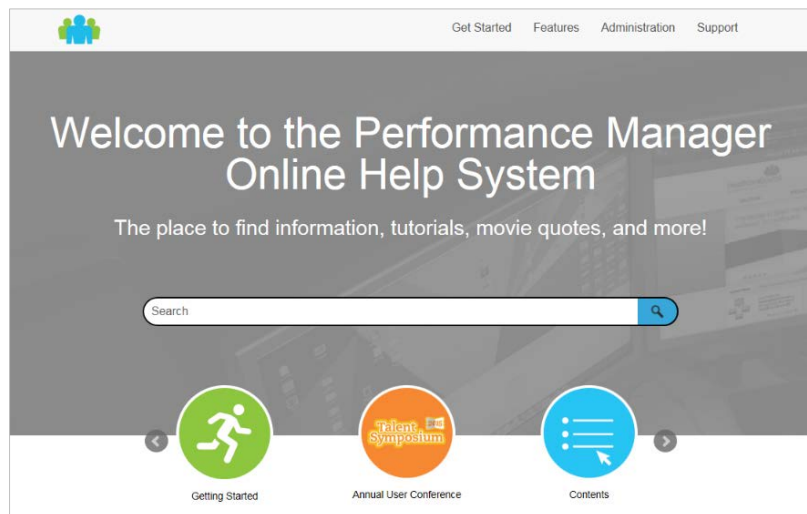
Item 3: User assistance

Ref# 101769

The online help system for Performance Manager has been updated to provide greater search functionality, compatibility with mobile devices, and a cleaner, more modern interface.

Benefits of the updated system include:

- Search available in header of every page
- Context-sensitive side menus displaying only related content
- Navigation bar with drop-down menus, similar to the navigation found in Performance Manager
- Responsive design automatically reformats to device and/or screen size
- Provides more robust platform for delivering additional features as solutions evolve



Additional items

The table below lists additional improvements. These items include changes or modifications that may or may not be actively displayed to end users.

Ref#	Page or Area	Description
97751	Goals	An information icon now appears with the Aligned to field to help define the difference between pillars and organizational goals when adding a goal in a goal task.
99979	Goals	A message is displayed to users when the 500-character limit for a goal Name is exceeded.
99962	Appraisal tasks	When an administrator updates a due date for a manager appraisal, the due date is now updated for any related tasks.
51240, 99362	Reports	The Feed Detail and 9 Box Succession Planning reports have been updated to use the latest reporting interface.
(multiple)	User assistance	Several instances of inline help have been added throughout Performance Manager to assist users.

Bug fixes

Ref#	Page or Area	Description
99983	Goals	Users dismissing certain Goals tasks were receiving incorrect confirmation messages. This has been resolved.