

Results Software™ Release Notes

February 26, 2020
Inactive Measure Management
Move / Clone Measures

The Results Management System™ and Software Enterprise Performance Management



February 2020

Announcing our February Release

We are excited to share with you our latest development work in support of Results Software. This release is focused on two significant improvements to managing inactive measures and the flexibility to clone measures and move them to different maps or to a different location on a map.

Inactive Measures

Often measures are retired as they have served their purpose or need to be refined. Results has improved the user experience for this functionality by adding an indicator when a measure has been flipped to inactive.

The new symbol is:



It will appear in a list view and chart view of a measure:



Figure 1: List of measures under Manage Map with the new inactive measure symbol.

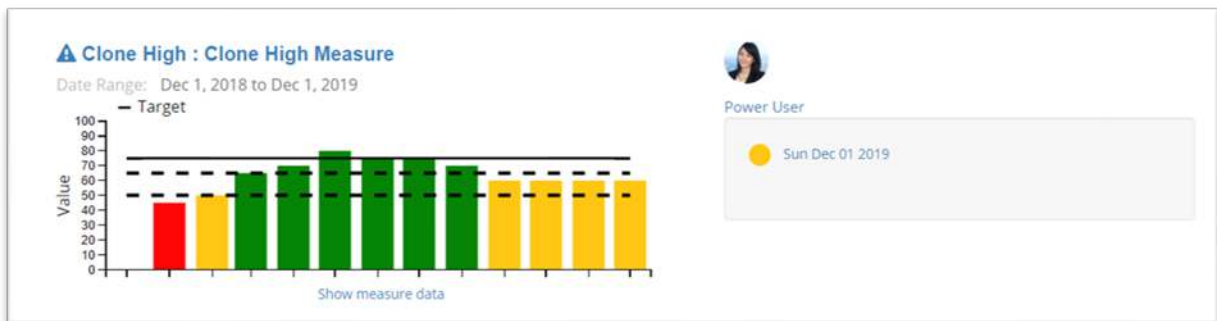


Figure 2: Chart view when you do a #inactive measure search with the inactive symbol.

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We also added the functionality to locate all inactive maps quickly by using the top-level search. To generate a complete list of your inactive measures, type in “#inactive”. If you only type in the word inactive, the symbol will search the database for measures and files with the word inactive in the name. To search on the inactive field, be sure to include the # (hashtag) symbol.

Assuming you have inactive measures, you will get a third tab with the list of all inactive measures. You can view the inactive measures in List or Chart view. You will only be allowed to view the charts in small chart view.

Important TIP: You are not allowed to edit, delete or add values to any inactive measure. If an inactive measure needs to be reactivated, it needs to be done by the administrator or the assigned power user for that map under Manage Map.

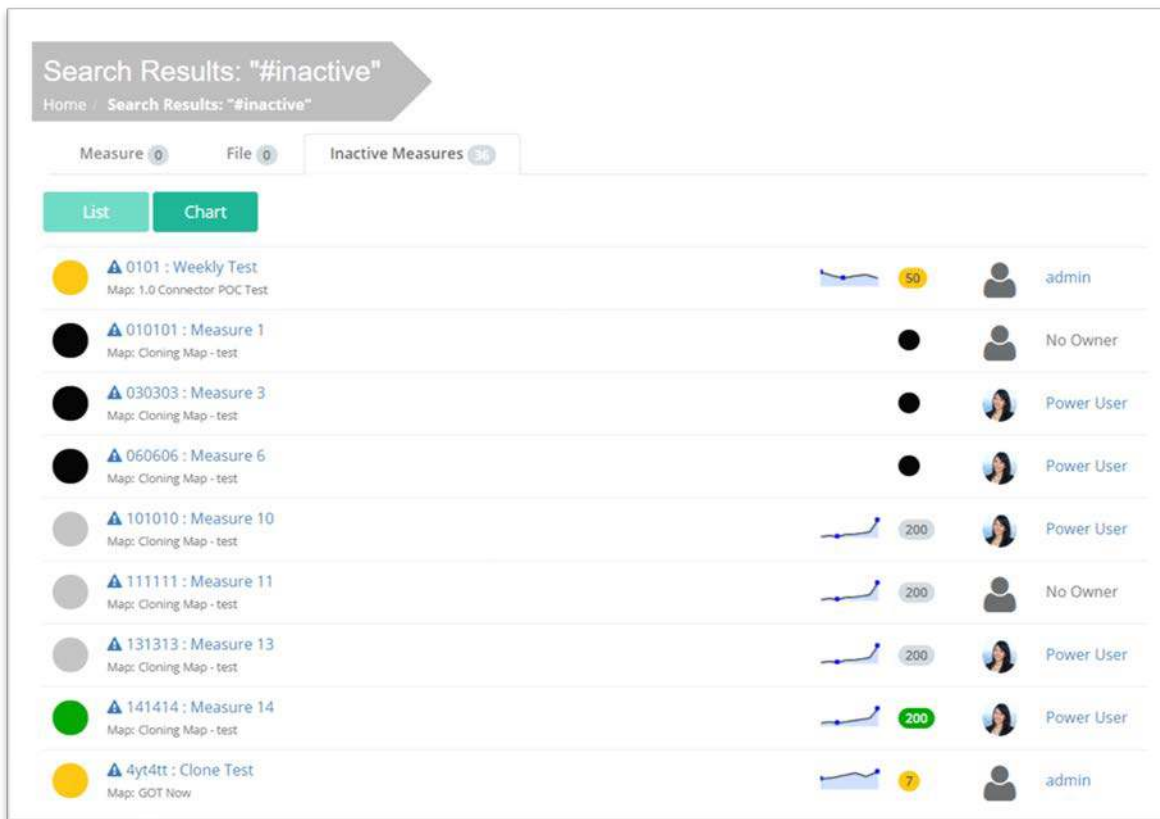
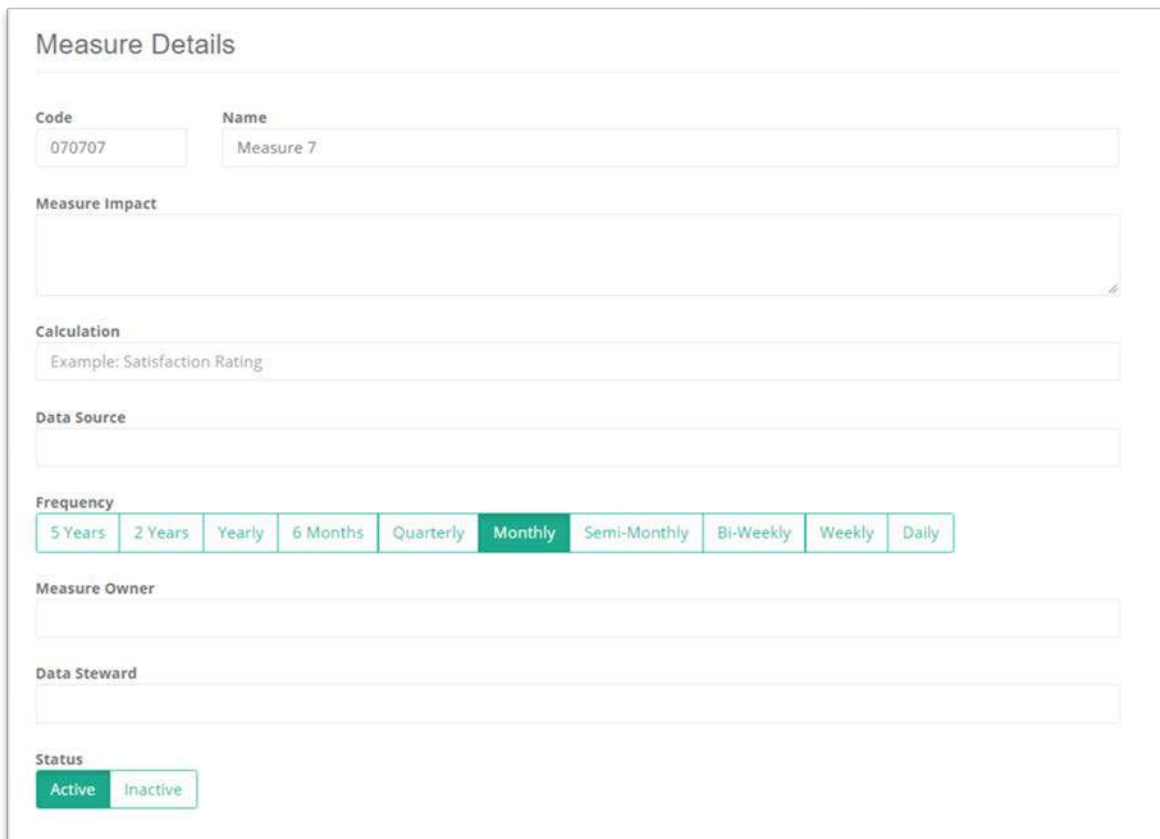


Figure 3: Use #inactive at the top-level search to see all of your inactive measures.

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How to flip a measure to Inactive?

To flip (aka: switch) a measure to inactive, find the measure and select Edit Measure. In the middle of the screen you will see the field: Active/Inactive. Select Inactive and save your change.



The screenshot shows a 'Measure Details' form with the following fields and options:

- Code:** 070707
- Name:** Measure 7
- Measure Impact:** (Empty text area)
- Calculation:** Example: Satisfaction Rating
- Data Source:** (Empty text area)
- Frequency:** A row of buttons: 5 Years, 2 Years, Yearly, 6 Months, Quarterly, **Monthly** (highlighted), Semi-Monthly, Bi-Weekly, Weekly, Daily
- Measure Owner:** (Empty text area)
- Data Steward:** (Empty text area)
- Status:** A row of buttons: **Active** (highlighted), Inactive

Figure 4: In the edit measure screen, select inactive under status.

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If the measure is in any “Group”, you will see a notification after hitting the save button. Inactive measures are not allowed to be part of a “Group.”

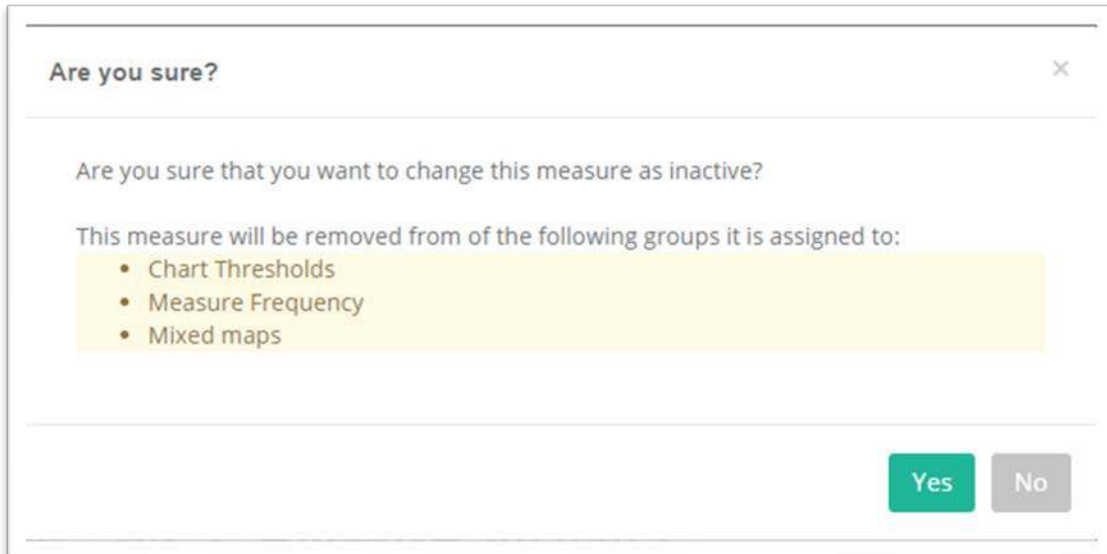


Figure 5: The system notifies you of any group relationships when inactivating measures. If you select yes, the measure will be removed from the listed groups.

Results also prevents you from assigning inactive measures to any new groups, projects or presentation. If a measure already has a relationship to a project or presentation, it will be maintained for historical purposes only.

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Project View with Inactive Measures

Project Summary

Owner: admin
Priority: Medium
Status: Not Started
Team: admin
Start Date: 5/1/2019
End Date: 5/31/2019

Related Maps

Cloning Map - test

Related Measures

- ▲ Clone High: Clone High Measure
Map: Cloning Map - test
- Clone High 2: Clone High 2
Map: Cloning Map - test
- 090909: Measure 9
Map: Cloning Map - test
- 121212: Measure 12
Map: Cloning Map - test
- ▲ 111111: Measure 11
Map: Cloning Map - test

Figure 6: Inactive measures cannot be assigned to a project, but a project measure can become inactive during or after the project is complete. The relationship maintains and the inactive indicator appears.

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Presentations and Inactive Measures

The same rules apply to inactive measures and presentations. Only active measures can be selected for new presentations. If a measure is flipped to inactive during or after the presentation is complete, the inactive symbol will appear. Edits to the page will break the relationship to that measure. The indicator symbol is listed next to each box to indicate the updated status of the measure.

Page Edit - Click a section to edit

Home Presentations Inactive Measure test (Edit) / Inactive measure (Edit) Back Preview PDF

Inactive measure

	12/01/19	01/01/20	02/01/20
Yellow Range	30 - 65	30 - 65	30 - 65
Target	60	60	60
Green			24
Yellow			
Red	95	100	

This is a test

Figure 7: Presentation where a measure was flipped to inactive after the presentation was completed. The measure information is retained but will be lost if the page is refreshed.

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Cloning/Moving of Measures

We are pleased to add the functionality of cloning and moving measures. You can clone and move across maps or within a map.

Cloning Process:

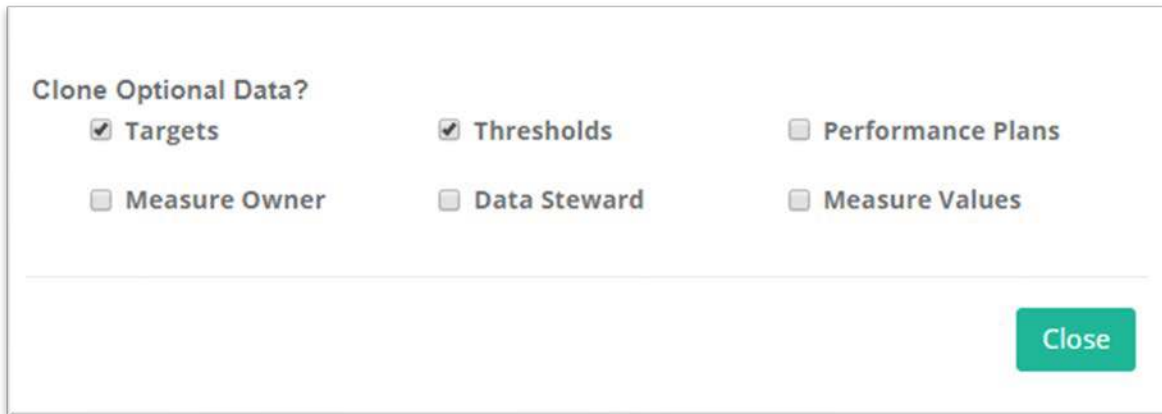
Step 1: To begin the cloning function, go to the desired map location and enter in the measure code, measure name, and check the clone box.



The screenshot shows a web interface titled "Outcome Measures". Below the title is a section labeled "Add Outcome Measure". This section contains two input fields: "Code" with the value "OM B - 1" and "Name" with the value "Feb Release". To the right of these fields is a green button with a white plus sign and the text "+ Add". Below the "+ Add" button is a checkbox labeled "Clone" which is checked.

Figure 8: Click the clone box and then select add.

Step 2: Select which of the optional fields you wish to clone. All other measure fields are automatically cloned such as chart type and measure type.



The screenshot shows a dialog box titled "Clone Optional Data?". It contains six checkboxes arranged in two rows. The first row has "Targets" (checked), "Thresholds" (checked), and "Performance Plans" (unchecked). The second row has "Measure Owner" (unchecked), "Data Steward" (unchecked), and "Measure Values" (unchecked). At the bottom right of the dialog box is a green button with the text "Close".

Figure 9: Choose the optional fields you wish to clone.

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Step 3: Select the measure you wish to clone by expanding the Select Measure to Clone Dialogue box until you find the measure you wish to clone. Once you locate the measure, click Clone. The measure will now be added.

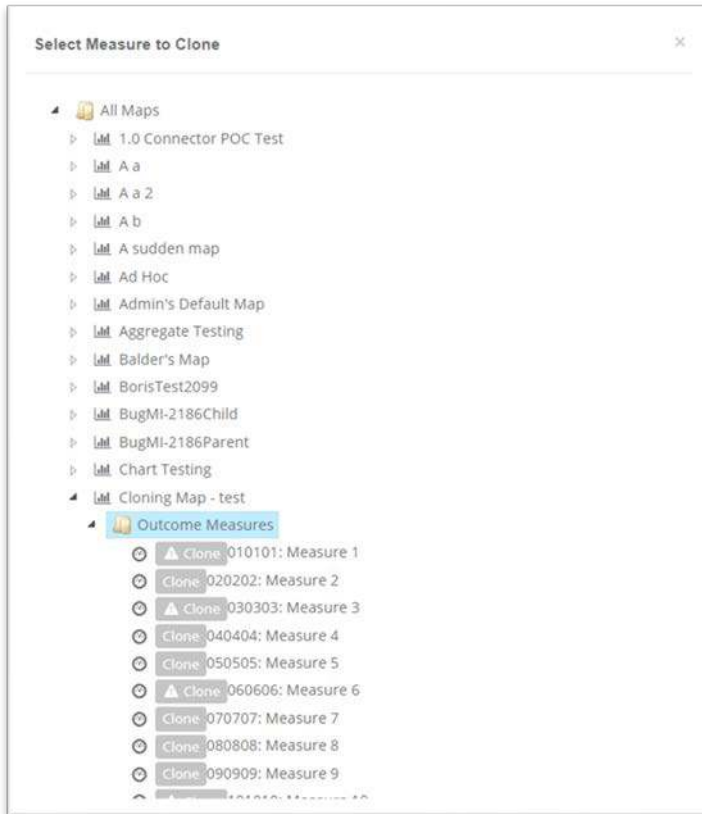


Figure 9: Locate the measure you wish to clone.

Important Note:

1. Aggregate measures are not eligible to clone. If you are cloning child measures for a future aggregate measure relationship, we recommend you clone all parts before establishing the aggregate relationship. Once the parent and child are connected, they will no longer be eligible to clone.
2. Power Users are only allowed to clone measures associated with their assigned map.

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Moving Measures

Results allows you to move a measure to a different location within one map or across maps. Aggregate measures are not eligible to move.

Step 1: Under Admin – Manage Maps, find the measure you wish to move and select the move button



Figure 10: Find the measure you want to move and select the move button.

Step 2: Open the Select Destination Dialogue Box and find the destination location. Click on Here.



Figure 11: Open the select destination box and find the location you want and select here.

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Step 3: Verify the measure was moved by waiting for the notification message “Successfully moved.” which will appear at the top of the measure list.



Figure 12: Verification notification will appear at the top of the measure list.

Getting help

If you are interested in having a webinar training on this new functionality for yourself or your power users, please reach out to **Chris Barker** (cbarker@massingenuity.com), Results Software Product Manager to schedule. Please also feel free to call Chris at 971-409-6680 with any questions you may have.