



Thank you to the several Plan-It users who submitted ideas for improvement this year.

If you asked for a change and it is not represented in this list of enhancements, please remember that not all changes are feasible given development resources and the needs of the overall user population. We welcome your continued interest in future enhancements and could discuss your particular needs on an individual basis.

VERSION 5.4 Enhancements

(Listed are the major changes made to Plan-It in Version 5.4)

LOGON SCREEN/OTHER

- Changed copyright period, version #
- Created new “Updater_V5R4.mdb” file that updates your data file to the new version
- Ensured program boots up successfully with all versions of Access (2007, 2010 or 2013)
- Updated Plan-It User’s Guide

ADMINISTRATION TAB

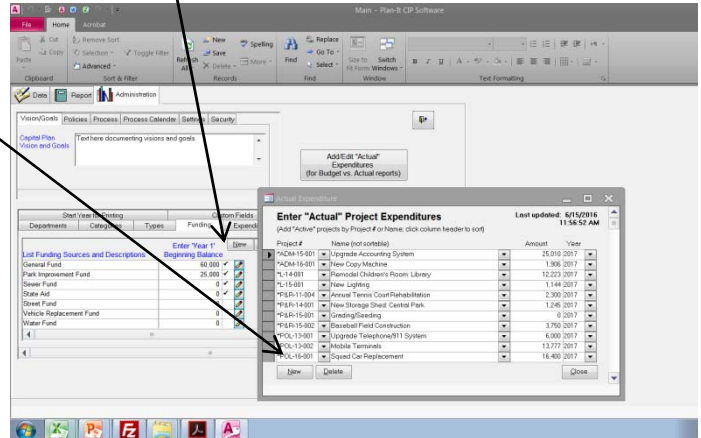
- Added ability to enter description of each funding source, for use with new “Funding Source Descriptions” report. Click pencil icon, then enter source description in window (checkmark appears when the source has a description).
- Created ability to add ‘Actual’ amounts directly via a screen (for use with “Budget vs. Actual” reports). For many years, Plan-It has had “Budget vs. Actual” reports but the ‘Actual’ amounts were difficult to input. Now you can list ‘Active’ projects (by # or name) and add amounts easily, making this functionality much more usable.

DATA TAB

- None.

REPORTS TAB

- NEW - “Funding Source Descriptions”
- NEW - “Projects & Expenditure Types by Dept”
- NEW - “Projects & Sources by Dept #2 (10 Yr)”
- NEW - “Projects & Sources by Dept #2 (w/Desc)”
- Added ability to turn off “Priority” in all reports (column headers and priority values go away). Do so by removing checkmark in ‘Page Options’ tab list.
- Allow for multiple “Contact” selections in report ‘Criteria #2’ tab
- Fixed issue with exports where projects assigned to custom ‘Status’ entries were being converted to “Active”
- Ensured that all reports respond correctly to all criteria selections (“Funding Sources by Dept” report was not responding to ‘Status’ criteria selections)
- Ensured that ‘Add Graphic’ and ‘Add Document’ buttons function in all Access 2013 versions
- New reports have a double-asterisk (**) next to their names



Contact us if you have any questions about this upgrade!

We can also go over the new version in a web seminar – a good way to see all these changes and get your questions answered.