



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 5.1 Enhancements

(Listed are the major changes made to Plan-It in Version 5.1)

LOGON SCREEN/OTHER

- Changed copyright period, version #
- Clarified screen language on “License_Renew.mdb” file (the one that adds a year) to clarify that the data file name (“Si_dat.mdb”) should not be included in path name
- Changed contact emails in all message windows
- Created new “Updater_V5R1.mdb” file that updates your data file to the new version

ADMINISTRATION TAB

- No change

DATA TAB

- Altered security to ensure that users may not add new projects to departments when they do not have edit rights

REPORTS TAB

- NEW report - “Projects by Department - All \$”
- NEW report - “Text: Budget Impact”
- NEW report - “Text: Summaries” (the “Budget Impact” text can be turned off under the Page Options tab)
- CHANGED report - “Sources and Department Summary”
 - reversed section order so Department data is above Source data
 - renamed report to “Departments and Sources Summary”
- Added “Criteria #4” tab to allow you to select or deselect individual projects to be included in report.
 - use for printing Project Detail reports for just a few projects
 - use to include only a subset of projects on other reports
 - use to do ‘What If’ cases
- On 5-year and 10-year “Sources & Uses – Detail” reports...
 - added project numbers where missing
 - changed pagination so if multiple Funding Sources are run, each will begin on a new page
 - changed sections to sort elements consistently from one funding source to the next (so all “Revenue”, “Other Fund Sources” and “Other Uses” sections sort alphabetically regardless of which Funding Source is being printed)
- Edited reports so long department names no longer truncate in “Total” lines

Call 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.