



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 5.5 Enhancements

(Listed are the major changes made to Plan-It in Version 5.5)

LOGON SCREEN/PROGRAM-WIDE

- Changed copyright period, version #
- Created new "Updater_V5R5.mdb" file that updates your data file to the new version
- Ensured program boots up successfully with all versions of Access (2007, 2010, 2013 or 2016)
- Updated Plan-It User's Guide

ADMINISTRATION TAB

- Added color to data entry fields to enhance usability
- Enhanced management of "Contact" list: added 'Replace', 'New' and 'Delete' options; can only add new "Contact" in Admin tab now
- Added "Glossary" tab for entering text for "Glossary" report

DATA TAB

- Added color to several fields to enhance usability
- Redesigned List screen to better display search and filtering information and selection buttons
- On List screen, replaced "Type" column with "Category"
- On List screen, added ability to set a default "Status" filter (e.g., if choose "All Projects", list will stay that way); may filter for other "Status" values but then "Restore" back to your preferred filter
- Locked down "Contact" list so users can only pick from options set in the Administration tab
- Added ability to turn off Budget Impact data for individual projects (so Budget Impact text box and schedule will not print on Project Detail reports for that project only); found in "Print Options" tab on Project Detail screen.
- When entering Project Detail screen, changed default landing field to "Expenditures" instead of "Description"

REPORTS TAB

- NEW - Project Detail - Small Graphic #3 (All yr)
- NEW - Projects & Sources by Dept #1 (All yr)
- NEW - Projects & Sources by Category
- NEW - Dept Expenditures by Source
- NEW - Glossary
- New reports have a double-asterisk (**) next to their names
- Tightened project spacing on several reports so more projects fit on one page
- Ensured all reports respond correctly to all criteria selections ("Expenditures and Sources Summary" report was not responding to most criteria selections)
- Ensured that Budget Impact data showed on select reports if "Include Prior/Future Dollars" is turned off
- Adjusted column header and dollar amount spacings as needed to enhance appearance of reports

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.