



**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 5.7 Enhancements

*(Listed are the major changes made to Plan-It in Version 5.7)*

## LOGON SCREEN/PROGRAM-WIDE

- Changed copyright period, version #
- Created new “Updater\_V5R7.mdb” file that updates your data file to the new version
- Ensured program boots up successfully with all versions of Access (2007,2010,2013,2016,Office365)
- Updated Plan-It User’s Guide

## ADMINISTRATION TAB

- Enhanced ability to manage all project graphics. Click on new button “Manage Graphics” to bring up new window. Graphic files may be entered or edited directly from here rather than going into the project in the Data tab
- Removed ‘General Plan Consistency Score’ tab from Settings>>System Settings tab. Though removed due to low utilization, if it is something you miss, please contact us to restore the functionality
- Ensured that Funding Source definitions and Glossary term definitions cannot be edited if security for Admin tab is turned off

## DATA TAB

- When linking-in project graphics or documents (camera & paper icons), increased field size to accommodate long file path names
- Added ability to turn off ‘Total Project Cost’ for individual projects (added new checkbox in project data entry screen ‘Print Options’ tab)

## REPORTS TAB

- NEW – \*Proj & Sources by Dept #2 (w/Desc,1 Yr)
  - NEW – \*Projects by Funding Source (1 Yr)
  - NEW – \*Project Detail – Small Graphic #1 (6 Yr)
  - NEW – \*Sources and Uses – Summary (6 Yr)
  - Ensured “Projects by Category & Department” report includes projects that have a \$0 value in the 5-year period
  - Ensured summation in “Project Detail – Small Graphic #3” report’s “Future” column is correct
  - Ensured projects that only have dollars in years 6-10 show on “Project Detail – Small Graphic #3 (All Yr)” report
  - Removed ‘Future’ column from “Projects by Category & Dept” report. If it is something you miss, please contact us to restore the functionality
  - Added ‘All Current 10 Years’ radio button so can print “Projects by Year” reports for 10 years more quickly
- HINT: Use the keystroke ‘Control/Apostrophe’. Hold down the Ctrl key and hit the (‘) key that is left of Enter. This will copy down data from above the field you are currently in. This is very useful to speed data entry when adding expenditure, funding source or budget data. In other words, it copies down dollar amounts from the row above.

**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.**