



2021-04-09 PLAN-IT | PROJECT Release Notes

Features

Project History is now live. You are able to see your history data within the application and reports across all project object adds, edits, and deletes (inactivations/redactions); you are also able to define a "change note" for all history events (this is an optional feature that can be activated/deactivated at the project level). The history data goes back to February 27th, and all tables and reports default to a 30 day window.

History Tables

Within the item details page, you can see a History table that tracks the history records for the selected item. There is also a History tab for the project which tracks all history events for each project object (project, building, level, department, room, item). You also have quick options to filter on all adds, all edits, and all deletes (inactivations / redactions). In addition to the quick filters, you are able to filter on the following parameters:

- Transaction ID
- Object type
- Object name
- Object ID
- Object Location
- User (who made the change)
- Date Range
- Action
- Variance
- Change Note

All history tables are also exportable.

History Reporting

There is a new report section called "History" that contains the following seven (7) reports:

- ADU report
- Project History
- Building History
- Level History
- Department History
- Room History
- Item History

Each report is available in Excel output only, and has filters and columns particular to the object type report you run.

The reports share all of the same behaviors as reporting we currently have: filterable, searchable, shareable, customizable.

ADU Report

This report contains a record of all **ITEM** Adds, Updates, and Deletes (inactivations / redactions) within the project. It does not have a line item of all changes; it takes a snapshot of each item at the beginning of the selected date range and compares it to a snapshot at the end of the selected date range and shows the difference between the two.

Project Object History Reports

Unlike the ADU report, these reports show all changes made to the selected object type during the selected date range. There is a line item row for each change made (either by a user or an automated Attainia change). They are also not limited to just item reporting, but have a separate report for all project object types.

Bug Squashing Corner

- Resolved several issues with reporting:
 - Datasheet report header distorted items with notes
 - Datasheet Specifications rules were not applied correctly
 - Datasheet Report PDF generation added blank lines in the middle of an item list
 - The header content was overlapping the logo on some reports
 - The Budget Summary by Department/Funding Source report was not showing all expected values
 - Trade-Ins were missing from the Budget Summary report
 - Incorrect values were appearing on the Budget Summary report
 - There was some duplication of items on the Room By Room report
 - The Datasheet report was removing notes and markings from resources
 - Some PDF resources were doubling up on the Datasheet report
- Resolved several issues with tables and filters
 - Filtering by vendor was not working appropriately
 - Filtering by manufacturer was not working appropriately
- Item Advanced Bulk Edit would not save vendor changes
- Manufacturer would revert to TBD when adding a template to a room
- There was a typo in the Procurement section of the Item Edit page
- The “clear” box was not working when making multiple edits during Bulk Edit