



2021-05-28 PLAN-IT | PROJECT Release Notes

Features

We have released new and enhanced Project Budget related features to bring the PLAN-IT | PROJECT application closer to parity with 2.0:

- Point-in-Time enhancements
- Budget Summary reporting enhancements
- Additional Custom Budget fields

There are also numerous updates to the look and feel of the application, as well as enhancements to design functionality.

Lastly, we have addressed and resolved a number of outstanding issues related to bugs in the application.

Point-in-Time (PiT) Enhancements

We have made changes to how you can use points in time, as well as how they are captured, managed, and reported on. There are four areas of enhancement:

- PiT Variance
- PiT History
- PiT Approved vs Actual Comparison Report
- PiT Auto-capture on Stage Change



PiT Variance

We have added enhancements to the PiT feature in PLAN-IT to bring it in line with parity to the milestones feature in 2.0.

- You are now able to track budgetary changes from prior dates in your project to the current state.
- You are able to capture your project budgets at a specific point in time (past, current) so that you can report on both changes and variances to your project budget(s).
- You can also report on these variances at various stages as well as ad hoc to help make further planning decisions.
- Also introduces in-app, interactive graphical representations of these variances are shown for budgets and their PiT calculations.

PiT History

We have added the ability to view PiT data at the item detail. This enhancement allows you to view an item's current actual financial data as well as see it compared to your selected Point in Time (PiT) so that you can track changes in your projected budget plan. If you have a default selected, it will automatically show those values when you select the option to compare item actual values with the selected PiT. You are now able to in-line edit financial fields for that PiT on an item detail page if values need to be updated to ensure variance data is accurate and complete. Additionally, we have improved this feature when compared to 2.0 to allow you to choose any PiT available in your project.

PiT Approved vs Actual Comparison Report

Two new variance tracking reports have been added to the generate reports page. You can now generate a report which captures variance calculations between one or more defined Points In Time (PiT) and Approved budget values against Actual. You are able to more easily and accurately track the progress of your budget and variances.

The report shows a variance calculation between various PiT as well as PiT vs Actual and Approved vs Actual. There are two reports that will provide views to this data:

- Project scope variance calculations (project totals with additions/deductions)
- Item scope variance calculations (individual item rows)

PiT Auto-capture on Stage Change

In 2.0, you can lock budget variance calculations at the “released” stage. PLAN-IT has improved on this feature and allows you define one or more stages for this auto-capture behavior (or optionally turn the feature off) in addition to capturing standard PiT, not instead of.

Simply go to the “edit project page” and turn on the feature, then select one or more stages you want to capture. Once those stage(s) are defined for your project, a PiT for that stage is automatically created. Any time one or more items are edited and changed to one of those stages, that PiT is automatically updated so that you can easily track changes in your budget from that item stage and any edits or changes to the item stage throughout your project lifecycle.

Budget Summary Reporting Enhancements

You now have access to the following parity Budget Summary reports:

- Budget Summary by Departments / Architectural Code
- Budget Summary by Items / Budgets
- Budget Summary by Items / Funding Source
- Budget Summary by Items / Status
- Budget Summary by Items / Stage
- Budget Summary by Items Over/Under
- Budget Summary by Manufacturer / Budgets
- Budget Summary by Manufacturer / Funding Source

These let you report on aggregated item pricing and quantity values so that you can have deeper visibility into project budgets across multiple dimensions.

Additional Custom Budget Fields

We have added the following additional parity budget fields to custom project budgets:

- Budget ID
- Budget Type
 - Capital
 - Operational
 - Project
 - Other
- Expense code
- Default Budget (checkbox)

When you create a default budget you have a baseline for comparison to the current and actual budgets. The default budget details will be applied to any new room or item that you create so that you can quickly add items and rooms to the default budget.

Polish Work

We have updated the application to reflect a more modern look and feel, as well as align with current standards for web-based applications:

- All PDF reports are now searchable
- All tables now support multi-column sorting (compounded sort)
- Tables load with placeholders rather than a loading bar
- On pages that require scrolling, there is a "Back to Top" button at the bottom
- All tabs now reflect "Title case" instead of being in all capital letters
- The action buttons at the top right have been re-arranged and redesigned
 - Note that primary icons and buttons are shown and the "more menu" (three vertical dots) will house the remaining actions.
 - This "more menu" will be available for the project actions on all pages
 - It has been reduced to show only the "more menu" on the project budget details page in order to access project actions
- There are now two breadcrumb options:
 - Navigation - pages you access to get to the current location
 - Project Hierarchy - visual of where that project object (building, level, department, room, item) is shown in the project.
- The filter drawer has been redesigned to come from the right and has a crisper appearance
 - Able to search the filter for select fields
 - Able to scroll within the filter without having to scroll down the page
 - Clear Filters and Done buttons added to filter and always visible

Bug Squashing Corner

We have addressed and resolved a number of previously identified bugs in this release:

- Table settings for items table on Room Details page is present
- The Budget Summary page now has an Edit Budget button
- Item Filters for Mechanical, Plumbing, and Electrical work properly and are reflected in the item count in the filters
- Budget Summary report pages have the correct titles
- Rooms list filters on empty room tags correctly
- Table sort on Budget column sorts properly
- Custom Products are appearing on Custom Suppliers page