Technical Brief of Miradi 4.4

Goals of the Release

Main Goal - Redesign the Miradi Work Plan to:

- Share data with Miradi Share for program-based work planning
  - People, Assignments and Expenses can be classified as desired by the program for program-wide filtering and reporting
  - Accounting Codes with general ledger-style segment flexibility can be defined by the program

- Allow users to make "Who" and "When" planning entries from the Diagram, Strategic Plan or Work Plan at any time throughout the planning process
  - Users can always add or remove resources in the People tab, unlike the "Who" entries of prior releases.
  - Users can enter time spans in the Timeframe tab, which are always editable, unlike the "When" entries of prior releases .
  - Automatic allocation of work units has been eliminated. Users can add, delete or reassign assignments at any time without being blocked by allocation assumptions.

- Build monitoring work plans based on actions (strategies, activities and tasks), consistent with action work plans
  - Work plan data applies to Monitoring Activities (and their Tasks) instead of to Indicators (and their Methods) *See page 2.*
  - Strategies and Monitoring Activities can be linked to one or more Indicators.

- Make the Work Plan table easier to read, navigate, understand and edit
  - Work Plan data can now be displayed one results chain at a time, making navigation easier. This also improves performance.
  - Columns can be displayed as desired by the user. Expanding some columns no longer automatically collapses others.
  - Assignments and Expenses are now displayed in the Work Plan table, displayed or hidden as desired by the user. This change also improves performance.
  - Work Plan data now totals by results chain.
  - All entries – whether at strategy, activity or task level – are displayed and counted in the totals. This allows vertical layering of costs.
  - New icons, subtler colors and lines, and improved row highlighting make the tables easier to view.

- Ensure that data migration from previous Miradi versions preserves Work Plan results
  - Because all entries are now counted in the totals, hidden entries of prior versions are deleted during migration. *See pages 4 and 5.*
  - The upgrade process previews any data loss caused by migration and seeks confirmation from the user before completing migration

Other Goal - Selectively add content
  - Add Progress Reports to results chains, conceptual models and at the project level
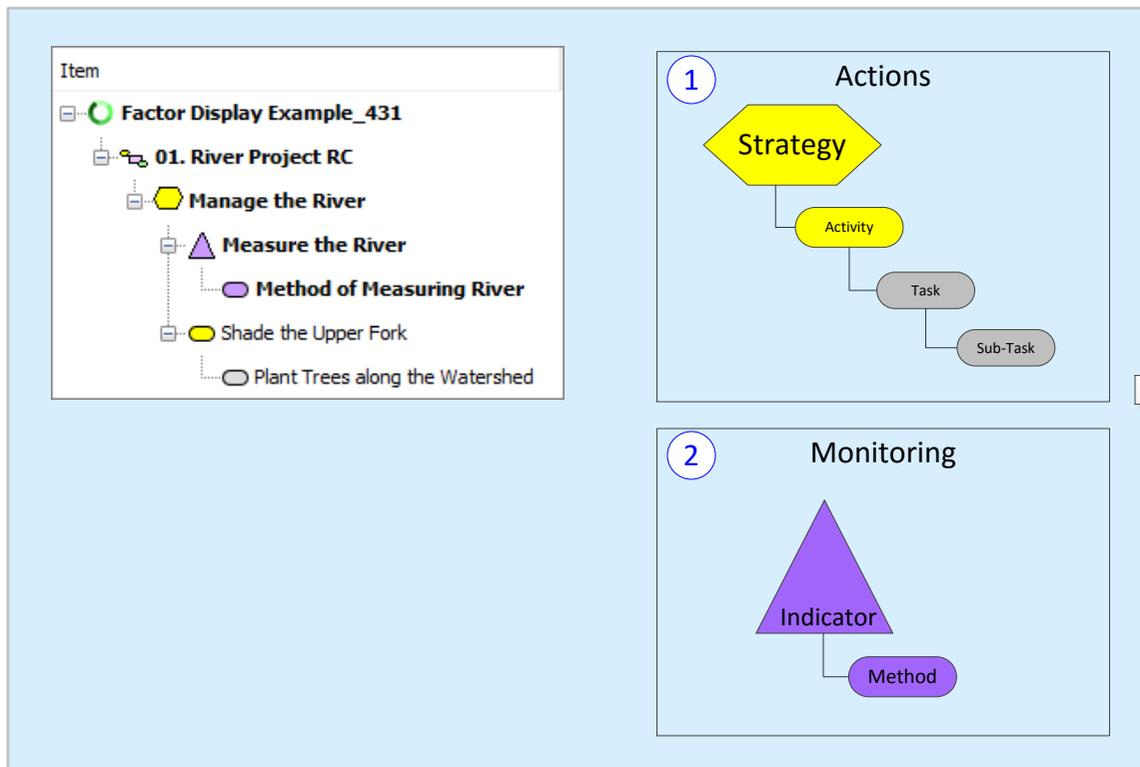
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Contents:

Work Plan Factor Changes

(1) Action Work Plans use the same factors, but limit the levels of tasks
- Strategies / Activities / Tasks
- Tasks are limited to one level below activities

(2) Monitoring Work Plans now emulate the Action Work Plans
- Strategies / Monitoring Activities / Tasks
- Monitoring Activities are the same as Activities, with a different color: ⬬
- Indicators and Methods no longer have work assignments or expenses
- Methods are given a new symbol (was: ⬬ , now: 📋)

(3) Monitoring Activities can link to one or more Indicators
This allows users to plan monitoring activities that encompass multiple indicators

(4) Assignments and Expenses are included in the Work Plan table
- They are moved up from the sub-panels
- This makes the table easier to read
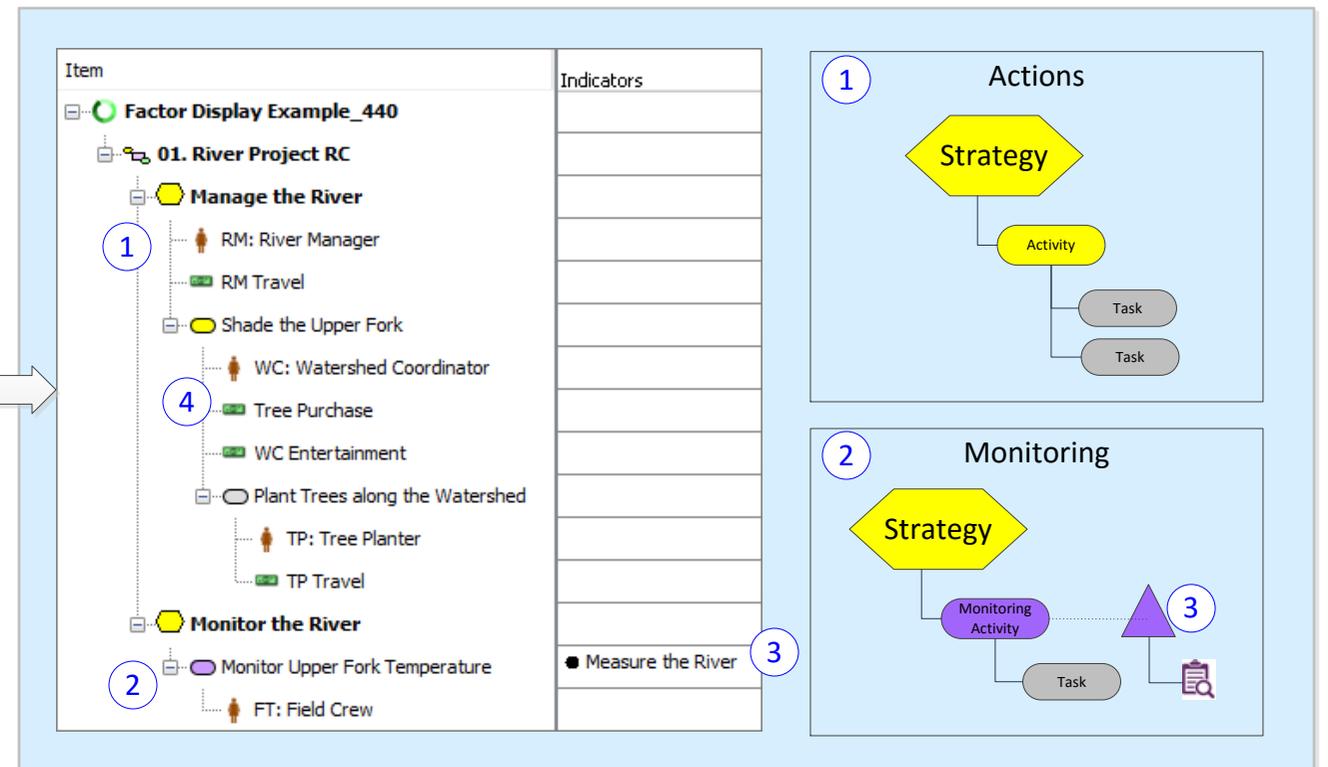- This also makes data entry easier and faster

WC: Watershed Coordinator
Tree Purchase
WC Entertainment

Miradi 4.3 and earlier

Miradi 4.4

Technical Brief of Miradi 4.4

Contents:

Feature changes - what's been added and removed

Comment

A **Added** Timeframe – this new column records the timespan of an action

Timeframe entries are always editable (unlike the "orange When", which is tied to work units and is now read-only).
In the migration to 4.4, Timeframe is initially populated with values defined by Work Unit entries

B **Added** Work Unit and Expense Totals by Results Chain

Also in 4.4, you can display the work plan one results chain at a time.

Diagrams – include data from	🔀 Only Results Chains ▼
Display this selection	01. River Project RC ▼

C **Added** Progress Reports for Project, Results Chain and Conceptual Model

The new project-level and diagram progress reports contain *next steps* and *lessons learned* as well as the standard fields for each report

D **Removed** Sharable Activities and Methods

In prior versions, sharing activities made allocation assumptions that were sometimes unwanted.
In the migration to 4.4, copies of shared factors are created, with work units and costs split evenly.

E **Removed** Multiple levels of Tasks

To reduce costs, activities are limited to one level of tasks.
In the migration to 4.4, tasks at two or more levels below are elevated to report to the activity.

Action Work Plans

Miradi 4.3

Item	When	Who	Work Units Total	Progress
○ **Work Plan Migration Example431**		TP, WC, RM	419	
🔀 **01. River Project RC**				
○ **Manage the River**	2014-07-01 - 2015-12-31	RM, TP, WC	222	On-Track
○ *Shade the Upper Fork*	2014-10-01 - 2015-12-31	TP, WC	197	Minor Issues
○ Plant Trees along the Watershed	FY15	TP, WC	172	Minor Issues
○ Buy Trees	Q1 FY15	WC	2	Completed
○ **Shade the County**	2014-10-01 - 2015-12-31	TP, WC	197	Minor Issues
○ *Shade the Upper Fork*	2014-10-01 - 2015-12-31	TP, WC	197	Minor Issues
○ Plant Trees along the Watershed	FY15	TP, WC	172	Minor Issues
○ Buy Trees	Q1 FY15	WC	2	Completed

(D shared; E)

Miradi 4.4

Item	Timeframe	Work Assignments Who	Work Units Total	Progress	Work Assignments When
○ **Work Plan Migration Example-440**		TP, WC, RM	419	On-Track	
🔀 **01. River Project RC**		TP, WC, RM	419	Minor Issues	
○ **Manage the River**	Q3 FY14 - Q4 FY15	RM, TP, WC	222	On-Track	Q3 FY14 - Q4 FY15
○ Shade the Upper Fork	Q4 FY14 - Q4 FY15	TP, WC	197	Minor Issues	Q4 FY14 - Q4 FY15
○ Plant Trees along the Watershed	Q2 FY15 - Q4 FY15	TP	170	Minor Issues	Q2 FY15 - Q4 FY15
○ Buy Trees	Q1 FY15	WC	2	Completed	Q1 FY15
○ **Shade the County**	Q4 FY14 - Q4 FY15	TP, WC	197	Minor Issues	Q4 FY14 - Q4 FY15
○ Copy of Shade the Upper Fork	Q4 FY14 - Q4 FY15	TP, WC	197	Minor Issues	Q4 FY14 - Q4 FY15
○ Copy of Plant Trees along the Watershed	Q2 FY15 - Q4 FY15	TP	170	Minor Issues	Q2 FY15 - Q4 FY15
○ Copy of Buy Trees	Q1 FY15	WC	2	Completed	Q1 FY15

(A, B, C, D₁, D₂, E)

Technical Brief of Miradi 4.4

Cost Rollup Method - what's new   *Work units and Expenses in 4.4 roll-up differently than prior versions*

(1) **In 4.3, only the lowest-level costs are displayed and included in totals**
Entries at the lowest level of detail for each time period are the only entries that count in prior Miradi versions. If high level entries conflict with lower-level entries, the high level costs are hidden and overridden in the totals.

(2) **During migration to 4.4, hidden entries are deleted so that work plan totals match**
See the next page (step 1) about migration steps

(3) **In 4.4, ALL levels of costs are displayed and included in totals**
Every total equals all assignments / expenses nested under it.
All entries – whether at strategy, activity or task level – are counted in the totals.

Miradi 4.3: Only lowest-level costs are displayed

High-level costs are overridden

$\sum (v4.3) = \sum (v4.4)$

Miradi 4.4: During migration, hidden costs are deleted to match 4.3 totals

Item	Who		Q1	Q2	Q3	Q4	2015	Total	Total (Projected Expenses)	Total (Budget Totals)
Multilayer Cost Example440to430to440	TP, WC		10	35	75	60	180	180	50	18,550
01. River Project RC	TP, WC		10	35	75	60	180	180	50	18,550
Manage the River	TP, WC		10	35	75	60	180	180	50	18,550
Shade the Upper Fork	TP, WC		10	35	75	60	180	180	50	18,550
WC: Watershed Coordinator	WC		10				10	10		1,500
Plant Trees along the Watershed	TP			35	75	60	170	170	50	17,050
TP: Tree Planter	TP			35	75	60	170	170		17,000
TP Travel									50	50

If the data of 4.3 is entered into 4.4, all costs would be displayed and included in totals

Item	Who		Q1	Q2	Q3	Q4	2015	Total	Total (Projected Expenses)	Total (Budget Totals)
Multilayer Cost Example440	TP, WC, RM		35	75	115	100	325	325	2,050	52,050
01. River Project RC	TP, WC, RM		35	75	115	100	325	325	2,050	52,050
Manage the River	RM, TP, WC		35	75	115	100	325	325	2,050	52,050
Shade the Upper Fork	TP, WC		10	55	105	90	260	260	1,300	31,800
Plant Trees along the Watershed	TP			35	75	60	170	170	50	17,050

Contents:

Work Plan data migration to 4.4 – General Steps

① **Step 1: The work units and expenses that are hidden in 4.3 are deleted.**
Migration pop-up lists a summary of the data losses (example at right).
This preserves the table as displayed in the prior version (explained in the prior page)

② **Step 2: Tasks that report to other tasks are elevated to report to the activity.**

③ **Step 3: Copies of shared factors are created, with work units and costs split evenly.**
New factors are named "Copy of [factor name]"
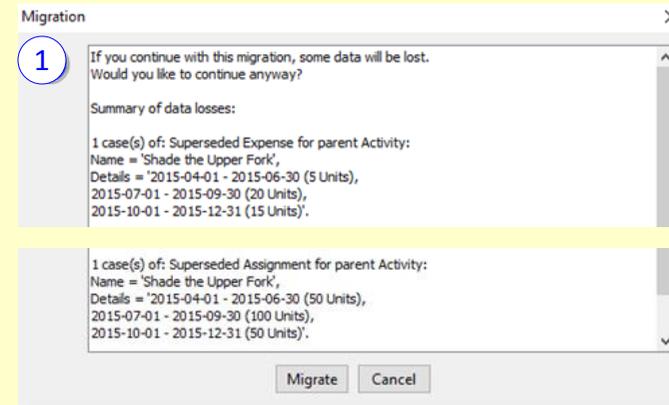
See next page for the special case of migrating Monitoring Work Plans

Migration dialog:

> **①** If you continue with this migration, some data will be lost.
> Would you like to continue anyway?
>
> Summary of data losses:
>
> 1 case(s) of: Superseded Expense for parent Activity:
> Name = 'Shade the Upper Fork',
> Details = '2015-04-01 - 2015-06-30 (5 Units),
> 2015-07-01 - 2015-09-30 (20 Units),
> 2015-10-01 - 2015-12-31 (15 Units)'.
>
> 1 case(s) of: Superseded Assignment for parent Activity:
> Name = 'Shade the Upper Fork',
> Details = '2015-04-01 - 2015-06-30 (50 Units),
> 2015-07-01 - 2015-09-30 (100 Units),
> 2015-10-01 - 2015-12-31 (50 Units)'.
>
> [Migrate] [Cancel]

Miradi 4.3

Action Work Plan

Item	When	Who	Work Units Total	Progress
Work Plan Migration Example431		TP, WC, RM	419	
01. River Project RC				
Manage the River	2014-07-01 - 2015-12-31	RM, TP, WC	222	On-Track
Shade the Upper Fork	2014-10-01 - 2015-12-31	TP, WC	197	Minor Issues
② Plant Trees along the Watershed	FY15	TP, WC	172	Minor Issues
Buy Trees	Q1 FY15	WC	2	Completed
Shade the County	2014-10-01 - 2015-12-31	TP, WC	197	Minor Issues
③ Shade the Upper Fork	2014-10-01 - 2015-12-31	TP, WC	197	Minor Issues
Plant Trees along the Watershed	FY15	TP, WC	172	Minor Issues
Buy Trees	Q1 FY15	WC	2	Completed

Monitoring Work Plan

Item	When	Who	Work Units Total	Progress
Work Plan Migration Example431		TC, WC	20	
01. River Project RC				
Measure the River	Q1 FY15 - Q3 FY15	TC, WC	20	On-Track
Method of Measuring Riparian Zone	Q1 FY15	WC	6	Completed

See next page for monitoring

Miradi 4.4

Action Work Plan

Item	Timeframe	Who	Work Units Total	Progress
Work Plan Migration Example-440		TP, WC, RM	419	On-Track
01. River Project RC		TP, WC, RM	419	Minor Issues
Manage the River	Q3 FY14 - Q4 FY15	RM, TP, WC	222	On-Track
Shade the Upper Fork	Q4 FY14 - Q4 FY15	TP, WC	197	Minor Issues
② Plant Trees along the Watershed	Q2 FY15 - Q4 FY15	TP	170	Minor Issues
Buy Trees	Q1 FY15	WC	2	Completed
Shade the County	Q4 FY14 - Q4 FY15	TP, WC	197	Minor Issues
③ Copy of Shade the Upper Fork	Q4 FY14 - Q4 FY15	TP, WC	197	Minor Issues
Copy of Plant Trees along the Watershed	Q2 FY15 - Q4 FY15	TP	170	Minor Issues
Copy of Buy Trees	Q1 FY15	WC	2	Completed

Monitoring Work Plan

Item	Timeframe	Who	Work Units Total	Progress
Work Plan Migration Example431to440		TC, WC	20	Not Specified
Migrated Monitoring Activities		TC, WC	20	Not Specified
Migrated Monitoring Activities (see Details)	Q1 FY15 - Q3 FY15	TC, WC	20	Not Specified
Measure the River	Q1 FY15 - Q3 FY15	TC, WC	20	On-Track
Method of Measuring Riparian Zone	Q1 FY15	WC	6	Completed

Technical Brief of Miradi 4.4

Monitoring Work Plan data migration

1 **Monitoring Activities are created for each Indicator that contains work plan data**
- A "**Migrated Monitoring Activities**" results chain and strategy are created to hold the new monitoring activities (and tasks)
- New Monitoring Activities are created and given the same name as the Indicator
- If the Indicator has Methods, Tasks are created for each Method, and given the same name as the Method

2 **Symbols change**
- The Methods symbol becomes the symbol for Monitoring Activities
- The new Methods symbol is

3a **Indicator progress reports are copied** to the newly created Monitoring Activities

3b **Method progress reports are moved** to the newly created Tasks

4 **Indicator and Method work plans are moved** to the new Monitoring Activities and Tasks
- **Who** and **When** data moves to **People** and **Timeframe**
- **Work Unit** and **Expense** data also moves

Miradi 4.3

Miradi 4.4