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
Technical Brief of Miradi 4.4

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1. Goals of the release
2. Work Plan Factor changes
3. Feature changes
4. Cost Rollup Method - what’s new
5. Work Plan data migration to 4.4 – General Steps
6. Monitoring Work Plan data migration

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

Miradi 4.3 and earlier

Miradi 4.4
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Feature changes - what’s been added and removed

**A** Added
- **Comment:** 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
- **Comment:** Work Unit and Expense Totals by Results Chain
- Also in 4.4, you can display the work plan one results chain at a time.

**C** Added
- **Comment:** 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
- **Comment:** 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
- **Comment:** 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.

Miradi 4.3

Action Work Plans

Miradi 4.4
**Cost Rollup Method - what’s new**

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.

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**Work units and Expenses in 4.4 roll-up differently than prior versions**

**Miradi 4.3: Only lowest-level costs are displayed**

<table>
<thead>
<tr>
<th>Item</th>
<th>Work Units</th>
<th>Projected Expenses</th>
<th>Budget Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>O1. River Project RC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manage the River</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Shade the Upper Fork</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Plant Trees along the Watershed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Work Assignments</th>
<th>Work Units</th>
<th>Projected Expenses</th>
<th>Budget Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>TP, WC</td>
<td>O1. River Project RC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TP, WC</td>
<td>Manage the River</td>
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**If the data of 4.3 is entered into 4.4, all costs would be displayed and included in totals**

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<td></td>
</tr>
</tbody>
</table>
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).

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

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.
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

3. Progress data is moved
   - Indicator progress reports are copied to the newly created Monitoring Activities
   - Method progress reports are moved to the newly created Tasks

4. Method work plans are moved
   - Who and When data moves to People and Timeframe
   - Work Unit and Expense data also moves

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