Deltek

Deltek Maconomy® 2.6.1

Enhancements Guide

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Contents

Maconomy 2.6.1 — Summary

This section gives a high-level summary of the key features for Maconomy 2.6.1.

Area	Feature	Web	Desktop	Mobile
Time & Expense	**Favorites in Timesheet Tables** **Deltek Tracking: 1742373** Favorites are now sorted alphabetically in timesheets.	✓		
Time & Expense	**Improved Warning Message for Proxy Registrations** **Deltek Tracking: 1704308** The warning message that displays when creating a proxy registration is improved for clarity.	✓	✓	
Time & Expense	**Time Sheet Overview Workspace Improvements** **Deltek Tracking: 1277061** You can now directly approve or reject submitted timesheets in this workspace.	✓	✓	
General Application Enhancements	**Web Client Assistants** **Deltek Tracking: 1840325** Assistants are side panels that expand from the rightmost portion of a web client workspace tab or sub-tab. These are now available by default in some workspaces, and as a customization option for the other workspaces. The functionality requires Maconomy 2.6.1 CU1.	✓		
General Application Enhancements	**Accessing the Web Analyzer from the Workspace Client** **Deltek Tracking: 1717371** You can now customize your Workspace Client such that users can go into any workspace that contains an Analyzer report and click a link that will open the corresponding Web Analyzer report in a browser window. Deltek recommends that you enable the Web		✓	

Area	Feature	Web	Desktop	Mobile
	Analyzer because the Java Analyzer will be decommissioned in the next major Maconomy version (2.7).			
General Application Enhancements	**Accessing Analyzer Reports in the Web Client** **Deltek Tracking: 1765243** This enhancement facilitates access to saved reports in a new My Reports menu item in the web client.	✓		
General Application Enhancements	**The G/L Entries Web Analyzer** **Deltek Tracking: 1534451** This release introduces a new G/L Entries Analyzer report to the web client.	✓		
General Application Enhancements	**Working with Vendor Information in the Web Client** **Deltek Tracking: 1754735** Finance users can now view and work with vendor information using two new workspaces added to the web client.	✓		
General Application Enhancements	**Refresh Data Action** **Deltek Tracking: 1077733** Maconomy users can now refresh workspaces in the web client using a dedicated icon at the top right of each workspace.	✓		
General Application Enhancements	**Recent Places** **Deltek Tracking: 1695773** The web client now features a Recent Places menu item which lists the last three workspaces accessed by the user.	✓		
General Application Enhancements	**Displaying Boolean Fields as Checkboxes** **Deltek Tracking: 1747913** Boolean fields in the web client are now rendered as simple checkboxes.	✓		

Area	Feature	Web	Desktop	Mobile
General Application Enhancements	**Filtering by the Approval Status Field** **Deltek Tracking: 1741561** You can now filter table lines by their **Approval Status** field values.	✓		
General Application Enhancements	**Adding a Selection Criteria Panel to Workspaces Without Tabs** **Deltek Tracking: 1746625** You can now add a Selection Criteria panel to workspaces that do not have tabs.	✓		
General Application Enhancements	**Default Access to Required System Level Windows** **Deltek Tracking: 1231179** Required System Level Windows is added to the Setup tab in the Users workspace for users to easily have access to system level windows.	✓	✓	
General Application Enhancements	**The Users Workspace** **Deltek Tracking: 1566682** You can now maintain data about users and their roles in the Users workspace in the web client.	✓		
General Application Enhancements	**CRM Workspaces and Enhancements** **Deltek Tracking: 1370473** New customer relationship management (CRM) workspaces are added to the web client to help you manage your business contacts and sales opportunities. The Opportunities Pipeline single dialog is also added in the Workspace Client.	✓	✓	
General Application Enhancements	**Support for User Approval** **Deltek Tracking: 1567173** User approval is now supported in the web client. The Approve Users by Employee single dialog workspace is also added in the Workspace Client.	✓	✓	

Area	Feature	Web	Desktop	Mobile
General Application Enhancements	**The Draft Invoice Creation Workspace** **Deltek Tracking: 1671335** You can now create draft invoices for a batch of jobs in the web client.	✓		
General Application Enhancements	**The Draft Invoice Status Workspace** **Deltek Tracking: 1696984** This workspace is added to the web client to provide an at-a-glance view of draft invoices in various stages.	✓		
General Application Enhancements	**The Job Invoicing Workspace** **Deltek Tracking: 1086198** You can utilize this workspace in the web client to view fully approved draft invoices that are ready for printing.	✓		
General Application Enhancements	**The Employee Dashboard Workspace** **Deltek Tracking: 1287239** The new Employee Dashboard workspace displays the key performance indicators (KPI) of an employee.	✓		
General Application Enhancements	**Simplified Web Client Menu Colors** **Deltek Tracking: 1821098** This enhancement improves on the web client color scheme introduced in 2.6.	✓		
Resource Management	**Assign Skills to Budget Lines** **Deltek Tracking: 1717461** You can now assign skills to budget lines.	✓		
Project Management	**Zero Value on Base Salary Markup Percentage in Price List Lines** **Deltek Tracking: 1688025** In price list lines, support is added to use the zero value to indicate that no additional markup is needed on base salary markup percentage and	✓	✓	

Area	Feature	Web	Desktop	Mobile
	standard base salary markup percentage.			
Project Management	**Alignment of Batch Invoicing Selection Criteria** **Deltek Tracking: 1731661** Selection criteria across batch invoicing-related workspaces are updated.	✓	✓	
Touch	**Improved Search Functionality** **Deltek Tracking: 1680648** Several improvements are made to enhance the search functionality in all Touch lookup screens.			✓
Touch	**Server URL Auto-Population Removal** **Deltek Tracking: 1453257** When you log in to the Touch app for the first time, you must enter your organization's Touch URL in the **Server URL** field manually.			✓
Touch	**Documents for Mileage Sheets** **Deltek Tracking: 781469** You can now add or remove documents from your mileage sheets and mileage sheet lines.			✓
Touch	**Multi-Level Approvals** **Deltek Tracking: 1642744** Touch shows the correct approval statuses and actions for multi-level approvals.			✓
Touch	**Online App Release Notes** **Deltek Tracking: 1698556** The App Release Notes is now available in the Maconomy Information Center only.			✓
Finance	**New Employee Field on Tax Settlement Entries**		✓	

Area	Feature	Web	Desktop	Mobile
	Deltek Tracking: 1179131 This enhancement adds a new **Employee No.** field to the Tax Entries sub-tab of the Financial Operations workspace and to the list of tax settlement entries filter list of the Show Tax Settlement Entries single dialog.			
Finance	**Enhanced Vendor Remittance Emails** **Deltek Tracking: 1705225** A new **Remittance Email Address** field is added to the Vendor Remittance Emails workspace. A new **Resend Email Remittances For All** action is also introduced to enable you to manually resend all vendor remittance emails shown in the sub-tab.		✓	
Finance	**New Company and Vendor Supplements** **Deltek Tracking: 1510918** New Supplement Types are added to the Supplement Types workspace to give you further control of Company, Vendor, and Customer.		✓	
BPM / Statutory Reporting	**Change from BIAR to LCMBIAR File Format** **Deltek Tracking: 1524094** The Maconomy BPM file format for releases is updated from Business Intelligence Archive (BIAR) to Lifecycle Management BIAR (LCMBIAR).		✓	
BPM / Statutory Reporting	**Additional Fields for the Job Information Universe** **Deltek Tracking: 1682692** The Job Information universe is updated with new fields to improve how you present data and calculations in reports.		✓	
BPM / Statutory Reporting	**Tax Numbers in Foreign Transactions Reports**		✓	

Area	Feature	Web	Desktop	Mobile
	Deltek Tracking: 1578898 To comply with Intrastat requirements, the Tax No. column is added to the Foreign Transactions reports.			
BPM / Statutory Reporting	**Manifest File Added in BPM RPUs** **Deltek Tracking 1565682** BPM Reporting Packing Units (RPUs) now include a manifest file in JavaScript Object Notation (JSON) text format.		✓	
BPM / Statutory Reporting	**NSAFT: New Analysis Table Dimensions Fields** **Deltek Tracking: 1614508** The Analysis Table Dimensions section of the Selection Criteria in the NSAFT report is updated with a new set of fields.		✓	
BPM / Statutory Reporting	**Improved Norway Tax Return Report** **Deltek Tracking: 1614130** The Norway Tax Return report is updated to make it easier to read and use.		✓	
BPM / Statutory Reporting	**SIE Updates** **Deltek Tracking: 1565586** The Standard Import/Export workspace is updated to improve performance via KeepAlive and dynamic pagination, and add email notifications.		✓	
BPM / Statutory Reporting	**UK MTD: New Authorization Message for Fraud Prevention Headers** **Deltek Tracking: 1420984** A new warning message confirms authorization of fraud prevention headers being sent to HMRC.		✓	
BPM / Statutory Reporting	**1099 MISC/NEC Report Changes** **Deltek Tracking: 1590632**		✓	

Area	Feature	Web	Desktop	Mobile
	The 1099 MISC/NEC reports are updated because of changes to the 1099 MISC/NEC forms required for tax year 2022.			
Performance	**Updated Access Control for Database Performance** **Deltek Tracking: 1439249** To improve performance, we have updated the access control definition for finance entries.	✓		
People Planner	**Booking Confirmation Message on Non-Working Days** **Deltek Tracking: 1711415** In the day view, a confirmation message now appears when you create a booking, if the time interval overlaps with one or more non-working days.	✓	✓	
People Planner	**Resource Matching on Skill Specifications** **Deltek Tracking: 1599740** You can now assign resources with the appropriate skills for a task. This functionality helps display which resource possesses all or most of the specified skills to the task.	✓	✓	
People Planner	**Import Actuals Enhancements** **Deltek Tracking: 1572076** You can now choose to import actuals only for projects that have changes, such as when an entry date was in the past period, but the posting date is in the current period.	✓	✓	
People Planner	**Verbose Logging on Tasks** **Deltek Tracking: 1814043** You can now specify which tasks should use verbose logging.	✓	✓	
People Planner	**Default Focus Date in Web Component Views**	✓	✓	

Area	Feature	Web	Desktop	Mobile
	Deltek Tracking: 1758309 Upon opening the Web Components, the default focus date can now be changed from the present day/week/month/year to specified dates prior to them, so users can avoid backtracking.			
People Planner	**People Planner Upgrade to .NET 6.0** **Deltek Tracking: 1571491** It is now mandatory to use ASP.NET 6.0.10+ Hosting Bundle for the People Planner Web Applications, People Planner Security Service, and the People Planner REST API.	✓	✓	
People Planner	**Remove Bookings on Closed Project** **Deltek Tracking: 1702209** You can now send a request to the People Planner REST API to remove bookings on a closed project after a given date.	✓	✓	
System Admin	**New System Messages** **Deltek Tracking: 1240585** System Messages are system-wide message which are shown to end-users on login, for instance to alert them of upcoming business deadlines or planned system downtime.	✓	✓	✓
System Admin	**Excel Data File Support for Imports** **Deltek Tracking: 1301846** Maconomy now supports Excel format for direct upload to application Import Programs.		✓	
System Admin	**Whitespace Resilience in 2FA and Email Tokens** **Deltek Tracking: 1814931** The 2FA and email tokens are updated for resilience against whitespace and punctuation in the entered values.	✓		✓

Area	Feature	Web	Desktop	Mobile
System Admin	**Certifications** **Deltek Tracking: 1419337** ▪ Pentaho 9.3 – for BPM ▪ Java SE Critical Patch Update 8u351 ▪ Windows (OS) 11 2022 Update ▪ Windows Server 2022 for BPM ▪ Android 13 and iOS 16 — for Touch ▪ Chrome browser for BPM — Supported from BO 4.2 SP9 on Windows 10 and 11 ▪ Safari browser for BPM — Supported from BO 4.2 SP8 on MacOS Sierra ▪ Oracle 19c (with Oracle 19c Client) — for Windows OS ▪ iOS 16 — for Web Client	✓	✓	✓

Maconomy 2.6 – Summary

This section gives a high-level summary of the key features for Maconomy 2.6.

Area	Feature	Web	Desktop	Mobile
Time & Expense	**Restricted List of Employees on Proxy Expense Registrations** **Deltek Tracking: 1278868** Maconomy now displays only the employees you can create expense sheets by proxy.	✓	✓	
Time & Expense	**Monthly Time Sheets No Longer Supported** **Deltek Tracking: 1470735** The Monthly Time Reporting functionality is removed in 2.6.	✓	✓	✓
General Application Enhancements	**New Maconomy Information Center** **Deltek Tracking: 1599272** The new online Maconomy Information Center serves as a hub for all Maconomy documentation.	✓	✓	✓
General Application Enhancements	**New Online Concepts Guide** **Deltek Tracking: 1599272** The new Online Concepts Guide merges the former Concepts Guide with other end-user documents and brings the material online.	✓	✓	✓
General Application Enhancements	**Debranding the Maconomy Web Client** **Deltek Tracking: 1549295** Beginning with this release, Maconomy will stop using the "iAccess" brand for its web client.	✓		
General Application Enhancements	**Modernization of the Web Client** **Deltek Tracking: 1389080** The web client has undergone some changes to improve the look of the interface and give it a more modern feel.	✓		

Area	Feature	Web	Desktop	Mobile
General Application Enhancements	**Line Number Column in Tables** **Deltek Tracking: 1654643** Users can now add the **Line No.** column to tables in their web client workspaces.	✓		
General Application Enhancements	**The Web Analyzer** **Deltek Tracking: 1217512, 1352308, 1462157, 1463988** This release introduces the Analyzer report functionality to the Maconomy web client. Users can now make ad hoc queries to the database and view the query results in table form. To improve usability, some Analyzer reports are now renamed, restructured, and moved to a new folder location in the Java Analyzer.	✓		
General Application Enhancements	**Controlling iFrame Refresh** **Deltek Tracking: 1544014** You can now use pane and field updates as triggers to refresh inline frames (or iFrames) embedded in your Maconomy web client workspaces. This ensures that your iFrames always reflect the latest information from the application.	✓		
General Application Enhancements	**Improved Editing Capability in the Maconomy Web Client** **Deltek Tracking: 1015368** The Maconomy web client now allows you to open a record and edit the fields directly. You no longer need to select or click the **Edit** action first.	✓		
General Application Enhancements	**Export to Excel** **Deltek Tracking: 1077734** Users can now export data from web client tables to spreadsheets using the new Export to Excel icon.	✓		
General Application Enhancements	**Improved Placement of Add Line Action**	✓		

Area	Feature	Web	Desktop	Mobile
	Deltek Tracking: 1277171 The Add Line action is now found above the table to make it easier for users to locate.			
General Application Enhancements	**Additional Chart Options** **Deltek Tracking: 1275019, 1577145, 1599758** Three additional chart types are now available for use in web client workspaces.	✓		
General Application Enhancements	**New Customer Payments Workspace in Web Client** **Deltek Tracking: 1287241** The Customers menu section is renamed to Accounts Receivable. A new Customer Payments workspace is added to the Accounts Receivable menu section of the Web Client to enable you to create and post customer payment journals.	✓		
General Application Enhancements	**Skills Expiry Date for Employees' Skills** **Deltek Tracking: 1618936** The Employees Skills table now includes an expiry date for assigned skills.		✓	
General Application Enhancements	**Restricted Access to Employee Data** **Deltek Tracking: 1078403** Sensitive employee information is removed from several workspaces, and other security measures to ensure the protection of employee data are added, including new single dialogs to set up authorized access and new user actions.	✓	✓	
General Application Enhancements	**Enhanced Access Control** **Deltek Tracking: 1387233** The AbsenceEntryAndEmployee and AbsenceCalendarLineAndEmployee universes are removed.		✓	

Area	Feature	Web	Desktop	Mobile
General Application Enhancements	**Enhanced Approval Information in Info Bubbles** **Deltek Tracking: 1167197** Additional approval information is now available when viewing info bubbles in the web client.	✓		
General Application Enhancements	**Long Text Single Dialog Workspaces** **Deltek Tracking: 1564965** Single dialog workspaces for all fields using long text functionality are now available.	✓	✓	
Resource Management	**Calculation of Total Cost or Billing Price on Budgets Imported from People Planner** **Deltek Tracking: 1487214** The total billing or cost price on budgets is now calculated as the sum of the billing or cost prices from resource allocation lines.	✓	✓	
Project Management	**Block Purchase Order Creation on Jobs** **Deltek Tracking: 1287230** You can now block the creation of purchase orders on jobs.	✓	✓	
Project Management	**Zero Value on Price List Lines** **Deltek Tracking: 1176123** Prior to this release, the zero value on price list lines was used only to indicate that Maconomy should derive prices from a different source, such as an employee's sales price. You can now indicate that zero as a value should be used to calculate prices.	✓	✓	
Project Management	**Transfer Job Quote Layout to Draft Invoice on Account** **Deltek Tracking: 1238701**	✓	✓	

Area	Feature	Web	Desktop	Mobile
	A quote layout can now be transferred to a draft invoice for invoices on account.			
Touch	**Support for Android 12L** **Deltek Tracking: 1597344** Touch now supports the Android 12L mobile operating system.			✓
Touch	**Enhanced Touch Menu** **Deltek Tracking: 151650** The Touch sliding menu features a new look and can be viewed in both portrait and landscape display modes.			✓
Touch	**Touch Online Help** **Deltek Tracking: 1463516** You can now access the Touch Online Help from the app.			✓
Touch	**Touch Admin Guide** **Deltek Tracking: 1530336, 1530340, 1530339** The Touch Admin Guide is introduced as the primary document for technical consultants.			✓
Touch	**MScript Removal** **Deltek Tracking: 1065005** The MScript Touch API is no longer supported, and affects Touch installation and customization requirements.			✓
Touch	**Login Settings Moved to the configuration.ini File** **Deltek Tracking: 1594337** The login settings used to set up credential authentication methods are moved to the configuration.ini / tenant.ini file.			✓
Touch	**Support for Windows Server 2022** **Deltek Tracking: 1411120**			✓

Area	Feature	Web	Desktop	Mobile
	The Touch 4.0 Installer now supports Windows Server 2022.			
Finance	**Company Specific Exchange Rate** **Deltek Tracking: 519031** Company Specific Exchange Rate (CSER) enables corporations with companies in different countries to specify exchange rates at the company level. It has far-reaching impact, with updates to most workspaces and new fields for currency conversions.		✓	
Finance	**Additional Tax Popup Fields** **Deltek Tracking: 1194587** Several statutory reports require additional VAT popup fields to provide more information and differentiate VAT groups when reporting to the tax authorities. To support this, new tax popup fields are added to Maconomy.		✓	
Finance	**Prevent Self-Approval for Proxy Approvers** **Deltek Tracking: 1273308** This feature enhances the functionality that prevents self-approval in the approval hierarchies such that it also restricts self-approval through a proxy approver.	✓	✓	✓
Finance	**Allow Accrual to Exceed Price on Purchase Order Line** **Deltek Tracking: 1240782** A new **Allow Accrual to Exceed Price on Purchase Order Line** system parameter is introduced to enable you to allow or prohibit accrual amounts that exceed the price on the purchase order line.		✓	
Finance	**Renamed Single Dialog Workspaces** **Deltek Tracking: 1231594** Previously, when users encounter the term **Delete**, it caused confusion whether the system would delete the		✓	

Area	Feature	Web	Desktop	Mobile
	entries. To address this issue, several single dialog workspaces are renamed, and the **Delete Section** is renamed as **Remove Section**.			
Finance	**New Invoice Received Date Field** **Deltek Tracking: 1228082** A new **Invoice Received Date** field is added to the vendor invoice journal in the Vendor Invoices workspace to enable you to specify the date when you received the vendor invoice.		✓	
Finance	**Conversations for Credit Control** **Deltek Tracking: 1278070** You can now use the Conversations functionality in the Credit Control workspace in the Workspace Client.		✓	
Finance	**New Approver Reference Type in Approval Hierarchies** **Deltek Tracking: 1549420** This enhancement gives you more flexibility in creating approval hierarchies where the approver cannot be found on the relation being approved or on a directly related relation.		✓	
BPM / Statutory Reporting	**Dutch Audit File** **Deltek Tracking: 1335385** The Dutch Audit File is added to support a statutory report requirement in the Netherlands.		✓	
BPM / Statutory Reporting	**New GL Audit Universe** **Deltek Tracking: 1423832** A new GL Audit universe is introduced to report on finance entry data combined with VAT settlement entries.		✓	
BPM / Statutory Reporting	**Simplified ETL Upgrade** **Deltek Tracking: 1221790** We have simplified the ETL upgrade mechanism to improve performance.		✓	

Area	Feature	Web	Desktop	Mobile
BPM / Statutory Reporting	**Statutory Report Email Notification** **Deltek Tracking: 1029881** This email notification is used to alert you when a report or any XML-related export runs.		✓	
BPM / Statutory Reporting	**NSAFT Updates** **Deltek Tracking: 1642131, 1642164, 1398483** Includes new and updated tag mapping and updated setup and limitations.		✓	
BPM / Statutory Reporting	**Removed Deprecated Functionality and Reports** **Deltek Tracking: 1226080, 1599213** Removed deprecated objects and ETL functionality for ease in upgrading to a main version. Removed unused reports.		✓	
BPM / Statutory Reporting	**Improved Fiscal Period Objects in Finance Universe** **Deltek Tracking: 1425036** The object titles and descriptions in the fiscal period folder of the Finance universe are updated for clarity, consistency, and efficiency..		✓	
BPM / Statutory Reporting	**Updated Universes** **Deltek Tracking: 1526073, 1335385** The deprecated database fields are removed from BPM universes to match the Maconomy database schema. AR Aging, AP Aging, and Tax settlement universes are updated.		✓	
BPM / Statutory Reporting	**USTVA Update for ERiC 35.3** **Deltek Tracking: 1564712** The Elster USTVA report is updated to reflect the changes to the interface and technical standards required by the ERiC 35.3 version update.		✓	

Area	Feature	Web	Desktop	Mobile
BPM / Statutory Reporting	**Cash Flow Statement Direct Method Report** **Deltek Tracking: 1113821** The Cash Flow Statement Direct Method report is released and added to the Workspace Client.		✓	
BPM / Statutory Reporting	**Tax Code Country Added to NSAFT** **Deltek Tracking: 1471497** The Country Tax Code is added to the NSAFT report schema as a mandatory field.		✓	
BPM / Statutory Reporting	**Norway Tax Return Report** **Deltek Tracking: 1486538** A new summary report is released to allow customers to manually file Norwegian VAT forms until an integration is complete.		✓	
BPM / Statutory Reporting	**Configurable Timeout for Background Tasks in NSAFT Report** **Deltek Tracking: 1346144** The NSAFT report extension is updated to allow for the configuration of timeout settings on background tasks.		✓	
BPM / Statutory Reporting	**Reauthorization Prompts in UK Tax Submissions Workspace** **Deltek Tracking: 1546383** Prompts are added to the UK Tax Submissions workspace to notify a user to reauthorize Maconomy by acquiring a new token from the HMRC website.		✓	
Performance	**Access Control View Optimizations** **Deltek Tracking: 1372495** Performance improvements, invisible to end users, have been made to access control views to provide a better user experience.	✓		

Area	Feature	Web	Desktop	Mobile
Performance	**Server Optimization / Timestamp Triggers** **Deltek Tracking: 1460222** We have removed TransactionTimestamp triggers on update and insert actions to improve performance.			
People Planner	**Additional Field Types in MyPlan** **Deltek Tracking: 1627703** Additional booking information such as allocated hours is now available when you view a booking in MyPlan. Additionally, you can now view the hours, amount, or percentage of a resource when using the Search bar on a booking.	✓		
People Planner	**Desupported Task Selector** **Deltek Tracking: 1506495** The task selector is removed from the Web Components as it is no longer supported in this release.	✓	✓	
People Planner	**Redesigned Web Components** **Deltek Tracking: 1594343, 1389080** This enhancement features a redesigned UI of the Web Components as part of the overall UI facelift in Maconomy.	✓	✓	
People Planner	**Under/Overspend Feature Enhancements** **Deltek Tracking: 1681570, 1681684** A confirmation message now displays when you reallocate under/overspent time or amounts using the **Under/Overspend** action. Aesthetic changes have also been made to the Under/Overspend column.	✓	✓	
People Planner	**Export Project to Excel** **Deltek Tracking: 1681522**	✓	✓	

Area	Feature	Web	Desktop	Mobile
	You can now export an entire project based on its start and finish dates to Excel.			
People Planner	**Improved License Checking in People Planner** **Deltek Tracking: 1532648, 705406** This feature introduces a centralized license checker used by the Web Components, MyPlan, and the Windows Application. The previous file-based license checker is also desupported. Note that this version requires a new license from the Global distribution team	✓	✓	
People Planner	**Cryptography Key Enhancements** **Deltek Tracking: 1081090** Improved security for encrypting/decrypting sensitive information is added in this release.	✓	✓	
People Planner	**Certifications** **Deltek Tracking: 1570796, 1570797, 1570798** People Planner 4.3 is certified for the following: ▪ Windows 11 ▪ MacOS Monterey ▪ Windows Server 2022	✓	✓	
Security	**iFrame Sandboxing** **Deltek Tracking: 1508915** You can now implement enhanced security on inline frames (or iFrames) within the Maconomy web client, using the new **permissions** property.	✓		
System Admin	**Moving Configuration of Authentication Methods for the Web Client from the Extender to MConfig** **Deltek Tracking: 1467062**	✓		

Area	Feature	Web	Desktop	Mobile
	MConfig now supports not only the setup of your preferred authentication method but also that of your allowed methods.			
System Admin	**Import Programs** **Deltek Tracking: 1248393, 1284522** Converted customized programs to standard programs. Added new standard import program for conversations.		✓	
System Admin	**"Kerberos SSO" Login Desupported** **Deltek Tracking: 1567178** The old Kerberos login configuration, "Kerberos SSO" is desupported and removed.		✓	
System Admin	**Removing Desupported and Discontinued Terms** **Deltek Tracking: 1419337, 1508483, 1311527, 1290384, 1419707, 1601319, 1343443** Removed terms including Kona, Portal, and iAccess (replaced with Web Client).	✓	✓	✓
System Admin	**Browser Setup / SPNEGO** **Deltek Tracking: 1519114** Maconomy now supports multi-step protocol negotiations.		✓	
System Admin	**Database Index Handling** **Deltek Tracking: 1421602** The database index handling process now includes support for index scripts useful for validating, creating, migrating, and maintaining indices in the Maconomy database.		✓	
System Admin	**Added Third Party SSO / MFA** **Deltek Tracking: 1282027** To support statutory requirements, new 2FA parameters are implemented and an external 2nd factor is verified		✓	

Area	Feature	Web	Desktop	Mobile
	for a user session where the user logged in.			
System Admin	**Export to Excel Row Summary** **Deltek Tracking: 1521517** In order to enhance usability and also in support statutory requirements, we have added an option to include a count of the number of rows included in the file generated via the Export to Excel action in Maconomy.		✓	
System Admin	**Default webaccess.ini** **Deltek Tracking: 1423370** A default webaccess.ini file is now included with Maconomy installations.		✓	✓
System Admin	**Limit Default Filetypes** **Deltek Tracking: 1519044** We now limit default filetypes included in server.ini that are allowed to be uploaded into Maconomy.	✓	✓	✓
System Admin	**Increase Allowed Number of Named Users** **Deltek Tracking: 1523921** Customers are now able to increase their number of allowed named Maconomy users by performing a quick procedure in the Workspace Client.		✓	
System Admin	**Certifications** **Deltek Tracking: 1419337** ▪ Business Objects 4.2 SP9 Patch 4 – for BPM ▪ Windows Server 2022 – for Maconomy ▪ Windows 11 O/S – for Maconomy ▪ SQL Server 2019 – for BPM ▪ OEL 8 – for BPM	✓	✓	✓

Area	Feature	Web	Desktop	Mobile
	▪ MacOS 12 Monterey – for Maconomy ▪ iOS 15 – for web client and Touch ▪ Android 12L – for Touch ▪ Pentaho 9 – for BPM			

Feature Details

This section gives a detailed description of the key features for Maconomy 2.6 stream. The format is structured by area and feature, with version to indicate when enhancements were made to each feature.

Note: People Planner features are now included in the Maconomy Enhancements Guide and no longer in a standalone document.

Time & Expense

Favorites in Timesheet Table

Deltek Tracking: 1742373
Version: 2.6.1

When you select a favorite in a weekly or daily timesheet table, these are now sorted alphabetically to allow you to locate the relevant favorite more easily.

Improved Warning Message for Proxy Registrations

Deltek Tracking: 1704308
Version: 2.6.1

The warning message that displays when you access another user's timesheet is now improved for clarity. This message is now changed to state that you are making a time entry on behalf of the employee.

Time Sheet Overview Workspace Improvements

Deltek Tracking: 1277061
Version: 2.6.1

Prior to this release, a supervisor (or secretary) could review timesheet status of employees under their supervision in the Time Sheet Overview workspace in the web client, but would need to go to the Approval Center to continue the approval process per timesheet.

This enhancement allows supervisors (or secretaries) to now directly approve or reject submitted timesheets in this workspace. This can be done per line in the workspace, or in the wizard that opens when you view detailed information regarding a specific timesheet.

Additionally, timesheet access is now updated to ensure that the current supervisor or secretary can view all of the employee's timesheets, including past timesheets wherein they were under a different supervisor. Previous supervisors can no longer see an employee's timesheets once they have been reassigned to a different supervisor.

Additionally, the Rejected status is now represented on timesheets in the various timesheet workspaces and in the calendar.

Workspace Client Updates

Improvements have also been made to the Supervisor Approval workspace and Supervisor Time Sheet Status single dialog workspace in the Workspace Client. Several fields are also added to support this feature:

- **Approve**
- **Reject**
- **Undo**
- **Rejection Remark**
- **Approve All**
- **Reject All**
- **Undo All**

Rejected time sheets are now also represented in the calendar.

Changes to Maconomy

Web Client

The Time Sheet Overview workspace is updated to support this feature.

Workspace Client

The following workspaces are updated to support this feature:

- Supervisor Approval Workspace
- Supervisor Time Sheet Status single dialog workspace

Procedures

Web Client

Approve or Reject a Time Sheet

Use these steps to approve or reject a time sheet.

> **Note:** The option to reject time sheets is available only when approval hierarchies is enabled.

To approve or reject a time sheet:

1. Go to the Time Sheet Overview workspace.
2. If you need to view more information about the time sheet you are reviewing, click the **Open Time Sheet** icon on the line for that time sheet.
3. To approve the time sheet:
    a. Click the **Approve** icon on the line.
4. To reject the time sheet:
    a. Click the **Reject** icon on the line.

       The Reject Time Sheet wizard displays.

    b. Enter a rejection reason. This is a required field.

       Maconomy automatically saves your changes, and refreshes the page.

    c. Click **Reject**.
5. To undo approval or rejection of a time sheet:
    a. Click **Undo**.

       Maconomy automatically saves your changes.

Setup Instructions

This feature is available by default for users with the requisite permissions.

Restricted List of Employees on Proxy Expense Registrations

Deltek Tracking: 1278868
Version: 2.6

Maconomy allows you to create an expense sheet on behalf of other employees, as a proxy, if you have been designated as a supervisor or secretary for them. However, when selecting an employee from the list, the system showed the names of all employees (subject to access control), and selecting one for whom you were not supervisor or secretary would display an error.

This enhancement now restricts the list to display only the employees for whom you can create expense sheets by proxy to make the process easier and prevent errors from occurring.

Monthly Time Sheets No Longer Supported

Deltek Tracking: 1470735
Version: 2.6

The Monthly Time Reporting functionality is discontinued in 2.6. The **Monthly Time Reporting** system parameter can no longer be enabled.

> **Attention:** If you are updating from a previous Maconomy version, you must disable the **Monthly Time Reporting** system parameter in order to proceed with the upgrade.

If you are using monthly time sheets, you can utilize weekly time sheets instead. The functionality of weekly time sheets is similar to that of monthly time sheets. You can still use split week time sheets to indicate days that belong to different months, although this is now optional.

General Application Enhancements

Web Client Assistants

Deltek Tracking: 1840325
Version: 2.6.1 CU1

Assistants are side panels that expand from the rightmost portion of a workspace tab or sub-tab, and these serve as an easily accessible location for secondary but still important information about the current record, transaction, or line. These side panels can also contain conversation and document viewer panes.

Assistants are now available by default in some workspaces, and as a customization option for the other workspaces.

Note that this functionality replaces table assistants previously found in the timesheet and expense workspaces. This means users must now enter daily timesheet descriptions and expense justification in the new assistants. However, table assistants are still available as a customization option.

The functionality requires Maconomy 2.6.1 CU1.

Accessing the Web Analyzer from the Workspace Client

Deltek Tracking: 1717371
Version: 2.6.1

You can now customize your Workspace Client such that users can go into any workspace that contains an Analyzer report and click a link that will open the corresponding Web Analyzer report in a browser window. Deltek recommends that you enable the Web Analyzer because the Java Analyzer will be decommissioned in the next major Maconomy version (2.7).

Existing users of the Java Analyzer who want to migrate to using the Web Analyzer can follow the setup instructions in the following section.

Setup Instructions

By default, the Workspace Client still uses the Java Analyzer. Follow these steps to enable the Web Analyzer instead.

To enable this feature:

1. Perform either of the following steps:
   - In the MConfig OSGi products dialog, go to the **Analyzer type** field and select **Web Analyzer** from the dropdown list.

     OR:
   - In the coupling service server.ini file, edit the value of the `web.services.analyzer.open-analyzer-links-in` property to **web-analyzer**.
2. In the Workspace Client, go to **System Setup » Parameters and Numbers » System Parameters**.
3. From the filter list, click the **URL for Web Client** system parameter.
4. On the System Parameter tab, specify the URL for your web client application in the **URL for Web Client** field.
5. Click **Save.**

Note: If you have customized reports, you will also need to add them to the web client menu.

Accessing Analyzer Reports in the Web Client

Deltek Tracking: 1765243
Version: 2.6.1

This enhancement facilitates access to Java Analyzer and web Analyzer reports in the web client. Specifically:

- Users can utilize the new My Reports functionality to quickly access all their saved reports. They can view this list using the **My Analyzer Reports** icon conveniently found on the top right corner of the application.
- All existing standard reports are now added to the Examples menu section, so extension consultants can easily locate and add them to the standard menu.

Note that the old Java Analyzer capability which allowed users to create a report hierarchy for their saved reports is not available in the web client. You can view an existing report hierarchy and add it to the menu, but you will not be able to manipulate its structure. You can export, delete, and reimport reports from this hierarchy to create a flat list.

The G/L Entries Web Analyzer

Deltek Tracking: 1534451
Version: 2.6.1

Adding to the Web Analyzer functionality introduced in 2.6, this release introduces a new G/L Entries Analyzer report to the web client.

Changes to Maconomy

To support this feature, the following report workspace is added to the web client:

- G/L Entries

To access this report workspace, go to **General Ledger menu section » G/L Analyzers submenu**.

Setup Instructions

To allow users to utilize the G/L Entries report workspace in the web client, make sure you add the **Analyzer::FinanceEntries.mul** report to the relevant user groups in the Users workspace of the Workspace Client (**Setup » Users » Setup » Window Groups » Windows**).

See the *Deltek Maconomy System Admin Guide* and the *Deltek Maconomy Web Client Install Guide* for more details.

Working with Vendor Information in the Web Client

Deltek Tracking: 1754735
Version: 2.6.1

Finance users can now view and work with vendor information using two new workspaces added to the Maconomy web client. Specifically, users can do the following:

- Create vendors and company vendors
- Edit vendor information

- Submit vendors for approval (if approval hierarchies are set up)
- Approve or reject vendors (if approval hierarchies are set up)
- Delete vendors
- Attach documents to vendors
- View vendor documents

Changes to Maconomy

As part of this functionality, the following workspaces are added to the web client:

- Vendors
- Company Vendors

These workspaces are found under the Accounts Payable menu section.

Setup Instructions

You can customize the menu and workspace layouts to limit each user's access to the workspaces and their tabs.

Refresh Data Action

Deltek Tracking: 1077733
Version: 2.6.1

Maconomy users can now refresh workspaces in the web client using a dedicated icon at the top right of each workspace. This icon allows them to refresh workspace data without having to refresh the actual browser. The **Refresh workspace** action is now also available in the Data changed by another user error dialog.

Recent Places

Deltek Tracking: 1695773
Version: 2.6.1

The web client now features a Recent Places menu item which lists the last three workspaces accessed by the user. This functionality helps users switch between workspaces quickly and easily.

Displaying Boolean Fields as Checkboxes

Deltek Tracking: 1747913
Version: 2.6.1

Boolean fields in the web client are now rendered as simple checkboxes. This enhancement also includes the capability to group these fields together in a workspace layout.

Filtering by The Approval Status Field

Deltek Tracking: 1741561
Version: 2.6.1

You can now filter table lines by their **Approval Status** field values. This enhancement applies to all existing and new web client workspace tables that contain the field.

Adding a Selection Criteria Panel to Workspaces Without Tabs

Deltek Tracking: 1746625
Version: 2.6.1

Companies can now customize their web client installations by adding a Selection Criteria Panel to workspaces that do not have tabs.

Default Access to Required System Level Windows

Deltek Tracking: 1231179
Version: 2.6.1

The Required System Level Windows is a new standard group that is added to the Setup tab in the Users workspace. Users have access to this window group by default, and it includes all windows used at the system level. User access to this window cannot be modified or removed.

Prior to this release, it was common for customers to have systems that were not configured for their users to have access to system level windows, which caused some standard functionalities in Maconomy to not work properly.

The Required System Level Windows group ensures that the following functionalities are working:

- Viewing and refreshing notifications
- Running background tasks
- Using long texts for comments on time sheets
- Using Approvals in Touch
- Using the Conversation Center workspace in the web client

The Users Workspace

Deltek Tracking: 1566682
Version: 2.6.1

You can maintain data about users and their roles in the new Users workspace in the Access Control menu group in the web client. Create users and roles, search for specific users, reset their passwords, and assign access privileges in this workspace easily. If approval hierarchy is enabled, you can also submit, approve, or reject users.

For more information, refer to the Deltek Maconomy 2.6.1 web client online help.

CRM Workspaces and Enhancements

Deltek Tracking: 1370473
Version: 2.6.1

New customer relationship management (CRM) workspaces are added to both the Maconomy Workspace and web clients to help you manage your company’s sales activities with current and potential customers more efficiently.

Existing CRM-related functionalities in the Workspace client are available in the new CRM menu group of the web client, which consists of the Contact Companies, Opportunities, and Pipeline workspaces. You can use the Contact Companies workspace to create and maintain information about your contact companies, such as their business details. As you solidify relationships with customers, use this workspace to assign roles to your employees to lead the sales engagements and negotiations. You can also log your sales opportunities and special sales interactions, including important documents. If you want to supply more details about your opportunities, events, and budgets, go to the Opportunities workspace, where you can also settle and close the opportunities as won or lost.

As for the Pipeline workspace in the web client, it includes a Selection Criteria panel that slides into view when you need it. Use it to filter sales opportunities, including closed ones, according to the company, contact company, assigned salespersons, and/or expected closing dates. This workspace features key performance indicators (KPI) and charts that provide an overview of sales estimates. You can also review the details of open and closed opportunities. The same features are available in the Opportunity Pipeline single dialog workspace in the Workspace Client. To access the workspace, go to **Single Dialogs » Contact Management » Lookup » Opportunity Pipeline**.

For more information about the new workspaces, refer to the Deltek Maconomy 2.6.1 Workspace Client Online Help and/or the web client online help.

Setup Instructions

To allow users to utilize the Pipeline workspace in the web client, make sure you add the **OpportunityPipeline** application dialog to the relevant user groups in the Users workspace of the Workspace Client (**Setup » Users » Setup » Window Groups » Windows**).

Support for User Approval

Deltek Tracking: 1567173
Version: 2.6.1

The Users tab in the Approval Center and related notifications are added in the web client to support user approval using approval hierarchies. The Approve Users by Employee single dialog workspace is also added in the Workspace Client.

For more information, refer to the Workspace Client or web client online help.

The Draft Invoice Creation Workspace

Deltek Tracking: 1671335
Version: 2.6.1

The Draft Invoice Creation workspace is added to the web client to enable you to create draft invoices for a batch of jobs.

New functionality in Maconomy is also added to this workspace:

- If errors occur during the batch creation of draft invoices, the system automatically skips the job causing the error and moves to the next one. The details of each error are registered as a notification for the user to review after the process is done.
- A **Print Draft** action is available in the table part to allow you to print drafts for each job individually.

Changes to Maconomy

To support this functionality, the Draft Invoice Creation workspace is added in **Accounts Receivable menu section » Batch Invoicing submenu.**

Procedures

Create Draft Invoices

You can create draft invoices for multiple jobs in this workspace.

To create draft invoices:

1. Under the Batch Invoicing submenu, go to the Invoice Draft Creation workspace.
2. In the Selection Criteria panel, use the available criteria to display the jobs for which the draft invoices should be created.
3. Click **Apply**.
4. Toggle on **Show Lines** to display the results.
5. Click **Delimit…**.
6. In the wizard that opens, specify information as needed.
7. Click **Delimit**.

   Note: A warning message displays if draft invoices already exist on one of more jobs in the table. The system skips these jobs during draft invoice creation.

   The Create Draft checkbox is selected on each applicable line in the table.
8. Click **Create Drafts**.
9. In the dialog that opens, choose a preferred invoice date to apply to all draft invoices.
10. Click **Create**.

    The **Drafts Exist** checkbox is automatically selected on each line after batch draft invoice creation is done.

    Note: If errors occur on jobs during invoice draft creation, these are automatically skipped by Maconomy. You can view which action failed and the cause of failure on the line in the table.

Setup Instructions

The Invoice Draft Creation workspace is available by default to users with the requisite permissions.

The Draft Invoice Status Workspace

Deltek Tracking: 1696984
Version: 2.6.1

In 2.6.1, the Draft Invoice Status workspace is added to the web client to provide an at-a-glance view of draft invoices in various stages. This helps you monitor all draft invoices and ensure that they progress to the next stage of the invoicing process in a timely manner.

Specifically, you can do the following:

- Utilize selection criteria to view specific draft invoices
- Easily view the status and next approver for a draft invoice
- Manually select individual draft invoices or process draft invoices in batches for submission, approval, or printing
- Print a draft invoice individually for each line in the table part using the **Print Draft** action

Changes to Maconomy

To support this functionality, the Draft Invoice Status workspace is added to **Accounts Receivable menu section » Batch Invoicing submenu**.

Setup Instructions

For users with the requisite permissions, this workspace is available by default.

The Job Invoicing Workspace

Deltek Tracking: 1086198
Version: 2.6.1

The Job Invoicing workspace is now available in the web client. It displays all fully approved draft invoices that are ready for printing. New functionality in Maconomy is also introduced with this workspace:

- The ability to specify which invoices to include based on the preferred invoice date
- The ability to restrict the displayed invoice type in the workspace to 0-invoices or regular invoices only

This workspace is located in **Accounts Receivable menu section » Batch Invoicing submenu.**

For users with the requisite permissions, this workspace is available by default.

The Employee Dashboard Workspace

Deltek Tracking: 1287239
Version: 2.6.1

The Employee Dashboard workspace highlights an employee's key performance indicators (KPI). It also displays a graph related to employee utilization, such as billable and productive time. By default, billable and productive hours are determined by assigning an employee utilization level to a time activity on a registered job entry, such as billable time and productive time. You can create these employee utilization level types in the Popup Fields reference workspace.

Absence statistics are also displayed in this workspace. Additionally, you can use selection criteria to filter to a specific month and year to view data for that time. You can also customize the layout to add From and To Date fields to the selection criteria to further specify what data you would like to view.

This workspace displays the data of the currently logged in user only. You cannot choose to view any other employee's information in this workspace.

This workspace is listed under the Self Service section in the web client.

Changes to Maconomy

The Employee Dashboard workspace is added to the web client.

Setup Instructions

While this workspace is available by default for web client users with the requisite roles and permissions, you must add the following to the relevant user groups in the Users workspace of the Workspace Client (**Setup » Users » Setup » Window Groups » Windows**):

- **EmployeeDashboard** application dialog
- **EmployeeAbsenceCalendars** application dialog
- **Analyzer::EmployeeDashboard::EmployeeUtilization.mul** report
- **Analyzer::EmployeeDashboard::EmployeeUtilizationByMonth.mul** report

Simplified Web Client Menu Colors

Deltek Tracking: 1821098
Version: 2.6.1

This enhancement improves on the web client color scheme introduced in 2.6. Colors are now simplified to make the menu more intuitive to use and navigate.

New Maconomy Information Center

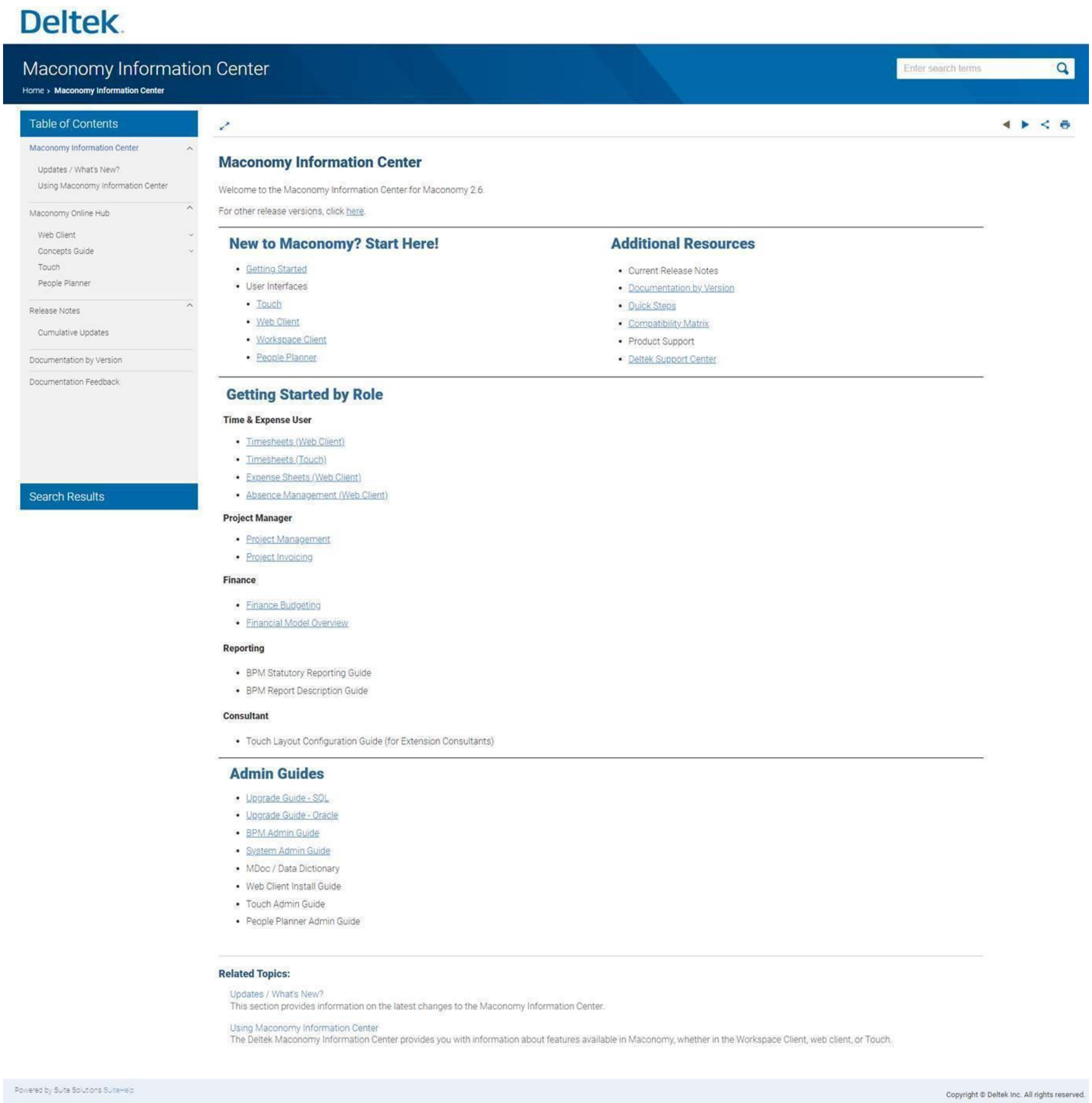
Deltek Tracking: 1564965
Version: 2.6

The new online Maconomy Information Center serves as a hub for all Maconomy documentation and related material with a static URL to bookmark. From the landing page, you can easily access all online help for Web Client, Workspace Client, Touch, People Planner, and the new Online Concepts Guide, as well as the Compatibility Matrix, Statutory documentation, and Admin Guides.

Access the Information Center via the following link:

https://help.deltek.com/product/Maconomy/Documentation/InformationCenter

Below is the landing page of the Maconomy Information Center.



New Online Concepts Guide

Deltek Tracking: 1599272
Version: 2.6

The new Online Concepts Guide merges the former Concepts Guide with PSO and CPA Solutions documents and Integrations guides. The role- and area-based structure is designed to help you easily find the material you need. The Online Concepts Guide is accessed through the Maconomy Information Center > Online Hub.

Debranding the Maconomy Web Client

Deltek Tracking: 1549295
Version: 2.6

Beginning with this release, Maconomy will stop using the "iAccess" brand. That is, it will no longer maintain a distinct name for its web client. This change is implemented across the user interface, as well as in documentation and other materials.

Modernization of the Web Client

Deltek Tracking: 1389080
Version: 2.6

The web client has undergone some changes to improve the look of the interface and give it a more modern feel. While the update is mostly aesthetic, this enhancement also covers a minor change to menu navigation.

When you hide the menu, the web client still displays the icons for the menu sections on the left side of your screen. You can quickly view and navigate to any workspace under a menu section by hovering your pointer over the icon for that section and clicking the specific workspace you need from the list that displays.

Line Number Column in Tables

Deltek Tracking: 1654643
Version: 2.6

Users can now add the **Line No.** column to tables in their web client workspaces.

> **Note:** Deltek does not recommend adding this column to large tables as this results in performance penalties when users insert table lines and Maconomy recalculates line numbers.

The Web Analyzer

Deltek Tracking: 1217512, 1352308, 1462157, 1463988
Version: 2.6

This release introduces the Analyzer report functionality to the Maconomy web client. Users can make ad hoc queries to the database and view the query results in table form. Specifically:

- Two report templates are now available via dedicated workspaces: a basic and an advanced report template for querying job data. More report workspaces will come in later versions.
- Users can utilize these report templates to customize layouts from which they can generate report outputs that fit their specific work requirement.
- At any time, users have the option to view report outputs from reports that they ran previously; they can also export these outputs to an Excel spreadsheet if needed.
- Users also have the ability to export a report layout, allowing others to import this into their application and run it themselves.
- While they wait for a report to finish running, users can navigate to other parts of the web client and perform other tasks.

- If needed, users can also cancel a report in the web Analyzer interface, and thus on the server as well. This action was not possible with legacy Analyzer implementation in the Workspace Client.
- Companies can add new custom reports to their application.
- Companies can also add existing standard and custom reports to the web client menu if they want to make these available in the application.

As part of this feature, some Analyzer reports are now updated to improve usability. Specifically:

- The “Job Filter” report is now called “Job Overview”.
- The “Job Analyzer” report is now called “Job Analysis, Advanced”.
- The “Job Progress” report is now called “Job Progress by Job”.
- The “Task Progress” report is now called “Job Progress by Task”.
- All four reports are restructured and updated with new fields, and are now available in the Universe Reports folder in the Java Analyzer.

Changes to Maconomy Web Client

To support this feature, the following report workspaces are added to the web client:

- Job Analysis Advanced
- Job Analysis Basic

To access these workspaces, go to **Jobs menu section » Job Analyzers submenu**.

Setup Instructions

See the *Deltek Maconomy System Admin Guide* and the *Deltek Maconomy Web Client Install Guide* for details.

Controlling iFrame Refresh

Deltek Tracking: 1544014
Version: 2.6

You can now use pane and field updates as triggers to refresh inline frames (or iFrames) embedded in your Maconomy web client workspaces. This ensures that your iFrames always reflect the latest information from the application.

To set up this customization, use the new **refresh** property together with the existing **embed** property.

Previous to this release, the only way you could trigger an iFrame refresh was to add a **query** parameter to the **embed** property. This query would contain one or more field properties.

Improved Editing Capability in the Maconomy Web Client

Deltek Tracking: 1015368
Version: 2.6

The Maconomy web client now allows you to open a record and edit the fields directly. You no longer need to select or click the **Edit** action first, and this action is now removed from all workspaces. To quickly undo your unsaved changes, you can just click the **Revert** icon displayed beside the field/s you edited.

If you want to easily view which fields are editable, you can opt to display borders around all editable fields. To do this, open the My Settings dialog and select **Show field borders** from the **Input controls** field dropdown list.

This enhancement is available by default.

Export to Excel

Deltek Tracking: 1077734
Version: 2.6

Users can now export data from web client tables to spreadsheets using the new **Export to Excel** icon. Specifically, you can:

- Go into any table or list view and export the data to a spreadsheet (.xlsx or .csv).
- Export filtered rows as is, whether you are exporting from a list view or while using inline filters.
- Export only visible columns, in the order that they appear in your application.

Note that hierarchical line information from tree tables are not reflected in the exported spreadsheet.

Improved Placement of Add Line Action

Deltek Tracking: 1277171
Version: 2.6

The Add Line action is now found above the table to make it easier for users to locate. There are no changes to the actual functionality.

Additional Chart Options

Deltek Tracking: 1275019, 1577145, 1599758
Version: 2.6

The following chart types are now available for use in your web client workspaces:

- Bar with negative stack
- Funnel
- Pyramid

Charts are not enabled by default, but you can add them to your installation as needed. To view the example workspaces that show the available chart types, go to **Examples » Charts**.

New Customer Payments Workspace in Web Client

Deltek Tracking: 1287241

Version: 2.6

The Customers menu section is renamed to **Accounts Receivable.** A new Customer Payments workspace is added to the Accounts Receivable menu section of the Web Client to enable you to create and post customer payment journals.

You can enter several customer payments in the same customer payment journal, and you can edit those entries until you post the journal. You can add more lines if there are more than one payment. You can have payments on several customers on the same journal. Once all payments have been added, you can post the journal.

Conversations for Credit Control

Deltek Tracking: 1278070
Version: 2.6

Previously, the Conversations functionality was added to the Collections workspace in the web client, which enabled users to create and respond to conversations about outstanding customer invoices or any invoice in general. You can now start a conversation or view messages you are a part of in the Credit Control workspace in the Workspace Client as well. If you are mentioned in a conversation, you will receive an Unread Customer Invoice Message notification in the To-Do pane, which will direct you to the message in the Credit Control workspace.

To support this feature, the following changes are made:

- The Create Conversation action and the Conversation sliding panel are added to the Credit Control workspace.
- New notification for unread customer invoice message

Skills Expiry Date for Employees' Skills

Deltek Tracking: 1618936
Version: 2.6

The Employees Skills table in the Employees Skills single dialog now includes an expiry date for employees' skills. This functionality aids People Planner in the filtering of resources based on matching the skills requirements linked to a job budget line.

Restricted Access to Employee Data

Deltek Tracking: 1078403
Version: 2.6

Maconomy contains a wealth of employee information, some of which are sensitive data. Thus, it is important to restrict employee data access to authorized users only, such as managers and human resources.

Prior to this release, you can set up access levels, dialog access, and use layouts among others to protect sensitive data. However, as employee information continue to grow, it is important for security measures to constantly evolve as well.

This feature includes:

- New Employee Field Access, and Show Employees Single Dialogs
- New User Actions for HR Workspaces
- Removal of Sensitive Employee Data from Search, Filter, and Employee Windows
- Removal of Sensitive Employee Data from Contact Persons

Overall, only non-sensitive employee data is accessible, and users with requisite access rights can view more information on the employee records in both the Workspace and web clients.

New Employee Field Access, and Show Employees Single Dialogs

You can now specify which employee details are accessible in search windows, employee filters, workspaces, and prints in the Employee Field Access single dialog workspace. Select the fields you want to be displayed, and then repeat or update the selection for each company. You can use the new actions available to show or hide all the fields and copy the selection to a company or all companies.

Any changes you make in the Employee Field Access single dialog workspace will not affect BPM reports, and all the fields you exclude will not be displayed in the Analyzer reports in the CTRL-G employee searches.

In addition, the Show Employees single dialog workspace is introduced to support assistants in the Workspace client and info bubbles in the web client. It is read-only and displays non-sensitive employee data according to the access levels setup. All employee fields are available, however, if you set up the Employee Field Access single dialog workspace to exclude certain fields, the data for those fields will be blank. Employee assistants are also now redirected to the Show Employees single dialog workspace instead of the Employees workspace.

To access the Employee Field Access or Show Employees single dialog workspaces, go to **Single Dialog » Set-Up » Set-Up** in the Workspace client or **Reference Workspaces » Set-Up » Set-up** in the web client.

New Actions in HR Workspaces

To control employee data access in HR workspaces, the following actions are added in **Setup » Users » Users » Roles » Actions**:

- **See HR Information for all Employees**: This action allows users to access records of all the employees.
- **See HR Information for Subordinates**: This action allows users to access records of employees for whom they are the manager.
- **See HR Information for Mentees**: This action allows users to access records of employees for whom they are the mentor.
- **See HR Information as Secretary**: This action allows users to access records of employees for whom they are the secretary.

These actions limit the employee data access in the following HR workspaces:

- Employees
- Employee Revisions single dialog
- Compensation Agreements single dialog
- Employee Relations single dialog
- Emergency Contacts single dialog
- Employee Evaluations single dialog
- Parental Status single dialog
- Relocations single dialog
- Education and Qualification single dialog

- Work Eligibilities single dialog
- Company Properties single dialog
- Contact Person, Gross Pay Overview single dialog
- Contact Person, Base Salary Rate Overview single dialog
- Employee Positions single dialog
- Employee Commission Agreements single dialog

The employee records users can view in these workspaces are the same information they are allowed to print. If none of these actions are enabled, they will only have access to their own employee records.

Removal of Sensitive Employee Data from Search, Filter, and Employee Windows

All sensitive employee data are removed from the Find Employee window and all employee filters. There may still be employee fields with sensitive data in the search and filter windows, but the data fields will remain blank.

In addition, sensitive employee data are removed from the following single dialogs:

- Employee Budget Line Overview
- Employee Absence Calendars
- Events Per Employee
- Employee Skills
- Employee Calendars
- Detailed Employee Planning
- Task Search
- Employee Approvals
- Employee Absence Overview
- Team Absence Overview
- Approver Absence Overview
- Show Employees

You also cannot print sensitive employee data from the following single dialogs:

- Print Employee Report
- Print Job Profitability
- Print Pending Job Actions
- Print Planning Conflicts

Removal of Sensitive Employee Data from Contact Persons

Previously, several fields are synchronized between employees and contact persons, including sensitive data. This feature ensures that all sensitive data are removed, and if a contact person becomes an employee, no sensitive data will be transferred to the employee records.

Beginning with this release, the following fields are the only fields that can be synchronized:

- Name1

- Position
- DepartmentNumber
- ElectronicMailAddress
- Initials
- Telephone
- Telephone2
- MobilePhone
- MobilePhone2
- CompanyNumber
- FirstName
- MiddleName
- LastName
- FormalFirstName
- FormalMiddleName
- FormalLastName
- PersonalTitle
- NameInLocalAlphabet

Only a user with requisite access rights to an employee record can view the corresponding contact person records of the employee.

Enhanced Access Control

Deltek Tracking: 1387233
Version: 2.6

The AbsenceEntryAndEmployee and AbsenceCalendarLineAndEmployee universes are removed. The Absence Calendar Lines and Absence Entry Overview single dialog workspaces now only use access control to restrict user access to their own entries; the entries where the user is the supervisor, secretary, or absence approver, and entries where the user can see all absences.

Enhanced Approval Information in Info Bubbles

Deltek Tracking: 1167197
Version: 2.6

Additional information is now available in info bubbles that are used in various workspaces in the web client. This allows for an easier way to determine where an approval object is in the approval process, and see who you can contact for the next step in the process.

These enhancements include:

- The info bubble in the card now shows overall approval status for the record, including detailed information about header and overall status about lines
- The info bubble in the card now shows last and next approver for the header
- The info bubble on the line shows last and next approver for the line
- A new **Partly Approved** status indicates if approval has started but not completed
- The information dynamically adjusts to the approval hierarchy configuration (such as if header and/or line approval is enabled)

Long Text Single Dialog Workspaces

Deltek Tracking: 1564965
Version: 2.6

New single dialog workspaces with long text functionality enabled by default are now available in the Workspace Client and web client. Functionality is the same as that in the existing short text single dialog workspaces.

These new workspaces are located under the Single Dialogs menu group under the relevant submenus.

For more information, refer to the Workspace Client single dialogs documentation.

Resource Management

Assign Skills to Budget Lines

Deltek Tracking: 1717461
Version: 2.6.1

You can now assign skills to budget lines in the Budgeting workspace in the web client, specifically to time lines. This is particularly useful for People Planner users, as this can be used for assigning relevantly skilled resources for improved efficiency and utilization on the job.

To support this feature, the **Show Skill Requirements on Budget Lines** system parameter is added. You must enable both this system parameter and the **Enable People Planner Web** system parameter to assign skills to budget lines.

In the Budgeting workspace, a new **Assign Skills** icon is added to budget lines. This icon is available in the Full Budget subtab and Time subtab. Clicking this icon displays a wizard where you can create or modify skills to add to the budget line. Note that you can only assign skills on time-related activities. This icon is not available for other line types.

Changes to Maconomy

The Budgeting workspace in the web client is updated to support this feature.

Procedures

Assign Skill Requirement to a Budget Line

To assign a skill:

1. Under the Jobs submenu, go to **Budgeting Workspace » Working Budget » Full Budget subtab** or **Time subtab**.
2. Click the **Assign Skills** icon on a budget line.

   > **Note:** This icon is available only on time lines.

3. In the wizard that opens, click **+Add Skills Requirement** to add a new skill.
4. Add information in the following fields:
   - **Skill Number**
   - **Skill Name**
   - **Level**
   - **Requirement Type**
5. Press ENTER to save the line.
6. To select an existing skill requirement to add to the budget line, click on a skill on the list.
7. Click **Save**.

Setup Instructions

To enable this feature:

6. In the web client, go to **Reference Workspaces » Set-Up » Set-up » System Parameters**.
7. Use the **Search** filter and/or the **Search** field to select the **Show Skill Requirements on Budget Lines** system parameter.
8. In the card part, select the **Show Skill Requirements on Budget Lines** checkbox.
9. Click **Save**.

System Parameters

Parameter	Description
Show Skill Requirements on Budget Lines	Select this parameter to allow users to add skills on time-related activities on budget lines. **Note:** The **Enable People Planner Web** system parameter should also be enabled to use this feature.

Calculation of Total Cost or Billing Price on Budgets Imported from People Planner

Deltek Tracking: 1528597
Version: 2.6

The standard functionality in Maconomy calculates total cost and billing prices on budgets as quantity multiplied by unit price. However, for users with People Planner integration, budget lines are comprised of underlying resource allocations and actuals. The unit price in this scenario is calculated using the average billing price from resource allocation lines. Since the unit price only provides two decimal points, the calculated total cost or billing price on the budget line may differ slightly from the sum of the cost or billing prices of the underlying resource allocation lines.

This feature was introduced in 2.5.3 CU 03 to provide a new way to calculate budget lines based on the underlying resource allocation lines. The total billing or cost price is now calculated as the sum of the billing or cost prices from resource allocation lines. The unit price is still calculated as an average of resource allocation lines, but is not used to calculate prices.

This feature applies only when you import lines from People Planner to your job budget by updating the job budget resource allocation. This also applies to progress evaluation workflows if you create a progress evaluation for the job. The **Allow Approximate Unit Price in Job Budgets** system parameter must also be enabled.

Beginning in 2.6, this feature is also supported when you run progress evaluations and import actuals from People Planner.

To use this functionality, the **Billing Price Based on Actuals and ETC** job parameter for Job Progress should also be enabled before the total billing price is updated to reflect the resource allocations (ETC).

> **Note:** Maconomy uses the standard algorithm (Quantity x Unit Price = Total Price) when you make further changes on the budget line after the import.

Changes to Maconomy

The following workspaces are updated:

- Jobs workspace
- System Setup workspace

Setup Instructions

To enable this feature:

10. Go to **System Setup » Parameters and Numbers » System Parameters**.
11. Double-click the **Allow Approximate Unit Price in Job Budgets** parameter.
12. On the System Parameter subtab, select the **Allow Approximate Unit Price in Job Budgets** check box.

System Parameters

Parameter	Description
Allow Approximate Unit Price in Job Budgets	Enable this system parameter to prevent Maconomy from changing the entered total cost or billing price for a job budget line in the Job Budgets or Periodic Job Budgets windows. This also applies to job budget lines imported from People Planner. If this system parameter is disabled, then the entered total price is recalculated to reflect the quantity multiplied by the unit price, which, due to rounding, might not be exactly equal to the entered amount. If enabled, the entered total price is kept, which has the consequence that the unit price on the job budget line is only approximately equal to the ratio of the total price and quantity.

Project Management

Zero Value on Base Salary Markup Percentage in Price List Lines

Deltek Tracking: 1688025
Version: 2.6.1

Maconomy 2.6 introduced the ability to use the zero value to indicate that additional markup on certain fields in general or job-specific price lists was not necessary in certain instances. This enhancement further extends that functionality to use for base salary markup % and standard base salary markup %, which is applied to time activities. To support this, the following fields are added to price lists:

- **Zero Base Salary Markup %**
- **Zero Standard Base Salary Markup %**

Alignment of Batch Invoicing Selection Criteria

Deltek Tracking: 1731661
Version: 2.6.1

Selection criteria across reference workspace layouts (web client) and single dialog workspaces (Workspace Client) related to batch invoicing are now updated to display identical fields that are used in the batch invoicing process.

Block Purchase Order Creation on Jobs

Deltek Tracking: 1287230
Version: 2.6

You can now block the creation of purchase orders on jobs. This provides a restriction on new purchase orders while still allowing you to receive vendor invoices and other costs related to outstanding purchase orders on the job.

When a job is blocked for purchasing, it is no longer possible to create purchase orders. If you have existing purchase orders on the job, you can still invoice them, but you cannot modify them.

When you create or update a purchase order from the Purchase Orders single dialog workspace, jobs that are blocked for purchasing do not appear in searches for creating or updating purchase orders in the system. An error message displays if you attempt to change the job number on the purchase order to that of a blocked job, or when you add or update a purchase order line related to the blocked job.

Additionally, when you create a job using a template that has enabled this feature, it is also automatically blocked for purchasing. This also happens when you copy a job that is blocked for purchasing.

To support this feature, a check box for Purchasing is added to the **Blocked** field in **Jobs » Jobs » Home » Information**.

> **Note:** Prior to this release, selecting Time or Amount Registration on the **Blocked** field would block purchase order creation on the job. This no longer applies since you can now block purchase order creation by selecting Purchasing instead.

This feature is available in both the Workspace Client and web client.

Setup Instructions

There are no changes to setup for this enhancement.

Zero Value on Price List Lines

Deltek Tracking: 1176123
Version: 2.6

Prior to this release, the zero value was used in price list lines to indicate that Maconomy should derive the sales price from a different source in the system, such as an employee sales price. However, there are instances when it is preferable to use zero as a value to indicate that additional markup or such is not needed.

In 2.6, the zero value can be used to indicate that you do not want Maconomy to derive values from another source. Specifically, this functionality is available for markup, intercompany pricing, and price adjustments. To support this feature, these fields are added:

- **Zero Markup %**
- **Zero Standard Markup %**
- **Zero Intercompany Price %**
- **Zero Adjustment %**

This enhancement applies to both job-specific and general price list lines.

Example

In the standard price list, a markup of 10% is specified on amount activities so all registrations will apply 10% markup. On one particular job, the markup must be 0% on amount registrations. When utilizing this feature, you can specify on a job-specific price list that 0% is imposed on the amount registrations by selecting the **Zero Markup %** check box. When you register an amount activity for this job, 0% is imposed on that registration.

Transfer Job Quote to On Account Draft Invoice

Deltek Tracking: 1487214
Version: 2.6

Currently, when a job invoice is prepared, a typical workflow is to approve the invoice selection and have job quote lines appear as basis for invoice editing according to invoice layout rules. This applies only to T&M invoices.

This enhancement extends the functionality to invoices on account (IOA) and to invoice preparation where the budget is the basis. Upon approval, the draft invoice on account is now based on the job quote lines of the latest job quote.

This feature also introduces the ability to choose whether you would like to base draft invoices, whether IOA or T&M, on the latest *approved* job quote. To support this functionality, the **Approved Job Quote as Basis for Draft Invoice** system parameter is added. When this is enabled, the transfer occurs only when an approved job quote exists, regardless of whether a more recent but unapproved revision exists.

To transfer job quotes to an on account draft invoice, you can select the new **Create Invoice on Account from Quote** check box in the invoice layout rules to allow this on a job. Additionally, the existing **Create Invoice from Quote** check box is renamed to **Create T&M Invoice from Quote** to differentiate between the two invoice types.

When you have draft invoices of both T&M and on account on the same job, they can now be based on the same job quote lines. Combined invoicing of T&M and on account invoices will include only one copy to the job quote lines as basis for editing.

Changes to Maconomy

The following workspaces are updated:

- Job Cost Setup workspace
- Jobs workspace
- Invoice Layout Rules single dialog workspace
- Invoice Selection single dialog workspace
- On Account Invoice Selection single dialog workspace
- Invoice Preparation single dialog workspace
- Work Orders workspace
- System Setup workspace
- System Parameters single dialog workspace

Setup Instructions

To base draft invoices on the latest approved job quote:

1. Go to **System Setup » Parameters and Numbers » System Parameters**.
2. Double-click the **Approved Job Quote as Basis for Draft Invoice** parameter.
3. On the System Parameter subtab, select the **Approved Job Quote as Basis for Draft Invoice** check box.

System Parameters

Parameter	Description
Approved Job Quote as Basis for Draft Invoice	If this system parameter is disabled, invoice printout lines are prepared based on the latest approved job quote revision, but if no approved revision exists, the latest revision is used as basis. If this system parameter is enabled, an error message displays if the job quote has no approved revision. This system parameter covers the following actions: ▪ Invoice selection is approved and editing is based on job quote. ▪ On account invoice selection is approved and editing is based on job quote. ▪ Invoice preparation based on job budget is approved and editing is based on job quote.

Touch

App Enhancements

The following enhancements are available when you upgrade to the specified Touch app version:

Improved Search Functionality

Deltek Tracking: 1680648
Version: 4.1

Previously, the Touch search functionality did not run as seamless as expected, and there were a few issues in obtaining data on the lookup screens. When you searched for specific criteria, the **More** button was either missing or pulled incorrect or no data. In addition, if you did not use the **Magnifier** icon during your search, you can only view the app results.

Lookup screens now show all the available data by default. For example, if you are on the Find Job screen, you can view your existing jobs, recent ones, and all other jobs on the screen in one go. If you are looking for more data, simply scroll down to the bottom of the screen. There are no additional data available in the Maconomy server if you cannot scroll anymore.

The **More** button and the **Magnifier** icon are also now removed. As you enter your search criteria, filtered data displays on the lookup screen automatically. Tap **Search** on your keyboard or use the new **See server results for** button to load more results. “No record found” is displayed on the screen when there are no results matching your search criteria.

Support for Android 12L

Deltek Tracking: 1597344
Version: 4.0

Touch has been updated to support the Android 12L mobile operating system.

Enhanced Touch Menu

Deltek Tracking: 1516150
Version: 4.0

The Touch sliding menu now features a new look, and it slides into full screen view on mobile devices in both portrait and landscape modes. It still displays the Touch screens according to your preferences on the Settings screen.

> **Note:** The new sliding menu is available only on Maconomy 2.5 (or higher), and when you upgrade to the Touch app version 4.0.

Maconomy Enhancements

The following enhancements are available when you upgrade to the specified Touch app and Maconomy versions:

Server URL Auto-Population Removal

Deltek Tracking: 1453257
Version: 4.1

To ensure app security, the link to auto-populate the **Server URL** field in the initial Touch setup screen is no longer available. The initial setup screen in Android and iOS mobile devices previously had slight differences. For Android, there was one link that you can click either to download the app if it is not yet installed or to auto-populate the **Server URL** field, whereas for iOS, those actions had two separate links.

Now there is only one link in the initial Touch setup screen that allows you to download the app. If it is already installed, you must copy the URL provided in this screen and paste it in the **Server URL** field in the app. These changes to the initial setup screen apply to both Android and iOS mobile devices.

> **Note:** This feature is available when you upgrade to the Touch app version 4.1 and Maconomy 2.6.1 (or higher). If you are using Touch Backend 4.0 (or earlier) and Touch app version 4.1 (or later), you cannot click the link to automatically populate the **Server URL** field. Request for the Touch URL from your administrator and enter or paste it manually in the **Server URL** field.

Documents for Mileage Sheets

Deltek Tracking: 781469
Version: 4.1

You can now include receipts in your mileage sheet and mileage sheet lines. You also have the option to remove receipts and keep or remove these in your Archives folder. To support this feature, the **Attach Receipt** and **Detach Receipt** actions are added to the Mileage Sheet and Mileage Sheet Line screens.

> **Note:** This feature is available when you upgrade to the Touch app version 4.1 and Maconomy 2.6.1 (or higher). For related mileage sheet procedures, tap » Help in the app to access the Touch 4.1 Online Help.
>
> The new server settings and layout changes for this feature are added in the *Touch 4.1 Admin Guide* and the *Deltek Touch 4.1 for Maconomy 2.6.1 Layout Configuration Guide*, respectively.

Multi-Level Approvals

Deltek Tracking: 1642744
Version: 4.1

Touch now shows the correct approval statuses and actions for multi-level approvals.

The following statuses can be displayed on approval items:

- Submitted
- Approved
- Partly Approved
- Rejected

The **Approve**, **Undo Approve/Reject**, and **Reject** actions are displayed or hidden depending on whether the item is approved or rejected.

> **Note:** This feature is available when you upgrade to the Touch app version 4.1 and Maconomy 2.6.1 (or higher). For more information about the layout changes, see the *Deltek Touch 4.1 for Maconomy 2.6.1 Layout Configuration Guide*.

Online App Release Notes

Deltek Tracking: 1698556
Version: 4.1

Previously, the Deltek Touch for Maconomy App Release Notes was published as a PDF along with the rest of the Touch documentation suite. The App Release Notes is now available in the Maconomy Information Center only. There are no major changes except for the addition of the Release History section which nests the release notes of earlier Touch versions.

You can access the Maconomy Information Center at https://help.deltek.com/product/Maconomy/Documentation/InformationCenter.

Touch Online Help

Deltek Tracking: 1463516
Version: 4.0

The Touch Online Help replaces the User Guides for Android or iOS in PDF. You can access the Touch Online Help according to your Maconomy version and mobile operating system when you tap **Help** in the app.

With the Touch Online Help, information about the app is more accessible and searchable. New sections for Quick Step guides and other resources, and documentation feedback are also introduced. Use the **Search** field to lookup information or tasks, and tap sections listed in the Table of Contents to easily browse topics.

> **Note:** This feature is available when you upgrade to the Touch app version 4.0 and Maconomy 2.6 (or higher). If you are using an older Maconomy version, you can still access the Deltek Touch User Guide for Android or iOS in PDF.
>
> If you have a customized Touch Help, there are no changes to the customization process, but you can now create either a PDF or an HTML custom Touch Help. When you upgrade to Touch 4.0 and Maconomy 2.6, you will automatically get the new Touch Help and will have to add your customizations.

Touch Admin Guide

Deltek Tracking: 1530336, 1530340, 1530339
Version: 4.0

Deltek introduces the Touch Admin Guide, the new primary document for technical consultants. It comprises of the previous Touch Installation, Upgrade, and Multitenancy Setup Guides.

MScript Removal

Deltek Tracking: 1065005
Version: 4.0

The Touch app no longer uses the MScript web service, and now relies fully on the RESTful web service. The removal of the MScript Touch API affects installation and customization requirements.

In addition, this feature includes the following improvements:

- All Maconomy communication use the RESTful web service. Thus, there is no need to configure which areas use REST.
- Load balancing is fully supported.
- The Touch API installation is easier and faster. Potential issues can be identified and resolved faster now that there is only one web service.
- Customizing Touch via Extender is now like customizing the web client. The standard files are available in Extender.
- The customization process for settings is improved. By customizing customsettings.json, the custom file will include the changed settings only, which reduces the risk of settings-related issues when upgrading Maconomy.
- All screens are now translated.
- The company specific values of the **EnableLongTextEmulationInWorkspaces** system parameter are now used.
- By default, a session timeout occurs after 20 minutes of inactivity. A session timeout after one hour of inactivity is no longer applicable.

> **Note:** This feature is available when you upgrade to the Touch app version 4.0 and Maconomy 2.6 (or higher). For more information, see the Technical Considerations section of the *Deltek Touch for Maconomy App Release Notes*.
>
> Refer to the *Deltek Touch 4.0 for Maconomy 2.6 Touch Admin Guide* for installation changes, and the *Deltek Touch 4.0 for Maconomy 2.6 Layout Configuration Guide* for customization changes related to this feature.

Login Settings Moved to the configuration.ini File

Deltek Tracking: 1411120
Version: 4.0

There are different credential authentication methods, such as Azure and Okta, that you can use to log in to Touch. Previously, the login settings were controlled by server settings, which limits the login types you can use in different systems. For example, you want to use Azure for production, but retain Maconomy login credentials for development and testing. The login settings are moved to the configuration.ini / tenant.ini file where technical consultants can set up non-Maconomy login types easily during Touch installation and would not affect customizations.

> **Note:** This feature is available when you upgrade to the Touch app version 4.0 and Maconomy 2.6 (or higher).

Support for Windows Server 2022

Deltek Tracking: 1411120
Version: 4.0

The Touch 4.0 Installer now supports installing Touch on Windows Server 2022.

Note: This feature is available when you upgrade to the Touch app version 4.0 and Maconomy 2.6 (or higher). For more information, see the Windows Server 2019 or 2022 section in the *Deltek Touch 4.0 for Maconomy 2.6 Touch Admin Guide*.

Certifications

Touch 4.1 Certifications

Deltek Tracking: 1626210, 1627068
Version: 4.1

Touch 4.1 is certified for the following:

- Android 13
- iOS 16

Touch 4.0 Certifications

Deltek Tracking: 1411120
Version: 4.0

Touch 4.0 is certified for the following:

- Android 12L
- Windows Server 2022

Finance

New Employee Field on Tax Settlement Entries

Deltek Tracking: 1179131
Version: 2.6.1

Previously, if you enter an expense sheet with VAT and run tax settlement report, you could see the vendor number but not the employee assigned to the vendor for reporting. This enhancement adds a new **Employee No.** field to the Tax Entries sub-tab of the Financial Operations workspace and to the list of tax settlement entries filter list of the Show Tax Settlement Entries single dialog.

Enhanced Vendor Remittance Emails

Deltek Tracking: 1705225
Version: 2.6.1

A new **Remittance Email Address** field is added to the Payment Orders sub-tab of the Vendor Remittance Emails workspace. This enhancement also introduces the new **Resend Email Remittances For All** action in the Vendor Remittance Email Log sub-tab of the Vendor Remittance Emails workspace and of the Vendor Remittance Email Logs single dialog workspace. This action enables you to manually resend all vendor remittance emails shown in the sub-tab. You can also resend an email individually using the new **Resend Email** field.

Customer / Vendor / Company Supplements

Deltek Tracking: 1510918
Version: 2.6.1

New Supplement Types are added to the Supplement Types workspace to give you further control of Company, Vendor, and Customer information. When you select a Supplement Type as the Area on a Supplement, Maconomy connects this particular instance of Supplement to the Supplement Type specified.

Supplements are free text and can be used for at your discretion unless otherwise noted. Additionally, Supplements do not inherit information from a parent to a subordinate.

New supplements include:

- **Company Supplement** — Link this Supplement to a Company to display it in the Company Information workspace.
- **Company BPM** — Link this Supplement to a Company to display it in the Company Information workspace
- **Vendor Supplement** — Link this Supplement to a Vendor to display the Supplement in the **Vendors » Home » Information** workspace.
- **Vendor BPM** — Link this Supplement to a Vendor to display the Supplement in the **Vendors » Home » Information** workspace.
- **Company Vendor Supplement** — Link this Supplement to a Vendor and display the Supplement in the **Company Vendors » Home » Information** workspace. This Supplement does not inherit information from a (parent) Vendor to a (subordinate) Company Vendor.

- **Company Vendor BPM** — Link this Supplement to a Company Vendor to display the Supplement in the **Company Vendors » Home » Information** workspace. This Supplement does not inherit information from a (parent) Vendor to a (subordinate) Company Vendor.
- **Customer Supplement** — Link this Supplement to a Customer and allow the Supplement display the Supplement in the **Customer » Home » Information** workspace
- **Customer BPM** — Link this Supplement to a Customer to display the Supplement in the **Customer » Home » Information** workspace. This Supplement does not inherit information from a parent Customer to a subordinate Customer. Additionally, there is no Supplement inheritance between Customer and Company Customer.
- **Company Supplement** — Link this Supplement to a Company Customer to display it in the **Company Customer » Home » Information** workspace. This Supplement does not inherit information from a (parent) Customer to a (subordinate) Company Customer.
- **Company Supplement BPM** — Link this Supplement to a company customer to display the Supplement in the **Company Customer » Home » Information** workspace. This Supplement does not inherit information from a (parent) Customer to a (subordinate) Company Customer.

Procedures

To apply a Supplement, follow the procedures below. New Supplements display in the List of Supplements.

Set up a Supplement Type (skip when reusing an existing Supplement Type):

1. Go to **Document And Notes » Supplements » Supplement Types** (or **Single Dialogs » Set-Up » Note » Supplement Types**).
2. Click .
3. In the **Name** and **Description** fields of the Supplement Type, complete your own naming convention / content in the free text fields.
4. Select an Area for the Supplement Type (so that all subordinate Supplements can be used in Dialogs of that Area).

Create a new Supplement:

1. Go to **Single Dialogs » Set-Up » Note » Supplement**.
2. Click .
3. Chose the Supplement Type. This Supplement is now usable in the Area specified on the Supplement Type.
4. Give the Supplement a name.
5. Enter data in the free text fields or leave them for later entry, directly on the dialog to which the Area points.
6. Click **Save**.

To use Supplements:

1. Go to the needed dialog within the designated Area for the Supplement.
2. Enter the name of the Supplement in the fields such as <Area> Supplement (for example, Vendor Supplement). The dialog and Supplement are now connected.
3. Enter data as needed on the Supplement from the Assistant Pane called Supplement. Alternatively, make layout customizations to include the Supplement.

Notes:

- The template company specified in **System Setup » System Information » Finance** cannot have a Supplement attached.
- Supplements used in BPM Reporting cannot be used for anything else. For direction on how to use fields in this Supplement, see BPM documentation.

Company Specific Exchange Rate (CSER)

Deltek Tracking: 519031
Version: 2.6

Company Specific Exchange Rate (CSER) enables corporations with companies in different countries to specify exchange rates at the company level. It has far-reaching impact, with updates to most workspaces and new fields for currency conversions.For information related to CSER functionality for BPM, see Company Specific Exchange Rate for BPM.

Currency Conversion to Enterprise Currency

Currently, the job-specific exchange rate table is used for a job-centric conversion to the job, and the company-specific exchange rate is used to convert an amount to base currency for that company. You can still do this to convert between currency of the original amount registered to currency, or to base currency. However, you cannot use this for conversion to enterprise currency.

A corporation that has companies in different countries can now specify exchange rates at the company level. The **Enterprise** exchange rate table is added to the System Information single dialog workspace and System Setup workspace. Maconomy uses the new enterprise exchange rate table to convert the base currency to enterprise currency. You can use the other existing exchange rate tables for company and system levels. Additionally, the following changes were made:

- The **Exch. Rate Tbl., Sales** field is renamed to **Sales**.
- The **Exch. Rate Tbl., Purch.** field is renamed to **Purchasing**.
- The **Exch. Rate Tbl., Duty** field is renamed to **Duty**.
- The **Exch. Rate Tbl., Budg.** field is renamed to **Finance Budget**.
- The **Exch. Rate Tbl., Enterpr.** field is renamed to **Miscellaneous** and can be used on both company and system levels.
- The **Enterprise** field is added and can be used at the system level.

Five new exchange rate tables are also added to the Companies workspace and Company Information single dialog workspace. You can use these for all non-enterprise related conversions for the current company. Specifically, the exchange rate tables are added for the following:

- Sales
- Purchasing
- Duty
- Finance Budget
- Miscellaneous

CSER in Job Cost

Company-specific exchange rates are supported in all aspects of a job, including budgeting, invoicing, and so on. This functionality especially affects calculations on job reallocations.

When you reallocate a job entry, the prices can either be updated based on the price setup or carried over from the job entry. This is controlled with the **Update Prices on Time Registrations upon Job Reallocation** and **Update Prices on Amount Registrations upon Job Reallocation** system parameters.

Job reallocation can require currency conversion. This occurs when prices are carried over and you reallocate to a different job in another currency, or belonging to a company with a different currency. It also happens if you carry over prices in reallocation to a different employee with a different base currency. In these cases, it is recommended to enable the aforementioned system parameters to ensure that prices are updated (recalculated) rather than carried over.

In the case of job entries for external cost such as expense sheets, vendor invoices, or a general journal, the cost price in job reallocation is found by currency conversion of the original cost (excluding tax).

Example 1

Suppose that you have a job entry from an expense sheet line of USD 200.00 on a job with a base currency in INR, and then reallocate the entry to a job with a base currency in USD. In this case, independently of the two system parameters, the new job entry has a cost price of USD 200.00 (excluding any tax) found from the expense sheet line. This is because the cost price on the new, reallocated entry is calculated on the basis of the original cost. The cost price in job reallocations is based on the original cost for job entries that comes from the following types of journals: expense sheet, mileage sheet, general, vendor invoice, invoice reallocation, payment, gross pay, asset, asset depreciation, and bank reconciliation.

For job entries from other journal types such as job journals and time sheet journals, the cost price is found by price lookup, if prices are updated, and otherwise by currency conversion of the cost price in the base currency on the job entry that is being reallocated. As this cost price could have been found through currency conversion for the job entry being reallocated, the job reallocation could give rise to a cost price which is the result of two consecutive currency conversions. Similarly, when the billing price (and standard billing price) is carried over during job reallocation, it is found through currency conversion of the billing price on the job entry being reallocated. Again, this could result in a billing price which is the result of two consecutive currency conversions. This application of consecutive currency conversions can be avoided by enabling update of prices upon job reallocation.

Example 2

You have a job entry from a time sheet that belongs to an employee who has a base currency of USD on a job with INR as the base currency. The billing price on the job entry could have been found through currency conversion of the billing price specified on the employee, therefore in USD. If this entry is reallocated to a job with the base currency USD without recalculation of prices, the cost price will be found by currency conversion from this INR price. Therefore, the billing price will be the result of first converting the billing price on the employee from USD to INR and then back to USD. If the IRN company uses company-specific exchange rates, this could result in a billing price different from the one specified on the employee. Again, such application of consecutive currency conversions can be avoided by enabling update of prices upon job reallocation.

New Exchange Rate Table Field for A/P and A/R Reporting

A new **Exchange Rate Table** field is added to enable you to specify the exchange rate table to use in the reports. Specifically, the field is added to the following single dialogs:

- Periodic Vendor Statement

- Global Periodic Vendor Statement
- Print Periodic Vendor Statement
- Print A/P Statistics
- Print A/P Aging Report
- Print A/P Balance List
- Print Vendor Report
- Global Periodic Customer Statement
- Print A/R Aging Report
- Print A/R Balance List
- Print Customer Statistics
- Print Customer Group Statistics

Additionally, the following fields in the A/R Entries sub-tab of the Global Periodic Customer Statement single dialog workspace are updated to support this functionality and to specify that they are using standard currency:

- **Debit, Currency** field is renamed to **Debit, Standard**.
- **Credit, Currency** field is renamed to **Credit, Standard**.
- **Remainder, Currency** is renamed to **Remainder, Standard**.
- **Currency** is renamed to **Original Currency**.

Use Exchange Rate Name on Import

Previously, you could only use the exchange rate table number to import exchange rate information in the Import Exchange Rates single dialog workspace. With this enhancement, the existing **Name** field is added as an alternative primary key that enables you to refer to a unique exchange rate table using the name during import, instead of just the exchange rate table number.

Enhanced Currency Conversion Workspace

The Currency Conversion single dialog workspace is extended to support the company specific exchange rate functionality. A new **Exchange Rate Table Type** field, which replaces the **Purchase/Sales** field, is added to the workspace to enable you to select any of the following exchange rate table types:

- Sales
- Purchase
- Duty
- Budget
- Miscellaneous
- Enterprise

A new **Company No.** field is also added where you can specify a company number. Maconomy uses the exchange rate table from the company, if specified. Otherwise, the system uses the exchange rate table from the system information. Additionally, the **Exchange Rate Table Used** field is removed while the **Job Number** field is renamed to **Job No.**

General Ledger

Print Currency Report

This enhancement introduces the new **Currency Reevaluation Based on Original Amount** system parameter, which enables you to set the default print layout. New **Post Company Exchange Rate Variances** and **Post Enterprise Exchange Rate Variances** fields are also added for posting and calculating unrealized exchange rate variances in base and enterprise.

Additionally, Maconomy posts the offset for the unrealized exchange rate variance in enterprise to the new posting references, as follows:

- A/R related enterprise exchange rate variances are posted on **Unrealized A/R Enterprise Exchange Rate Variance.**
- A/P related enterprise exchange rate variances are posted on **Unrealized A/P Enterprise Exchange Rate Variance.**
- G/L related enterprise exchange rate variances are posted on **Unrealized G/L Enterprise Exchange Rate Variance.**
- WIP related enterprise exchange rate variances are posted on Work in Progress, Unrealized Enterprise Exchange Rate Variance.
- Invoice on Account related enterprise exchange rate variances are posted on **Invoiced on Account, Unrealized Enterprise Exchange Rate Variance.**

Setup Instructions

Set the Default Print Layout of the Currency Report to Original

To set the default print layout:

4. Go to **System Setup » Parameters and Numbers » System Parameters**.
5. Double-click the **Currency Reevaluation Based on Original Amount** parameter.
6. On the System Parameter sub-tab, select the **Currency Reevaluation Based on Original Amount** check box.
7. (Optional) To enable this for a specific company, go to the Company Specific Values sub-tab, specify the company number in the **Company No.** field, and select the **Currency Reevaluation Based on Original Amount** check box.
8. Click **Save**.

System Parameters

Parameter	Description
Currency Reevaluation Based on Original Amount	Select this parameter to set the default print layout in the Print Currency Report Workspace to **Original**. Deselect this parameter to set the default print layout in the Print Currency Report Workspace to **Standard**.

Intercompany Invoices

You can use company specific exchange rate tables when creating and posting intercompany invoices. To support this feature, the **Amount, Executing, Enterprise** and **Amount, Responsible, Enterprise** fields now replace the **Amount, Enterprise** field on the following workspaces:

- Intercompany Invoicing
- Company Information
- Open Entry Intercompany Account Statement
- Interest Calculation of Intercompany Entries

The change is also applied to the following relations:

- Intercompany Interest Calculation Specification
- Intercompany Interest Note
- Intercompany Interest Note Journal
- Intercompany Entry
- Intercompany Grouping Journal
- Settlement Invoice
- Intercompany Invoice
- Settlement Invoice Specification

Customer Reconciliation

This enhancement allows the use of company specific exchange rate tables for customer reconciliation on the following workspaces:

- Customer Payments
- Job Pre-Invoice Reconciliation
- Customer Open Entry Reconciliation
- Customer Payment Reporting
- Import Customer Payment

Reference Currency on Job and Customer Specific Exchange Rates

The reference currency of the standard exchange rate tables, if specified, must be the same as the enterprise currency. This was normally the case. However, the reference currency could also be the Euro currency, which previously resulted to incorrect currency conversion. See sample conversion calculation from Currency A to Currency B:

Currency A = the enterprise currency

Currency B = amount in Currency A (enterprise currency) converted with the exchange rate from Euro

This enhancement resolves this issue. It also adds a new functionality that enables you to specify the reference currency for a job or customer specific exchange rate table in the Fixed Exchange Rates Information Workspace. Note that the reference currency for a job or customer specific exchange rate table is the enterprise currency now.

The **Reference Currency** field is now an open field in the customer specific version of the Fixed Exchange Rates Information single dialog workspace. The same field is now an open field in the job-specific version of the Fixed Exchange Rate Information single dialog workspace. You can manually enter or change the reference currency. Maconomy copies the reference currency when you copy the exchange rate from a system or job-specific exchange rate table using the following actions:

- **Copy Standard Exchange Rates to Customer**
- **Copy Standard Exchange Rates to Job**
- **Copy Job Exchange Rates to Job**

Enterprise Amount Calculation of Executing and Responsible Company

This enhancement enables you to calculate and post enterprise amount in the executing and responsible company when you are doing intercompany transactions in the following:

- **Customer Entry**
- **External Cost**
- **Tax Amount**
- **Vendor Entry**
- **Fixed Assets**
- **Intercompany Invoices**

Finance Budgets

Maconomy now uses the finance budget exchange rate table, instead of the global exchange rate table, that you specified on the company on finance budgets.

A new **Exchange Rate Table** field is added to the Budget Inspection single dialog workspace and Inspect sub-tab of the Budget workspace. Maconomy converts the total amounts in the Budget Inspection tab from the base amount on the budget entries to the reporting currency using the new exchange rate table, if specified. Otherwise, Maconomy uses the company specific budget exchange rate table if you do not select an exchange rate table to use.

Similarly, a new **Exchange Rate Table** field is added to the Budget Control single dialog workspace and Control sub-tab of the Budget workspace. Maconomy converts the total amounts in the Budget Control tab from the base amount to the reporting currency using the new exchange rate table, if specified. Otherwise, Maconomy uses the company specific miscellaneous exchange rate table if you do not specify an exchange rate table to use. The miscellaneous exchange rate table is used for G/L reporting and for budget figures such that the same exchange rate table is used for all conversions.

Additional Tax Popup Fields

Deltek Tracking: 1194587
Version: 2.6

Several statutory reports require additional VAT popup fields to provide more information and differentiate VAT groups when reporting to the tax authorities. To support this, the following enhancements are made:

- New **Tax Popup 5-10** fields are added to the General Ledger Setup and System Setup workspaces.
- New **Popup 5-10** fields are added to the Tax Codes, Show Tax Settlement Entries, Show G/L Entries, Tax Reporting Unit Selection, and Popup Fields single dialog workspaces.
- New **Popup 1-10** fields are added to the G/L Tax Codes single dialog workspace.

There are no changes to the functionality and the usual procedures for creating tax popups. Additionally, when you create tax settlements for customer invoices and vendor invoices that use tax code and G/L tax code with VAT popup setup, the popups you selected still appear in the Show Tax Settlement Entries single dialog workspace. The fields are also included in the standard layout when you print tax codes and G/L tax codes.

Prevent Self-Approval for Proxy Approvers

Deltek Tracking: 1273308
Version: 2.6

In Maconomy, you can restrict a user from approving an item if the user is also the submitter. However, the system still allowed a number of other approval situations, such as a user's approval of a time sheet created on behalf an employee, and submitted by another employee. This feature enhances the functionality that prevents self-approval in the approval hierarchies such that it also restricts self-approval through a proxy approver, including the requisitioner of a purchase order, and the employee on a time sheet, expense sheet, or mileage sheet.

The **Submitter Can Approve** field used to allow self-approval on the approval lines created from an approval hierarchy line is renamed to **Allow Self Approval** to clarify that the field not only considers submitter information but also the proxy approvals.

> **Note:** This enhancement also restricts the automatic approval of a transaction, such as purchase order, time, expense, or mileage sheet, even though you enabled the **Approve at Submission** field in the Approval Hierarchies workspace, Approval Hierarchy Rules single dialog workspace, and Changes on Change single dialog workspace.

Changes to Maconomy

The Approval Hierarchies single dialog workspace is updated to support this feature.

Allow Accrual to Exceed Price on Purchase Order Line

Deltek Tracking: 1240782
Version: 2.6

Previously, when you need to accrue the cost of your purchase order for a certain job at the end of the month, the open purchase order lines displayed in the Job Accruals or Batch Job Accrual single dialog workspaces, and the system allowed you to accrue more than the price on the purchase order line. The margin for job accrual reconciliation exceeded the price on the purchase order line. As a result, it prohibited you from releasing the reversal automatically.

A new **Allow Accrual to Exceed Price on Purchase Order Line** system parameter is introduced to enable you to allow or prohibit accrual amounts that exceed the price on the purchase order line. When the system parameter is deselected, you cannot accrue for more than the value on the purchase order line.

Changes to Maconomy

The System Setup workspace is updated to support this feature.

Setup Instructions

To enable this feature:

1. Go to **System Setup » Parameters and Numbers » System Parameters**.
2. Double-click the **Allow Accrual to Exceed Price on Purchase Order Line** parameter.
3. On the System Parameter sub-tab, select the **Allow Accrual to Exceed Price on Purchase Order Line** check box.
4. Click **Save.**

System Parameters

Parameter	Description
Allow Accrual to Exceed Price on Purchase Order Line	Select this parameter to allow accrual amounts that exceed the price on the purchase order line. When you deselect the system parameter, you cannot accrue for more than the price on the purchase order line.

Renamed Single Dialog Workspaces

Deltek Tracking: 1231594
Version: 2.6

Previously, when users encounter the term **Delete**, it caused confusion whether the system would delete the entries. Hence, the entries would no longer display in reports or audits. To address this issue, several single dialog workspaces are renamed, and the **Delete Section** is now renamed as **Remove Section** in these modules:

- **General Ledger**

  The Delete Posted General Journals Workspace is renamed to Remove Posted General Journals Workspace.

- **Accounts Payable**

  The Delete Purchase Orders Workspace is renamed to Remove Purchase Orders Workspace.

- **Inventory**

  The Delete Item Entries Single Dialog Workspace is renamed to Remove Item Entries Single Dialog Workspace.

- **Item Purchase**

  The Delete Item Purchase Orders Workspace is renamed to Remove Item Purchase Orders Workspace.

- **Contact Management**

  The Delete Contact Data Single Dialog Workspace is renamed to Remove Contact Data Single Dialog Workspace.

- **Set-Up**

  The Delete Security Log Single Dialogs Workspace is renamed to Remove Security Log Single Dialogs Workspace.

New Invoice Received Date Field

Deltek Tracking: 1228082
Version: 2.6

A new **Invoice Received Date** field is added to the vendor invoice journal in the Vendor Invoices workspace. The field enables you to specify the date when you received the vendor invoice. It is also added to the filter list of the Vendor Entries workspace. When you enter a date in the **Invoice Received Date** field in the vendor invoice journal, the new field in the filter list of the Vendor Entries workspace populates with the same value.

You can only enter an invoice received date in the vendor invoice journal until the entry is posted. Thus, you can no longer edit the field after posting. Additionally, if you do not specify a date, Maconomy automatically uses the current date as the default value.

Changes to Maconomy

The following workspaces are updated to support this feature:

- Vendor Invoices workspace
- Vendor Entries workspace
- Company Vendors workspace
- Vendors workspace
- Approval Center workspace
- Financial Operations workspace
- Fixed Assets workspace
- Payments workspace
- Show Vendor Invoice Journals single dialog
- Show Vendor Invoices single dialog
- Vendor Entries single dialog
- Show Vendor Reconciliation single dialog
- Show Vendor Reconciliation History single dialog
- Vendor Entry Analysis single dialog
- Show Vendor Entry Payment single dialog

Conversations for Credit Control

Deltek Tracking: 1278070
Version: 2.6

Previously, the Conversations functionality was added to the Collections workspace in the web client, which enabled users to create and respond to conversations about outstanding customer invoices or any invoice in general. You can now start a conversation or view messages you are a part of in the Credit Control workspace in the Workspace Client as well. If you are mentioned in a conversation, you will receive an Unread Customer Invoice Message notification in the To-Do pane, which will direct you to the message in the Credit Control workspace.

Changes to Maconomy

To support this feature, the following changes are made:

- The Create Conversation action and the Conversation sliding panel are added to the Credit Control workspace.
- New notification for unread customer invoice message

New Approver Reference Type in Approval Hierarchies

Deltek Tracking: 1549420
Version: 2.6

A new approver reference type called **Advanced Reference** is added to the Approval Hierarchies. A new **Approver, Advanced Reference** field is also introduced. This enhancement gives you more flexibility in creating approval hierarchies where the approver cannot be found on the relation being approved or on a directly related relation. When you select approvers as employees on relations linked to the relation being approved, you can now connect the relation links from one relation through a field to another relation, and so on.

In addition, this enhancement introduces two new single dialog workspaces:

- Advanced References — Use to specify the relations of the advanced references for the approval objects that you specified.
- Approval Hierarchy Lines — Improves the approver functionality by enabling the user to build connections between employees on one relation through other relations (for example, Employee 1 on Local Spec 1 on the Job linked to the Job Budget in question should approve).

Procedures

Create a New Advanced Reference

You can create a new advanced reference.

To create an advanced reference:

11. Go to **Single Dialogs » Setup » Approval » Advanced References.**

    OR

    Go to **Setup » Approval Hierarchies » Approval Hierarchy Selections » Approval Hierarchy Selection Lines » Approval Hierarchies » Approvers.**
12. Click **+ New Advanced Reference**.
13. Fill out the following fields:
    - Name
    - Description
    - Source Internal Relation Name
    - Target Internal Field Name
14. Fill out the other fields as needed.
15. Click **Save.**

BPM / Statutory Reporting

General

Change from BIAR to LCMBIAR File Format

Deltek Tracking: 1524094
Version: 2.6.1

The Maconomy BPM file format for releases is updated from Business Intelligence Archive (BIAR) to Lifecycle Management BIAR (LCMBIAR). This switch extends file delivery to the cloud platform, and prepares for the discontinuation of BIAR as a supported file format for a growing number of applications. With this update, RPUs (Reporting Packing Units) contain only LCMBIAR files and no longer include BIAR files for any future releases of all versions.

> **Note:** The update to LCMBIAR does not change any procedure (such as installation steps) or functionality for end users.

Additional Fields for the Job Information Universe

Deltek Tracking: 1682692
Version: 2.6.1

The Job Information universe is updated with new fields to improve how you present data and calculations in reports.

The changes include:

- Job Extension table — Custom fields (**Boolean** 1-5, **Date** 6-10, **Popup** 6-10, and **Text** 21-25)
- Price List Information table — **Job Price List Issue, Billing** field and **Job Price List Issue, Cost** field; **Job Price List Start Date, Billing** field and **Job Price List End Date, Cost** field; and **Job Price List End Date, Billing** field and **Job Price List End Date, Cost** field

You can use the new fields to add layers to reports. For example, you can specify price increases that take place on certain dates within the contract period.

Tax Numbers in Foreign Transactions Reports

Deltek Tracking: 1578898
Version: 2.6.1

Intrastat now requires companies to include the tax ID numbers of customers and vendors when submitting reports. To comply with this requirement, the **Tax No.** column is added to the Foreign Customer Transactions report and the Foreign Vendor Transactions report. You can access these reports on the Foreign Transactions document via the WebI reporting tool. For more information related to BPM WebI reports, refer to the *Deltek Maconomy BPM Report Description Guide*.

Manifest File Added in BPM RPUs

Deltek Tracking: 1565682
Version: 2.6.1

BPM Reporting Packing Units (RPUs) now include a manifest file in JavaScript Object Notation (JSON) text format that provides the following data:

- Manifest file version
- Internal version of Maconomy
- External versions of Maconomy
- Business Object (BO) version derived from the BO version used when running the pack
- Build number

The meta information helps you determine compatibility between components of different Maconomy versions.

Universe Updates

Deltek Tracking: 1335385
Version: 2.6

New GL Audit Universe

Deltek Tracking: 1423832
Version: 2.6

A new GL Audit universe is introduced in order to report on finance entry data combined with VAT settlement entries, as well as for subledger customer entries and vendor entries.

See the *Deltek Maconomy BPM Technical Universe Guide* for details.

AR Aging Universe

New objects include:

- `[Credit Limit]` of company customer (CreditMax)
- Add new dimension table `JOURNAL_D` and join to fact table on `journalnumber` field
- Check that the field is mandatory on customer entries (inner join can be used)
- Redefine object `[Journal No.]` to be defined on that new dimension table. Look at whether index awareness should be defined
- `[Journal Type]` of customer entry. Define on new dimension table

AP Aging

New objects include:

- `[CPC No.]` of company vendor
- Add new dimension table `JOURNAL_D` and join to fact table on `journalnumber` field. Check that the field is mandatory on customer entries (inner join can be used)
- `[Journal Type]` of vendor entry. Defiine on new dimension table
- `[Entry Type Code]` of vendor entry. This belongs to the Entry Information folder. The existing object `[Entry Type],` is moved to that folder.

Tax Settlement

New objects include:

- `[Finance Account Incoming Tax]`
- `[Finance Account Outgoing Tax]`

See the *Deltek Maconomy BPM Technical Universe Guide* for details.

Updated Universes to Match Database Schema

Deltek Tracking: 1526073
Version: 2.6

Deprecated Fields

The deprecated database fields are removed from BPM universes to match the Maconomy database schema.

Specifically, the following changes are made:

- Bank – The "Is Cancelled" object is removed.
- Job Budgeting – The link (selfjoin) for BOPURCHASEORDERLINE is changed to use clause PurchaseLineType=4 instead of removed field RemovedTextLinePN (earlier TextLinePN).
- System – The "Can Approve Monitors", "Role No.", and "Role Name" objects are removed.

New NSAFT XML Report Schema Field

The **Country** field is added to the NSAFT XML report schema as a mandatory field. It is added as a two-letter country code in Maconomy following the ISO 3166-1 alpha 2 standard.

See the *Deltek Maconomy BPM Statutory Guide* for details.

Statutory Report Email Notification

Deltek Tracking: 1029881
Version: 2.6

This email notification is used to alert you when a report or any XML-related export runs. It is triggered when:

- A report runs successfully
- A report runs and fails

Recipient

The Statutory Report Email notification is received by the user specified as the recipient in the Employee workspace.

Setup

There are two options to enable the email alerts:

- By manually scheduling by hour/month (recurring).
- By manually scheduling after you run the report.

Simplified ETL Upgrade

Deltek Tracking: 1221790
Version: 2.6

Previously, the ETL had a complicated upgrade mechanism to ensure dimension tables were converted consistently. However, the setup made it difficult to introduce adjustments to the data warehouse.

To simplify the upgrade mechanism and thus improve performance, we have updated the following:

- Removed upgrade jobs / transformations from standard ETL
- Generalized the drop job
- Manage remaining tables after upgrade

The previous **Upgrade job** functionality is now removed from the ETL. Following is the new upgrade process moving forward (and described in the *Deltek Maconomy BPM Admin Guide*).

Now, run **Create Job** from the ETL to drop and re-create the data warehouse during upgrades.

To run Create Job:

1. Import ETL.
2. After successful ETL import, open the repository and go to the /public/Business Performance Management folder.
3. Click **Create Job**.

The following occurs:

1. Drop all the DWH tables (including the deprecated tables in previous versions, namely INDEX_MANAGEMENT, TABLE_MANAGEMENT,UPGRADE_LOG).
2. The views, dimension, and fact tables are then recreated for the current version while INDEX_MANAGEMENT, TABLE_MANAGEMENT, and UPGRADE_LOG are longer available.
3. The job then proceeds to load the FULL data from Maconomy to the DWH.

Removed Deprecated Functionality

Deltek Tracking: 1226080
Version: 2.6

We have removed deprecated objects and certain functionality for ease in upgrading to a main version.

The changes include:

- **BPM Reporting**
  - Removed deprecated objects Company No. and Company Name in the Time Sheet universe.
  - Removed deprecated objects in the Finance universe.
- **BPM Analysis**
  - Removed ETL jobs and transformations positioned in the Deprecated folder.
  - Removed ETL jobs and transformations positioned in the Extension folder.
  - Removed fields from the ETL, based on database fields removed in Maconomy.
  - Removed corresponding objects in the Analysis universes.

Removed Unused Reports

Deltek Tracking: 1599213
Version: 2.6

We have removed unused standard dashboards and dashboard components, and BPM reports, as well as the *BPM Description Guide*, including:

- Cash Flow Forecast
- Cash Flow with Budget
- Cash Flow Statement by Dimension
- Profit and Loss, Fiscal Year
- Profit and Loss, Periodic
- Personal Information

Improved Fiscal Period Objects in Finance Universe

Deltek Tracking: 1425036
Version: 2.6

Some objects were defined similarly in the fiscal period folder of the Finance universe. This enhancement streamlines the objects for clarity, consistency, and efficiency. The object titles and descriptions are updated to distinguish between objects that use the CalendarMonth/CalendarYear fields and objects that use the year number of the FiscalYear and Period objects.

The updates to the objects are as follows:

Object	Description
Year-Period + 1	The **Fiscal Year-Period + 1 Year** object is renamed to **Year-Period + 1.** This displays the year-period of the next fiscal year.
Year-Period + 1 Year	This displays the next fiscal year as a string.
Year + 1	The **Year-Period + 1 Year Num** object is renamed to **Year + 1.** This displays the next fiscal year as a number.
Year-Period	The **Fiscal Year-Period** object is renamed to **Year Period.** This contains the values in the **Year** and **Period** objects as a string.
Fiscal Year-Period	This a new object that assumes fiscal year and fiscal period regardless of setup.

Object	Description
Year	The **Fiscal Year** object is renamed to **Year.** This displays the year number as stated in the **CalendarYear** field.
Fiscal Year	The **Fiscal Year Number** object is renamed to **Fiscal Year.** This displays the fiscal year number. However, it always assumes fiscal year regardless of setup. The system derives the year number from the **FiscalYear** field of the fiscal period.
Year Str	The **Fiscal Year Str** object is renamed to **Year Str.** This object displays the number of the fiscal year as a string. The object uses the **Calendar Year** field in Maconomy. With this, fiscal periods can be named concerning the fiscal year or after the calendar year. Maconomy Type: **Integer**
Current Year-Period	The **Current Fiscal Year-Period** object is renamed to **Current Year-Period**. This displays the current year-period, either fiscal or calendar depending on the setup.
Current Year	The **Current Fiscal Year** object is renamed to **Current Year.** This displays the year of the current fiscal year.

The following objects are removed:

- **Calendar Year-Month** – Use the **Period** object instead.
- **Calendar Year** - Use the **Year** object instead.
- Calendar Month – Use the Period object.

As part of this enhancement, the following are corrected in the WebI reports:

- Queries related to object references
- Queries related to prompt titles
- Prompt titles on workspaces

The path and name referencing of objects on data export queries are also improved so when changes are made to the names, the references are also correct.

The fiscal references are also updated in the selection criteria of the Accounting Entry File (AEF), Standard Import/Export (SIE), and General Ledger reports in the Workspace Client.

Cashflow Statement Direct Method Report

Deltek Tracking:1113821
Version: 2.6

The Cashflow Statement Direct Method outlinse how cash flows in and out of the business. There are two ways of displaying the figures in a cashflow statement report; the *Direct Method* and the *Indirect Method*. The present report is using the *Direct Method*.

In the direct method, the main difference is on the Operating Activities section.

The Operating Activities section is divided into the following sections:

- Cash receipts from Customers
- Payments to Suppliers
- Payments to Operations
- Tax Paid

The report displays finance figures organized over a certain reporting structure so that the standard sections of Operating Activities, Investing Activities, and Financing Activities, are outlined under a header called Net Cashflow. A header called Cash Reconciliation is also added that is used to reconcile with the closing balance.

The report is similar to the structure of its indirect counterpart. Other calculations and structures such as the Investing Activities, Financing Activities as well as Cash Reconciliation are identical.

See the *Deltek Maconomy BPM Statutory Guide* for details.

Company Specific Exchange Rate for BPM

Deltek Tracking: 519031, 1519705, 1503825, 1313490
Version: 2.6

A new **Use Company Specific Exchange Rates** prompt is added to the reports that display data in reporting currency.

Specifically, the prompt is added to the following reports:

- Asset List
- Balance Sheet
- Balance Sheet Movement
- Cash Flow Statement Indirect Method
- Cash Flow Statement Direct Method
- Cash Flow Statement, by Dimension
- Changes in Equity
- Finance Transactions
- General Ledger
- Profit and Loss, by Dimension
- Profit and Loss, Comparative Year
- Profit and Loss
- Trial Balance

- Trial Balance Analysis
- Trial Balance No Grouping

It enables you to use the exchange rates at the company level. If you select **Yes**, the system uses the exchange rate table you specified in the **Miscellaneous** field in the Company Information workspace in Maconomy. If you select **No,** the system uses the exchange rate table that you specified in the **Exchange Rate Table** prompt. Thus, company specific exchange rates are not applied to the company. In addition, this enhancement also introduces a new **Company No. – Currency Database** object to the Finance, Asset, and Currency Exchange universes to bind currency and company.

If you need an extension to the Currency Exchange universe, we recommend that you create a universe extension. For more information, see the “Steps for extending a universe by the Link Method” section in the *Deltek Maconomy BPM Extension Guide*.

Note that this functionality is not yet supported on BPM Analysis (DWH). For more information related to CSER, see Company Specific Exchange Rate (CSER).

Adjust Customized Reports

Previously, the “Currency” of the transaction query was matched with the “Currency – Database” of the currency conversion query. With this enhancement, the new object that comprises company number and currency is included and makes the binding on that object from each universe.

You can adjust the custom reports that offer the ability to display amounts in reporting currency to include the company specific exchange rate functionality and match with the enhanced Currency Exchange universe.

To adjust a customized report to work with the new revision of the Currency Exchange universe and support company specific exchange rates, follow these steps:

1. Add the **Company No. – Currency Database** object from the Finance universe to the transaction query.
2. Add the **Company No. – Currency Database** object from the Currency Exchange universe to the currency query.
3. Add the **Company No.** object from the Currency Exchange universe to the currency query.
4. Check the currency query. It should only select the following objects:
   - Currency – Database
   - Company No.
   - Currency Rate
   - Currency Report
   - Company No. – Currency Database
5. Change the currency query. The only filter it has should bind the “Company No. – Currency Database” from Currency Exchange to “Company No. – Currency Database” in the transaction query (“Object from other query”-filter).

Workspace Client Field and Description

Field	Description	Mandatory
Use Company Specific Exchange Rate	If you select the checkbox, currency conversion (if performed) uses the company’s	No

Field	Description	Mandatory
	exchange rate table. Otherwise, the system uses the exchange rate table stated in the **Exchange Rate Table** prompt.	

Germany

USTVA (VAT Return) Report

Update for ERiC 35.3

Deltek Tracking: 1564709
Version: 2.6

The Elster USTVA (VAT Return) report is updated to reflect the changes to the interface and technical standards required by the ERiC 35.3 version update. These requirements are effective as of April 1, 2022.

The schema for Elster is updated with the following changes:

- The year 2022 is included in the name of the extract output file (USTVA_2022.xml)
- The namespace and version in the XML code itself refer to 2022

The Netherlands

Dutch Audit File Report

Added Dutch Audit File

Deltek Tracking: 1335385
Version: 2.6

In the Netherlands a particular finance XML report, the Dutch Audit File (DAF), is a statutory requirement for select companies to file with the Dutch Government. The Dutch Audit File (Auditfile Financieel) contains opening balances and transactional data for a given fiscal year. Both general ledger data and subledger (customer and vendor related) data is included. We have created this BPM report in an XML format following the Dutch Government XSD file specifications.

See the *Deltek Maconomy BPM Statutory Guide* for details.

Norway

NSAFT Report

New Analysis Table Dimensions Fields

Deltek Tracking: 1614508
Version: 2.6.1

The Analysis Table Dimensions section of the Selection Criteria in the Norwegian Standard Audit File - Tax (NSAFT) report is updated with a new set of fields. The **Override Name** field is included for each dimension in the table. Use this field to change the default description for the dimension included in the report extract. The fields display in the MasterFiles as AnalysisTypeDescription under the AnalysisTypeTable section.

New and Updated Tag Mapping

Deltek Tracking: 1642131, 1642164, 1398483
Version: 2.6

New tags are added and some tags are updated. Below is the list of changes to tags on NSAFT (Tags and Mapping section):

Updated Tags

- **<Period>** — Now only shows the first fiscal period of all entries in a transaction. For example, if a <Transaction> contains lines from fiscal period 1 to fiscal period 3, <Period> only shows the value 1. Note that this is fiscal period and not calendar month.
- **<PeriodYear>** — Same rules as above but shows the first fiscal year of the entries in a transaction. *YYYY* format.
- **<TransactionDate>** — Same rules as above but shows the first entry date of the entries in a transaction in XML Gregorian Calendar format.
- **<TransactionType>** — Previously derived from the **Automatic Transfer** field and now remapped to **Maconomy Transaction Type**. This has a maximum character limit of 18; characters exceeding this limit are truncated.
- **<RecordID>** — Previously mapped to **Sequence No.** and now mapped to **Combined Sequence No.** to maintain uniqueness for entries spanning more than a single fiscal year. Has a maximum character limit of 18 and values exceeding are truncated.
- **<AnalysisTypeTable>** and **<AnalysisInfo>**

New Tags

- **<ValueDate>** — Added on the <Line> level, this is mapped to the **Entry Date** and only displays if it is different from the <TransactionDate> and the <Transaction> levels.
- **<Country>** — Added on <TaxInformation>. Displays the Country ISO code of the tax code from Tax Code or G/L Tax Code setup.
- **<PeriodStart>** and **<PeriodStartYear>** — Added on <SelectionCriteria>. Shows the fiscal year and period of the entered **From Year-Period**. Requires the option “show fiscal year-period.”
- **<PeriodEnd>** and **<PeriodEndYear>** — Added on <SelectionCriteria>. Shows the fiscal year and period of the entered **To Year-Period**. Requires the option "show fiscal year-period in selection criteria.”

See the Deltek Maconomy BPM Statutory Reporting Guide for details.

Updated Setup and Limitations

Deltek Tracking: 1642131, 1642164, 1398483
Version: 2.6

The following are required setup for NSAFT:

Tax Table setup — Both Tax Table and G/L Tax Table evaluate displays on <MasterFiles>/<TaxTable>. In case of duplicate tax codes, only the first instance of the tax code is displayed. All tax codes used in the general ledger entries should be added on the tax table, otherwise it is not shown in the master files. Tax Code, Period From and Period To are taken from Tax Table and G/L Tax Table and the rest of the information is taken from Tax Code and G/L Tax Code setup.

Sequence No. — Configure in the Company > Setup > Sequence Numbering. The following sequence number criteria is required to maintain uniqueness of <RecordID>:

- Sequence numbering = per Entry
- New Sequence per
- Period = unchecked
- Trans. Type = unchecked
- Length of Sequence No. = depends on the length of the company numbers. This will affect the value of the combined sequence no. since the format is: <Year><Company No.><Sequence No.>. NSAFT requires that the total characters/digits for combined sequence no. has a maximum of 18 characters otherwise it will be truncated.
- Seq. No. Accounts - needs at least one line even if the row is empty.

See the Deltek Maconomy BPM Statutory Reporting Guide for details.

Optional Setup

OPTIONAL Avoid Truncated Names

In situations where the tax code name exceeds the character limit (9 for versions 2.5.3 and below, 35 for version 2.5.4 and above) a setup is provided to override the tax code names to avoid truncation which could result to seemingly duplicate <TaxCode>.

To override the tax code name:

1. Go to Option Lists
2. Using the same option list = "NSAFT" used for mapping standard tax codes, add the value for the new tax code name to be used on "Remarks 2"
3. Save and rerun NSAFT

OPTIONAL Provide SKATT with Analysis Code Usage

Users may enter information regarding the use of the dimensions, such as department for location dimension. Include this information in the header to provide SKATT with a description of the analysis code usage.

Example

```
<Header>

      <HeaderComment>AnalysisType S1 is used as Department</HeaderComment>
      <TaxAccountingBasis>A</TaxAccountingBasis>
      <UserID>redacted</UserID>

</Header>

<AnalysisTypeTable>

     <AnalysisTypeTableEntry>

       <AnalysisType>S1</AnalysisType>
```

<AnalysisTypeDescription>Spec1Name</AnalysisTypeDescription>

<AnalysisID>11</AnalysisID>

<AnalysisIDDescription>Engineering</AnalysisIDDescription>

</AnalysisTypeTableEntry>

</AnalysisTypeTable>

<GeneralLedgerEntries>

<NumberOfEntries>1</NumberOfEntries>

<TotalDebit>41762.84</TotalDebit>

<TotalCredit>41762.84</TotalCredit>

<Journal>

<JournalID>302</JournalID>

<Description>Invoice</Description>

<Type>AR</Type>

<Transaction>

.

.

-- transaction details removed for readability --

<Line>

<RecordID>1</RecordID>

<AccountID>5220</AccountID>

<Analysis>

<AnalysisType>S1</AnalysisType>

<AnalysisID>11</AnalysisID>

</Analysis>

Limitations

NSAFT is unable to handle tax codes and G/L tax codes that have the same name. If this occurs, NSAFT takes data such as Country ISO code from the Tax code and not from the G/L Tax code. This could result in bookkeeping issues. We highly recommended you use different tax code names for Tax Code and G/L Tax Codes.

Addition of Anaylsis Tables in NSAFT Report

Deltek Tracking: 1398483
Version: 2.6

This enhancement adds Analysis tables to the NSAFT report so that you can specify additional dimensions to include in the report extract. The additional items are added via an option list called **NSAFT AnalysisTypes.**

You can select the dimensions from this option list (including but not limited to the items below):

- Location
- Entity
- Project
- Purpose
- Spec. 2
- Spec. 3
- Local Spec. 1
- Local Spec. 2
- Local Spec. 3
- Job/Project
- Employee

This is an optional element but it is added in order to accommodate Analysis items that customers may want to include in their NSAFT extract for reporting or tracking purposes.

See the *Deltek Maconomy BPM Statutory Guide* for details.

Configurable Timeouts for Background Tasks for NSAFT Report

Deltek Tracking: 1346145
Version: 2.6

The NSAFT report extension is updated to allow for the configuration of timeout settings on background tasks. Previously, No timeouts were set for the generated tasks. As a result, you have only the option of increasing the **Default Max. Task Duration** for background tasks if the report encountered a background task timeout. This was not desirable as it impacted all other background tasks on the system.

This enhancement allows you to configure timeout settings on individual tasks. This is similar to creating a background task manually, where you are able to specify a timeout period via a Maximum Duration or that no timeout should apply to the specific task. By having configurable timeouts, tasks can either run or timeout according to the specified settings without impacting any other tasks running in the system.

Country Field Added as Mandatory Field in NSAFT Report

Deltek Tracking: 1471497
Version: 2.6

The **Country** field is added to the NSAFT report schema as a mandatory field. The value for this field is a 2-digit ISO code in the alpha 2 standard format. It is added within the TaxCode XML element and is also included in the schema for Finance Entry Lines.

Norway Tax Return Report

Improved Norway Tax Return Report

Deltek Tracking: 1614130
Version: 2.6.1

The Norway Tax Return report is updated to make it easier to read and use. Updates include:

- Previously, the tax basis and tax rate were missing from the generated report. These values are now available to help calculate the tax settlement.
- To improve the overall appearance of the report, it now displays in landscape orientation so all columns are visible, and also contains header breaks for subtotal and total values.

Added Norway Tax Return Report

Deltek Tracking: 1486538
Version: 2.6

A new summary report is released to allow customers to manually file Norwegian VAT forms until an integration is complete. The Norway Tax Return report is created in compliance with the new system for submission of tax-reporting to the Norwegian government effective January 1, 2022. This report assists customers with the manual submission of the tax return. This report contains aggregated data for the tax entries grouped by the standard tax codes as provided by the Norwegian tax authority (Skatteetaten).

The report can be accessed via BI Launchpad at the following location: **Business Performance Management » Reporting » Norway**.

Note: This report does not handle validation and automatic submission to the Norwegian Tax Authority at this time.

Sweden

SIE Report

Reimplementation for Performance Improvement

Deltek Tracking: 1565586
Version: 2.6.1

The Standard Import/Export report is reimplemented to improve performance. Previously, the Selection Criteria had a **File Type** input field where you could enter your preferred report file format. The field is replaced with check boxes allowing you to select between SIE 1 and SIE 4. The **Year-Period** field text is replaced with **Year/Period**, to indicate transactions are from the entered PeriodYearInterval, not the date range.

Additional Email Notifications

Deltek Tracking: 1565586
Version: 2.6.1

An email notification is triggered when running SIE reports to alert you if the report is successful or not. The email specifies the report format (SIE 1 or SIE 4) as well as the date and time the export is created. For reports with errors, the message points to the maconomy.log for details. To receive notifications, you must set up the email server and configure the email address as a recipient.

Added KeepAlive Setting To Prevent Timeout

Deltek Tracking: 1565586
Version: 2.6.1

Previously, reports failed to generate because of timeouts that occurred when queries to the BO server took too long to process or when the Maconomy server stayed idle for more than ten minutes. SIE is updated with a KeepAlive setting so it pings the Maconomy server periodically until it successfully generates the report.

Adjusted Pagination Size of Data

Deltek Tracking: 1565586
Version: 2.6.1

The SIE pagination size can now be adjusted depending on memory capacity. The default pagination size is updated from 32000 to 20000, and you can set this to your preferred value up to 100000. When the BO server processes a large amount of data, it fails when there is not enough memory to handle the page size. Memory utilization also affects how long it takes for the server to generate a report. This enhancement lessens memory-related errors while generating SIE reports.

United Kingdom (UK)

UK MTD—Making Tax Digital

New Authorization Message for Fraud Prevention Headers

Deltek Tracking: 1420984
Version: 2.6.1

A new warning message confirms authorization of fraud prevention headers being sent to HMRC. Now, to gain access to APIs needed to audit a VAT submission, you must acknowledge an additional warning message displayed in the UK Tax Submissions workspace. The warning message includes a list of fraud prevention headers and may contain sensitive information such as IP addresses and license IDs. If the data is correct, click **OK** to submit all fraud prevention headers to HMRC. Otherwise, click **Cancel**.

UK HMRC Reauthorization Expiry Warning Messages

Deltek Tracking: 1546383
Version: 2.6

Prompts are added to the UK Tax Submissions workspace to notify a user to reauthorize Maconomy by acquiring a new token from the HMRC website. Once you acquire the new token, you can then add it to **Code** field under VAT Submission to authenticate. Upon doing so, a prompt window appears to warn you that the authorization between Maconomy and HRMC expires after 18 months and provides further instructions for reaching out to HMRC to renew authorization. The reason for adding this prompt is to make you aware that you must periodically request reauthorization in order to file the VAT 100 form. Before adding this prompt, it was possible to not realize this and this led to confusion for users.

United States (US)

1099 MISC/NEC Report

Changes to 1099 MISC/NEC Report

Deltek Tracking: 1590632
Version: 2.6.1

The 1099 MISC/NEC reports are updated because of changes to the 1099 MISC/NEC forms required for tax year 2022.

For both 1099 MISC and 1099 NEC reports:

- A **Direct Sales of $5000 or More** column is added, which displays Y (Yes) or N (No) and corresponds to a check box on the form (Box 2 on 1099-NEC and Box 7 on 1099-MISC).
- The **2nd TIN Notice** column is moved next to **Box 1 Amount** to follow the arrangement in the form.
- The **Rcp Account No.** column is now placed to the left of **2nd TIN Notice**.

For the 1099 MISC report only:

- A **FATCA Filing Requirement** column is added, which displays Y or N.
- **Box 16 Amount and Box 17 No.** are updated to reflect the tax withheld amount and tax state number.
- The report now includes **Box 11 Amount**, **Box 12 Amount**, and **Box 18 Amount** to match the boxes present on the form.

Integrations

There are no Integrations enhancements for Maconomy 2.6 and 2.6.1.

Performance

Access Control

Updated Access Control for Database Performance

Deltek Tracking: 1439249

Version 2.6.1

To improve performance, we have updated the access control definition for finance entries.

Access Control View Optimizations

Deltek Tracking: 1372495

Version 2.6

Performance improvements, invisible to end users, have been made to access control views to provide a better user experience.

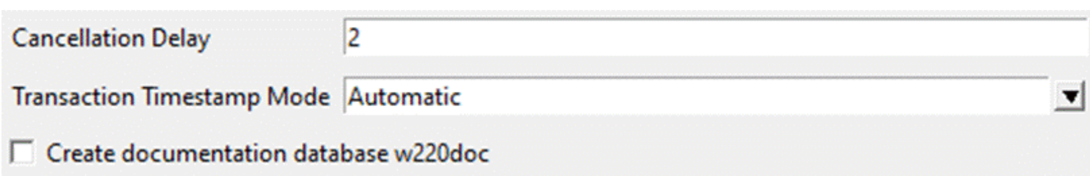
Server Optimization / Timestamp Triggers

Deltek Tracking: 1460222

Version 2.6

Before 2.6, transaction timestamp fields on all tables were maintained by database triggers. However, this caused performance issues, so we have removed TransactionTimestamp triggers on update and insert actions to improve performance. From 2.6, this can now be done by the MaconomyServer.

In MConfig, there's a new **Transaction Timestamp Mode** field in the Application window:



This setting is transferred to MaconomyDir\Definitions\maconomy.ini and controls how the server works with Transaction Timestamps. The server can run in either trigger mode (database triggers in place) or the server update transaction timestamps.

For the **Transaction Timestamp Mode** field, select:

- Automatic— Default. Select so that MConfig drops database Timestamp Triggers if present.
- Database—Select so that MConfig creates database triggers.

The server validates if the setup is functional in terms of having the required triggers of the configured mode.

Server setting:
[ServerConfig]
TransactionTimestampMode=<mode>

-where '<mode>' can be one of the following:

Off:

- Server checks that there are no triggers in the database.
- Server does not update transaction timestamps.

Automatic:

- Server checks that add-on 125 is installed, and that there are no triggers in the database.
- Server updates transaction timestamps itself.

Database:

- Server checks that add-on 125 is installed, and that there are triggers in the database.
- Server does not update transaction timestamps itself.

<missing>:

- Server does not check if add-on 125 is installed, or if there are triggers in the database.
- Server does not update transaction timestamps itself.

People Planner

Maconomy Integration

Import Actuals Enhancements

Deltek Tracking: 1572076
Version: 4.4

You can now choose to import only new actuals and actuals for projects that have changes, such as when an entry date was in the past period, but the posting date is in the current period.

For more information about this feature, refer to the *People Planner Integrations Guide*.

Verbose Logging on Tasks

Deltek Tracking: 1814043
Version: 4.4

Prior to 4.4, verbose logging was configured in the application file, which meant when the People Planner service ran several tasks, they all used verbose logging.

This enhancement introduces the ability to specify which tasks should use verbose logging upon execution. The **Force Verbose Logging** local parameter is added to the task specification to support this functionality.

When you enable this parameter on a batch task, all executed tasks in the patch will use verbose logging.

For more information about this feature, refer to the *People Planner Integrations Guide*.

MyPlan

Additional Field Types in MyPlan

Deltek Tracking: 1627703
Version 4.3

When viewing events in MyPlan in the Maconomy web client, you can now view additional booking information, such as allocated hours, on the calendar without having to open the event itself.

Additionally, when you start entering information on a search-as-you-type field, additional information on the employee is now available, such as allocated hours, amounts, and percentages. This enables you to easily select an employee with the available resources on a job.

Enhancements to Web Components

People Planner Upgrade to .NET 6.0

Deltek Tracking: 1571491
Version: 4.4

It is now mandatory to use ASP.NET 6.0.10+ Hosting Bundle for the People Planner Web Applications, People Planner Security Service, and the People Planner REST API.

Booking Confirmation Message on Non-Working Days

Deltek Tracking: 1711415
Version: 4.4

In the day view, a confirmation message now appears when you create a booking, if the time interval overlaps with one or more non-working days. The Allow bookings on non-working days setting in the Admin Tool is added to let you customize how often the message should prompt upon booking, or if it should not be displayed at all.

This functionality applies in the following instances:

- Entering a booking in a single day cell
- Multi-cell selection
- Book recurring

For more information about this feature, refer to the *People Planner Web Components Guide*.

Resource Matching on Skill Specifications

Deltek Tracking: 1599740
Version: 4.4

You can now assign resources with the appropriate skills for a task. This functionality provides a list of resources that best match the specified skills to complete the task. It provides an efficient way to find a resource that possesses all or most of the skills needed.

> **Note:** You must enable the **Show Skill Requirements on Budget Lines** system parameter in Maconomy to use this feature. For more information, refer to Assign Skills to Budget Lines.

The **Skills Requirement** column is added to the Resourcing Overview, Progress Evaluation Assistant, and Budgeting Assistant to support this feature. This column displays an icon to easily determine the skill requirements on the task:

- **Grey bulb:** Skills are required, but none of the assigned resources are a match for any of the required skills
- **Dim bulb**: Skills are required, and there is at least one resource matching any of the required skills
- **Lit bulb**: Skills are required, and all of them have been matched by one or more resources
- **No icon**: Skills are not required

This column also displays the number of matching skills based on all assigned resource skills and the total number of skills required to accomplish the task. As you assign resources to the task, the number of matched skills is updated in the column.

In the Project Manager Gantt (PG) main grid, PG detail grid, and Resources Gantt (RG) detail grid, the **Skills Match** column is added to display the resource's matching required skills against the total number of skill requirements on the task.

To provide a simple way to filter resources based on their skills, new filters are added to the Assign/Reassign dialog boxes. These are:

- **Resource Matching Missing Skills:** Allows you filter resources that have the missing skills still needed on the task
- **Resource Matching All Skills:** Allows you to filter resources that match all the required skills

- **All Resources:** Displays all resources

New settings are also added to the Admin Tool to support this feature. These include:

- **Use Skills Requirement functionality**
- **Use REST for Skills master data import:** Enabling this allows People Planner to import skill related data using REST.
- **Required skills allow sort threshold:** Enter a value in this field to import a specific number of skills from Maconomy. Valid values should be between zero and 100.

> **Attention:** To use this feature, the following settings must both be enabled:
>
> - **Use Skills Requirement functionality**
> - **Use REST for Skills master data import**
>
> You also need to enable the **Use REST for Project Import setting**.

For more information about this feature, refer to the *People Planner Web Components Guide* and *People Planner Integrations Guide*.

Default Focus Date in Web Component Views

Deltek Tracking: 1758309
Version: 4.4

Prior to this release, the view in the Web Components would default to the current day, month, or year, depending on which view you are using. For example, you could change the default view to the following:

- **Day view:** Four weeks prior to the current day
- **Week view:** Four weeks prior to the current week
- **Month view:** the previous month
- **Year view:** the previous year

By default, the setting for each view is set to zero, meaning it is set to the current day/week/month/year.

This aims to help users easily find data for the prior dates, instead of having to backtrack from the current date upon opening the Web Components. This functionality applies to all views, including the Resourcing, Resource Planning, and Resource Managements workspaces.

Redesigned Web Components

Deltek Tracking: 1594343
Version: 4.3

The Web Components now displays a new modernized look to match the new design of the Maconomy web client. Two themes are added to support this feature in their respective UIs. This enhancement affects only the UI and there is no change in functionality when using the Web Components.

> **Note:** This feature is compatible only when using BOTH People Planner 4.3 and Maconomy 2.6. Previous versions of People Planner and Maconomy do not support this feature. If you do not update to both 4.3 and 2.6, the Web Components automatically reverts to using the previous Workspace Client theme.

Under/Overspend Feature Enhancements

Deltek Tracking: 1681570, 1681684
Version: 4.3

People Planner 4.3 provides enhancements to this feature to improve the user experience.

Confirmation of Under/Overspend Actions

When you use the **Under/Overspend** action to perform an automated reallocation to the current period, a confirmation message now displays to provide information regarding the changes that occur when you perform the operation. This includes the following:

- Assignments that will fail due to an error will display the reason.
- Assignments that have under/overspent hours or amounts will display the values to be distributed equally in the previous period, then carried over to the current period.

Display of Values in Under/Overspend Column

Minor changes have been made regarding how values are displayed in the Under/Overspend column in the Web Components. The column displays both time and amount and amount values are now displayed in square brackets.

Note that these are aesthetic changes to the UI and do not affect the functionality of the feature itself.

Export Project to Excel

Deltek Tracking: 1681522
Version: 4.3

Prior to this release, you could only export the current period displayed in the Web Components to Excel. You can now export an entire project based on its start and finish dates by using the new **Export entire project** checkbox in the Export to Excel dialog.

This feature is available only in the Resourcing Overview in the WSC, and the Resourcing workspace in the web client.

People Planner REST API

Remove Bookings on Closed Project

Deltek Tracking: 1702209
Version: 4.4

You can now send a request to the People Planner REST API to remove all bookings from a closed project after a given date, such as the Estimate to Completion (ETC) date. This prevents Maconomy from receiving ETC values from People Planner, and the budget will be equal to the actuals. This allows for the project to be closed with the correct values. Note that this applies only to main jobs. Bookings for subprojects are not affected by this functionality.

Improved License Checking in People Planner

Deltek Tracking: 1532648, 705406
Version: 4.3

Prior to this release, People Planner used a file-based license checker which required file level access to the license. This enhancement introduces a more efficient centralized method to check for licenses and return the number of plannable resources in the Web Components, MyPlan, and the Windows Application.

When you install a new database or update from an older version of People Planner using the Admin Tool, a prompt displays wherein you are required to enter a license key before you can proceed.

Attention: If you are updating from an existing People Planner installation using the old license method, a new license key must be obtained from Deltek Global Distribution before the update can be completed.

After successfully creating your database, the License tab becomes available in the Admin tool, where you can view the details of the current license, which is now stored in the People Planner database. You can also use this tab to update the license key when needed.

Additionally, the license file path field, which was used for the previous license checking method, is removed from the Admin Tool as it is no longer supported in 4.3.

If you create or update your database using the Console Admin Tool, the process is similar. The **/licensekey** parameter is added to support this feature, and it is required when using the **/createdatabase** or **/updatedatabase** options.

Once the database has been created or updated using either the Admin or Console Admin Tool, the LicenseHistory table is automatically created in the database. This table stores the license in the database, and provides details on the current and previous licenses.

The license checker automatically checks the database for a valid license each time you access any People Planner application. If a valid license exists, the application opens successfully. If no license is found, or the license is invalid or has expired, the system displays an error message.

This also occurs when you send a request to the People Planner REST API. It returns an error that is added to the log file if a license does not exist, or if it is invalid or has expired.

When working in the Web Components, if your license exceeds the maximum number of plannable resources, you cannot assign tasks or resources. The check boxes in the Assign dialog are disabled and an error displays. This also occurs when you attempt to reassign a task or resource. You need to update your license to proceed.

Workflow

The following are the high-level tasks to accomplish to use the new license checker.

Task	User	Details
Contact the Deltek Global Distribution (DGD) team for a new license.	Deltek Business Consultant	
Create the license.	DGD	
Create/update the database.	System Administrator	▪ Input the license key in the Admin or Console Admin tool. ▪ Continue with the creation or upgrade of the database.

> **Attention:** For more information about this feature, refer to the *People Planner Admin Guide*.

Cryptography Key Enhancements

Deltek Tracking: 1081090
Version: 4.3

People Planner has improved security for encrypting and decrypting sensitive information by replacing the previous storage method with a new way to store and generate cryptography keys. You can now use environment variables as a key type provider.

Whether you are installing a new database or upgrading from an older version of People Planner, the system will display a prompt to create the cryptography key. This is required to enable you to proceed with the creation or upgrade of the database. Once you have created your key, the installation proceeds.

When you open the Admin Tool after installation, the Cryptography tab becomes available for use. This tab is added in this release to provide details about the current security key. You can also change the security key in this tab.

You can also create cryptography keys when installing a database using the Console Admin Tool. Two new parameters are added to support this feature:

- **/cksptype**: Enter the cryptography key service provider.
- **/ckspkeyid**: Enter the unique identifier used to get the cryptography key from the specified provider type.
- You can also use these arguments to update the cryptography key.

> **Note:** When you change a security key, you need to restart your People Planner applications, such as the Web Components.

When accessing any People Planner application, such as the Web Components or MyPlan, the system checks whether you have a valid cryptography key. If it does not exist, an error message displays.

> **Attention:** For more information about this feature, refer to the *People Planner Admin Guide*.

Security

iFrame Sandboxing

Deltek Tracking: 1508915
Version: 2.6

You can now implement enhanced security on inline frames (or iFrames) within the Maconomy web client, using the new permissions property. This functionality mirrors that of the standard iFrame sandbox property.

System Admin

System Messages

Deltek Tracking: 1240585
Version: 2.6.1

A new concept called System Messages is introduced in Maconomy 2.6.1. System Messages are system-wide message which are shown to end-users on login, for instance to alert them of upcoming business deadlines or planned system downtime.

Each system message is an XML document containing an HTML formatted message in one or more languages. These documents can be deployed to a new 'SystemMessages' folder in the customization folder hierarchy within a Maconomy installation.

To support system messages, which applies to all Maconomy installations on a server node, two new global customization folder locations are introduced: 'GlobalDir/Override' takes priority over all installation-specific customization folder locations, while 'GlobalDir/Default' can contain default resources which are not defined by the individual Maconomy installations.

Restructuring the Coupling Service Configuration

Deltek Tracking: 1759138
Version: 2.6.1

In 2.6.1, we introduce a number of changes to how the Coupling Service configuration is managed and documented. This is to ensure consistency between the values seen in MConfig and the actual values of the properties, as well as avoid situations where MConfig overwrites values that has been manually changed. Additionally, it is to make it clear which properties are static (changes take effect only after a CS restart) and which are dynamic (changes take effect immediately). Finally, we have made it easier to find and keep track of properties for different types of logging as well as properties that are specific to extensions.

Changes include:

- The top-level server.ini is now reserved for MConfig-managed settings only.
- New folder 'settings' and default configuration file 'settings/settings.ini' contains all configurable settings, ordered according to category and whether they are dynamic or static.
- Settings related to extensions, logging, and monitoring are considered "very dynamic" and are contained in separate files, to make it easier to push/pull configuration settings from a system (and readily add and remove, during support cases for instance). These settings include:
  - settings/extension.ini
  - settings/logging.ini
  - settings/monitor.ini
  - settings/mpm.ini
- All settings encountered in the ini-files are now validated against the full list of known settings.
- Most ini-files accept only a limited list of settings, according to the purpose of the file. The default .ini files each contain a commented-out section listing the accepted properties for that file.
- All settings are now documented in a separate README.txt file in the Settings folder.

Upgrade Consideration

Modifications to 'server.ini' cannot be automatically merged when upgrading to 2.6.1, and must be reapplied manually. In addition, some settings are renamed, so consult the new default .ini files and README.txt for further detail.

The settings.ini file is found in the Coupling Service of a Maconomy System in `/configuration/settings/settings.ini`.

Excel Data File Support for Imports

Deltek Tracking: 1301846
Version: 2.6.1

Many customers and consultants use Excel to prepare their data files. However, Maconomy previously did not support this format for direct upload using Maconomy stand-alone Import program or the Data Import Package functionality. We now support the format for direct upload and have added the import of Excel files to application Import Programs.

No configuration is required for this feature.

Features include:

- Works for all stand-alone Import programs and for Data Import Packages.
- Excel-files are supported (transformed to CSV-files internally). File must have extension: xslx.
- All features of CSV-import-files are supported in Excel-import-files
- All import keywords (such as #KEEP and #EMPTY) are supported as cell values.
- Only the first Excel sheet is imported. Further sheets are ignored.
- Each row in the Excel sheet is translated to a line in the CSV-file.
- Each cell in the Excel sheet is translated to a value (the content between two tabs) in the CSV-file
- Excel hidden lines in an Excel-sheet are NOT imported but are considered comments.
- Excel hidden columns are NOT imported but are considered comments.
- Support for comment rows (rows which are not imported): Leave the first (visible) cell of a row empty.
- Formatting (colors, fonts, borders and more) is supported but does not have any semantics during import.
- Excel-booleans are supported and will be converted to Maconomy-booleans
- Numbers (int, real, amount) can be entered in Excel format or as Excel text.
- Date and time fields can be entered in Excel-format and will be converted to Maconomy-format for date and time..
- If a String field cell contains data which Excel interprets as a Date, a Time or a Date and Time, such Strings will also be converted to Maconomy representations of the same date and/or time. This is due to the Excel limitations. To prevent this, add a ping (') in front of the date/time to force Excel to interpret it as a text (and not a date/time).

Whitespace Resilience in 2FA and Email Tokens

Deltek Tracking: 1814931
Version: 2.6.1

The 2FA and email token security features in Maconomy were not sufficiently resilient against whitespace and punctuation in the entered values.
This was particularly an issue when these security features were accessed from a web client through the RESTful API, where any additional white space in the values would cause them to be rejected.

All whitespace and punctuation is now ignored for 2FA codes, while all leading and trailing whitespace is ignored for email tokens.

Moving Configuration of Authentication Methods for the Web Client from the Extender to MConfig

Deltek Tracking: 1467062
Version: 2.6

MConfig now supports not only the setup of your preferred authentication method but also that of your allowed methods. The latter used to be set up using the Extender. This enhancement streamlines the web client's installation process.

Import Programs

Migrate Custom Programs

Deltek Tracking: 1248393
Version: 2.6

Previously, the following import programs were customized, and thus were not included in the data import packages interface. We have now migrated these import programs, so that they are now auto-generated and can therefore be used with Import Packages.

Migrated import programs include:

- ImportWarehouses ItemInformation
- ImportFormatDescriptions Basics
- ImportPostalDistricts Basics
- ImportOpportunities ContactManagement
- ImportChargeTables Basics
- ImportApprovalLists Vendor

The following import programs are *not* converted:

- ImportFinanceData GeneralLedger
- ImportPlanningLines ResourcePlanning
- ImportJobsOld JobCost

New Conversations Import Program

Deltek Tracking: 1284522
Version: 2.6

A new standard import program, Import Conversations, is added and is available in Workspace Client and through Import Packages. It is particularly useful if you have added conversations through extensions and want to migrate to new standard conversation functionality.

"Kerberos SSO" Login Desupported

Deltek Tracking: 1567178

The old Kerberos login configuration, identified as "Kerberos SSO" in MConfig and based on a manually configured external ticket verifier command in MaconomyCustom.ini, is desupported and removed.

Instead, you can use one of the other Kerberos login methods, such as "Kerberos account login" or "Kerberos keytab file," which are better supported by MConfig and require no manual configuration steps.

Removing Desupported and Discontinued Terms

Deltek Tracking: 1419337, 1508483, 1311527, 1290384, 1419707, 1601319, 1343443
Version: 2.6

Discontinued terms include:

- iAccess (now called web client)

Desupported technologies / terms include:

- Deltek Collaboration
- Portal
- FPU
- SQL 2012, 2014, and 2016
- MDL
- MPL1 and MPL2 (replaced by MPL4)
- Dirmi Workspace Client
- Workflow engine
- Azure AD
- Excel legacy output

See the *Deltek Maconomy Product Support Guide* for details.

Browser Setup / SPNEGO

Deltek Tracking: 1519114
Version: 2.6

Maconomy now supports multi-step protocol negotiations. Protocol negotiation is now supported by the RESTful webservices, enabling Kerberos authentication to work seamlessly in a wider range of installation environments.

Maconomy web clients use the SPNEGO protocol to perform Kerberos SSO. The SPNEGO protocol will try to negotiate an authentication context between the server and the browser which satisfies the security requirements of both sides. Usually this works seamlessly, but in some scenarios the browser might be unable, or unwilling, to fulfill the security requirements of the server. In such cases you can follow the steps in the System Admin Guide to manually set up your browser to perform Kerberos-based SPNEGO SSO.

- *See the Deltek Maconomy System Admin Guide* for setup details.

Database Index Handling

Deltek Tracking: 1421602
Version: 2.6

The database index handling process now includes support for index scripts useful for validating, creating, migrating, and maintaining indices in the Maconomy database.

See the *Deltek Maconomy System Admin Guide* for details.

Added Third Party SSO / MFA

Deltek Tracking: 1282027
Version: 2.6

A new Maconomy2FA authentication key set contains the information about which MFA (Multifactor Authentication) claims are associated with a login session. The information is stored within the Maconomy reconnect credentials, along with other information about the type of login that was performed. This new functionality improves security and supports statutory requirements.

This authentication key detects if MFA was enforced by an external (cloud) authentication provider, and reflects that information in the set of authentication keys stored in the reconnect credentials for the login session.

For more information and to see the full set of available authentication keys, refer to the skipIf list within the *Deltek Maconomy System Administration Guide*, Maconomy 2FA login module configuration section.

Export to Excel Row Summary

Deltek Tracking: 1521517
Version: 2.6

In order to enhance usability and also to support statutory requirements, we have added an option to include a count of the number of rows included in the file generated via the Export to Excel action in Maconomy.

Administrators must configure this option prior to use. The following parameters are added to export-to-excel action ExportDataSet:

- **RowId (boolean)**—If enabled a row-id (number starting from 1) is added as the first column for all rows in the export. The color-format of the row-id column is identically to the header-color-code.
- **RowCount (boolean)**—If enabled a count (number) of all data-rows is added as the last line in the export. For example: Row Count: 1001

The system checks that the number of rows does not exceed 1048576, which is the maximum number of rows supported by Excel (including header and tail-info / row count).

Note: If the number of lines exceeds this number, the export is truncated.

Default webaccess.ini

Deltek Tracking: 1423370
Version: 2.6

A default standard webaccess.ini file is now included with all Maconomy installations (including upgrade and new installations). For security purposes, the default file includes restrictions that remove direct access to all search dialogs in Workspace and web clients, but not the search dialogs used by Touch.

The webaccess.ini file is automatically installed by MConfig as part of the 2.6 installation or upgrade. It is possible to use Extender to customize the file either adding new restrictions or removing the default restrictions.

Note: Since access to search dialogs is now restricted, this could potentially impact integrations.

Limit Default Filetypes

Deltek Tracking: 1519044
Version: 2.6

For security purposes, we limit default filetypes in the server.ini that users are allowed to upload to Maconomy. These types include:

- Composite Document File V2 Document
- HTML document
- Microsoft Excel 2007+
- Microsoft OOXML
- Microsoft PowerPoint 2007+
- Microsoft Word 2007+
- PDF document
- JPEG image data
- PC bitmap
- PNG image
- Zip archive data
- 7-zip archive data
- ASCII text
- ISO-8859 text
- Rich Text Format data
- UTF-8 Unicode
- Unicode text
- XML 1.0 document
- news or mail

Other entries in the server.ini file to support Maconomy functionality are:

- data—Necessary to allow files from support documentation functionality to be saved
- empty—Necessary to allow for files without any content but this is not an allowed filetype

You can modify this list in server.ini if needed.

See the *Deltek Maconomy System Admin Guide* for details.

Increase Allowed Number of Named Users

Deltek Tracking: 1523921
Version: 2.6

Customers are now able to increase (or decrease) their number of allowed named Maconomy users by performing a quick procedure in the Workspace Client. Previously, this update could only be performed by one of Deltek's technical consultants and would require a restart of the system (which is no longer needed).

Setup Instructions

See the *Deltek Maconomy System Admin Guide* for details.

Certifications

Deltek Tracking: 1419337
Version: 2.6.1

- Pentaho 9.3 – for BPM
- Java SE Critical Patch Update 8u351
- Windows (OS) 11 2022 Update
- Windows Server 2022 for BPM
- Android 13 and iOS 16 — for Touch
- Chrome browser for BPM — Supported from BO 4.2 SP9 on Windows 10 and 11
- Safari browser for BPM — Supported from BO 4.2 SP8 on MacOS Sierra
- Oracle 19c (with Oracle 19c Client) — for Windows OS
- iOS 16 — for Web Client

Deltek Tracking: 1419337
Version: 2.6

- Business Objects 4.2 SP9 Patch 4 – for BPM
- Windows Server 2022 – for Maconomy and People Planner
- Windows 11 O/S – for Maconomy and People Planner
- SQL Server 2019 – for BPM
- OEL 8 – for BPM
- MacOS 12 Monterey – for Maconomy and People Planner
- iOS 15 – for web client and Touch
- Android 12L – for Touch
- Pentaho 9 – for BPM

REST API

Addition of Diagnostic Endpoints

Deltek Tracking: 1514954
Version: 2.6

Diagnostic endpoints are added in REST to improve support case handling. These endpoints are used to determine whether a reported issue is something that has already been reported or is known issue.

For more information, see the *Web Services Programmer's Guide*.

Cache Invalidation for Configurations Endpoint

Deltek Tracking: 1480952
Version: 2.6

This enhancement is added to assist consultants with cache invalidation used to enforce extension changes. There was previously confusion around the best way to handle cache invalidation. Configuration cache look for system file changes in `MaconomyDir/Web`, including `CustomizationDir`. Changes then trigger memory cache invalidation.

Appendix A – Field Descriptions

New Invoice Received Date Field Fields / Descriptions

Accounts Payable » Vendor Invoices » Vendor Invoices » Vendor Invoice

Accounts Payable » Company Vendors » Lookup » Vendor Invoices » Vendor Invoice

Accounts Payable » Vendor Invoices » Journals » Vendor Invoice Journal » Vendor Invoices » Vendor Invoice

Accounts Payable » Vendors » Lookup » Vendor Invoices » Vendor Invoice

Accounts Payable » Vendor Entries » Origin » Vendor Invoice

Vendor Invoice Island

Field	Description
Invoice Received Date	This field shows the date when you received the vendor invoice.

Time & Expenses » Approval Center » Vendor Invoices » Approval Line » Vendor Invoice

General Ledger » Financial Operations » Posting » Post » Journals » Vendor Invoice Journal » Vendor Invoices

General Ledger » Fixed Assets » Registrations » Unassigned Vendor Invoices » Invoice Allocation » Vendor Invoice

Accounts Payable » Company Vendors » Lookup » Periodic Statements » Entries

Accounts Payable » Vendor Invoices » Vendor Invoices » Vendor Invoice » Vendor » Vendor Invoices » Vendor Invoice

Accounts Payable » Vendor Invoices » Invoice Allocations » Vendor Invoice

Accounts Payable » Vendor Invoices » Invoice Allocations » Vendor Invoice » Vendor » Vendor Invoices » Vendor Invoice

Banking » Payments » Selection » List of Vendor Entries » Vendor Entry

Invoice Island

Field	Description
Invoice Received Date	This field shows the date when you received the vendor invoice.

Accounts Payable » Company Vendors » Lookup » Periodic Statements » Entries » Entry

Accounts Payable » Company Vendors » Lookup » Entries » Entry

Accounts Payable » Vendor Invoices » Vendor Invoices » Vendor Invoice » Vendor Entry

Accounts Payable » Vendor Invoices » Invoice Allocations » Vendor Invoice » Vendor Entry

Accounts Payable » Vendors » Lookup » Periodic Statements » Entries » Entry

Accounts Payable » Vendors » Lookup » Entries » Entry

Accounts Payable » Vendor Entries » Entry

Accounts Payable » Vendor Entries » Transaction » Vendor Entries » Details

Entry Information Island

Field	Description
Invoice Received Date	This field shows the date when you received the vendor invoice.

Accounts Payable » Vendor Invoices » Vendor Invoices » Vendor Invoice » Vendor » Vendor Invoices

Accounts Payable » Company Vendors » Home » Approve Invoices » Entries

Accounts Payable » Company Vendors » Lookup » Vendor Open Entry Statement » Entries

Accounts Payable » Vendor Invoices » Invoice Allocations » Vendor Invoice » Vendor »Vendor Invoices

Accounts Payable » Vendor Invoices » Journals » Vendor Invoice Journal » Vendor Invoices

Accounts Payable » Vendors » Lookup » Periodic Statements » Entries

Accounts Payable » Vendor Entries » Transaction » Vendor Entries

Banking » Selection » Edit » Selection » Entries

Banking » Selection » Approve » Entries

Field	Description
Invoice Received Date	This field shows the date when you received the vendor invoice.

Increase Allowed Number of Named Users Fields / Descriptions

Setup » System Setup workspace » Installation Details section » Installation Information tab

Single Dialogs » Set-Up » Set-up » Installation Information single dialog

Version island

Field	Description
Named Users	This field displays the allowed number of named users for this Maconomy installation.
Named Users Code	In this field, enter the license key provided by your account manager. Once you save your

Field	Description
	edit, Maconomy immediately updates the value displayed in the **Named Users** field.

New Approver Reference Type in Approval Hierarchies Fields / Descriptions

Single Dialogs » Setup » Approval » Advanced References » Advanced Reference

Information Island

Field	Description
Name	Enter the name of the advanced reference.
Description	Enter a description of the advanced reference.
User Reference	Select the checkbox to reference a user. Maconomy then derives the employee of that user. It then assumes that the derived value is an employee if you do not select this field.
Source Internal Relation Name	This field shows the internal name of the relation where the connection of relation links starts. When you create it from the Approval Hierarchy workspace, the source internal relation automatically populates with the approval hierarchy Type.
Source Relation Name	This field shows the external name of the relation where the connection of relation links starts. When you create it from the Approval Hierarchy workspace, the source relation automatically populates with the approval hierarchy type.
Reference Relation 1	Select the field from the source relation, which serves as the reference to the next relation. If you do not select any field, both source and target relation are the same. You can only select the **Target Field Name** from among

Field	Description
	the fields on the source relation (usually the approval relation). The field is optional.
Reference Relation 2-5	Select the field from Reference Relation 1, which serves as the reference to the next relation. These fields are optional, but you must fill the fields in continuous order from 1 to 5 when you use them.
Target Internal Field Name	Select a text field from this field. Maconomy derives the approver from the **Target Internal Relation Name** and **Target Internal Field Name** fields. You can only select the target field from the last reference relation or from the source relation when no reference relation has been filled in.

Action

Action	Description
+ Create Advanced Reference	Use this action to create a new advanced reference.

Setup » Approval Hierarchies » Approval Hierarchy Selections » Approval Hierarchy Selection Lines » Approval Hierarchies » Approvers

Single Dialogs » Setup » Approval » Approval Hierarchies » Approval Hierarchies » Approvers

Field	Description
Approver Reference	▪ Advanced Reference - Select an advanced reference to an employee associated with the approval object. If this is entered, you must also select a reference and a field in the **Approver Reference, Employee** and **Approver, Advanced Reference** fields.
Approver, Advanced Reference	Enter the advanced reference of the Approver.

Field	Description
Substitute, Advanced Reference	Enter the advanced reference of a substitute approver if one has been specified on the approval task.
Super Approver, Advanced Reference	Specify an advanced reference to assign any users of this type as super approvers who can view and approve the record.

Setup » Approval Hierarchies » Approval Hierarchy Selections » Approval Hierarchy Selection Lines » Approval Hierarchies » Approvers

Action

Action	Description
+ Create Advanced Reference	Use this action to create a new advanced reference.

New Employee Field on Tax Settlement Entries Fields / Descriptions

Workspace Client

General Ledger » Financial Operations » Tax » Tax Settlement » Tax Entries

Field	Description
Employee No.	Enter or search for the employee number assigned to the vendor for reporting.

Enhanced Vendor Remittance Emails Fields / Descriptions

Workspace Client

Accounts Payable » Vendor Remittance Emails » Payment Order

Field	Description
Remittance Email Address	This field shows the email address specified for a vendor linked to the payment selected for email.

Accounts Payable » Vendor Remittance Emails » Vendor Remittance Email Logs » Vendor Remittance Email Log

Field	Description
Resend Email	Use this action to resend the vendor remittance email individually.

Vendor Remittance Email Log action

Action	Description
Resend Email Remittances for All	Use this action to resend all the vendor remittance emails shown in the Vendor Remittance Email Log sub-tab.

The Employee Dashboard Workspace

Setup » System Setup » Parameters and Numbers » Popup Fields

Single Dialogs » Setup » Set-Up » Pop-up Fields » Popup Field » Values

Field	Description
Name	**Employee Utilization Type** – These are used for specifying how an employee's time was utilized on a registered job entry. The following fields are available: ▪ **Billable** – Select this field to specify that the employee utilization type is mean for activities that are invoiceable (for example, not an absence). Reporting will follow this setup. ▪ **Productive** – Select this field to specify that the employee utilization type is meant for activities that are productive (for example, not an absence). Reporting will follow this setup.

Single Dialogs » API » Human Resources » Employee Dashboard

This single dialog workspace is used as the basis for the Employee Dashboard workspace in the web client. This is not meant to be utilized by users and has limited or no content.

Employee island

Field	Description
Employee Name	This field displays the name of the employee.

Field	Description
Employee Number	This field displays the number of the employee.

Selection Criteria island

Field	Description
From Date	Select a date to display data beginning from this date.
To Date	Select a date to display data up to this date.
Month	Select the appropriate month range to display your data for the specified time interval, beginning from the first day of the start month up to the last day of the current month. If you have specified **From** and **To** dates, that takes precedence over your selection in these fields.
Year	Select the appropriate year range to display your data for the specified time interval, beginning from the first day of the start year up to the current day of the current year. If you have specified **From** and **To** dates, that takes precedence over your selection in these fields.

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