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Maconomy FAQ

Upgrading to Maconomy 2.6.1 in Enterprise Cloud

Upgrade Process

1. **How will Deltek communicate about the upgrade?** You will be receiving emails to communicate the status of your upgrade. Each communication will include Expected Dates, actions to be taken by your organization, and next steps. You will also receive support cases before each environment deliverable containing download links, URL's and other useful information.

2. **Will our system be down during the upgrade? Will we be able to continue production activities?** Your system will be down during the Production upgrade weekend. This outage will be communicated in advance and will occur outside of regular business hours. During the upgrade, Deltek will setup an Upgrade environment for each customer, which is a new environment in the new version containing a copy of data from your Production environment. Your Test environment is upgraded approximately 7 weeks before Production and will be unavailable for a few days prior to upgrade.

3. **What do I need to do to prepare for the upgrade?** During the upgrade period you will need to upgrade custom content to the new version and perform user acceptance testing. We strongly recommend that you engage with Deltek to help in assessing your environment. The most critical factor in a successful upgrade is your engagement in creating an upgrade plan in advance. This will ensure that resources are available to meet your needs and that your upgrade will complete with minimal disruption. Please contact your Customer Success Manager to schedule a pre-upgrade consultation.

4. **What is made available during the upgrade?** Deltek will provide you with a new Upgrade environment including Maconomy 2.6.1, Business Objects 4.2 SP9 and People Planner 4.4 (if applicable). This environment will be delivered with a copy of data from your Production environment but without your extensions and custom reports deployed. You can raise a Service Request to request extensions and custom report deployment in advance or after delivery of this environment. Approximately 7 weeks prior to your Production upgrade your Test environment will be upgraded to Maconomy 2.6.1, Business Objects 4.2 SP9 and People Planner 4.2. Other non-production environments will be upgraded following your Production environment.

5. **What is the scope of the upgrade?** The traditional upgrade is simply a technical upgrade, which results in your environment being upgraded to the latest cloud environment version. Links to the Maconomy 2.6.1 Release Notes and Enhancements Guide will be available in the Deltek Support Center on the Maconomy Enterprise page. If you do want to activate new features and receive face-to-face, bespoke training, then it is recommended you contact your Customer Success Manager.

6. **What do I need to do to complete the upgrade?** The customer will be expected to perform a thorough regression, integration, functional, and system test of your configuration in the Upgrade and Test environments which will be on the new version of Maconomy. If working with Deltek they will perform updates of custom configuration in the Upgrade environment and then deploy to Test once upgraded for your testing and verification.

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7. **Is there a way I cannot have to download and circulate a new version of the Workspace Client to my users with each upgrade?** Yes, it is possible to request that Update Sites are enabled in your Production environments for all future updates and upgrades. This will ensure that end user Workspace Clients will automatically update to the new version without having to download and reinstall. Please raise a Support Case if you would like to request that Update Sites are enabled. More details on Update Sites can be found in the SaaS Administrators Guide in the Deltek Support Center.

8. **How long will the upgrade take to complete?** The upgrade will be conducted in 3 Phases.

   a. **Phase I:** Custom Content upgraded. Upgrade environment delivered. Your Upgrade environment will be delivered at the beginning of the upgrade cycle. When delivered the environment will contain a copy of your Production data. The custom reports and universes will have been copied across from the Business Performance Management/Custom folder in Production. Extensions will not be deployed at delivery. The developer upgrading your extensions will be able to deploy them directly to the Upgrade environment when ready. The upgrade environment is delivered approximately 12 weeks before your Production environment upgrade. If working with Deltek Consulting they will upgrade all custom elements in this environment for your organization prior to Phase 2 at which point you will verify and test in your upgraded Test environment.
   b. **Phase II:** Validation and Familiarization. Your upgraded Test environment is delivered approximately 7 weeks (please see your specific dates in your chosen upgrade Window) prior to the Production upgrade. This environment is delivered with a copy of custom reports and universes from the Business Performance Management/Custom folder in the Upgrade environment. You will need to raise a service request to have extensions deployed as they are not automatically deployed at delivery. Here you will review the upgraded custom elements and validate the version before your Production upgrade.
   c. **Phase III:** Production upgrade. The Production upgrade will take approximately 2 days to complete. You will be informed of when the Production environment is available through support case. This support case will contain a download link for the Workspace Client and connection details for the Workspace Client, iAccess and Touch. This upgrade will be performed over a weekend so as not to disrupt normal business. This environment is delivered with a copy of custom reports and universes from the Business Performance Management/Custom folder in the Test environment. You will need to raise a service request to have extensions deployed as they are not automatically deployed at delivery. We recommend raising the Service Request in advance so that the Production environment contains extensions at delivery.

9. **What testing with Deltek undertake before releasing the environment upgrades?** Deltek will perform smoke testing on the environments before release. If engaging with Deltek Consulting during your upgrade they will perform updates and unit testing of custom content in your Upgrade environment.

10. **How are reports and print layouts handled during the upgrade?** We will validate that the standard reports, window layouts and print layouts are working, but it will be your responsibility to test and correct any issues with your customer-specific custom reports, and/or custom print layouts. If issues exist in custom-developed reports or custom print layouts, or custom UI configurations that are not part of the standard product, you will be required to either resolve these issues yourself, with the assistance of a partner, or through a paid engagement with Deltek Consulting.

11. **What safeguards are in place for backup and recovery, in case of an unforeseen issue with the upgrade process?** It is standard practice for Deltek to take an initial backup when we interact with any of our client's environments. As part of the upgrade process, a full backup is taken before any upgrade tasks are undertaken. Additional backups occur at various points of the upgrade process. In addition to the above Deltek also has the ability to roll the environment affected back to the start of the process should an issue be identified that cannot be resolved in a timely manner.

12. **How do I notify Deltek that I have completed testing on the upgraded version?** Please raise a Support Case to notify Deltek that you have successfully completed testing of the 2.6.1 upgrade. If a case has not been raised your Customer Success Manager will contact you for verbal confirmation and the Production upgrade will proceed.

Functionality Changes

1. **What are the advantages of upgrading to 2.6.1?** From 2.6.1 we will no longer be using the name iAccess for our web interface, it is now referred to as the Web Client. This upgrade will introduce further capabilities in the Web Client as well as a new more modern look and feel; More of your heavyweight users will be able to use the Web Client and move away from the Workspace Client. The new Web analyzer reporting tool is based on the popular Java analyzer. With all the capabilities our Clients love plus valuable additions with more fields and calculations available.

2. **What new functionality will now be available?** Links to the Maconomy 2.6.1 Release Notes and Enhancements Guide will be available in the Deltek Support Center on the Maconomy Enterprise page, which should assist you in becoming familiar with the new functionality introduced with your upgrade. Again, in most cases, in order to utilize new features we recommend you work with your Customer Success Manager to schedule Deltek Professional Services to activate those features.
   New features of note are as follows:
   - **Company Specific Exchange Rates** (CSER) – This will be disabled at delivery. If you chose to enable this feature in future it will not affect any historical entries.
   - **New Web Analyzer** – With the Maconomy 2.6.1 release we are introducing the analyzer to the Web Client for the first time. With the new look and feel and three new reports for Job Cost and GL Entries we hope to see customers benefit from this new web client feature immediately. Reports based on the old java analyzer will also be available in the new web analyzer. Since the old Java Analyzer will no longer be available from Maconomy 2.7 we recommend our customers to start the transition to the new web analyzer with this release. If you prefer to use the new web analyzer from both Workspace Client and Web Client please inform your Customer Success Manager in advance.
   - **New Web Client user settings:**
     - **Show field borders** determines whether the web client displays borders around all editable fields.
     - **Show recent places** lists the three last opened workspaces in the menu.
     - **Show narrow margins** displays narrow side margins in workspaces.

     All three settings are disabled by default but can be enabled by the users.
   - **Employee Dashboard in Web Client –** this new dashboard provides the logged-in employee with key performance indicators for billable and productive utilization and absence statistics. Billable and productive hours are determined by assigning an employee utilization level to a time activity. You can create these employee utilization level types in the Popup Fields. In addition, the user must be a member of a group that grants access to the analyzer reports Employee Utilization and Employee Utilization by Month.

- **Derive Zero Value from Price List Lines** – You can now enforce Maconomy to derive the value 0 on a job entry if you enable this feature on your price list line by using the new fields
    - **Zero Markup %**
    - **Zero Standard Markup %**
    - **Zero Intercompany Price %**
    - **Zero Adjustment %**
    - **Zero Base Salary Markup %**
    - **Zero Standard Base Salary Markup &**
- **Web Client workspaces -** More standard business functionality has been made available in new workspaces for CRM, Batch Invoicing, Users, etc. You must add the workspaces to your web client menu before these are available to users. The new Pipeline dashboard requires access to the new Opportunity Pipeline dialog.
- **Employee Data -** In 2.6 we introduced the new Employee Data functionality to restrict the type of Employee data that Users can see. This includes the ability to control the employees a user can see in ”HR windows” and the ability to restrict access to sensitive employee information outside the “HR windows”, e.g. searches and assistants/info bubbles
    - There are now four tick boxes that need to be checked or unchecked in a user's actions restricting access to HR dialogs:
        - See all HR data
        - See all data where you are Supervisor
        - See all data where you are Secretary
        - See all data where you are Mentor

    In addition, you can control access to specific fields in searches and info bubbles in the Employee Field Access tab in the Employees workspace.
- **Transfer Quote Lines to Job Invoice -** With Maconomy 2.6.1 it is now possible to have quote lines transferred to a job invoice on account. This new functionality is enabled by a new **Create Invoice On Account from Quote** checkbox in the invoice layout rule.
- **Webaccess.ini -** A default standard webaccess.ini file is now included with all Maconomy 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. Since access to search dialogs is now restricted, this could potentially impact integrations and the file must be updated with your specific rules.

Documentation & Training

1. **Where can I find guides and documentation?** The latest documentation and guides will be included in the Deltek Support Center and can be found on the Maconomy Enterprise Cloud page.

2. **How do I report any issues I discover during the upgrade period?** You can submit Support Cases in the Deltek Support Center. When entering a case please begin the Summary field with “Enterprise 2.6.1 Upgrade”, this will allow the team to prioritize and action the case as required.