Deltek

Deltek Maconomy®

2.6.3 Release Notes

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Deltek Maconomy 2.6.3 Release Notes

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Welcome to the Maconomy 2.6.3 Release Notes.

Overview

This release includes People Planner 4.6 and Touch 4.3.

These release notes contain a summary of the following:

- Pre-Installation Information
- Install Information
- Enhancements
- Database Changes
- Software Issues Resolved
- Known Issues

Note: People Planner Release Notes are now part of the Maconomy Release Notes and no longer a standalone document.

Pre-Installation Information

Contents of this Service Pack

Maconomy 2.6.3 contains the following items:

- APU 2.6.3, including Touch 4.3 Web service
- TPU 2.6.3 with Maconomy Server 51.103.0.22103000644681
- PSO SPU 2.6.3
- Workspace Client 2.6.3
- Touch, including the Touch 4.3 Installer
- Web Client PU 5.3.0

Installation Preconditions

- **APU** - The APU in version 2.6.3 and in subsequent 2.6.3 Service Packs requires a TPU from the same Service Pack or from a Cumulative Update (CU) on the same release stream.
- **TPU** - Deltek recommends that you upgrade all TPU parts (in MConfig called Global tools, Application TPU, Application Portal TPU, Web TPU and Coupling Service TPU) whenever a Service Pack or a CU is installed.
- **MConfig** - MConfig 10.3 or higher is required for installation of the APU as well as the TPU.
- **Oracle Instant Client** - For Oracle users, Oracle Instant Client 19 is required for installation of Maconomy 2.6.3.
- **Touch** - If you are already using Touch but not the latest version, you must upgrade Touch on your server and ensure your users upgrade to the latest app.
- **Web Client** - If you are already using Web Client, you must upgrade Web Client on your server.

Technical Considerations

Core Maconomy Considerations

User Login and Maconomy License

Previously, active users were calculated based on the number of users whose passwords were not blocked. The calculation has been changed in Maconomy 2.6.3 to base on the users' validity period.

There will be no automatic data conversion, so the number of active users could exceed the number of licenses after the upgrade, and you need to manually change the validity period for those users that require modification.

Long-Running Operations

The current version of the web client does not support long-running operations. If an operation exceeds two minutes, it will be automatically canceled by the web server. Additionally, progress bars, which are available in the workspace client to indicate operation progress, are not present in the current web client version. For instance, this may occur during batch invoicing when handling a large number of jobs, resulting in timeouts. Users experiencing this issue are advised to use the Workspace Client for such processes. Alternatively, the timeout duration on the web server can be configured beyond the default two minutes.

Long-running process support will be added in a future Maconomy release.

MConfig Version Support Update and Feature Deprecations

With Maconomy 2.6.3, deprecation warnings will display when starting MConfig or attempting to use MConfig features (such as installing a documentation database) on older Maconomy versions and on servers with old technology/applications.

Monthly Time Reporting Desupported

The Monthly Time Reporting feature is discontinued in 2.6. 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.

Known Issues

Review Known Issues for information on unresolved software issues, in particular, known issues introduced with this release.

People Planner / Maconomy Integration

Two features, "Grouping of Budget Lines" and "Imported Resource Allocations," found within Imported Resource Allocations, are incompatible. If you want to use the latest Resource Allocation integration, which sends planning back to Maconomy to form a periodic resource budget/forecast, you should not use Grouping, as it is not supported for this workflow.

APU Installation Notes

The Synchronous Notifications feature requires setup. See the System Admin Guide for details.
The Access Control for Approvers feature is included in this version, which provides restricted access to approval items. Maconomy 2.5.1 (and newer versions) comes with a default setting that can be modified to support individual customer needs. Refer to the *Deltek Maconomy 2.5.x Enhancements Guide*, Deltek Tracking 1174941, for details, including recommendations on actions prior to going live with this release.

TPU Installation Notes

Two features, "Grouping of Budget Lines" and "Imported Resource Allocations," found within Imported Resource Allocations, are incompatible. If you want to use the latest Resource Allocation integration, which sends planning back to

Maconomy to form a periodic resource budget/forecast, you should not use Grouping, as it is not supported for this workflow.

- The .bash shell (version 7.04) is required for all Unix/Linux installations.
- Customized dictionaries for the Workspace Client are handled by the Extender. Refer to the Extender Handbook for details. The Extender ensures that both dynamic and static texts are updated.

Surrogate Characters Not Supported

Surrogate characters are characters not representable in 2 bytes in UTF-16. They are mostly used in Chinese for representing seldom used characters. Maconomy currently does not support surrogate characters.

Local Characters in Variable Names

Variable names in MScript may no longer contain non-ASCII characters. As of version 2.1, Maconomy no longer supports the use of Scandinavian letters ('æ ø å Æ Ø Å') in variable names in all Maconomy languages, including MScript, RGL, portal files, and MSL.

Unnecessary Error Occurs During Installation
When performing an APU upgrade using version 2.4 GA or later of the Maconomy Server, a PPU_Warning related to popup values might appear in the PPUDebug file as PPU_Warning. These messages are expected during the APU upgrade process as the database is temporarily in a state that this neither the old version nor the new version. Ignore the messages and continue the installation. See defect 577837 for more information.

Default Database Query Timeout
The default database query timeout might interfere with Maconomy Analyzer report queries which are expected to run for more than 5 minutes. In you are using such Analyzer reports you can increase the database query timeout with the following setting in 'MaconomyCustom.ini':

- [ServerConfig]
- DB_Cancellation_DefaultTimeout = <timeout-in-seconds>

Touch Considerations

The following are the considerations for Touch app version 4.3:

Deltek Touch for Maconomy supports mobile devices that run on Android 11 (or higher) and Apple iOS 16 (or higher).
Attention: For more information about the Touch installation requirements, see the *Deltek Touch 4.3 for Maconomy 2.6.3 Admin Guide*.

Web Client Considerations

Customized Workspaces

Please note that if you have customized web client workspaces, there will be a task for an extension consultant to make these workspaces work after the upgrade to 2.6.2.

Specifically, for Maconomy 2.6.3 the Open In List View enhancement requires that the settings.json file has the openInListMode property defined.

Attention: For more information about the web client installation, see the *Deltek Web Client Install Guide*.

Analyzer Reports

Analyzer reports accessed from the workspace client will now open in a browser window by default. A prerequisite for this is that the URL for the web client is specified in the system parameter URL for Web Client and that the analyzer reports are available in the web client menu. Customers who want to continue using the java analyzer can change this configuration with MConfig.

Logging in via OAuth

Users who log in to the Workspace Client via Open Authorization (OAuth)-based options will now do so using an external browser.

Statutory/BPM Considerations

The file that stores area-specific settings related to Statutory/BPM extensions and logging is renamed from server.ini to extension.ini.

Attention: When running reports, you may encounter error messages that inaccurately refer to the extension.ini file as server.ini. All updates for Statutory/BPM related settings must go to the extension.ini file only.

People Planner Considerations

People Planner 4.6 has updated the ASP.NET Core Hosting Bundle used by Security Service, the Rest API, and the Web Admin Tool from .NET 6 to .NET 8. Other applications such as People Planner Windows applications and the Web Components use .NET Framework 4.8.

The page tooltip is now removed from all People Planner Web Components to optimize performance.

Special Actions Prior to Upgrade

Upgrading to 2.6.3 includes actions prior to upgrade.

Integration with CRM

Maconomy only supports Vantagepoint 3.0, and does not support Vision 7.6 and DPS 1.1. The Vantagepoint SOAP APIs are deprecated in version 3.0, and consequently, the Deltek CRM Integration migrated to REST API.

Additional Actions in Upgrade Guides

Warning: Numerous features with 2.4 GA forward require critical upgrade actions. See the *Deltek Maconomy Upgrade Guide* for details.

Translations

This section contains information about translations in Maconomy.

For Danish, Dutch, English (GB and US), Norwegian, and Swedish, both Standard and Solution dictionaries exist. Solution dictionaries contain industry-specific terminology for select terms for the selected language. For example, the standard term "Job" in US English translates into "Project" in US English MCS and into "Engagement" in US English CPA.

For all languages, Engineering has verified that a solution can be installed with that language as Enterprise Language. For languages with a solution variant, only the solution variants are validated for use as Enterprise Language. If this validation is not completed, manual corrections to the import files is expected during installation of a solution.

Updated dictionaries are made available once released from Engineering.

Language	Validated as Enterprise Language
Swedish	No
Swedish (MCS)	Yes
Italian	Yes

Language	Validated as Enterprise Language
Norwegian	No
Norwegian (MCS)	Yes
Danish	No
Danish (MCS)	Yes
Dutch	No
Dutch (MCS)	Yes
Spanish	Yes
French	Yes
German	Yes
Portuguese	Yes
English (UK)	No
English (UK, MCS)	Yes
English (US)	No
English (US, MCS)	Yes
English (US, CPA)	Yes
Chinese	Yes

Changes to Extensions Framework

The Extension Framework used for implementation of customizations and integrations is maintained and upgraded with new features enabling Business and Extension developers to handle even more requirements with less effort.

Migration from previous versions to the latest version of the Extension Framework may require few updates to existing extensions.

For more information about the latest version of the Extension Framework and migration please see the *Extension Framework Programmer's Guide*.

Documentation

This section includes new and updated documentation for this release.

Key Features of Documentation for Maconomy 2.6.3

Maconomy 2.6.3 Documentation includes the following new and updated documentation:

- The **Maconomy Help Center** is the hub for all of your documentation, including User Guides, Concept Guide, Release Notes, and Compatibility Matrix in a new visual format for ease of use. See the Maconomy Help Center for details.
- The **Maconomy Release Notes** is now in online format for ease of use. It includes details of all new features for Maconomy, Touch, and People Planner. The Release Notes is accessible from the Maconomy Help Center.
    - Click relevant links for summary of features, software issues resolved, pre-installation information, database changes, and known issues.
- Update to **Web Client User Guide** includes new features, field descriptions, and procedures. The former Workspace Client documentation is renamed Maconomy Reference Guide and is available via the Help dropdown in the web client. It is retired in-app as of 2.6.1.
- The **Maconomy Product Support Guide** is now available online. It includes important announcements and now provides a listing of compatible third-party products. Go to the Product Support Guide for details.
- **System Admin Guide** updates include:
    - Added information about how usernames are handled when creating a new node.
    - Updates to Coupling Service Installation and Configuration about new parameter in server.ini for client configuration.
    - Updates to client bandwidth information.
    - Added information about handling login attempts with incorrect password.
    - Added examples and command line options to the Running Index Scripts section.
    - Updated section to include User Blocked checkbox.
- Updated the **Azure Setup Guide** to accommodate setup changes related to the use of an external browser for OAuth Login.
- Updated BPM documents, including:
    - **BPM Country Reports Guide** (previously named BPM Statutory Reporting Guide), which is now available online, has updates to the USTVA and NSAFT reports. There are three new reports for Denmark, namely: DSAFT, Annual CSV File and VAT Return. Go to BPM Country Reports Guide for details.

  - **BPM Standards Reports Guide** (previously named BPM Report Description Guide) is now available online for ease of use. Go to BPM Reporting Guide for details.
  - **BPM Admin Guide** is now available online. Go to the BPM Admin Guide for details.
- Updated Touch documents, including:
  - The **Touch App Release Notes** is now available in online format and can be accessed here or from the Maconomy Help Center.
  - The **Touch Admin Guide** was introduced in 2.6 as the new primary document for technical consultants. It streamlines Touch documentation and combines the previous Touch Installation, Upgrade, and Multitenancy Setup Guides.
  - The **Touch Online User Guide** was introduced in 2.6 and replaced Touch User Guides for Android and iOS in PDF. See the "Online Guides" section in these Release Notes for details.
- Updated the **People Planner Web Components Guide** with new features.
- The **People Planner Web Components Performance Considerations Guide** is now available with information for configure the Web Components with optimized performance.
- Updated the **Web Client Install Guide** with information about and configuration instructions for the following:
  - Collapsed menu upon login
  - Streaming of Large Web Analyzer Reports
- Documents retired as of 2.6.x:
  - **Enhancements Guide -** Now part of Online Release Notes.
  - **Concepts Guide** - Now part of Online Concepts Guide.
  - **PSO and CPA Solutions Guides -** Now part of Online Concepts Guide.
  - **CRM and DTM Integrations Guides -** Now part of Online Concepts Guide.
  - **Maconomy Reporting Guide -** Moved to legacy documents; available upon request if needed.
  - **Deltek Touch for Maconomy MScript & REST Comparison Guide -** Moved to legacy documents; available upon request if needed.
  - **BPM Report Description Guide -** Now available in online format only and renamed to BPM Standard Reports Guide.
  - **BPM Statutory Reporting Guide -** Now available in online format only and renamed to BPM Country Reports Guide.
  - **BPM Admin Guide -** Now available in online format only.
  - **Product Support Document -** Now available in online format only.

Maconomy Help Center

The Maconomy Help Center serves as a hub for all Maconomy documentation and related material. For easy access, bookmark the following link:
Maconomy Help Center

Online Guides
The following documents are available in HTML.

Online Guide	Details
Online Release Notes	The release-specific Maconomy Release Notes is available in online format and in PDF. This document merges with the former Enhancements Guide and now includes feature overviews for Maconomy, Touch, and People Planner.
Online Concepts Guide	This online document merges the former Concepts Guide with some user guides, including those for CRM and Talent Management integration and the PSO and CPA Solutions description guides. It also includes the Getting Started guide, which was formerly part of the online help embedded in the software.
Touch Release Notes	The Touch Release Notes is available in online format and is also accessible from the Maconomy Help Center.
Touch for Maconomy Online Help for Android Touch for Maconomy Online Help for iOS	The online guide replaces the Touch User Guides for Android or iOS in PDF, and is accessible from the app.
People Planner Web Components Guide for Web Client People Planner Web Components Guide for Workspace Client	This document is now published only as an online guide, with client-specific versions.
Maconomy Web Client Install Guide (previously the iAccess for Maconomy Install Guide)	The Install Guide is now available only as an online guide. Previously, this document was also released in PDF.

Maconomy Web Client User Guide (previously the iAccess for Maconomy Online Help)	This product-specific online help system is accessible from the app and is also available in PDF.
Maconomy Reference Guide (previously the Maconomy Workspace Client Online Help)	This online guide is available via the new Help dropdown in the web client, and in PDF.
Product Support Guide	The Maconomy Product Support details Maintenance and Sustaining Support for Maconomy products and related third party products.
BPM Standard Reports Guide	The BPM Reporting Guide provides a comprehensive guide on the report functionality of the standard reports available in BPM. Previously, this document was also released in PDF
BPM Country Reports Guide	The BPM Country Reports Guide provides a comprehensive guide on the report functionality of the country reports available in BPM.
BPM Admin Guide	The BPM Admin Guide provides steps to install, upgrade, enable and customize BPM in Maconomy. It also includes details for performing overall maintenance on your BPM system.

Enhancements

This section provides a summary of all general features included in this release.

Project Management

Renamed Job Cost Fields

Deltek Tracking: 2058439
Prior to this release, there were several fields in Job Cost-related workspaces with the same name, although they had different functionality. Several fields are now

renamed to improve the user experience in Maconomy.

In the Job Employees workspace, the following table fields are renamed:

- The fields for specifying the values for favorites are now called **Favorite Task**, **Favorite Activity No.**, **Favorite Location**, and so on.
- The fields for specifying the employees to whom favorites should be distributed are now called **Employees with Company No.** and similarly for other dimensions.
- The fields for specifying the range of employees to whom favorites should be distributed are now called **Employees from Company No., Employees to Company No.**, and similarly for other dimensions.
- The corresponding fields with description or name for the above fields is now the same with **, Description** or **, Name** added, such as **Favorite Task, Description** or **Employees with Company No., Name**.

In the Absence Entry Overview workspace, the fields in the filter list used for specifying values for related entries are now renamed for clarity. These include:

- **Entry Date** is renamed to **Related Entry Entry Date**
- **Entry Type** is renamed to **Related Entry Entry Type**
- **Reason** is renamed to **Related Entry Reason**
- **Time Registered** is renamed to **Related Entry Time Registered**
- **Time Used** is renamed to **Related Entry Time Used**
- **Valid Till** is renamed to **Related Entry Valid Till**

Job Entries Workspace in the Web Client

Deltek Tracking: 1945518
The Job Entries workspace has been added to the web client, offering comprehensive management and viewing capabilities for job-related entries. It features a main entry field and dynamic tabs that adjust based on the data being viewed. You can access detailed information on job entries through the main tabs: Entry, Transaction, and Journal. Under the Transaction tab, you can see all finance, job, intercompany, vendor, and asset entries if they exist and belong to the same transaction.

Additional tabs representing the origin of the entries may also be available depending on the entry type. Currently, the available tabs are Asset Adjustment, Bank Reconciliation, Expense Sheet, Mileage Sheet, Job Revenue Recognition, Time Sheet, Job Transfer, Job Invoice, Job Credit Memo, and Vendor Invoice, with more origin tabs to be added in future releases. Assistants within tabs provide collapsible views of details.

Additionally, you can now directly access the Job Entries workspace from the Entries tab in the Job Home workspace. A new "Open Job Entries" link has been added to the Entries tab under the **Entry Details** column. Clicking this link opens the Job Entries workspace for the selected entry in a separate browser window, streamlining navigation and saving you time and effort.

Changes to Maconomy

- The Job Entries workspace is added under the Job Administration Submenu.
- A new link "Open Job Entries" is added under the **Entry Details** column in **Jobs Menu Section » Jobs Submenu » Job Home Workspace » Entries Tab**.

Document Assistant for Job Entries

Deltek Tracking: 2005384
In the Job Home workspace, the Document assistant is added to the Entries tab to allow you to easily access documents related to job entries. This assistant is dynamic and displays only when the selected line has an attached document.

Job Purchases in the Web Client

Deltek Tracking: 1274613
Enhancements have been made in the web client to enable you to easily raise and manage purchase orders from budget lines on a job.

In the Jobs submenu, the following updates have been made to support this feature:

- Addition of the Purchasing From Budget workspace, which allows you to raise purchase orders and requisitions from budget lines on a job.
- Inclusion of a Purchases assistant in both the Budgeting and Estimating workspaces to enable you to view purchases directly in the budgeting workspaces.
- Easily view purchase order lines allocated to the selected job using the new Purchase Order Lines tab in the Job Home workspace.

For more information about this workspace, refer to the *Deltek Maconomy Web Client User Guide*.

Taxes for On Account Reconciliation

Deltek Tracking: 2035337
This feature provides additional functionality to make it easier to calculate taxes for on account reconciliation. This includes the ability to remove the limit on the on account tax reconciliation and the ability to do split tax itemization.

Calculation of Tax on Account Reconciliation

This feature introduces a new way to calculate the tax on account reconciliation on a job invoice. Maconomy's current calculation has so far applied an upper limit on the on account reconciliation so as to not reconcile more tax than what is invoiced. If, for example, you have 1000.00 net on account with 80.00 tax net on account and invoice T&M of 1000.00 with 60.00 in tax (so a lower tax rate than the invoice on account), then Maconomy would suggest an on account reconciliation of 1000.00 and 60.00 tax, leaving the invoice on account with an open amount of 0.00 and open tax of 20.00. The logic behind this has been that even though the full amount of 1000.00 is reconciled and the tax of the invoice on account is 8% in this example, the tax on account reconciliation is reduced to 60.00 so as to not produce a credit memo.

However, the disadvantages of this behavior are that (1) if you include an itemization of tax by tax rate then the line for the tax rate of 8% will show an amount of -1000.00 with tax -60.00, not -80.00 as you might expect, and (2) there is no easy way in Maconomy to credit an invoice on account that only has open tax.

This new feature allows you to disable this limit on the tax on account reconciliation. It is controlled with the new **Tax On Account Reconciliation limited by Tax of T&M** job parameter attribute. By default, the parameter's default value is **Yes**, which corresponds to the standard behavior on existing job parameters, as well as when you create a new job parameter. When the new attribute is set to **No**, Maconomy calculates tax on account reconciliation by applying the tax code(s) of the invoice on account that is being reconciled, without limiting it by the tax being invoiced T&M. The effect can be summarized as follows:

- The tax amount shown in the tax itemization will be what you expect from the tax rate.
- Approving invoice selection where total billing price is positive can generate a credit memo when the on account reconciliation is against on account invoices with higher tax rate than the T&M being invoiced.
- On account reconciliation will not give rise to invoices on account that have open tax but no open amount.
- If the WIP equals the amount net on account, you can print an invoice or credit memo which closes both the WIP and the invoices on account.

Separate Tax Itemization Lines for On Account Reconciliation

The tax itemization on job invoices presents the total amount and tax amount for each tax code. This includes on account reconciliation and can therefore be hard to interpret when there are multiple tax codes, such as when there is a transition from one tax rate to another. To improve this, you can now set up and configure Maconomy to present the tax itemization of the on account reconciliation on separate lines.

This new functionality is enabled by setting the new **Separate Tax Itemization Lines for On Account Reconciliation** job parameter attribute to **Yes** on the relevant job parameters of the On Account Reconciliation type.

The prints for draft invoices, draft credit memos, job invoices, and job credit memos are extended with two new fields for the tax itemization: **Description** and **UseVATItemizationTextVar**. The first has one of two values that can be configured in Language Texts using the two records with **TaxItemization** in the **Key 1** field. The second, **UseVATItemizationTextVar**, is true or false and used in new original print layouts to control whether to present the Description in tax itemization. The **UseVATItemizationTextVar** field has the true value when the tax itemization has lines both for what is invoiced and lines for what is reconciled on account and when the feature is enabled.

The new original print layouts for Print Invoice Editing to use (or use as basis for custom layouts) have the internal names **DraftInvoiceTaxItemizationText** and **DraftCreditMemoTaxItemizationText**. The new original print layouts for Print Job Invoice and Print Job Credit Memo to use (or use as basis for custom layouts) have the **TaxItemizationText** internal name. These layouts use the new Description and **UseVATItemizationTextVar** fields described above.

Moreover, the **TaxItemizationOnAccRec** field is introduced on the InvoiceEditingHeader and Invoice tables. These fields are set to true when the feature is enabled and is intended for use in Print Layout Selection to select layouts based on the new original print layouts when this field is true.

General Application

Improved Workflow Status Display in Web Client

Deltek Tracking: 1759152
Previously, in the Web Client, the display of workflow status in various workspaces caused confusion, especially when the status could not be changed, such as always showing "Open" when approval hierarchies were not in use. To streamline the user experience, unnecessary status displays have been removed.

The "Open" status will always appear if approval hierarchies are enabled for the given approval type, as they can have more than one status. Additionally, certain approval types, such as Time and Expense sheets, Jobs, Job Budgets, and Purchase Orders, still always display status changes, even without using approval hierarchies. For example, the status updates when submissions are made or when jobs are closed.

Enhanced Approval Actions in the Web Client

Deltek Tracking: 1922559
The functionality of Approval actions (**Approve**, **Reject**, **Undo**, **Approve All**, **Reject All**, and **Undo All**) is now both correct and consistent across Maconomy

Web Client. Users can expect a standardized experience when managing approvals.

In addition, when it's not possible to undo an approval (or change to **Reject**) after an object is approved, the **Approvals** action group will no longer be shown. This update is relevant for the following workspaces:

- Job Budgets (Baseline, Contract & Working budgets)
- General Journal
- Expense Sheets
- Mileage Sheets
- Vendor Invoices
- Purchase Orders

CRM Setup Workspace in Web Client

Deltek Tracking: 1567170
System admins can now configure the CRM module from within the Web Client. The CRM Setup module in the web client includes support for the following workspaces:

- Contact Management
    - Event Flow Types
    - Event Plans
    - Opportunity Types
    - Contact Management
    - System Setup
    - System Parameters
    - Popup Fields
- Deltek CRM Integration (only if Deltek CRM Integration is enabled via the system parameter)
    - Deltek CRM Setup

Changes to Maconomy
CRM setup is now possible through various workspaces in the Web Client.

Contact Management
CRM setup in the Web Client is now possible in the following workspaces:

- Event Flow Types
- Event Plans
- Opportunity Types
- Contact Management Setup
- System Parameters
- Popup Fields

The tabs previously found under **Setup » Contact Management, Setup » Event Flow Types/Opportunity Types/Contact Management Setup** in the Workspace Client are migrated to **Setup » CRM** in the Web Client.

Deltek CRM Integration
It is now possible to set up the Deltek CRM integration in the web client in the Deltek CRM Setup workspace.
The tabs previously found under **Setup » CRM Integration Setup** in the Workspace Client are migrated to **Setup » CRM** in the Web Client.

See the *Deltek Maconomy Web Client User Guide* for more information.

Note Types Setup Workspace in Web Client

Deltek Tracking: 1567573
You can now perform note types setup in the web client. New workspaces are available under the **Setup » Notes** submenu to support this feature. With these enhancements, you can:

- Create notes and assign them to events or jobs or other records in Maconomy.
- View and edit notes in relevant workspaces.
- Attach a document to a note.
- Create and edit note types.
- Update notes.

Changes to Maconomy
The Notes submenu is added under the Setup menu.
The following workspaces are added under the Notes submenu:

- Notes
- Note Types

See the *Deltek Maconomy Web Client User Guide* for more information.

New User Blocked Field

Deltek Tracking: 2032815
Administrators can now fully block a specific user using the new **User Blocked** field in the Users workspace. When this field is selected, the user is prevented from logging in to Maconomy via both SSO and Maconomy password. However, administrator users cannot be blocked, and users cannot block themselves.

The **User Blocked** field can be used in combination with:

- An approval workflow to unblock a user.
- The **Block users when blocking employee** system parameter.
- The **Block Unapproved Users** system parameter.

The **Blocked Users** filter is now linked to the **User Blocked** field, displaying users who have been blocked.

Additionally, several fields are reordered and renamed in the Users workspace. The **Password Expiry Date** field is renamed to **Maconomy Password Expiry Date**. The **Password Blocked** field is renamed to **Maconomy Password Blocked**.

Previously, the **Password Blocked** field is always enabled for template users. You can now enable or disable the **Maconomy Password Blocked** field for template users. New users inherit the value of this field from template users. Note that the **Maconomy Password Blocked** field should be enabled for systems not using Maconomy authentication.

Changes to Maconomy

The **User Blocked** checkbox is added in the Validity island of the Users workspace.
The **Password Expiry Date** field is renamed to **Maconomy Password Expiry Date** and moved to the new Maconomy Password island of the Users workspace.
The **Password Blocked** field is renamed to **Maconomy Password Blocked** and moved to the new Maconomy Password island of the Users workspace.

System Setup Workspaces in Web Client

Deltek Tracking: 2069269
You can now perform basic system set up in the web client. Two new submenus, **System Setup** and **Utilities**, are added under the Setup menu to support this feature.

Changes to Maconomy
The following workspaces are added under **Setup » System Setup submenu**:

- System Information
- System Parameters
- System Numbers
- Popup Fields
- Option Lists
- Linking Rules
- Customer Level Setup
- Countries
- Address Formats
- Language Texts
- Holiday Calendars
- Selection Criteria
- Rules of Validation
- Modulus Calculation

The following workspaces are added under **Setup » Utilities submenu**:

- Database Relations
- Database Fields
- Installation Details

See the *Deltek Maconomy Web Client User Guide* for more information.

Notifications Setup Workspace in Web Client

Deltek Tracking: 2009229
You can now configure notifications and email alerts using the Maconomy web client. New submenus and workspaces are added under the **Setup » Notifications** submenu to support this feature. With these enhancements, you can:

- View information about the available notifications in Maconomy.
- View the list of notification types assigned to each user.
- Create a distribution group for sending email notifications.
- Create email templates for sending to different distribution groups.
- Create and update the list of notification types set up in Maconomy.

Previous to this release, you can only set up notification categories, notification types, and assign these notifications to a group in the web client.

Changes to Maconomy
The Notifications workspace is added under the existing Notifications submenu. The following workspaces are added under the new Email Alerts submenu:

- Distributions
- Templates
- Setup

The Notification Types by User is added under the new Lookup submenu. All these submenus and workspaces are nested under **Setup » Notifications**. See the *Deltek Maconomy Web Client User Guide* for more information.

System Parameter for Updating Future Revision Lines

Deltek Tracking: 1579748
It is now possible to apply changes from current revision to the existing future revision in the Employees workspace. This functionality is controlled by a new system parameter called **Automatic Update of Future Employee Revisions**, which is enabled by default.

When the **Automatic Update of Future Employee Revisions** system parameter is enabled, any updates made to the current revision lines are also applied to future revisions. However, if future revision lines contain different details from the current revision, a warning message is displayed indicating that some fields were already updated in a future revision. The changes made in the current revision do not overwrite the details in the future revision.
When the **Automatic Update of Future Employee Revisions** system parameter is disabled, any updates implemented in the current revision are not automatically applied to any future revision.

Changes to Maconomy
The new system parameter, **Automatic Update of Future Employee Revisions**, is added to the new System Parameters workspace in the web client.

New Standard Conversation Types

Deltek Tracking: 2050088
Previously, Maconomy supported only four conversation types, limiting customers in their ability to introduce conversations for various entities. Maconomy introduces an expanded set of standard conversation types to provide users with increased flexibility in managing and customizing their workspace. The following conversation types are now available in the Conversation Types workspace:

- Contact Company
- Customer
- Customer Payment
- Expense Sheet
- Job Budget
- Mileage Sheet
- Opportunity
- Time Sheet
- Vendor

The new conversation types are not enabled by default and are not included in any workspaces. Customers interested in using these conversation types must enable these and add them to workspace layouts by using the extension framework.

Conversations Setup Workspace in Web Client

Deltek Tracking: 1567559
This feature allows for the setup and maintenance of Conversations in the Web Client. Workspaces for Conversations and Conversation Types are included as part of the implementation. These new workspaces are migrated from **Setup » Conversations** in the Workspace Client to **Setup » Conversations** in the Web Client. See the *Deltek Maconomy Web Client User Guide* for more information.

Document Archives Setup Workspace in Web Client

Deltek Tracking: 1567571
You can now configure document archive setup in the web client. New workspaces are added under the **Setup » Document Archives** submenu to support this feature. With these enhancements, you can:

- Create a document archive and assign it to a customer, job, or other records in Maconomy.
- Set up access rights per document archive.
- Enable or disable revision control and document locking stored in a document archive.
- Set up standard document archives for different companies and document archive types.

Changes to Maconomy
The Document Archives submenu is added under the Setup menu.
The following workspaces are added under the new Document Archives submenu:

- Document Archives
- Document Archive Setup

See the *Deltek Maconomy Web Client User Guide* for more information.

Parameter Specification for Container Actions and Wizards

Deltek Tracking: 989961
It is now possible to specify parameters for containers actions and wizards such that:

- Web client users can click an action to generate an email with predefined text, content, and the relevant file attachment.
- A wizard can access and display values other than those that are available on its host pane.

While this is primarily a framework feature that extension consultants can use, there is default implementation in some workspaces. See the next section for more information.

Changes to Maconomy
As part of this functionality, the following web client workspaces are updated:

- Draft Invoices
- WIP Invoice (Invoice Editing and Invoice History tabs)

- Invoice on Account (Invoice Editing and Invoice History tabs)
- Customer Invoicing (Invoice History tab)
- Customers (wizard in Invoices tab)

Language and Regional Settings in Maconomy

Deltek Tracking: 1191104
Language and region settings are now separate in the Maconomy web client. That is, users can specify their preferred language without it impacting their region-specific settings. In older Maconomy versions, the specified language automatically determined other settings like the date format, decimal separator, and so on.

Changes to Maconomy
The My Settings dialog is updated as part of this enhancement.

Kendo PDF Viewer in the Web Client

Deltek Tracking: 2037318
The Document assistant in the web client now utilizes a Kendo-based PDF viewer. This new viewer has more features compared to the previous iteration, and these are available to users across all browsers.

Data Import Packages Workspace in the Web Client

Deltek Tracking: 1884878
The new Data Import Packages workspace allows you to create, validate, and import data packages. This workspace is available for users with the requisite access rights.
Note: To simulate imports, you will still need to use the Workspace Client.

Changes to Maconomy
To support this functionality, the new Data Import Packages workspace is added under the Import submenu of the web client (**Setup » Import » Data Import Packages**).

Streaming Support for Large Web Analyzer Reports

Deltek Tracking: 2030139
Web client users can now generate large Analyzer reports without causing the Maconomy server to run out of memory and crash. The implementation of new

streaming architecture allows you to bypass size restrictions imposed by the Maconomy server, the coupling service, and/or your browser.
That is, you can run a large report and, instead of viewing the result in your browser, download the results to a file. The download option is available to you via the Report truncated dialog that Maconomy displays if your report exceeds the 5,000-row limit. You can also opt for a direct download via the **Download** action found in the **Other Actions** dropdown of your web Analyzer workspace. For both these options, the inclusion of subtotals and grand totals is disabled; select the **Include All Totals** checkbox if you want to include these.
Maconomy allows up to two concurrent downloads; users can continue working while their downloads run in the background.

Filtering and Sorting Field Value Lists

Deltek Tracking: 1784330
The web client now supports the filtering and sorting of values for popup or enumeration data type fields. That is, values marked as hidden no longer appear in the dropdown for these fields. The remaining values follow default sorting applied by the backend.
The web client uses specifications already in place for the Workspace Client in the coupling configuration MCSL file.
For more information on MCSL file configuration for this field type, refer to "Pop-Ups Specification" in the *Deltek Maconomy Language Reference Guide*.

Moving Modals in the Web Client

Deltek Tracking: 1061106
Users can now reposition a dialog or wizard if it is blocking a part of the screen that they need to view.
To move a modal, simply click its gray header bar, and hold the mouse button down as you drag the modal to your preferred position.
This enhancement is also supported on tablets.

Customizing Workspaces to Open in List View

Deltek Tracking: 1286464
All Maconomy web client workspaces currently open in Detail view. This enhancement allows companies to customize a workspace so that it opens in List view the first time you access it after login. Once you select a record in the workspace, that workspace displays the Detail view and only resets when you log off.

Setup Instructions

This enhancement is disabled by default. To enable it globally, open settings.json and set the **openInListMode** property to **true**.
To enable it for a specific workspace, open the list.json file for that workspace and set the **openInListMode** property to **true**.

Improvements to the Maconomy Web Client Menu

Deltek Tracking: 1824506
The web client menu is now structured in color-coded levels, with sections and submenus that expand downward and allow users to see the navigation path when switching between workspaces.
When users search for a workspace, Maconomy lists results within the context of expanded menu sections and submenus.

New User Setting for Decimal Places

Deltek Tracking: 2088790
Users can now set the number of decimal places for real fields in the web client. To override the company-wide setting, edit the new **Number of Decimals** field found in the Formats tab of the My Settings dialog.
Note that user preference does not override workspace-specific settings.

Opening Additional Web Client Workspaces

Deltek Tracking: 1905783
Web client users can now open a new workspace in a separate tab without having to log in again. Right-clicking on a workspace name in the menu opens that workspace in a separate browser tab. Maconomy clones the session data based on the originating browser tab, and will not require users to log in again.

Drag and Drop Columns in the Customize Columns Dialog

Deltek Tracking: 2072192
The Customize Columns dialog now allows users to drag a column name from the Available columns list to their preferred position for it in the Visible columns list. Previous to this enhancement, users could only add columns to the very end of the Visible columns list, and then drag it to their preferred position.

Enhancements to File Uploading in the Web Client

Deltek Tracking: 1528695
Users now have additional ways to upload files in the web client. Specifically, they can:

- Upload files via actions with an associated wizard. This is currently available as an extension.
- Add files when creating a record.

Previous to this release, the functionality was only available via the **Attach** action in regular workspaces.

Changes to Maconomy
The ability to add files when creating a record is enabled by default in the following reference workspaces:

- Document Archives
- Document Archive Lines

Customizing the Web Client to Open With the Menu Collapsed

Deltek Tracking: 2114459
If you prefer having more screen space for viewing your Maconomy workspaces, you can now customize your web client so that it opens with the menu collapsed when you log in. To do this, go to the Miscellaneous tab of the My Settings dialog and clear the **Expand menu when logging in** checkbox.

Changes to Maconomy
The My Settings dialog is updated as part of this enhancement.

Setup Instructions
To control this setting at the server level, open the settings.json file and set the menu's **expanded** property to **false**. The following code shows default values for menu properties.

```
"menu": {
  "search": false,
  "expanded": true
},
```

Individual users can still override the server-level setting.

Exporting List of Dialogs Required for Workspace Access

Deltek Tracking: 2085066
This release introduces a tool for quickly extracting the list of dialogs to which the web client requires access. The tool can extract a list either by workspace (installed on the system) or by user role (defined by the web client menu). This list is exported as a text file that can then be imported into Maconomy.
Access to these dialogs is necessary for access to workspaces in the web client. Customers can use this tool when migrating their users to the web client, ensuring that their users have the required dialog access to workspaces.
Deltek will use this tool to generate a template Groups import file based on a template menu, which can then be used as a starting point for web client implementations.

Accessing the Dialog Group Imports Tool
You can access the tool using either of two ways:

- From the web client login page – Press CTRL + SHIFT and click the link that displays under “Deltek Maconomy”.
- From within the web client, after logging in - In the address bar, replace “workspace/[workspace name]” with “tools” and then press ENTER.

Maconomy loads the tool on the same browser tab. You can then navigate to the Dialog Group Imports tab.

Option to Configure Assistants as Open by Default

Deltek Tracking: 2114818
Companies can now customize their workspaces such that assistants are open by default when users go to a workspace. To enable this option, add the following property to the JSON file of each assistant:

```
"expanded": true,
```

Finance

General Ledger Workflows and Functionality in Web Client

Deltek Tracking: 1911762
General Ledger workflows and functionality are migrated from Workspace Client to Web Client, including:

- Tax setup
- Dimensions
- Company locations
- Fiscal year setups
- Posting references/descriptions
- Company/registration codes
- Intercompany accounts
- Transaction # series/transaction types/transaction type groups
- Allocation/registration codes
- Derived dimensions
- Company and dimension combinations
- GL/Company allocation combinations
- Dimensions sets
- Line styles
- Journal setup
- Posting period setup
- Sequence #
- Claims
- Local Chart of Accounts

These tabs are located in the General Ledger section of the Web Client.

See the *Deltek Maconomy Web Client User Guide* for more information.

Support for Gross Pay Calculations in the Web Client

Deltek Tracking: 1952000
Finance users can now accurately setup gross pay calculations in the newly added Compensation Models workspace in the Maconomy web client. This workspace includes the following tabs:

- Compensation Model
- Compensation Types
- Compensation Groups

The Compensation Model workspace is located under Human Resources » Setup in the Maconomy web client.

See the *Deltek Maconomy Web Client User Guide* for more information.

The Fixed Assets Submenu

Deltek Tracking: 1552260
The General Ledger menu section in the web client now includes the Fixed Assets submenu to support the daily administration of assets and depreciations by the

Finance Department and provide users with the ability to create and maintain fixed assets. This submenu includes the following workspaces:

- Assets
- Asset Transactions
- Lookup

In addition, a Fixed Assets submenu is added to the Setup menu section to cover fixed assets setup-related workspaces.

See the *Deltek Maconomy Web Client User Guide* for more information.

Intercompany Invoicing Submenu

Deltek Tracking: 2004219
The Intercompany Invoicing submenu has been added to the Maconomy web client to support the creation and management of intercompany invoices.

The Intercompany Invoicing submenu includes the following workspaces:

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

These workspaces provide access to invoice and entry history for reviewing past transactions, ensuring visibility into any open intercompany entries, and enabling the calculation of interest on outstanding intercompany invoices.

The Intercompany Invoicing submenu is located under the G/L Transactions menu.

See the *Deltek Maconomy Web Client User Guide* for more information.

Support for General Journal Approvals in Approval Center

Deltek Tracking: 1190379
The Approval Center workspace now supports approving General Journal headers and lines. In addition, the RejectGeneralJournal notification type is linked to the General Journal workspace, and the following notification types are linked to the Approval Center for the approver, approver type, and substitute approver:

- ApproveGeneralJournal
- ApproveGeneralJournalByType
- ApproveGeneralJournalSubsitute
- ApproveGeneralJournalSubstituteByType
- ApproveGeneralJournalLine

- ApproveGeneralJournalLineByType
- ApproveGeneralJournalLineSubstitute
- ApproveGeneralJournalLineSubstituteByType

The G/L Cockpit Submenu

Deltek Tracking: 1552282
Finance users now have a centralized hub for various financial tasks and reports, offering convenient access to financial reports, company information, approvals, and other related areas of the general ledger with the newly added G/L Cockpit submenu in the Maconomy web client.

The G/L Cockpit submenu includes the following workspaces:

- Companies
- Chart of Accounts
- Account Ledger
- Dimension Report

The G/L Cockpit submenu is located under the General Ledger menu.

See the *Deltek Maconomy Web Client User Guide* for more information.

Support for Vendor Remittance Emails in the Web Client

Deltek Tracking: 1552263
Finance users can now send vendor remittance emails and view email records with the newly added Vendor Remittance Emails and Vendor Remittance Email Logs workspaces.

The Vendor Remittance Emails workspace allows users to send vendor remittance emails, confirming that the vendor invoice has been paid within the specified payment terms. In addition, the Vendor Remittance Emails Log workspace allows users to view email records and track all attempts to send out the vendor remittance emails.

These workspaces are located in the Accounts Payable menu section of the Maconomy web client.

See the *Deltek Maconomy Web Client User Guide* for more information.

Enhanced Tax Display And VAT Code Simplification

Deltek Tracking: 2084209
The configuration of tax level display parameters has been updated to ensure consistency and accuracy in handling tax information. There is now a strict dependency between the "Show Two Tax Levels" and "Show Three Tax Levels" parameters. Enabling "Show Three Tax Levels" now requires "Show Two Tax Levels" to be enabled as well.

In addition, users will now encounter restrictions when attempting to disable "Show Two Tax Levels" while "Show Three Tax Levels" is enabled, and vice versa.

New Import Program for Approval Lines

Deltek Tracking: 2149338
Import Approvals is now added to the Reference workspace. This new import program is designed for importing approval lines. The program can be used to:

- Approve items directly through the import program.
- Change the approver, substitute, or super approver efficiently.

Note: Reference workspaces are now available by default in the web client menu for users with the requisite permissions.

New Web Client G/L Transactions Workspaces

Deltek Tracking: 2003560
The following workspaces have been added to the Maconomy web client to provide users with the ability to update the database for opening balances for certain reports, as well as the ability to view the entries associated with the balances. Additionally, users can now assign sequence numbers as part of their month-end process.

- Opening Balances
- Sequence Numbers

These workspaces are located under the G/L Transactions menu.

See the *Deltek Maconomy Web Client User Guide* for more information.

Customer and Company Customer Workspaces Enhancements

Deltek Tracking: 2027084
The Customer and Company Customer workspaces have been updated to address inconsistencies in the menu items. In addition, customer entries have

been added to both workspaces. These updates align the functionality and appearance of both workspaces, providing a uniform user experience.

These workspaces are located in the Accounts Receivable menu section of the Maconomy web client.

Performance

Enhanced Indirect Access Control for Improved Performance

Deltek Tracking: 1748143
The Indirect Access Control feature has been enhanced with the addition of the 'Mandatory+' designation. This enhancement simplifies the Access Control view and boosts overall system performance.

Time and Expense

Time & Expense Approvals in the Web Client

Deltek Tracking: 1013344
The Time & Expense Approval workspace is now available in the web client under **Jobs » Jobs submenu**, providing project managers with a central interface to manage time and expense sheet lines for jobs. It supports time and expense approval hierarchies, enabling users to handle approvals and track the progress of submissions.
With this feature, users can:

- View and manage time and expense sheet lines, including unsubmitted entries, under “Time” and “Expense” tabs.
- Perform batch or line-level approvals/rejections, with the option to undo actions.
- Filter entries using criteria such as date, employee, task, and other parameters.
- View the approval hierarchy for each submission, including the next approver, project manager information, and submission date.
- View information cards for time totals, project costs, expenses, and approval statuses.
- View daily descriptions, attached documents, and expense justifications if applicable.

The **Status** field is for approval hierarchies only, but the **Approval, Project Manager** field can be added manually.
By default, this workspace is available for users with the requisite permissions.

Changes to Maconomy
The Time & Expense Approval workspace is added under the Jobs submenu.

Absence Management in the Web Client

Deltek Tracking: 1925003, 1995072, 1992023
Absence administrators can now manage employee allowances and absences in the web client using the workspaces under the newly added Absence Management menu section.

The Periodic Allowance workspaces enables you to manage employees' yearly allowance in batches. You can also view the details of each employee's allowance for the current and previous period.

You can create and manage absence and allowance for individual employees using the Employee Allowance workspace. An overview of the employee's approved allowance and absences can be seen in this workspace. You can also manage allowance and absence requests on behalf of an employee.

The Absence Approver Overview workspace provides a full overview of the absence of an individual employee. Absence approvers can see an employee’s absence and allowance balance for a vacation period. An allowance history is also available for review. You can also create or modify absence and/or allowance requests on behalf of the employee.

A secretary assigned to one or more employees can raise and manage absence or allowance requests on their behalf in the Secretary Absence Overview workspace. This workspace also lets you view the available absence balance for an individual employee, as well as granted allowance in a selected vacation period.

By default, these workspaces are available for users with the requisite permissions.

For more information about these workspaces, refer to the *Deltek Maconomy Web Client User Guide*.

Enhancements to the Absence and Allowance Approval Workspaces

Deltek Tracking: 1990031
Improvements have been made to the Absence Approval and Allowance Approvals workspaces in the web client. Aside from viewing requests that are pending approval, you can now:

- Review an employee's total approved absence or allowance requests, as well as the remaining balance, for the current date and period
- Easily view a pending request's status using the new status tag at the top right of a record
- View the supervisor, secretary, and absence approver assigned to the employee

Enhanced Absence Workspace in Web Client

Deltek Tracking: 1990033
The Absence workspace is updated to support additional functionality to improve the user experience. Existing functionality in the Workspace Client is added to this workspace. The web client workspace introduces an improved seamless experience in the absence workflow.

Specifically, this workspace now provides:

- At-a-glance view of the total approved absence requests and remaining allowance balance for the current date and period
- Overview of allowance for the vacation period in the new Allowance History tab
- Easy checking of approval status of requests using the new Status field
- New wizards for quick creation of absence and allowance requests

For users with a customized version of the current web client absence workspaces, you must update the .json file for absences as it is now renamed from .../AbsenceMgmt/AbsenceMgmt*.json to .../Absence/Absence/Absence*.json.

The Time Sheet Status Workspace

Deltek Tracking: 2014552
This new workspace allows controllers and those with similar responsibilities to see at a glance all non-approved timesheets and follow up with the relevant employees and supervisors. This helps them ensure that all hours are posted before invoicing.

Specifically, they can:

- View the list of all timesheets for a time period they define, including split week timesheets.
- Filter that list by any of the other available criteria: timesheet approval status, employee or company number, supervisor, dimensions, and so on.
- Determine whether a timesheet is not yet created for the employee, and add that on behalf of the employee. This is based on the week calendars and the employees assigned to work during that week.

- Identify the timesheets with missing lines, and create those on behalf of the employee.
- Submit timesheets on behalf of the employee.
- Approve or reject timesheet headers and lines on behalf of a designated approver (or all approvers).

Note: The approval actions in the table part of the assistant are disabled by default in standard layouts. To display these actions in the workspace, you must enable the new **Approval Actions in Time Sheets and Expense Sheets Lower Pane** system parameter.

Users with the requisite access rights will find this workspace under the Approvals section of the web client menu.

For more information about this workspace, refer to the *Deltek Maconomy Web Client User Guide*.

Expense Sheet Status Workspace in the Web Client

Deltek Tracking: 2014554
The Expense Sheet Status workspace is added under the Approvals menu section in the web client to provide a comprehensive overview of submitted expense and mileage sheets for controllers.

Specifically, you can:

- Filter and review approval status and receipts for all expense/mileage sheets for which you have access.
- Approve or reject the expense/mileage sheet header directly in the table
- Utilize the assistant to view detailed information about the expense/mileage sheet and modify, approve, or reject individual lines

The new approval actions in the assistant are disabled by default in standard layouts. To display these actions in the workspace, you must enable the new **Approval Actions in Time Sheets and Expense Sheets Lower Pane** system parameter.

For more information about this workspace, refer to the *Deltek Maconomy Web Client User Guide*.

Resource Management

Copy Resourcing from Jobs

Deltek Tracking: 2001704

This enhancement enables Maconomy to automatically copy resourcing information from one job to another. You can now choose whether to copy actuals or allocations from the original job to a new one using the new Copy Resourcing field. When you send the job with copied information to People Planner or do a project import, the system compares the source and target job to match events and copy planning information.

When you create a job and specify a value in the **Copy Resourcing** field, this is carried over to any new jobs that are copied from it. Likewise, if you copy or roll forward an existing job, the value specified in its **Copy Resourcing** field is copied over to the new job.

You can further configure how imported resourcing data is copied to People Planner itself. For further information on this, refer to the section on "Copy Resourcing from Imported Projects" (Deltek Tracking: 1998951) in these Release Notes.

This new field is available in the Workspace Client (both standard and PSO systems) and in the web client if People Planner is enabled in the system.

The **Reference Job No.** field is also added to several job cost-related workspaces to provide further support for this feature. People Planner uses the value in this field and in the **Copy Resourcing** field to determine what data is copied from the imported job to a new job in People Planner.

Changes to Maconomy
The **Copy Resourcing** field is added to the following workspaces:
Web Client:

- **Jobs » Jobs » Job Home » Information**
- **Reference workspaces » Job Cost » Creation » Jobs**
- **Reference workspaces » Set-up » Approval » Approve Jobs by Employee**

WSC:

- **Jobs » Jobs » Home » Information**
- **Single Dialogs » Setup » Approval » Approve Jobs by Employee » Approve Jobs by Employee**
- **Single Dialogs » Job Cost » Creation » Jobs » Job**

The **Reference Job No.** field is now available in the following workspaces:
Web Client:

- **Jobs » Jobs » Job Home » Information**
- **Reference workspaces » Job Cost » Creation » Jobs**

WSC:

- **Jobs » Jobs » Home » Information**
- **Single Dialogs » Job Cost » Creation » Jobs » Job**

Resource Assignments in the Web Client

Deltek Tracking: 2089115
The Resource Assignments workspace is now available to enable People Planner users to work with a flat listing of Assignments (as opposed to accessing them under a Project or a Resource). The component includes the majority of applicable controls that are native to other components to allow you to filter, group, and sort assignments to best support your workflow. For more information about how this feature works in People Planner, refer to the section on "The Resource Assignments Workspace" (Deltek Tracking: 1187702) in these Release Notes.

This workspace is available only in the web client. Users with the requisite permissions can access this workspace under the Resource Management menu section.

BPM and Statutory Reporting

Denmark Standard Audit File-Tax Report

Deltek Tracking: 187483
The Denmark Standard Audit File-Tax (DSAFT) is a statutory requirement by the Danish Bookkeeping Act to make way for digital tax reporting and ensure compliance with the Danish Tax Agency (*Skattestyrelsen*) regulations and digital bookkeeping system. The DSAFT report comes in a standard chart of accounts structure (XML file format), and includes accounting transactions from the General Ledger, customer and supplier finance entries, and other necessary master data.

To access the DSAFT report on the Maconomy Workspace Client, go to **Reporting » Denmark » Standard Audit File-Tax**. For more information about the DSAFT workspace, refer to the *Deltek Maconomy BPM Country Reports Guide.*

USTVA: Popup Field Setup for Goods and Services

Deltek Tracking: 1869080
The USTVA report is updated so popup settings comply with the tax filing requirements of Germany. The **Tax Popup 1** fields are configured as follows:

- Boolean 1 for **Goods** is selected.
- Boolean 1 for **Services** is *not* selected.

USTVA: Additional Kz Fields

Deltek Tracking: 1909858
The USTVA workspace is updated with two fields, **Kz87** and **Kz90**, in the VAT Base section of the selection criteria. The Kz fields are required by the German government in the VAT return form to indicate 0% tax rate for the supply of solar products.

NSAFT: Use of Additional Supplement Fields

Deltek Tracking: 1476782
The Norwegian Standard Audit File - Tax (NSAFT) is updated to use the following supplement fields to map the corresponding company information:

- **Text 2** field: Company **IBAN No.**
- **Text 3** field: Company **Bank Account Number**
- **Text 4** field: Company **Tax Entity**

You can set up the NSAFT company information card in **Single Dialogs » Set-Up » Note » Supplements**. For details, refer to the *Deltek Maconomy BPM Country Reports Guide*.

Denmark Annual CSV File Report

Deltek Tracking: 1996673
The Annual CSV File workspace is added to Maconomy to help customers comply with the Danish Bookkeeping Act statutory requirement to submit an annual report that combines accounting data from companies using the same Central Company Register Number (CVR), including the Balance Sheet and Profit and Loss entries.

The Annual CSV File report is available on the Workspace Client via **Reporting » Denmark » Annual CSV File**. After generating the report in CSV file format, it must be manually uploaded to the Regnskab Basis. For more information on the Annual CSV File workspace, refer to the *Deltek Maconomy BPM Country Reports Guide*.

Denmark VAT Return Report

Deltek Tracking: 1936224
Maconomy introduces a new report that summarizes input and output VAT in compliance with the Danish Bookkeeping Act legislation. The VAT Return report generates an XML file that can be manually uploaded to the Danish Tax Agency

(Skattestyrelsen) website. It contains VAT-related data, such as VAT payable and deductible totals, VAT amounts on purchases of goods or services (domestic and abroad) and cost of various energy taxes.

On the Maconomy Workspace Client, go to **Reporting » Denmark » VAT Return**, and identify the company, dates, tax amounts, and other related information that must be included in the VAT declaration. For more information on the VAT Return workspace, refer to the *Deltek Maconomy BPM Country Reports Guide*.

UK Tax Submissions: Restrict Actions of Users Without Access to Company

Deltek Tracking: 1967121
The UK Tax Submissions report is updated to fully prevent users without access to a company from executing actions on the workspace that affects the company. An error message displays when the user selects action buttons or attempts to remove a company (to which the user has no access) on the workspace.

System Admin

Certifications

Deltek Tracking: 1970381

- Firefox 115 ESR – for Web Client and BPM
- Android 14 – for Web Client
- SQL Server 2022 – for BPM

Handling of Login Attempts with Incorrect Password

Deltek Tracking: 1502744
Users who enter an incorrect password three times consecutively will no longer have their password blocked. Instead, their accounts will be temporarily blocked from performing password logins, using an exponential growth algorithm.

The newly renamed **Maconomy Password Blocked** field (formerly **Password Blocked**) is now only used to completely prevent login attempts using the Maconomy password. When the password is blocked, all related functionalities, such as changing the password and resetting it with 'Forgot my password,' are also blocked. This change does not affect login methods that do not involve the Maconomy password, such as Active Directory Domain Login, Open ID Connect (OIDC), and the Privileged Login method used by the Background Task framework.

The generic error message for failed login attempts is expanded to include the possibility of temporary blocking due to multiple failed login attempts.

Previously, the **Maconomy Password Blocked** field was used to enforce Single Sign-On (SSO) authentication. Now, you can use this field to enforce SSO only and use the new **User Blocked** field to completely block a user regardless of the authentication method.

REST API

minimalFields Property Improvement in Foreign Key Search

Deltek Tracking: 1633976

The **minimalFields** property in the containers.json files is no longer needed to make foreign key searches work. All "minimalFields" definitions that were previously used for that purpose are removed. There are still some cases where the property is used in connection with LayougNameVar.

People Planner

Copy Resourcing from Imported Projects

Deltek Tracking: 1998951
Copying resourcing information from projects is now automated and occurs during a project import. When importing the target project, it checks for an existing reference or source project and copies all assignments, bookings, or actuals. A combination of task name, event kind, and WBS sequence number is used to find matching tasks from the target project to the source project.

The target project is created during the project import. This effectively means that copied resourcing data occurs only during the first import to the target job, or if you have deleted all planning on the target job and do a reimport.

Any subsequent changes to the source project are not reflected on the target project after you have copied resourcing data. Time registrations or actuals are automatically converted to bookings in People Planner.

Time allocations or actuals from the source project are considered as historical data to show how the time was spent on the original project. This is converted into planning data to show the expected use of time on the target project.

Note: The Copy Resourcing feature cannot be used if budget lines in Maconomy already have assigned resources, and if the value in the Import budgetline from Maconomy setting in the Admin tool is set to Import Events and Assignments.

Before using this feature, you must ensure that the source project has already been imported into People Planner.

You must also configure settings in the Admin tool. This includes the following:

- **Copy Resourcing** - Choose to import time bookings or actuals only, amount bookings or actuals only, or both. You can also disable this feature using this setting.
- **Merge Bookings when Copying from Actuals** - When actuals are copied, the entries are consolidated into one booking per assignment. For example, if a resource has five daily time registrations on March 4 to March 8, consisting of eight hours each in Maconomy, this is consolidated into one booking of 40 hours from March 4 to March 8 in People Planner when the actuals are copied.
- **Merge Bookings when Copying from Bookings** - When bookings are copied, the entries are consolidated into one booking per assignment. The functionality of this setting is similar to the setting for merging bookings when copying from actuals.
- **Enable the Use REST for Project Import setting.**
- **Disable the Make assignments to resource category setting.**

In Maconomy, prior to the import, you must specify a value in the **Copy Resourcing** field of the source project to determine what is copied to People Planner.

For more information about how this feature works in Maconomy, go to the section for "Copy Resourcing from Jobs" (Deltek Tracking: 2001704) in these Release Notes.

Once data is imported to People Planner, planning on the source project is distributed based on the start date of the target project or redistributed between the start and end dates, if end dates are entered. If the duration of the target project is shorter than the source project, the target project is extended to cover all the bookings from source project.

Support for Oracle Database

Deltek Tracking: 1980973
New People Planner databases can now run on an Oracle Database server.

Note: Migrating existing People Planner SQL databases to Oracle is currently not supported.

The People Planner Web Admin Tool

Deltek Tracking: 1919328
The Web Admin Tool is now available to provide a more accessible way to update various administrative settings. This tool provides support for a combination of existing settings in the current Admin Tool and Windows Application. Specifically, you can:

- Create and manage scheduled tasks, executed tasks, task specifications, booking categories
- View the log for executed tasks
- Add and manage roles, permissions, and data limitations
- Enable or disable various settings in People Planner
- Create and maintain a list of languages to be used for translating the UI
- View the resource list
- View a list of People Planner users

Project-Specific Actuals Import Setting

Deltek Tracking: 2026527
The Enable button for project specific actuals import setting in the Admin Tool is no longer an early adopter feature. It is now moved from **Early Adopter » Actuals Import** to **System Settings » Web Component**.

Improved Matching of Events to Tasks in Actuals Import

Deltek Tracking: 2104904
Improvements have been made to how actuals are mapped to events with an identical task-activity number combination. When you run an actuals import via Maconomy REST API and the system finds multiple matching events, by default it uses the first on the list. By enabling this feature, it is first checked if any of the assignments already exist. If so, that is used instead of the first on the list.

To support this functionality, the **Match actuals line-events on employee assignment** setting is added to the Early Adopter tab in the Admin Tool.

Attention: This in an early adopter feature and should only be used under specific direction from Deltek.

Revert Latest Under/Overspend Allocations

Deltek Tracking: 2000203
When you use the **Run Under/Overspend** action, allocations are automatically created for the current period and after the estimate date. These allocations are automatically saved to the People Planner database. This enhancement introduces the ability to revert the latest entries created from using this action.

The **Under/Overspend** button in the Web Components is now a dropdown list from which you can choose to allocate under/overspend hours or amounts, or revert the latest allocations.

Use the new **Revert Latest Under/Overspend** action to revert the latest allocations created from using the **Run Under/Overspend** action. When you revert allocations, the system displays information regarding the changes that occur, such as:

- The operation fails if there are no assignments on the event.
- Assignments with no under/overspent hours or amounts will be skipped.
- Assignments that have already been reverted will be skipped.
- Assignments with under/overspent hours or amounts will display the values to be reverted and deleted within the current period and after the estimate date. If a user has manually deleted entries for either the current period or after the estimate date (or both), the system will display a message stating allocations for either period (or both) cannot be found.

Note: If you revert allocations for a previous period, the system automatically searches for the last under/overspend for each assignment, even if it is not within the current period. For example, if you choose to revert allocations in August, and the latest allocations were in June, the system will delete the June allocations.

The Resource Assignments Workspace

Deltek Tracking: 1187702
This workspace utilizes the Assignment Gantt (AG) to provide support for the new resource booking request and approval workflow. It enables you to view all bookings, regardless of status. There are various filters that can be used to display specific bookings, such as tentative or declined bookings. These are useful when approving and/or assigning a generic request to a named resource or rejecting the bookings. Use this workspace to approve or decline one or multiple tentative bookings.

This workspace is available only in the Maconomy web client under the Resource Management menu section.

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

New Fields on Assignments in MyPlan

Deltek Tracking: 2022276
Additional fields are now available when you view assignments in MyPlan in the Maconomy web client to provide an at-a-glance view, instead of having to open each booking to view more details.

The following fields are added to events and time bookings:

- Job/Task Name
- Main Job Customer Number
- Main Job Name
- Number of Hours

Period Summation of Allocations in the Web Components

Deltek Tracking: 2000206
Bottom/up summation of allocations is now available in the Web Components. This feature allows users to view the total sum of hours on project bookings for each month directly on the Gantt chart, without having to manually calculate or collapse each project. This functionality is particularly useful for project managers who need to quickly assess the total workload or budget for a given period.

This feature calculates the total number of hours for each project, even if some tasks or summaries are not visible on the Gantt chart because they are filtered or on another page. This ensures that the sum always reflects the total project bookings, regardless of the current view or filters. The sum is automatically updated whenever there are changes to the project bookings, such as new assignments, modifications, or reassignments. However, this feature only sums up the values that are not blocked. Additionally, the sum does not include milestone values, as these cannot be assigned booking values.

If a project has subprojects, bookings on the subprojects are not included in the calculated sum for the parent project. Subprojects display their own sums in their respective Gantt sticks.

This functionality is available for all four period views in the Gantt chart: day view, week view, month view, and year view. However, the sum is only displayed for the current view. For example, if you are using the month view, you can view the sums for each month.

Note: Amounts are not included in the project summation. Instead, the totals for amounts are constrained to their own Gantt sticks.

To support this functionality, the Summation control is added to the toolbar in the Web Components.

Resource Summary View Default Fields

Deltek Tracking: 2008917
You can now add more fields to the default display view of the resource summary view header and tooltip in the Admin Tool to provide more information on booking entries.

For new People Planner systems, the default value of Resource Summary View Headline is now *EventCustomer*|*EventMainProjectName*|*Name*|*ResourceSummaryEntryValue*.

Likewise, the default value of Resource Summary View Tooltip is now *EventMainProjectNumber*|*EventMainProjectCustomer*|*Name*|*ResourceSummaryEntry*

Software Issues Resolved

Finance

Defect: 2107346
Missing Local Spec Values Re-Derivation
Local specification dimensions are validated for a single company using a specific set of local specification lists during the registration process. When an intercompany transaction occurs with another company that has a different set of local specification lists, the local specification values need to be rederived. However, there are instances where this rederivation is missed if the settling company differs from the original company. This error is now corrected.

Defect: 2099930
Poor Performance Opening Approval with Many Lines
Previously, poor performance occurred when a user, unable to approve a general journal line, opened a submitted unapproved general journal with a large number of lines. This issue is now addressed.

Defect: 1953219
Issue With Unrealized Enterprise Exchange Rates

Previously, the calculation of unrealized enterprise exchange rate variances was inaccurate when based on the enterprise currency and simultaneously calculating unrealized exchange rate variances in the base currency. This error is now corrected.

Defect: 1073602
Missing Withholding Entries in Tax Settlement Report
Previously, withholding tax entries were included in the tax settlement calculation, but withholding tax amounts were not displayed in the Tax Settlement workspace. This is now corrected so that information about withholding tax is displayed in the table part of the Tax Settlement workspace. Additionally, total withholding tax receivable and payable are also displayed in the card part of the Tax Settlement workspace.

Defect: 2117390
Improvement in Vendor Subcontractor Reconciliation Performance
The performance of vendor subcontractor reconciliations has been improved for cases with many entries ready for reconciliations.

Defect: 2156250
Performance Improvement on SQL-Server
Previously, posting could take a longer time on Microsoft SQL Server. This problem could occur if finance entries were joined or summarized, and the summarized entry had a zero amount. This issue is now fixed.

Defect: 2085051
Remittance Email Missing in Web Client Vendors
Previously, the **Remittance Email Address** field in the Vendors workspace was not available in the web client when a new vendor was set up. This error has been corrected, and the **Remittance Email Address** field is now added in the **Vendors » Information** tab to support sending vendor remittance emails.

Defect: 2058655
Missing Finance Updates in Intercompany Journal Posting
Previously, there was an issue that caused customer reconciliations created from general journals to not update finance periods during posting. This error is now corrected.

Defect: 2053267
Performance Improvement for Approving Base Salary Rate Calculations
Performance has been improved for approving base salary rate calculations, especially when employees have numerous revisions.

Defect: 2088437
Error Message When Allocating Fixed Asset

Previously, customer received an error message when trying to allocate a fixed asset purchase order to a vendor invoice. This error is corrected.

Defect: 2058549
Amount in Bank Account Currency Is Set to the Paid Amount in Base
Previously, Maconomy could generate a bank reconciliation line whenever a payment file or a check was created. The amount in bank reconciliation currency is determined using the payment amount. Maconomy will post the payment to the bank account once it has been approved in payment reporting. Maconomy will adjust the amount in bank reconciliation currency to match the base amount paid. This update should only be performed if the currency is the same. This error is corrected.

Defect: 1917382
Error in Job-Related Invoices
A posting error occurred when a vendor invoice was posted in a company where the base currency differs from the enterprise currency, and the invoice currency matches the enterprise currency. This error specifically arises when the vendor invoice includes job-related invoice allocation lines with a quantity other than one, and the job belongs to a company where the base currency matches the enterprise currency, compounded by an unfortunate combination of exchange rate, quantity, and unit price. This issue is now corrected.

Defect: 2006887
Re-Run of Currency Reevaluation for Vendor Entries in Original Currency Error
Previously, rerunning the currency reevaluation could produce unexpected results for vendor entries if the currency reevaluation is based on the original amount, which is the same as enterprise currency but different from entry/vendor currency. This error is corrected.

Defect: 2091317
Approval Hierarchy Setup Issue
Previously, it was not possible to set up advanced references for substitute and super approver in the Approval Hierarchy. It worked if both of them were using advanced references, but not if only one of them was set up for advanced references. This error is corrected.

Defect: 2134008
Data Import Package Limits Fiscal Year Closing
Previously, the data import package could not be used when closing fiscal years. This error is now corrected.

Project Management

Defect: 2051910
Task from Incorrect Job in Approval Center
Prior to this correction, it was possible for a task description to be coming from a task list from the incorrect job in the Invoice Allocation wizard in Approval Center in the Web Client. This error is corrected.

Defect: 2106418
Allow Drafts for Invoicing Groups with Different Debit or Credit Type
For jobs set up with the Split by Invoicing Group set to **Yes** on the selected job parameter for invoice selection, Maconomy collects the main and subjobs and creates a draft for each invoicing group. An error would occur if drafts did not all have the same debit credit type, such as if some are draft invoices and others draft credit memos. This should not happen and the error is now corrected.

Defect: 2042662
Only Lines with Open Entries Option in Job Invoice Allocation
In the Job Invoice Allocation workspace, the **Only Lines with Open Entries** option is now located in the Entries tab to align with the layout of other workspaces in the web client.

Defect: 2096767
System Error in Invoicing
A system error appeared in situations where the number invoiced on a job entry was zero but the billing price invoiced was a different value. The system allows for job entries to have a positive number invoiced and a negative billing price invoiced. This correction prevents the error from appearing again on such occasions.

Defect: 2022337
Fixed Price on Approved Budget
When approving a new fixed price for a job, there is a setup where you do that by approving a new contract budget or fixed price budget. The fixed price of a job is also recorded on the revision of the job budget. However, when approving a new fixed price, the old value was recorded on the revision. This error is corrected.

Defect: 2077477
Incorrect Approval Status and Submitter in Info Bubble for Timesheets
For timesheets where reapproval is not required and approval hierarchies are not enabled, an error would occur when you reopened a timesheet and made no changes. When resubmitted, the workflow status would show it as **Partly Approved**. Resubmitted timesheets with no changes should be in the **Submitted** status. The submitter in the info bubble could also be incorrect. These errors are corrected.

With this fix, new fields are added to the API for TimeRegistration and SupervisorTimeSheetStatus containers:

- ApprovalGroupSubmittedByVar :String :"Submitted by, Approval Group"
- ApprovalGroupDateSubmittedVar :Date :"Date Submitted, Approval Group"

These fields are added to the table part of the following layouts:

- SupervisorTimeSheetStatus.mdml.xml
- REF_SupervisorTimeSheetStatus_Table_Row.json

The new fields mentioned above are now used in the status info bubble instead of **TimeRegistrationCard.HeaderSubmittedByVar** and **TimeRegistrationCard.HeaderDateSubmittedVar** for the **Submitted By** and **Date Submitted** information. These fields affect the following layouts:

- Workspace/JobCost/SupervisorTimeSheetOverview/SupervisorTimeSheetOverv
- Workspace/JobCost/WeeklyTimeSheets/WeeklyTimeSheets_Record.json

Customers with customizations in the aforementioned layouts need to install changes for the new fields.

Defect: 2108547
Edited Subjob Name Clears Sales Person Field
When you changed the name of a subjob in **Jobs > Home >Subjobs**, the value in the **Sales Person** field for that job was removed. This error is corrected.

Defect: 2089880
Duplicate Valid Till Fields
In the Absence Entry Overview single dialog workspace, there were duplicate **Valid Till** fields in the filter list.
The error is corrected and the fields are renamed for clarity to:

- **Entry Type** is renamed to **Related Entry Entry Type**
- **Entry Date** is renamed to **Related Entry Entry Date**
- **Valid Till** is renamed to **Related Entry Valid Till**
- **Time Registered** is renamed to **Related Entry Time Registered**
- **Time Used** is renamed to **Related Entry Time Used**
- **Reason** is renamed to **Related Entry Reason**

Defect: 1952474
Markup Percentage on Non-Invoiceable Jobs
When you set up a job as non-invoiceable, the budget lines belonging to it must be set to have -100% markup. An error would display regarding this when you modified a budget line. To improve efficiency when working on jobs, an error is now displayed earlier in the process to inform you to correct the budget lines when setting the job as non-invoiceable.

Defect: 2105987

Overflow Error for Repeated Reallocations

Repeated partial reallocations of a job entry could result in the job entry having a non-zero open billing price, but the quantity was so close to zero that you may get an overflow error upon recalculation of unit price in the **Close All** action in Job Invoice Allocation or Invoice Selection. This error is corrected.

Defect: 2031916

Additional Field in Job List Filter

The filter list in the Jobs single dialog workspace now includes the **Standard Invoice Text List** field.

Defect: 1967015

Reopen Job Error due to Approval Hierarchies

You could encounter on an error and be unable to proceed with the process when reopening a job. This occurred when approval hierarchies for job budgets were enabled, and the job was set up with one of the approvers as a reference to a field on the job. This error is corrected.

Defect: 2077845

Editable Document Archive Number Field

Prior to this correction, the **Document Archive Number** field on draft invoices was read-only. You could only restore the reference to the document archive to a prior draft invoice by using the **Restore Editing** action. This solution was not ideal because it would also restore previous edits. The **Document Archive Number** field is now updated as an editable field.

Defect: 2072094

Prevent Deletion of Tasks

You can no longer delete a task if it is being used on a budget journal line.

Defect: 2071647

Notification Displays for Nonexistent Draft Invoice

Prior to this correction, the **Submit Invoice Drafts** notification would still appear after removing a draft invoice. This would link to a nonexistent draft. This error is corrected and no notifications will be sent for drafts that do not exist.

Defect: 2089950

System Error for Job Invoices

In some cases, job invoices could have different amounts in company base currency and customer standard currency, even when those currencies are the same. This caused a system error when trying to reconcile the A/R entry.

Defect: 2068032

Partial Crediting of Job Invoice Error

Partially crediting a job invoice with a write-up or write-down could lead to job entries where the open quantity and open billing price had opposite sign. This error is corrected.

Defect: 1962155
Negative Quantity Stops Progress Evaluation
If you had budget lines for time with a negative quantity, then did a progress evaluation on such a budget, an error message might display stating that the estimate to completion cannot be negative. This would stop the progress evaluation. This error is corrected by setting the estimate to complete to zero in this situation.

You can still have amount budget lines with negative total cost, which does not affect the progress.

Defect: 2074703
Entries Renamed to WIP in Job Invoice Allocation
In the card part of the Job Invoice Allocation workspace, the **Entries** field name is used for the total open billing price and total billing price for allocation. This title is also used for the subtab that shows aggregated job entries and the assistant showing job entries. The **Entries** field in the card part and the Entries subtab are both renamed to WIP to avoid confusion with the assistant showing job entries.

Defect: 2094748
Overflow Error in Progress Evaluation on SQL Server
Users on an SQL Server experienced an amount overflow error in job progress evaluations because of the division of very small time quantities. This error is corrected.

Defect: 2069085
Overflow Error in Progress Evaluation
An amount overflow error would occur in job progress evaluations because of the division of very small time quantities. This error is corrected.

Defect: 2019241
Subjob Triggers Main Job Job Invoice Selection Recalculation
A subjob that was not being main job invoiced may by error trigger recalculation of invoice selection on the main job when job parameters change on the subjob. A warning message would display stating "The invoice selection will be recalculated. This is because job parameters concerning job invoice allocation are updated. The recalculation can take some time depending on the number of steps in the recalculation. There are 654 steps." The number of steps was clearly too many if the subjob did not have this number of job budget lines and job entries, and was unnecessarily time consuming. This error is corrected and invoice selection on the main job is not recalculated when the subjob is not being main job invoiced.

Defect: 1979084
Overflow Error in Invoice Preparation
In the Invoice Preparation single dialog workspace, an overflow error could occur when you changed the total price in the Invoice Lines subtab during preparation of invoice from budget. This error is corrected.

Defect: 1883172
System Error in Project Manager Approval Workspace
If you had a mixed approval setup, such as when transitioning from the old style project manager approval for time and expense to using approval hierarchies, you could get a system error in the Project Manager Approval workspace. This error is corrected.

Defect: 2098324
Unable to Reconcile Outstanding Tax
Prior to 2.6.1 CU14, where the feature for tax on account reconciliation (Deltek Tracking: 2024425) was added, you could reconcile outstanding tax on an invoice on account credit memo, but this was no longer possible with a zero invoice or credit memo. This error is corrected.

Defect: 2022342
Simplified Layout for Revisions Tab in Budgeting
In the Revisions tab of the Budgeting workspace, the card for contract budgets is simplified to align with the layout of the Contract tab. This applies if the job is set up to be a fixed price job with a fixed price coming from a budget or T&M job setup to do revenue recognition by completion percentage or overrun handling.

Defect: 2033110
Unable to Save Purpose Field Value
When you applied selection criteria in the Surcharge Rules workspace, the value entered in the **Purpose** field was not saved as part of the selection criteria. This error is corrected.

Defect: 2107655
System Error When Crediting Invoice
Multiple partial reallocations of a job entry followed by invoicing of the job entry could lead to a posting error if the invoice is subsequently credited. This error is corrected,

Defect: 2021109
Change Billing Price During Job Entry Reallocation
When trying to reallocate a job entry, including an entry where you cannot change the unit billing price for invoicing, a message could display asking you to use the **Restore Original Unit Price** action to change the billing price to the original unit price. This could cause confusion when the two amounts in the message are identical. This was caused by an error in the condition for when to raise this, as

well as the message mentioning amounts in only one currency. This error is corrected.

Defect: 997752
Change Customer Price List Error
Prior to this correction, when a job had a item price list, and you changed to a customer that did not have them, the price lists were blank. This error is corrected and price list information is carried over to the new customer.

Defect: 2099492
Renamed Fields in Job Employees Workspace
The subtab in the Job Employees workspace has a large number of fields that can be added to the standard layouts. These fields fall into four groups:
(1) Values such as **Task Name** and **Location Name** for the new favorites,
(2) Selection criteria for the employee who should receive favorites as a single value such as employees with a certain company number.
(3) Fields that are similar to (2) but specified as a range such as employee with company number in a certain range.
(4) Fields with descriptions / names of the above.

With this correction, the fields are given titles in a more systematic manner. Specifically, the field titles are updated as follows:
(1) The fields for specifying the values for favorites are now called **Favorite Task**, **Favorite Activity No.**, **Favorite Location**, and so on.
(2) The fields for specifying the employees to whom favorites should be distributed are now called **Employees <u>with</u> Company No.** and similarly for other dimensions.
(3) The fields for specifying the range of employees to whom favorites should be distributed are now called **Employees <u>from</u> Company No.**, **Employees <u>to</u> Company No.**, and similarly for other dimensions.
(4) The corresponding fields with description or name for the above fields is now the same with **, Description** or **, Name** added, such as **Favorite Task, Description**, or **Employees <u>with</u> Company No., Name**.

Defect: 1957678
Daily Description on Finance Entries
Jobs can be set up so wherein the daily description from timesheets becomes the primary description on the job entries. By error, the finance entries picked up the task description instead. This error is corrected.

Defect: 2109036
Sum Line Description Change Error
Users without permission to change or view time costs encountered the error message: "'Cost cannot be manually changed on a sum line" when attempting to change the description on a sum line within a job or opportunity budget. This error is now corrected.

Defect: 1998356
Purchase Order Number Removed on Job Budget Line
The value in the **Purchase Order Number** field on a job budget line was always removed when the latest purchase order was deleted. This error is corrected. If there is another purchase order line associated with this job budget line, the purchase order number field contains a value. The field is blank only when you delete the last (not latest, meaning there are no other existing purchase orders) purchase order on the job budget.

Defect: 2073002
Error in Billing Price Due to Rounding Discrepancy
While trying to post a vendor invoice allocation line, a system error may occur due to a rounding error when calculating the enterprise billing price from markup percentage. This error is corrected.

Defect: 2058522
Bill to Customer Actions in Job Home Workspace
In the web client, a few standard actions were not available in **Jobs > Jobs > Job Home > Customer > Setup of Bill to Customers**. This error is corrected. You can now use the **Calculate Setup Percentage** action in this table, as well as the **Show Blocked Lines** toggle option.

Defect: 1875287
Blank Transaction and Journal Numbers in Blanket Invoicing
Blanket invoicing, in combination with direct invoicing or surcharge at invoicing, could give rise to job entries with blank transaction numbers and blank journal numbers for entries that should have a transaction number equal to the invoice number and journal number equal to the number of the invoice journal. This error was corrected in 2.5.5. Maconomy now introduces a step in the data conversion, which is part of the upgrade to 2.6.3, to correct this on any data affected by the error.

Defect: 2042736
Error When Crediting Split Billing
If you had multiple invoices that stemmed from a split billing where a write up/down was performed, crediting the subsequent invoices would not restore the full write up/down of the entries. This error is corrected.

Defect: 1611029
Zero-Invoice Crediting Error
When crediting a zero-invoice, you may not be able to proceed due to the following error:
"The sum of the amounts selected on the bill to customers of job number <job number> (currently <non-zero amount>) must be identical to the amount for invoicing which is 0.00. This can be updated on the bill to customer(s) under 'Split Billing'."

This would occur when approving the invoice selection, even on a job without split billing or a job where you have not changed the selected amount or selected percentage on any of the bill to customers. This error is corrected.

Time and Expense

Defect: 2019766
Access Error Due to Loophole Function
Previously when attempting to approve a timesheet line you had access to, you might have encountered an error message stating, "There is no access to Time Sheet (<employee no.>, <period start date>)" even though you had access to the time sheet line. This error is now corrected.

Defect: 2124690
Removal of Move Actions in API and Web Client
In the Approve Time Sheet Lines and Approve Expense Sheet Lines reference workspaces, the move line up and down buttons were shown by error in the web client. An error would occur if you tried to use these actions. This error is corrected by hiding the actions in the web client. This was done by removing the actions from the API.

The following dialogs are affected by this:

- ApproveExpenseSheetLines
- ApproveTimeSheetLines
- DailyTimeSheetLineExpenses
- DailyTimeSheetLineMileage
- TimeSheetLineExpenses
- TimeSheetLineMileage

Defect: 2053332
List of Employees in Expense Sheet Creation
When creating an expense sheet in the web client, you must enter an employee number or name in the wizard. The list of employees should be restricted to yourself and employees for whom you are the supervisor or secretary. By error, the list of employees was not restricted to this. This error is corrected.

Defect: 2153133
Unable to Search by Employee in Absence and Allowance Approval Workspaces
In the web client, you could not do a search using employee names in the Absence Approval and Allowance Approval workspaces. This error is corrected.

Defect: 2052066
Approving Time and Expense Sheets After Change of Supervisor
Prior to a change of supervisor, if you had submitted a time or expense sheet and it was not yet been approved, the new supervisor would gain access to those timesheets whereas the former supervisor typically would lose access. Since it is the former supervisor who is in the best position to approve such time sheets, this is not ideal. This is now changed so that when you change the supervisor on an employee revision, this "handover" of access to time and expense sheets only takes place within the period covered by the employee revision. For example, if you change the supervisor in the Employees workspace on the current revision, the handover of access will be for the period covered by the current revision. A weekly time sheet will be affected by this if the start date belongs to the period of the employee revision. An expense sheet will be affected if it has one or more lines with entry date in the period of the employee revision, or if it has no lines and has not yet been submitted and the employee revision is the current revision.

Defect: 1953728
Approval Group on Expense Sheet
When changing the job number on expense sheet header on a submitted expense sheet, the Approval Group approval hierarchy table remained in the **Submitted** status, even though the expense sheet header was no longer submitted. This error is corrected.

Defect: 2062467
Absence Allowance Error When Two Absence Calendar Lines for Same Employee Approved Concurrently
An employee may submit two or more absence calendar lines for approval. By error, Maconomy may approve both without accurately deducting the use of allowance for the absence type. The error occurs only when absence calendar lines are approved concurrently, such as by a background task. This error is now corrected.

Defect: 2072163
Daily Descriptions in Timesheets
By error, daily descriptions were required before you could resubmit a timesheet, even when you had made no changes to it. This error is corrected. The system now checks whether required daily descriptions have been entered on timesheet lines that are not neutral, in the sense that they have some hours for transfer to the journal.

Defect: 2022321
Rederive Employee Category on Timesheet Lines
Maconomy can now rederive the employee category when creating timesheet lines. The **Always Rederive Employee Category on New Time Sheet Lines** system parameter is added to support this feature. This system parameter is disabled by default.

Defect: 697124
Color-Coding for Timesheets
An error occurred wherein the color-coding in the calendar for timesheets did not update to the correct color. This would happen when an employee modified and resubmitted a previously rejected timesheet, or the last approver approved a timesheet but reset approval. This error is corrected.

Defect: 1602595
Approve Timesheet Error
Upon approving a time sheet for which one or more daily time sheets are already approved, an error message could display stating that the fixed working time of the employee cannot be updated, as an approved daily time sheet exists.

Maconomy is improved such that the error only shows if the employee fixed working time for the approved days have actually changed since time sheet creation. Additionally the error message has been changed to be more precise: "The fixed working time of employee no. [employe number] cannot be updated on time sheet for [date], as an approved daily time sheet exists"

Defect: 845586
Unnecessary Timesheet Update
If the **Only One Transaction Number for Each Time Sheet** system parameter is disabled, Maconomy does not maintain a transaction number on timesheet headers. However, even with this setup, the Central Time Sheet Transfer updated the transaction *timestamp* on the headers of the time sheets that are processed. This error is corrected.

Defect: 1950426
Transfer Expense Sheet Lines Produces Empty Journal
In the Transfer Expense Sheet Lines single dialog workspace, using the **Transfer Expense Sheet Lines** action did not transfer lines, resulting in an empty journal. This error is corrected.

Defect: 1299322
Incorrect Timesheet Status
After undoing timesheet header approval, the Fully Approved timesheet status was still retained. This error is corrected.

Defect: 2060146
Employee Name Displayed in Time Sheets Workspace
Previously, if the system is set up to use separate fields for first, middle, and last name, and you changed the value on the Employee Name field in the Employees workspace, the Employee Name on the Time Sheets workspace was not updated. This error is corrected.

Performance

Defect: 1877821
Performance Improvement for Account Data
Performance has been improved by reducing the number of database operations on the account table.

Defect: 1863105
Optimized Print Currency Report
The print layout for the Print Currency Report (P_CurrencyReport) is modified to remove the following:
<conditional {JobCapitalizationMethodVar = CapitalizationMethodType'\At Billing Price\}>

This is removed for performance optimization. The above condition on JobCapitalizationMethodVar should also be removed under "repeating JobEntry" in standard.mpl (not under "repeating JobInvoiceOnAccount").

Defect: 2003542
Performance Issue on High Network Latency
A performance issue was identified when a Java extension set up a progress bar with frequent progress updates in the Workspace Client. On networks with high latency, such as when the server is overseas, the frequent progress updates could incur significant performance overhead, causing the tracked operation to run considerably slower compared to on a low-latency network.
Progress updates from Java extensions are now throttled to perform at most 1 update every 2 seconds. This ensures that any difference in network latency on these updates has only a negligible impact on the performance of the tracked operation.

General Application

Defect: 2112769
Unable to Input Rules on Multiple Dimensions
Previously, it was not possible to enter dimension derivation rules on more than one dimension derivation principle. This error is corrected.

Defect: 1312755
Unable to Open Reference Workspace
Opening the Targeting Codes reference workspace would fail and display an error stating the following: Expression "not ReadOnly and TargetingCodesCard.ShowBlockedVar" refers to field "ReadOnly" in a pane which is out of scope of "TargetingCodesTable." This error is corrected.

Defect: 2013771
End Users Window Addon
Previously, the End Users window was part of the Commerce addon (L4). This error is corrected.

Defect: 2069239
Incorrect and Missing Info Bubble in the CRM Module
Previously, when you selected an employee in the Employees tab of the Contact Companies workspace, the information displayed in the info bubble was incorrect. Also, the employee info bubble link was missing in the Events tab of the Opportunities workspace. These errors are now corrected.

Defect: 2066688
Incorrect Employee Container in Web Client Workspaces
In some web client workspaces, the employee info box is based on an HR container. This means that you can only get information if you have HR access to the specific employee. This error is corrected.

Defect: 2067223
Shared Record Was Sometimes Changed When Navigating Between Workspaces
Browsers: Chrome, Safari, and Firefox
Workspaces which use the *shared record* functionality (where the same record, for example, the same job, would stay selected when switching between workspaces) would lose the correct record selection after users navigated via internal links. This error is now fixed.

Defect: 1987656
Chart API Did Not Expose Reversed Attribute for Legends
You can now configure charts to display the legend in reverse order.

Defect: 1613848
Non-Existent Record When Inserting a Line After Session Timeout
When users added a new line to a table after a period of inactivity, the web client would occasionally display the following error message: "The given record does not exist in this pane." This issue is now corrected.

Defect: 1987658
No Support for Dynamic Titles in Charts
Dynamic titles (that is, titles with expressions) were not supported for charts. This is now corrected.

Defect: 2055370
Default Title for Calendar Navigation Incorrectly Referred to Fixed Field Name

The hardcoded reference to a "DateVar" field, used for showing a default title in workspaces which use calendar navigation, is now removed.

Defect: 1546250
Error When Navigating to Another Tab While Attaching Documents
Switching to another workspace tab while attaching documents was still in progress would result in an internal error. This is now corrected.

Defect: 1312756
Support File Callback on Create Actions
This issue is now corrected. For more information, go to the section for "Enhancements to File Uploading in the Web Client" (Deltek Tracking: 1528695) in these Release Notes.

Defect: 2032429
Edited Fields Modified by the Backend Upon Saving Reflected Incorrect Values
Browsers: Chrome, Safari, and Firefox
When users edited a table field and the server updated that same field's value upon saving, the web client would display the incorrect value for the field. This error is now fixed.

Defect: 2159351
Embedded Row Would Load Target URL Even When Query Parameters Were Not Yet Fully Resolved
In workspaces that contained an embedded iframe, the content of the iframe could be refreshed too often if the source URL depended on data in the workspace. This unnecessarily strained both the server hosting the content and the user's browser. This issue is now fixed.

Defect: 1413815
"The Updated Record Cannot Be Empty" Error Message When Last Record on the Table Was Removed
In some tables, changing a field on a line would make the line disappear from the table. If this was done on the last line in a table, the web client would then report an error. This is now fixed.

Defect: 2145192
Performance Improvements to Web Client Tables
Minor performance improvements are now applied to tables in the web client.

Defect: 2075848
Invalid Filename When Exporting Tables for A/R Entries
When exporting tables, users found that the default filename occasionally contained invalid characters. These characters are now stripped away.

Defect: 2056104
Error When Opening Wizard Led to Empty Window
Browsers: Chrome, Safari, and Firefox
If an error occurred while the web client was opening a wizard, the wizard window would display as blank and could not be closed. This is now fixed.

Defect: 1987671
Chart API Did Not Expose Visible Attribute for Axes
It is now possible to hide the X- and Y-axis of a chart through the configuration.

Defect: 2088120
No Support for Dynamic Visibility of Actions Based on Enabledness (isActionEnabled)
A new expression language function, "isActionEnabled", is now added. This function takes a string with an action name as a parameter and returns a Boolean value indicating whether the action is enabled.

For example:

```
{
  "actions": [
    {
      "T$title": "Submit",
      "source": "JobsCard.SubmitJob",
      "visible": "isActionEnabled('JobsCard.SubmitJob')"
    },
...
```

The action name can be qualified with a pane name (as in the previous example). If an unqualified name is specified (as in the following example), then the pane currently in context will be used:

```
isActionEnabled('SubmitJob')
```

Limitations:

- In order to evaluate whether an action is enabled, data needs to be loaded into the target pane; the function will return *false* if the target pane has no data. Note that the function itself does not initiate loading of data. If that is required, an expression should reference some field in the target pane. For instance: "not isEmpty('JobsCard.JobNumber') and isActionEnabled('JobsCard.SubmitJob')".
- In wizards, the "Host" keyword may refer to the action on which the wizard is defined. However, the *isActionEnabled* function does not currently support that keyword; instead, the actual name of the action needs to be given. For example, use "isActionEnabled('Host.CopyJob')" rather than "isActionEnabled('Host')".

Defect: 2074629

Clicking Previous/Next Arrows Beside Search Filter Returned User to the First Record

Browsers: Chrome, Safari, and Firefox

The search filter found at the top of some workspaces (for example: Job Home, Expenses) would occasionally display the incorrect record. This issue occurred when:

- The record initially selected by the user was not listed on the first page of search results (that is, the first 25 records).
- The user edited some fields and saved the changes, or clicked an action.

When the user tried to navigate using the **Previous/Next** arrow buttons, the search filter would incorrectly revert to the first record on the list.

This has been improved; the search filter now loads the same number of records as previously shown in the search filter dropdown.

Defect: 2075850

No Height Attribute for Embedded Rows

It is now possible to configure the minimal height in pixels of an embedded row.

Defect: 2065464

Disable Draggable Field Values

The ability to drag values from fields or table cells is now disabled. To reenable the old functionality, set the **draggableFieldValues** property in Settings.json to **true**.

Defect: 2124730

Empty Headers in Excel Export

Headers in Excel exports were empty if you used titleValue and titleSource properties. This is now fixed.

Defect: 2149396

Misaligned Calendar Titles

Weekday titles were not aligned with dates in the calendar widget. This error is now corrected.

Defect: 2092296

Wizards in a Disconnected Host Pane Did Not Work Correctly

A wizard defined in a pane which was not used to show any fields in the workspace would not open correctly. This error is now fixed.

Defect: 2075849

Missing Option to Expand the Table Footer by Default

It was not possible to configure the table footer as open by default. This is now fixed; the **expanded** attribute for table footers is now available.

Defect: 2092920
Field Search Results Were Occasionally Invalidated
When users started a search from a field, the displayed search results would sometimes be outdated if a field related to the search was edited.
For example, if a **Local Spec. 1 List** field was updated, then the search results shown for **Local Spec. 1 Name** could be incorrect.
This issue is now fixed.

Defect: 2162718
Invalid Field Values Sent to Server Upon Card Update
Some values (such as numbers or dates) that are typed into a field need to be transformed into a different format before they are sent to the server. An improvement has been made which ensures that this transformation is always applied.

Defect: 2102880
Foreign-Key "Primary" Binding Did Not Support "Reversed" Mode
You can now use a reversed primary foreign-key binding in workspaces. For example:

```
"binding": {
  "foreignKey": "primary",
  "reversed": true
},
```

Defect: 2165795
Infinite Scroll Was Broken in List View
When you attempted to scroll down the list view dropdown, infinite scroll did not activate, making it impossible for you to view other entries. This issue is now fixed.

Defect: 2163296
Dialog Group Import Required Extra Dialog Members for Documentation Workspaces
The 'documentRevisions' dialog is now added to the import for any 'document' type bindings. In addition, the import can now be used to update as well as create dialog groups.

BPM and Statutory Reporting

Defect: 2053872

User Information Universe: Incorrect Current User and Current Role Objects
In previous releases of Maconomy 2.6.2 after transitioning from BO Views to AX Views, the Current User object from the User Information universe displayed all user name and user role data instead of only the user name and user role of the currently logged in user. In addition, the Current Role object displayed the current user object value instead of the role name value. These errors are corrected.

Defect: 2081732
SAP BusinessObjects 4.3 SP3 Patch 5 Upgrade to Resolve Date Errors
Maconomy systems running BusinessObjects (BO) 4.3 SP3 Patch 4 may be affected by a SAP error in which incorrect dates are processed when using **OpenLive** to view reports on the BO. To resolve this, you must upgrade the BPM/SAP BO 4.3 SP3 to Patch 5.

Defect: 2038819
NSAFT: Incorrect Amount in Tax Information for Intercompany Entries
Previously, the Norwegian Standard Audit File - Tax (NSAFT) report displayed an incorrect tax amount for intercompany entries. This error is corrected such that the amount is now calculated using the currency amount of the tax multiplied by the exchange rate from the finance entry.

Defect: 2122043
AEF: Changes to Opening Balance Fields
The AEF report is updated to reflect the correct values for the following fields:

- **PieceRef** is Report A-Nouveau (RAN), which means Carry-Forward
- **PieceDate** is the first day of the selected year for opening balance entries
- If empty, it displays [NS] or Non-significatif, which means Not significant (Previously this was VIDE, which means empty.)

Defect: 2023866
Time Sheet Overview: Wrong Status of Weekly Time Sheet Without Lines
Previously, the Time Sheet Overview report displayed the incorrect status for weekly time sheets submitted with zero hours. The **Status** value was "Due" instead of "Submitted". This error is corrected so that the report now synchronizes the time sheet status within Maconomy records.

Defect: 2116498
AEF: Include Currency Amount and Code for Transactions Not in Euro
Previously, the AEF report did not include the currency amount and currency code if the transaction (Customer Vendor) was in any currency other than Euro as specified in the **Instance Key** and **Currency Code** for opening balance. This error is corrected.

Defect: 2116503
AEF: Chronological Order of Ecriture Dates
Previously, transaction entries in the AEF report were not sorted by **Ecriture Date** field value. This error is corrected such that the dates are now in ascending chronological order (earliest to latest).

Defect: 2116488
AEF: Include Invoice and Reconciliation Against Payments
Previously, the AEF report did not display the **Ecriturelet** and **Datelet** fields even when reconciled or paid invoices existed. This error is corrected such that the **Ecriturelet** field now shows the transaction number, and the **Datelet** field now displays the reconciliation date.

Defect: 2025845
USTVA: Incorrect Kz66 Values
Previously, expense sheet transactions were not included in the vendor Kz line categorizations resulting to inaccurate Kz66 line values on the USTVA report. This error is corrected.

Defect: 2116485
AEF: Include Customer and Vendor Number and Name for Opening Balances
Previously, the AEF report did not include customer and vendor details under the **CompAuxNum** and **CompAuxLib** fields. This error is corrected.

Defect: 2053208
WebI Report Names with Special Characters Not Working on BO 4.3 SP3 Patch 4
Previously on systems running SAP BI 4.3 SP3 Patch 4, accessibility issues occurred with WebI reports containing special characters in its name. When a URL link pointing to said WebI report was accessed, an error message displayed. To correct this error, you must upgrade the BI system to 4.3 SP3 Patch 5.

Defect: 2029103
Incorrect Join between Tables in Job Invoicing Universe
Previously in the Job Invoicing universe, an incorrect join through the CompanyNumber column of the derived JobInvoiceOnAccount table and PaymentCustomer table was found. This error is corrected by updating the join between the CompanyNumber column of the JobInvoiceOnAccount derived table and the SettlingCompany column of the PaymentCustomer table.

Defect: 2126173
GoBD: Include Global Accounts
Previously, the GoBD report did not include global accounts. This error is corrected.

Defect: 2121786
GoBD: Issue with Log File Size
Previously, the log file produced when running the GoBD report was too large causing the Maconomy server to crash. This error is corrected.

Defect: 2035698

Incorrect Definition of Gross Margin % in Job Budgeting Universe

Previously, the Gross Margin % object had an incorrect definition so if the billing price was zero, it resulted to a database query error stating "Divisor is equal to zero…". This error is corrected.

Defect: 2070005

Changes in Time Sheet Universe Objects

Time Sheet universe objects are updated to reflect job descriptions, as follows:

- From **Description - Daily** renamed to **Job Description - Daily**
- From **Description - Weekly** renamed to **Job Description - Weekly**

Additionally, the universe is updated with eight new objects for daily descriptions added by users on the daily time sheet line. The object, **Description - Weekly**, is also added for weekly descriptions on the time sheet line (TimeSheetLine.EntryTex).

Defect: 2126065

Corrected Object on GeneralLedger Universe

Previously, reports using the object [Date Employed] from the GeneralLedger universe did not display any value. This error is corrected.

Defect: 2122009

AEF: Transaction Number Is Start of Fiscal Year

Previously in the opening balance of the AEF report, the transaction numbers (**EcritureNum** field) were assigned sequential numbers. This error is corrected such that the **EcritureNum** field is now the start of the fiscal year specified in the selection criteria.

Defect: 2023950

USTVA: Updated Kz45 Line to Include EU (Excluding Germany)

Previously, the Kz45 line summated only non-EU customer transaction amounts. Due to requirement changes, the Kz45 value must now include EU (excluding Germany) customer transaction amounts. The USTVA report is updated so that all EU (excluding Germany) and non-EU customer transaction amounts are now summated under the Kz45 line.

Defect: 2051866

WIP Rollforward: Incorrect Calculation of Net on Account

Previously, the value of the **Net on Acc.** (Net on Account) field only considered invoices created before the date provided in the **From Date** field. This error is corrected such that the Net on Account value is now calculated based on invoices created within the **From Date** and **To Date** range.

Defect: 2014833
Payment Time: English Text Not Translated
Previously, the Payment Time report contained English texts that were not translated to Swedish, such as Payment Time and Include Non-Swedish Companies. This error is corrected.

Defect: 1956097
Norway Tax Return: Multiplied Amounts Due to NSAFT Option List
Previously, when both the **NSAFT** option list and the **NSAFT-GL** option list were applied to the report, the data export displayed an amount that was multiplied when the Tax Code was mapped to only one option list, and only the **NSAFT** option list was considered for the report. This error is corrected.

Defect: 1950628
Fixed Asset: Depreciation Value Display Issue
Column sizes on the Fixed Asset report are adjusted so when you export as a PDF file, the **Depreciation** value is displayed in full.

Defect: 2085928
SIE: Duplicate and Missing Entries Due to Pagination Issues
Previously, the **#VER** and **#TRANS** fields were not balancing correctly due to pagination issues, which resulted to duplicate or missing entries in the report. This error is corrected.

System Admin

Defect: 2019204
Wrong "Current Row" In Tables Could Lead to Errors in Java Extensions
The dialog container API did not always return the correct current row number for a table pane if the location of the current row in the table pane changed as a side-effect of a row update or pane action. As a result, a Java extension implementing post-actions on such a container pane was at risk of performing their post-action on the wrong table record. This was only an issue in a few standard dialogs where rows would be added, deleted, or moved as a side-effect of another dialog action. This is now fixed.

Defect: 2082981
Real Values Fetched Using MQL Always Rounded to Four Decimals
Previously, real values fetched using MQL queries were rounded to four decimal places by default. However, such precision was insufficient when performing accurate calculations on real numbers when using MQL in Java extension and MPL customizations.

As of this release, Maconomy uses the hexadecimal representation for real numbers in MQL so they can now be represented using full precision. This behavior can be configured using the MQL_Format_Real_HEX property in MaconomyDir\Definitions\MaconomyCustom.ini under the [ServerConfig] section.

For example:

```
[ServerConfig]

MQL_Format_Real_HEX = false
```

Note: The MQL_Format_Real_HEX property is true by default.

Defect: 1254287
Excessive Locking on SQL-Server When Deleting Background Tasks
When you attempted to delete finished background tasks, a background task rule often caused excessive locks and long transactions in the database, which sometimes led to deadlocks. This was changed so that the finished tasks were deleted in smaller batches over multiple transactions instead of a single transaction. This change reduced the number of locks in the database, shortened transactions, and eliminated deadlocks. This is now fixed.

Defect: 2028314
Authentication Errors Not Displayed After Session Timeout
Previously when the Workspace Client (WSC) prompted for user credentials after a session timeout, any authentication errors that occurred during the reconnect attempt were hidden behind a generic "Access denied" error. This error is corrected such that underlying authentication errors now show when reconnecting fails.

Defect: 2026370
BGT: Deadlocks in SQL Server Not Properly Detected Resulting in Unrescheduled Tasks
When running the SQL Server database, deadlock between two operations could sometimes occur, especially for customers with enabled Audit logging (configured through the *UpdateLog.cnf* file). In some cases, a background task suffering from a deadlock would fail with an error category of "Other Error" instead of being automatically rescheduled to run later. This error is now fixed: background tasks suffering from a database deadlock will now be attempted to be rescheduled in such cases.

Defect: 2086127
Email PDF from Background Task Fails
Previously, you cannot email a PDF made from the Background Task workspace because the operation to merge to PDF failed. This error is corrected.

Defect: 2155088
Memory Retention Issue on SQLServer Version of MaconomyServer

An issue with unwanted memory retention was identified when executing "raw" SQL statements on the SQLServer version of MaconomyServer. Such SQL statements are mostly used in various add-on functionality, such as custom extensions, but also by the Email Alert distribution feature.

In certain situations this memory retention can cause the MaconomyServer process to eventually fail with a memory allocation error. This issue has is now resolved.

Defect: 2031207
EmailOnAction Incorrect Encoding
Previously when sending emails using EmailOnAction, some characters were incorrectly encoded. This error is corrected.

Defect: 1914106
Unfilterable Fields Allowed as Container Selection and Container Restriction Fields
Unfilterable fields could be entered in Background Tasks **Container Selection** fields and Schedule Rule **Container Restriction** fields. This is now fixed.

Defect: 2027755
Server Crashes When Localized Messages Exceed 255 Bytes and Contain Placeholders Beyond the 255-Byte Mark
In some cases, long error messages led to an internal error when using a non-English or custom dictionary. The error is now fixed.

Defect: 2057801
Serialization Error on System Messages
Previously, a serialization error on the Workspace Client (WSC) communication protocol meant that active system messages were not displayed during login. The error was not shown in the client UI, but an error message was written to the user-specific WSC log file containing the text "ERROR c.m.c.main.local.McMessageHandler - Error getting messages from server [...]". This error is corrected.

Defect: 2025874
Server Configuration Link Internal Error
When you clicked the Server Configuration link, an internal error occurred. This error is now fixed.

Defect: 1541817
Race Condition on XROCache Refresh When Running Analyzer Reports
An error occurred when an XRO report document was deleted while another analyzer report was refreshing the report object cache map (XROCache). This error is now fixed.

Defect: 1073197
Error Displayed When Clicking Search on the Main Job No. Column in Filter for Jobs and Absence Requests
When you searched from inside a filter, such as searching for values to restrict the filter by, the following error occurred: Error in foreign key search field value callback - no mapping for key ***'<someFieldName>'***. This is now fixed.

Defect: 2080334
MaconomyDaemon Not Replaced When Changing Global TPU
Previously, MaconomyDaemon was not always replaced when changing global TPU. This error is corrected by adding missing old binaries.

Defect: 2069961
Permission Error When Installing Coupling Service on Nodes
Previously when installing a Server Node (on Windows), creating Coupling Service services failed with a permission error. This error is corrected.

REST API

Defect: 2035807
Improved Foreign Key Search Not Implemented for Initialized Records
With the Containers Web Service version 8.0 released with Maconomy 2.6.3, the concept of initialization sub-resources is phased out. That is, whenever the client program acquires a data pane record template by following either an action:init or an action:init-row hyperlink, an initialization sub-resource is no longer created.

With initializations being transient, a data pane record can only be created by following either an action:init-create or an action:init-row-create hyperlink. Also, either a data:init-search or a data:init-row-search hyperlink has been added to the specification of a searchable data pane foreign key, allowing the client program to trigger a foreign key search from a transiently initialized record. For further details, refer to the version 3 of the Programmer's Guide for the Maconomy RESTful web services.

Touch

Defect: 2149222
Error When Trying to Login with Okta
When using the Touch native app, in the Touch Login screen, if you entered your Okta username and tapped Login, then performed the remaining authentication in Okta / Azure, the app showed the "mismatched guid" error and it was not possible to log in. This is now fixed.

Defect: 2063900
Unable to Change Unit Price from 4.09 to 4.10
If you had an expense sheet line with Unit Price 4.09 and changed it to 4.10, after tapping **Save**, the Unit Price remained 4.09. This is now fixed.

Defect: 2128787
Incorrect Expense Sheet Line Content
When you changed the last line's data (description, job, and task) and attached a receipt, instead of seeing the data for the last line, you were shown the data for the first line. This is now fixed.

Defect: 2080897
App Hangs When Trying to Login with Azure
When using the Touch native app, in the Touch Login screen, if you entered anything in the username and tapped **Login**, the app froze with the animation on top. This is now fixed.

Defect: 2079281
Unable to Select Value in Expense Justification Field of Type Option List
If an expense sheet line required expense justification of type option list, it was not possible to enter (select) a value in the justification field. This is now fixed.

Defect: 2158830
Unable to Detach Receipt After Updating Expense Line's Description/Job Field Values
When you had an open expense sheet with an expense line and changed the line's description or job task, attempting to 'Detach Receipt' immediately afterwards did not detach the receipt attached to the line. This issue is now fixed.

Defect: 2059873
Unable to Use Proper Field Casing in Restrictions
When you used uppercase letters in the fields for restrictions in layouts, the restriction was not applied. It should have been possible to use proper casing on fields in restrictions. This is now fixed.

People Planner

Defect: 2153514
Refresh Data Error in Resource Management
When you changed the page number in the Web Components, the Resource Management workspace did not refresh the prefetching of referenced data. This caused an excessive amount of SQL queries. This error is corrected.

Defect: 2156316

Expand Assignments Performance Optimization
Prior to this correction, the Web Components would load slowly if you expanded all assignments in the PG or RG. Loading time is now faster due to performance improvements.

Defect: 2100764
Work Hours Deleted in Import
When importing calendars, some of a resource's work hours were deleted by error. This error is corrected.

Defect: 2156263
Unable to Delete User with Multiple Records
When a user has multiple WebUserSettings records, an error would occur if you tried to delete the user record in the Windows Application and in Maconomy, then import users to People Planner. This error is corrected.

Defect: 2082797
Import Actuals Error
Importing actuals would fail if the IIS OS had TLS 1.x disabled. This error is corrected.

Defect: 2121748
Disable Editing of Project End Dates
Users could still edit the end dates for tasks on imported projects even though the **Project Start and Finish calculation on imported projects setting** was set to Automatic in the Admin tool. This error is corrected.

Defect: 2113339
Assignments Filter Performance Issue
The assignments filter search endpoint was slow when querying a large amount of data due to performance issues. This error is corrected.

Defect: 2125151
Import Project Performance Improvements
If you changed the start and/or end date of a project in Maconomy, reimporting it to People Planner could take a long time. Performance is now improved to make reimports faster.

Defect: 2107381
Perspective Error
Perspectives would not load if you were using an old layout with a Sum footer. This error is corrected.

Defect: 2157789

Capacity Filter for Budget Type Resources
The capacity filter in the Resource Management workspace did not work on budget type resources. This error is corrected. The filter now applies equally to both individual and budget type resources.

Defect: 2099383
Performance Issues When Expanding Assignments
Expanding assignments with several booking categories and changing the zoom factor was sometimes slow. This error is corrected.

Defect: 2131863
Expand Task Error
When opening a task on a project without a name, the Resource Overview did not expand the assignment for the task. Instead, it would stay on the loading page infinitely. This error is corrected.

Defect: 2088814
Unable to Save Bookings
When you tried to save a booking using the Workspace Client or the IE browser, the application would freeze. This occurred only if multiple assignments were simultaneously expanded on the screen. This error is corrected.

Defect: 2126594
Resource Management Assignment Filter Error
Prior to this correction, an error would display when you tried to access the Resource Management workspace in the web client. This would occur if you had a larger amount of assignments when using the Booked in Visible Period or New assignment filter, and there were bookings in the visible period. This error is corrected.

Defect: 2082274
Unable to Export Project Manager Values
The values in the Project Manager column were missing when you exported information from the Web Components to an Excel spreadsheet. This error is corrected.

Defect: 2090609
Incorrect Color Coding in Var Column
When you modified a value in the **Var** column, the color coding did not update accordingly. Instead, it would still display the color associated with the previous value. This error is corrected.

Defect: 2085657
Unable to Load Web Components

A "Cross-thread operation detected" error would sometimes occur when accessing the Budgeting Assistant, Progress Evaluation Assistant, or Resourcing workspace. This error is corrected.

Defect: 2024746
Book Recurring Dialog Error in Windows 11
The Book Recurring dialog would not display if you were using the Edge browser in Windows 11. This error is corrected.

Defect: 2091237
Imported Absence Booking Error
When you imported an absence from Maconomy, you could edit the booking in People Planner. This should not be possible and the error is now corrected.

Database Changes

This section contains the database changes from Maconomy version 2.6.2 to 2.6.3.

Maconomy Changes

Summary
0 relations removed
7 were expanded
0 were moved
0 were renamed
9 new fields
0 removed fields
0 renamed fields

Database Relation

```
Relation: USERINFORMATION
    Field: USERBLOCKED added

Relation: INVOICE
    Field: TAXITEMIZATIONONACCREC added

Relation: VATINFORMATION
    Field: WITHHOLDINGTAXPAYABLE added
    Field: WITHHOLDINGTAXRECEIVABLE added

Relation: INVOICEVATSPECIFICATION
    Field: DESCRIPTION added

Relation: INVOICEEDITINGHEADER
```

```
    Field: TAXITEMIZATIONONACCREC added

Relation: DRAFTINVOICEVATSPECIFICATION
    Field: SEPARATEDESCRIPTION added
    Field: DESCRIPTION added

Relation: JOBHEADEREXTENSION
    Field: COPYRESOURCING added

Relation: TARGETGROUPEXPENSESHEETS (new)
Relation: TARGETGROUPTIMESHEETSTATUS (new)
```

People Planner Changes

The following shows the database changes from People Planner version 4.5 to 4.6.

Tables Added Between Release 4.5 and 4.6

Table Name
CopyResourcingType
UnderOverSpendLatestResultEntry

Tables Changed from Release 4.5 and 4.6

Table Name	Columns Removed	Columns Added
WebUserSetting		AssignTaskPopupState

API Changes

Existing fields in the database are now included in the API. You can view the full list of fields here.

Known Issues

This section includes a summary of issues that are new in this release.

Maconomy

No Warning Message Displayed When Changing Password via File Menu
Defect 2019214, Sev 4
A warning message is not currently displayed when changing your password via the File menu.

Internal Error When Changing Language to French
Defect 2171087, Sev 2
Due to a regression in the implementation of regional settings, it is not possible to log in with the French language. The workaround is to switch to a different language.

Touch

2FA Application Link Displays QR Screen on Android Devices
Defect 1320157
When you log on to Deltek Touch using two-factor authentication (2FA) on your Android device, and tap the two-factor authentication application link, the QR screen displays instead of the Duo Mobile main screen.

This defect affects Deltek Touch for Maconomy Android users who are using 2FA to log in.

As a workaround, manually obtain the passcode from the Duo Mobile application.

Biometric Authentication Issues on Android Devices
Defects 1381785, 1381786, 1381788
Face ID authentication is supported on some Android devices, however, an Android operating system issue prevents face ID from working on all these devices. You may encounter the following scenarios when logging on the application using face ID:

- If both fingerprint and face ID are registered on the device, only fingerprint ID works.
- If only face ID is registered on the device, only PIN authentication works.
- **Log in using Fingerprint/Face** displays on the Login and Settings screens, instead of either **Log in using Fingerprint**, or **Log in using Face**.

Face ID authentication successfully worked on Samsung Galaxy S9+. The following devices were tested, and have known face ID authentication issues:

- Samsung Galaxy A10 and A11
- Samsung Galaxy S8
- Xiaomi Redmi Note 7
- Xiaomi Mi 9 SE
- Pocophone F1

In some cases, you cannot setup or use face ID from the Login and Settings screens. However, you can still opt to use security PIN and fingerprint ID authentications to log on to Deltek Touch.

Limited Photo Selection on iOS 14 Allows Full Gallery Access
Defect 1443974
One of the features of iOS 14 is the capability to restrict access to your device's entire photo gallery with the Select Photos functionality. You can select specific photos to appear on applications which utilize the images on your device. For example, when you enable and open Quick Capture with intelligent character recognition (ICR) on your iOS device to obtain photos of your expense receipts, a Photo Permissions dialog appears. The Touch app is only granted access to the photos you select. However, an iOS 14 issue allows full access to the gallery even if you select photos. This error affects users of Touch 3.7 (or later) and Maconomy 2.5.2 (or later). As a workaround, create a custom photo gallery that contains all the photos you need for your expenses and open the folder when you are using Quick Capture.

BPM and Statutory Reporting

Limit on Companies With Same Tax Number
Deltek Tracking: 2131781, Sev. 3
The report can only support up to ~10 companies with the same tax number due to a character limit related to the data type used by Maconomy. If the limit is exceeded, an error occurs and the report fails to generate.

ETL Job Fails to Load Due to Data Type Conversion Error
Deltek Tracking: 2088778, Sev. 3
When running ETL jobs that load data to the Data Warehouse, one of the Number fields on Maconomy may fail while being converted to string (data type) before loading. We recommend temporarily disabling the cache on steps that fail until this issue gets resolved.

NSAFT: Incorrect Tax Amount for Intercompany Entries for Same Currency
Deltek Tracking: 2083995, Sev. 3
Currently, the NSAFT report displays the incorrect tax amount for intercompany entries when the base currency and the header currency are the same. The issue is caused by using the base currency of the entry instead of converting it to currency of the reporting company.

SIE: Incorrect Company Information in Header
Deltek Tracking: 2085942, Sev. 1
Currently, the SIE export file header may display the company information of a different company instead of the company named in the Selection Criteria.

Data Export Fails Due to Offset Value
Deltek Tracking: 2143241, Sev. 4
If the total finance entries for export is divisible by the offset value (where default value is 5000) the data export fails and displays an error, "Only xxxx rows available". As a workaround, you must set the filepath.dsaftoffset parameter to a value to which the number mentioned in the error message is not divisible.

Example:

Error message: Only 10000 rows available
Parameter: filepath.dsaftoffset=50001

People Planner

There are no known issues in this area for Maconomy 2.6.3.

System Admin

There are no known issues in this area for Maconomy 2.6.3.

Security Enhancements

Security Enhancements
Deltek Tracking Numbers: 2067283, 2021819, 2035750, 2012798
Various security enhancements were made relating to error handling, password checks, and the calculation of active users.

About Deltek

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