

Deltek Maconomy 2.3 GA

Solution Upgrade Guide

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Overview

This document describes special considerations when upgrading Maconomy applications with a solution installed to Maconomy 2.3. It is intended to be used with the standard Deltek Maconomy Upgrade Guide and describes additional steps that are necessary with reference to the steps that are mentioned in this guide.

This guide assumes knowledge of the Deltek Maconomy 2.3 Upgrade Guide.

This guide currently does not cover upgrading to the CPA solution from a version that does not have the CPA solution installed.

Prerequisites

Solution Packing Unit (SPU)

You must obtain the SPU to be installed. For Deltak Maconomy 2.3, spu.17_0.pso.xxx for the PSO solutions (MCS and CPA) is available.

Industry Accelerators

In this document, the term “industry accelerator” is used only to describe packages of functionality that are delivered in an SPU and installed with MConfig. Standard Industry Accelerators are available in the solution SPU. Make sure that any third-party industry accelerator SPUs are available in the packing units folder.

Custom Layer and Extension Layer

In Maconomy, there is *one* Custom layer and *one* Extension layer. This means that adding new customizations or accelerators may overwrite already installed files. This means that the order in which accelerators are installed may be significant.

In the early PSO solutions, industry accelerators were considered customizations and treated as such; that is, they were installed in the Custom layer on both the Maconomy server and the web server. This means that “standard” customizations are potentially mixed with “true” customizations.

Since PSO 1.4, Industry Accelerator files have been installed in a separate Extension layer.

In both cases, portal components from accelerators are still marked as “not standard” in the Portal Designer.

When upgrading a system from a PSO solution prior to 1.4, two possible paths can be taken for the upgrade:

- Keep the entire Custom layer “as is” or
- Remove the accelerator parts and keep only true customizations

If the first option is chosen, all of the files in the Custom layer should be transferred to the new application both on the Maconomy server and the web server. Going forward, anything on the Custom layer will be treated as true customizations. No service packs will be released that support accelerators on the Custom layer, and they may hide updated layouts and configurations in the Extension layer released in later service packs.

If the second option is chosen, portal components that refer to removed custom content should be removed using the Portal Designer either before the upgrade or after installing web products.

Accelerator Installation Order

Because Industry Accelerators all reside in the same layer, the order of installation matters if several accelerators are installed in the steps described in “Install Web Products” and “Install Maconomy Server Industry Accelerator Files.” The following is the recommended installation order:

1. MCS 1.2: CreditControl, EmailAlerts, WorkOrder
2. MCS 1.4: PSOExtensions
3. CPA: CreditControl, PSOExtensions, CPA

Installation

This section describes how to install the new SPU on the W 17.0 application to which Maconomy has been upgraded.

Install the Solution Packing Unit (SPU)

This step must happen when the shortname is attached to the version 17.0 application or before.

Note: These choices cannot be changed. A wrong selection in this section will require a database restore and a reinstallation of the application.

SPU	spu.16_0.pso.v0201.sp0.tgz	▼
Solution	Prepare for CPA solution	▼
<input checked="" type="checkbox"/> Translate Solution data files		

In MConfig, select the application. On the Application screen, select the appropriate SPU: spu.17_0.pso.xxx for the PSO solutions (MCS and CPA).

If third-party Industry Accelerators are used, select the first in the **Install IA SPU** field.

Select **OK/Next** to unpack the SPU and install the solution files on the Maconomy Server.

Additional Industry Accelerator SPUs

Additional third-party Industry Accelerators can be unpacked for the application at any time.

1. Select the accelerator in the **Install IA SPU** field.
2. Select **OK/Next** to unpack the accelerator.

This does not activate any content in the application; it only unpacks the accelerator SPU files to a folder below the application. To activate the Industry Accelerators that were unpacked, the files must be installed on the Maconomy server and web server; see the next sections.

Install Web Products



Before continuing with the following procedures, complete the steps described in the standard Delttek Maconomy 2.1 Upgrade Guide **until and including** the “Other Constraints” section. The following sections should be used in connection with “Installing and Upgrading the Portal.”

In MConfig, set up web products for the application using the Web Products screen. Select **Install Portal database in shortnames** and **Install Portal components in shortnames**.

Select **Install Unconditionally** in the **(Re)Install Application component files** field, and if Industry Accelerators are to be installed, select the first accelerator in the **Custom Portal files directory** field. Select **Ok** on the main screen and install. Repeat this process for each accelerator.

Install Maconomy Server Industry Accelerator Files

The Industry Accelerators that are supplied with the PSO SPU can be installed by using the data import feature in MConfig: On the shortname screen, select **Solution Setup Data (import only)** in the **Load shortname data** field. In Data configuration options, select the appropriate Industry

Accelerators and select **Accelerator Runtime Files Only**. This will install files, but no data in the database.

For third-party accelerators: In the **Load shortname data** field, select **IA.<Accelerator Name> (Import Only)**. Consult the documentation for the accelerator for data configuration options, *and verify that upgrade without data import is supported*.

Portal Component Set-Up

If appropriate, updated versions of solution and Industry Accelerator portal components can be installed. This may be necessary when upgrading from an APU solution to a PSO solution, or when upgrading from a pre-PSO1.4 solution if the “custom” Industry Accelerators are exchanged for the new standard accelerators. Also, a few PSO 1.4 components from version 12.0 are known to cause issues; see “Known Issues.”

Updating components can be done using the Portal Designer import features either inside the portal by opening the **Portal Designer » Import / Export** component (choose **Import** and select the files to be imported) or from the command line. Component definitions and default role setup and menus are available.

Solution files to be imported are located in `maconomy/w_17_0/Portal/Installation`.

Import files for Industry Accelerators can be found in `maconomy/w_17_0/IA.myAcc/Portal/Installation`

If importing from the command line, import files must be copied to a location that is visible by the web server, for example, `C:\WebServers\Production\MaconomyPortal`

```
cd C:\WebServers\Production\cgi-bin\Maconomy
MaconomyPortal.myshort.W.exe -e -q
"filename=solution_module_comps.xml&username=Administrator&password=123456&i
mporttype=components" Framework/import/importportal.ms
```

Change the import type on the command line as appropriate for menus and roles.

Validation of Portal Components

The standard upgrade procedure installs standard portal components and a limited set of solution components, depending on solution type. Custom components, including additional components from the selected solution and accelerators, are carried forward by the upgrade process.

Validate portal components as described in the Deltek Maconomy 2.3 Upgrade Guide.

Finalize Upgrade

Complete the final steps from the Deltek Maconomy 2.3 Upgrade Guide.

BPM Reporting Setup

Special Considerations before Upgrading

The default value for the **BPM Enable Silent Sign In** system parameter is set to true in PSO and CPA solutions. This parameter is set to false in BoBedst, so the standard system has Silent Sign In (SSI) disabled.

If portal components do not use Silent Sign In, disable this system parameter before upgrading.

Portal Setup

The BPM server name must be entered in the new file:

\webserver\<app>\MaconomyPortal\W_17_0\Portal\BPM\BPMReporting.I

Save a copy as: \webserver\<app>\MaconomyPortal\W_17_0\Custom\BPM\BPMReporting.I

For any system not installed as a PSO 1.4 system in 12.0:

The AnalytixLiv components found under External Sources in the portal designer should be removed and replaced by the new standard BPM portal components.

To import these new components via the portal designer you can use the solution_analytix_*.xml files located in \maconomy\<app>\Portal\Installation\

Update System Parameters

If the Workspace Client is to be used, the BPM setup is done using a set of new system parameters.

In the System Parameters dialog review the settings of parameters in the Business Performance Management group.

Make sure that the BPM Server URL is set.

People Planner Setup

In Maconomy 2.0 and forward, a group of system parameters have been added for setup of the integration. These replace the values that in 12.0 had to be set in three different files for the Portal, Web Services, and Custom actions (server-side MScript) to work.

Update System Parameters

In the System Parameters dialog, find the parameters that belong to the People Planner group and review these. The default values that are used on a PSO demo system are listed in the following table.

Web Service API User	PSOSERVERNAME\PeoplePlannerAPI
Web Service API Password	123456
Web Service API Namespace	http://marstrand-innovation.com/
Web Service API SOAP Address	http://PSOSERVERNAME:20002/PeoplePlannerAPI/Project sAPI.asmx
Enable Custom People Planner Actions	1
Update Total Cost (Base) in Budget	0
Create New Budget Revision on Updates	0
Include Subjobs When Sending Job to People Planner	0
Always Allow Send Action	0
Default Job Budget Type	@planning
Default Opportunity Budget Type	@standard
Default Forecast Budget Type	
Integration Status Note Type	Integration Status
URL for MyPlan	http://PSOSERVERNAME:20002/MyPlan/

You must restart the web daemon before the system parameter updates are reflected if you are using the custom People Planner actions in the Java or Workspace Clients.

Update Web Services

In \webserver\<app>\MaconomyWS\Services\Custom\JobBudgets.I

Set the **JobBudgetType** attribute if no fixed budget type (different from @planning or @standard) was selected for the **Default Job Budget Type** system parameter.

Portal Set-Up

If there is a custom version of NotifyThirdParty.I, it should be removed or updated to match the new one in standard. It is located in:

`\webservers\<app>\MaconomyPortal\W_17_0\Custom\Packages\Composers\Integration\NotifyThirdParty\NotifyThirdParty.I`

The connection values for the People Planner API should no longer be entered here; enter them in the System Parameters, instead.

Known Issues

Updated MCS 1.4 Solution Portal Component Definitions

During an upgrade, portal components that are marked as custom, including accelerator components and certain solution components, are not automatically upgraded.

For an upgrade to Maconomy 16.0 MCS 2.1 from Maconomy 12.0 MCS 1.4, a number of components can no longer be marked as "Validated for" the new version due to references to renamed database fields. A components import file has been prepared to upgrade components that are known to have this problem. Note that the file content must be manually reviewed before import, because it is possible some of the components that are included in the import really have been customized and should be fixed manually rather than upgraded to the standard version. The import file contains all of the components that are known to have the problem after an upgrade.

Oracle: pso2_comps_upgrade_extensions_15.xml

MSSQL: pso2_comps_upgrade_extensions_15.mssql.xml

See "Portal Component Setup" for a description of the procedure for upgrading components to the latest version.

Updated MCS 1.2 Portal Files

If it is decided to keep MCS 1.2 Industry Accelerator files in the Custom layer, a number of files must be updated when moving custom files from a 12.0 to Maconomy 16.0 system:

- Field and table name changes must be reflected in custom files
- Replace W_12_0 with W_16_0 path references in portal files

The following files that are supplied by Industry Accelerators must be replaced with the updated versions that are available on the download server in the folder:

`\Applications\SpecialReleases\Maconomy_2.1\ServicePack0\PS01.2_Updated_Accelerator_Files.zip`

Note that any customized versions of the files should be considered.

IA.CreditControl

Custom/Packages/Composers/Portfolio/Portfolio.lay

Custom/Packages/Composers/Portfolio/OpenEntryCustomerStatement/OpenEntryCustomerStatement.1.ms

Custom/Packages/Composers/Portfolio/Portfolio.1.ms

IA.EmailAlerts


Custom/EmailAlerts/EmailAlerts.ms

Custom/EmailAlerts/_Settings.ms

IA.WorkOrder

Custom/Packages/Composers/WorkOrder/WorkOrders/WorkOrders.2.ms

Custom/Standard/Portals/WorkOrder/WorkOrderHome/RegisterHours/WorkOrders.l



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