Maconomy FAQ

Upgrading to Deltek Maconomy Essentials 2.6.1

Upgrade Process

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

2. **Will our system be down during the upgrade? Will we be able to continue production activities?** Your system will not be down during the entire upgrade, with the exception of the Production environment upgrade, which will take place over a weekend and may impact only one business day. You will be given notice of this in advance. During the upgrade, Deltek will setup an Upgrade environment for each customer, which is a new environment in the new version containing a copy of data from your Production environment. This is a new environment and thus will not affect your existing Sandbox or Production environments.

3. **What do I need to do to prepare for the upgrade?** You should run through your typical business processes in the new version. You should also test all custom reports and custom print layouts, any issues with these will need to be resolved by yourselves or through an Engagement with Deltek Consulting. Testing is a vital step during the upgrade period to ensure any issues are identified early and the impact at the Production upgrade is minimal. **We recommend you complete testing 10 working days before the Production upgrade window to ensure that the issue and resolution can be investigated.** The Engagement Manager and your Customer Success Manager will be able to provide you with more information about the consulting assistance packages we have available to support you through this upgrade.

4. **What is made available during the upgrade?** Deltek will provide you with a new Upgrade environment including Maconomy 2.6.1, Business Objects 4.2 SP9 and People Planner 4.4 (if applicable).

5. **What is the scope of the upgrade?** The traditional upgrade is simply a technical upgrade, which results in your environment being upgraded to the latest cloud environment version. Post upgrade you may just decide to continue working as-you-do-today. If you do want to activate new features and receive face-to-face, bespoke training we recommended you contact your Customer Success Manager to arrange a billable engagement with Deltek Global Consulting.

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

    a. **Phase I:** Upgrade Environment Delivered. Your upgrade environment is a new environment that we are installing. You will receive a support case when the Upgrade environment is available. This support case will contain a download link for the Workspace Client and connection details for the Workspace Client, Web Client, Touch and RestAPI.
    b. **Phase II:** Upgrade Environment Validation and Familiarization. You will have approximately 8 weeks to review the Upgrade Environment and validate your data before the production upgrade.

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c. **Phase III:** Production upgrade. The Production upgrade will take approximately 3 days to complete. You will be informed of when the Production environment is available through a support case. This support case will contain a download link for the Workspace Client and connection details for the Workspace Client, Web Client and Touch.

7. **What testing will Deltek undertake before releasing the environment upgrades?** The Essentials 2.6.1 version will undergo thorough testing by our internal teams before you receive it. Deltek will also perform smoke testing on the environments before release. Deltek tests issues related to the application but does not test issues related to each client's data and setup. Testing undertaken by Deltek will be with regard to the application. We are not able to test issues with your specific data and setup, for this reason, it is important that Customers also thoroughly test during the Upgrade period.

8. **How are reports and print layouts handled during the upgrade?** We will validate that the standard (core or template) reports, window layouts and print layouts are working, but it will be your responsibility to test and correct any issues with your customer-specific custom reports, and/or custom print layouts. If issues exist in custom-developed reports or custom print layouts you will be required to either resolve these issues yourself, with the assistance of a partner, or through a paid engagement with Deltek Consulting. Custom reports and custom print layouts are only confirmed to be working for the version they were purchased for and will often need updates at upgrade.

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

10. **Will there be any additional costs associated with the upgrade?** The upgrade can come at no external cost if you choose to do a like-for-like upgrade, which means you are not working with Deltek Global Consulting to activate new features or receive additional face-to-face training. The internal cost is truly the resources utilized to test the upgrade thoroughly per the answers provided in this document. Deltek is not in the position to define this in general for each customer, as the level of testing required will depend largely on the areas of the system that each customer utilizes and the complexity of the data configuration. We recommend a billable engagement with Deltek Global Consulting to test the basic functionality for your data/setup.

11. **Will we need to circulate a new version of the Workspace Client to all of our users?** The upgrade to 2.6.1 will require you to install a new version of the Workspace Client on all user machines. There is one exception: if the existing installation of the Workspace Client was done using a ZIP archive on Windows or a DMG image on Mac, and the installation took place in a writable location (the end-user has write access to the installation folder). In that case, update sites will automatically update users Workspace Clients when they first connect post upgrade. Otherwise, you will have perform a manual installation.

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Functionality Changes

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

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

     All three settings are disabled by default but can be enabled by the users.
   - **Derive Zero Value from Price List Lines** – You can now enforce Maconomy to derive the value 0 on a job entry if you enable this feature on your price list line by using the new fields
     - **Zero Markup %**
     - **Zero Standard Markup %**
     - **Zero Intercompany Price %**
     - **Zero Adjustment %**
     - **Zero Base Salary Markup %**
     - **Zero Standard Base Salary Markup &**
   - **Web Client workspaces -** More standard business functionality has been made available in new workspaces for CRM, Batch Invoicing, Users, etc.
   - **Employee Data -** In 2.6 we introduced the new Employee Data functionality to restrict the type of Employee data that Users can see. This includes the ability to control the employees a user can see in "HR windows" and the ability to restrict access to sensitive employee information outside the "HR windows", e.g. searches and assistants/info bubbles
     - There are now four tick boxes that need to be checked or unchecked in a user's actions restricting access to HR dialogs:

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- See all HR data
- See all data where you are Supervisor
- See all data where you are Secretary
- See all data where you are Mentor

Example import files are provided here to assist you in adding these new check marks to you typical employees in Maconomy. You will need to enter your own user data in the files before importing. Mentors.txt Secretary.txt Supervisors.txt SeeAllHRData.txt

In addition, you can control access to specific fields in searches and info bubbles in the Employee Field Access tab in the Employees workspace.

- **REST API Search Dialog Access** – In Maconomy version 2.6 for security purposes we removed direct access to all search dialogs in Workspace and web clients from the Rest API. Since access to search dialogs is restricted, this could potentially impact any custom integrations you may have. If any of your custom integrations are using these dialogs there is a need to grant access specifically to the dialogs that are used. We recommend that if you do have custom integrations you tests these as part of your upgrade window to ensure you identify any issues. If you do find an integration that is no longer working because of the removal of one or more search dialogs please submit the **Rest API Search Dialog Access** service request and they will be added back in the chosen environments. If you need assistance in understanding which search dialogs you need please engage Consulting to help you identify the dialogs you need access too.

Documentation & Training

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

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

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