Maconomy FAQ

Upgrading to Deltek Maconomy Essentials Flex 2.4.5

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. The emails will begin at least 10 weeks before your Preview environment is made available.

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 upgrade, with the exception of Production cutover, which typically will fall on a weekend day and may impact only one business day. You will be given notice of this in advance. During the upgrade, Deltek will setup a Preview environment for each customer, which is a new environment and thus will not affect your existing Development, Sandbox or Production environments.

3. **What do I need to do to prepare for the upgrade?** The Development environment can be used to test any custom layouts reports and universes, updates can then be made to custom elements by yourselves or with the assistance of Deltek Consulting. Once you have resolved any issues with custom layouts, reports and universes these can be deployed to Preview for testing in a Production replica environment. Once all custom elements are confirmed to be working in Preview we recommend you use the Service Requests “Move Basic Layout Changes”, “Move Custom Reports” and “Move Custom Universes” to request that layouts, reports and universes are promoted to Production in line with the Production upgrade.

4. **What testing do I need to do to complete the upgrade?** You will be expected to perform a thorough regression, integration, functional, and system test of your configuration in your Preview environment, which will be on the new version of Maconomy. Clients can engage with Deltek Global Consulting in a billable engagement for additional guidance and advice on testing. We advise you to test any custom reports and custom print layouts early during the testing period to ensure that if you need support from Deltek Global Consulting, this can be scheduled in advance.

5. **What is made available during the upgrade?** Deltek will provide a new Preview environment with access to the Workspace Client, iAccess, Touch, and Business Objects Reporting.

6. **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. This upgrade will introduce the three new User Interfaces, Workspace Client, iAccess and Touch. The old UI’s Portal and Java Client are now decommissioned. You will be provided with links to an Online User Guide containing training materials for these interfaces. Post upgrade you may just decide to continue working as-you-do-today for a period of time until you decide to turn on new features. If you do want to activate new features and receive face-to-face, bespoke training on the new interfaces, then it is recommended you contact your Customer Success Manager to arrange a billable engagement with Deltek Global Consulting.

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7. **What will happen to the Portal client after the DFME upgrade?** We will be decommissioning the Portal for all Customers. We will be moving functionality produced for the regions from the Portal into the Workspace Client and/or iAccess as appropriate. We will also be providing access to Custom reports through the Workspace Client and iAccess. For instructions on adding custom reports, please see the DFME BPM Descriptions Guide.

8. **What do I need to do to complete the upgrade?** You will be expected to perform a thorough regression, integration, functional, and system test of your configuration in your Preview environment which will be on the new version of Maconomy.

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

    a. Phase I: Preview Environment Upgrade and Development Environment Upgrade. Your Preview environment is a new environment that we are installing. Your current Development Environment will be upgraded to 2.4.5 and a copy of Preview applied. You will receive an email when the Preview environment and upgraded Development environment are available. This email will contain download links for the Workspace Client and connection details for the Workspace Client, iAccess and Touch.
    b. Phase II: Preview Environment Validation and Familiarization. You will have 4 weeks to review the Preview Environment and validate your data after the upgrade. Only development on the new version 2.4.5 can take place during this period. Development should take place in the upgraded Development environment and be promoted to Preview using the 'Move Basic Layout Change', 'Move Custom Report' and 'Move Custom Universe' Service Requests within the Deltek Support Center
    c. Phase III: Production upgrade. The Production upgrade will take approximately 3-4 days to complete. You will receive an email when the Production environment is available. This email will contain a download link for the Workspace Client and connection details for the Workspace Client, iAccess and Touch.

10. **What testing with Deltek undertake before releasing the Preview environment?** Deltek will perform smoke testing on the environment. Following feedback from previous upgrades Deltek will also perform more thorough testing in the Preview environment before releasing it to you. In order to be able to perform this thorough testing we require that a Support Case is raised with Customer Care where you state that you give permission for Deltek resources to access your 2.4.5 Preview environment. A separate communication will be sent to you regarding this. 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 about the application. We are not able to test issues with your specific data and setup; therefore, it is important that Customers also thoroughly test during the Preview period.
    Please Note: The Preview environment will be updated with a copy of Production before it is released to your organization and as such, no testing data will be present in your version.

11. **Will changes I make in my Preview system be automatically pushed to Production?** The Preview environment is provided for you to test any changes in the new version that is a Production replica. You will need to replicate those changes in the Production environment after upgrade. We recommend keeping a log of changes so that you can easily and quickly apply them when your upgraded Production environment is released.

12. **Will my search favorites and column selections be affected?** Yes, you will need to re-create your previously saved searches (favorites) and column selections within the Workspace client. To re-create Favorites click the favorite star button at top right of screen to add search favorite. To re-create column selections right click on tables in the Workspace Client and choose the columns you want to add or remove. These will then be saved for your next login.

13. **I have saved analyzers that I use regularly what should I do to preserve these?** Prior to the upgrade you can export any saved analyzer reports ready for import into your new 2.4.5 environments. To export a report open the analyzer and go to Organize My Reports → Click on the Report → Click Export. To import a report into your new 2.4.5 Environment open the Analyzer and go to Organize My Reports → Click Import and choose the saved report file. Another option is to run your individual analyzers and print the first page (the first page shows you setup). Once the upgrade completes you can use this print to easily re-create these reports.

14. **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, or custom UI configurations that are not part of the standard product, you will be required to either resolve these issues yourself, with the assistance of a partner or through a paid engagement with Deltek Consulting. As you know, custom reports and custom print layouts are only confirmed to be working for the version they were purchased for.

15. **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 clients' environment. 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.

16. **Will there be any additional costs associated with the upgrade for professional services?** 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 Professional Services to activate new features or receive additional face to face training on new interfaces, etc. 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.

Functionality Changes

1. **What new functionality will now be available?** Included in the standard Deltek upgrade communications is an Enhancements Guide, 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.

2. **What are the new BPM capabilities?** Included in the Deltek upgrade communications is the Deltek Maconomy Essentials BPM Descriptions guide that accompanies the version of the software that you are upgrading to. This guide will explain what reports and universes exist for you to leverage.

3. **What are the advantages of upgrading to 2.4.5?** This upgrade will introduce many new features including, but not limited to, Absence Management, Credit Control, Combined On Account and Time and Material Invoicing, and Employee Masking. Furthermore, moving to the 2.4.X platform ensures you are on the latest infrastructure utilizing scalable server and other performance enhancements to optimize your solution.

4. **In the Preview environment, the account structure in reports like the Trial Balance looks different to the old version. How do I make it look the same?** One of the Enhancements to Maconomy since your previous upgrade was the introduction of Reporting Structures to replace the old Dimension Groupings and Account Structures. Please review the Reporting Structures section of the Deltek Maconomy Essentials Enhancements Guide available from the Maconomy Essentials page in the Deltek Support Center for assistance in amending the Reporting Structures. Reporting Structures are a more sophisticated, user friendly approach to reflecting report structures in your reports. On upgrade Dimension groupings will be converted to Reporting Structures automatically but some Customers may see variations in the structure from their previous version.

5. **Are there any changes to approvals that we should be aware of?** In your new version of Maconomy Essentials you will need to use approval hierarchies to manage your approvals. If you are not using approval hierarchies today and want to explore enabling them please reach out to your Customer Success Manager to setup a billable engagement with Deltek Global Consulting.

6. **We want to have Time and/or Expense approval set up to use Employee Types, how do we make sure the notifications are there?** The Approve Expense Sheet as Employee Type and Approve Time Sheet as Employee Type notifications are available in Maconomy 2.4.5 but are not installed as standard. Please raise a Support Case through the Deltek Support Center if you would like to have these installed.

7. **In the Portal the Projects available to be chosen on a time sheet were limited but we are now seeing all Projects in iAccess, how can we change this?** For Swedish Clients the Portal relied on old functionality "Employee Control" to limit the projects available for an Employee to select in the Time Sheet. This functionality has now been replaced by Favorites. Please raise a Support Case regarding this and Deltek can either issue you with an import file for Favorites that you can import to correct this or you can engage the Services team to do the import for you and/or provide training on this new functionality.

8. **When I enter more than 10 hours on a time sheet line for a particular day it automatically adjusts the time entered to minutes, how do I change that?** This is a global setting for all Essentials Customers. To change it for your users please advise users to go to Preferences in the Workspace Client and change the field "Interpret hour entry as minutes when above" to a higher number e.g. 24. To change this in iAccess users can go to My Settings and change the field "Interpret hour entry as minutes when above" there.

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 page. This will include an Enhancements Guide, Release Notes, BPM

Descriptions Guide, Online SaaS Administrators Guide and Online User Guide. The Online User Guide will provide videos and quick guides to assist with training your team on the new interfaces.

2. **How do I train my users?** It is your responsibility to train your users; however, you may choose to speak to your Customer Success Manager if you would like to discuss hiring Deltek Global Consulting to engage in training with your company.

3. **How do I report any issues I discover during the upgrade preview period?** You can submit Support Cases in the Deltek Support Center. When entering a case please begin the Summary field with “DFME 2.4.5 Upgrade”, this will allow the team to prioritize and action the case as required.

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