Deltek Maconomy iAccess 2.0 LA

Release Notes

March 10, 2017

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Contents

Overview

Welcome to the Deltek Maconomy iAccess 2.0 LA Release Notes.

These release notes contain a summary of the following:

- Pre-Installation Information
- Enhancements
- Software Issues Resolved
- Known Issues

Pre-Installation Information

Please review the contents of this section before you install Maconomy iAccess 2.0 LA.

Prerequisites

See the *Deltek Maconomy iAccess 2.0 LA Installation Guide* for the list of prerequisites to installing iAccess.

Supported Products

Supported Maconomy Versions

This version of iAccess supports the following Maconomy version:

- Maconomy 2.3 GA CU 3

Compatibility Matrix

Information about platform requirements (as well as supported Maconomy versions) is maintained in the Deltek Product Support Compatibility Matrix, located on the Deltek Customer Care Connect Site. In the Matrix, search on "Maconomy iAccess" to quickly navigate to the information you need.

Internal Link

http://home.deltek.com/sites/products/Documents/DeltekProductSupportCompatibilityMatrix.pdf

External Link – Deltek Customer Care Connect

https://deltek.custhelp.com/app/answers/detail/a_id/38499

Documentation

In addition to these Release Notes, the Maconomy iAccess 2.0 LA release contains the following documentation:

- Online help (accessed through the application)
- Deltek Maconomy iAccess Installation Guide

Locating Documentation Online

Internal Link — Sharepoint

All documentation is available internally on SharePoint (drill down by product and version):

https://home.deltek.com/sites/products/Maconomy/Documents/Forms/AllItems.aspx

External Link — DSM

https://dsm.deltek.com/documentationlists/DeltekMaconomy23GA.html

Enhancements

The following features/enhancements are added for iAccess 2.0 LA:

- Layout Customization Framework
- Updated User Interface Design
- Expense Justification
- Purchase Orders
- Support for Absence Approval Workflows
- Viewing BPM Reports
- Forgot My Password
- Printing Weekly Time Sheets
- New Mileage Sheet Notification

Layout Customization Framework

Tracking Numbers: 754125, 713286

iAccess 2.0 LA introduces a layout customization framework that enables customers to modify existing workspaces or add new workspaces. Specifically, you can:

- Modify how data is ordered and displayed in the user interface
- Modify existing actions or add new actions
- Modify the different sections of existing workspaces
- Add new workspaces to the menu or links that let users quickly navigate to external URLs

Part of this feature is the migration of all existing functionality to the new technology. As a result, screens have changed slightly. For example:

- Previously, approval information was shown in an info bubble on the lines in the table part. Now, approval information must be added as fields to the lines.
- Wizards for the creation of absence requests are now replaced with inline creation.

Updated User Interface Design

Tracking Numbers: 754118, 596658, 610924

To adhere to new Deltek standards, the visual design of iAccess is now updated. After you log in, some of the changes are:

- Menu items listed as words (with the old icons removed)
- An icon at the top left corner to hide/display the menu
- Updated views for time/expense/mileage sheets, favorites, and absence management

By default, iAccess also remembers the last tab you worked in and displays that tab the next time you log in.

Expense Justification

Tracking Number: 470004

The expense justification feature is a commonly used feature by Maconomy customers in the Workspace Client.

This feature enables customers to require the expense submitter to provide additional information related to an expense type before submission. This justification relates to the type of expense selected by the submitter.

Certain types of expenses may require justification, while others may not. For lines that do not require justification, an employee can add an expense on a task and submit it without being prompted for justification. If justification is required, the employee is prompted to enter a justification for the expense before they can submit it. Expense sheet lines that do not have the necessary justification are highlighted.

Changes to Maconomy iAccess

The following changes are made to iAccess to support this feature:

- New Justification column added to an expense registration to illustrate if justification is required
- New Justification pane to add the justification for the expense sheet line
- If the justification is not completed, the user will not be able to submit the expense sheet

Workflow

Task	User	Details…
Add and View Expense Justification	Employee	- Add a justification to any expense line. - You can also view incomplete entries in the Justification column.

Purchase Orders

Tracking Number: 608831

You can now use Maconomy iAccess to create and maintain purchase orders. Specifically, you can:

- Create, edit, submit, and print POs.
- Add documents as attachments to the PO.
- View the status of a PO's header/lines.

Changes to Maconomy iAccess

The following changes are made to iAccess to support this feature:

- New Purchase Orders workspace
- New Notification for rejected purchase orders

Workflow

The high-level workflow for creating and maintaining purchase orders is as follows:

Task	User	Details…
Create a PO, or open an existing PO.	Employee	▪ If needed, attach documents to the PO.
Submit a PO.	Employee	▪ Submit a PO for approval. ▪ If a submitted PO is rejected, edit it and resubmit for approval.
Approve the PO	Approver	▪ The designated approver views and approves/rejects submitted POs in the Workspace Client or Touch.
Close a PO.	Employee	▪ Close a PO (for example, once all services/goods are received).
Reopen a PO.	Employee	▪ Reopen a PO, if needed (for example, to reuse an existing PO by adding lines to it).
Print the PO.	Employee	▪ You can do this at any point during the process.

Support for Absence Approval Workflows

Tracking Number: 708905

The Absence Approval workspace enables managers to easily approve absence requests for employees in iAccess.

> Configuration and back office tasks such as managing absence balances at year end are not supported by iAccess.

Approvals

The workspace includes the Approve Absence notification, which directs the user to the absence item for approval.

Views

Approver users can view the absence requests pending approval, and review information such as duration of absence, whether or not the absence is submitted for approval, and if the absence information is synchronized with time sheets. Approvers can also approve or reject an absence in this view.

Changes to Maconomy iAccess

The following changes are made to iAccess to support this feature:

- New Absence Approval workspace
- New Notification to support absence approval

Workflow

The following are the high-level tasks to accomplish with Absence Approvals.

Task	User	Details…
Approve Absences	Absence Approver	- View existing requests from your team members. - Approve or reject absence requests.

Viewing BPM Reports

Tracking Number: 470008

BPM reports are now available under the Reports section of the iAccess menu. This section lists reports, grouped by category, that are available to you. This enables you to easily access reports used by your company. You can configure iAccess (or the Workspace Client) to work with Single Sign In so that users can automatically log in to BPM.

iAccess 2.0 LA introduces two new workspaces with predefined BPM reports: Job Reports and Management Reports. Each workspace is displayed as an item under the Reports section of the menu. When you click a menu item, the workspace opens and shows a list of BPM reports. When you click a report within the workspace, it opens with InfoView in a separate tab on your browser. You can customize what reports are viewable to the user by adding or deleting reports from the list. You can also create your own workspace and specify what reports are available for each user group.

The following BPM reports are available in the workspaces:

- Job Reports workspace
  - Job Profitability Summary
  - Job Profitability Budget
  - Job Profitability Budget, by Task
  - Job Profitability Comparison
  - Job Profitability Periodic

- o Job Profitability Transactions

- o Job Budget to Actuals YTD

- o Job Budget to Actuals YTD, by Task

- o Job Status, by Task & Employee

- o WIP Aging

- o Revenue Analysis

- Management Reports workspace

- o Utilization, by Employee

- o Realization, by Employee

- o Realization, by Account Manager

- o Job Profitability Summary, by Job

- o Customer Profitability, by Customer

- o AR Aging

- o Profit and Loss

- o Profit and Loss, by Dimension

> Viewing BPM reports with Chrome is not officially supported. You can view the reports with the supported browsers listed in the Deltek Product Support Compatibility Matrix mentioned earlier in this document.

Changes to Maconomy iAccess

The following changes are made to iAccess to support this feature:

- New Reports section in the menu
- New Job Reports workspace
- New Management Reports workspace

Forgot My Password

Tracking Number: 429405

Maconomy iAccess now supports the "Forgot my password" authentication method. If you click **Forgot your password?** on the login screen, you receive a token via email, and can then use this token to authenticate and change your password.

This feature is only available for users who log in using their Maconomy credentials.

Changes to Maconomy iAccess

As part of this feature, the iAccess login screen is updated.

Printing Weekly Time Sheets

Tracking Number: 563888

You can now print weekly and daily time sheets in iAccess.

Changes to Maconomy iAccess

The following workspace is updated:

- Weekly Time Sheet

New Mileage Sheet Notification

Tracking Number: N/A

The Rejected Mileage Sheet notification is now added to Maconomy iAccess.

Software Issues Resolved

There are no software issues resolved for this release.

Known Issues

Tablet Support

Safari on iPad: Viewing BPM Reports is Not Supported

Defect: N/A

Browsers: Safari, Chrome

Description: You cannot view BPM Reports on any browser if you are using an iPad. This is a limitation of the BusinessObjects software used for reports.

Customers Impacted: Affects all clients using iPads.

Workaround Before Fix: Utilize other ways of viewing BO reports on a tablet: either through the Mobile BI app, or through emails with PDFs of reports attached to them.

iAccess

BPM Reports: No Session Expired Validation

Defect: 760872

Browsers: IE11, Chrome, Safari, and Firefox

Description: When the BPM server times out, iAccess cannot renew the session.

Customers Impacted: Affects all customers using BPM.

Workaround Before Fix: Log out of iAccess, refresh the page, and log in again.

Continuous Scrolling Does Not Work

Defect: 763220

Browsers: IE11, Chrome, Safari, and Firefox

Description: The continuous scrolling feature does not work for search filters and advanced searches. You can only view the first 25 results.

Customers Impacted: Affects all clients.

Workaround Before Fix: Narrow down your specified criteria in the filter or advanced search restriction fields.

Notifications: Links to Absence-Related Items Do Not Navigate to the Correct Data

Defect: 775728

Browsers: IE11, Chrome, Safari, and Firefox

Description: Clicking To-Dos related to the Absence Management Workspaces does not open the relevant records. The action only takes the users to the workspace.

Customers Impacted: Affects all clients.

Workaround Before Fix: Navigate manually to the record mentioned in the To-Do.

Shell: Blank Fields on Initial Login

Defect: 775789

Browsers: IE11, Chrome, Safari, and Firefox

Description: Users logging in for the first time might see blank input fields, even though no error occurred. This issue happens intermittently.

Customers Impacted: Affects all clients.

Workaround Before Fix: Refresh the browser page.

Additional Notes: This error can be replicated on Chrome and IE.

Notifications: Page Reloads When Opening an Item from Notifications

Defect: 775730

Browsers: IE11, Chrome, Safari, and Firefox

Description: When you open a Notification, the browser automatically reloads. This happens for all notifications, except those for time sheets.

Customers Impacted: Affects all clients.

Workaround Before Fix: None

iAccess Automatically Sends New Token

Defect: 751817

Browsers: IE11, Chrome, Safari, and Firefox

Description: When the user enters an incorrect token during the reset password process, iAccess automatically sends out a new token.

Customers Impacted: Affects all clients.

Workaround Before Fix: None

Popup Fields Are Not Searchable in Advanced Search

Defect: 763239

Browsers: IE11, Chrome, Safari, and Firefox

Description: When using the Advanced Search capability, you cannot make restrictions based on popup fields.

Customers Impacted: Affects all clients.

Workaround Before Fix: None.

Info Bubbles Are Missing

Defect: 766239

Browsers: IE11, Chrome, Safari, and Firefox

Description: The info bubbles from iAccess 1.0 are not yet available in iAccess 2.0.

Customers Impacted: Affects all clients.

Workaround Before Fix: If you need to view the information usually available in the info bubbles, you can add a pane with the fields you require to the normal layout.

User Roles: Last Visited Workspace Exclusive to a User Type Can Be Viewed by Other User Types

Defect: 770789

Browsers: IE11, Chrome, Safari, and Firefox

Description: Since iAccess remembers the last workspace visited by a user, it can sometimes display that workspace when the user logs in again with a different user type. However, the user will not be able to view the data exclusive to the previous user type.

Customers Impacted: Affects all clients.

Workaround Before Fix: None.

BPMReportView: Session Timeout When Opening a Report for Users Not Configured in BPM/BO

Defect: 772372

Browsers: IE11, Chrome, Safari, and Firefox

Description: When a user not set up in BPM tries to open a report, iAccess displays a Session Expired warning message. This is not the correct error message for the situation.

Customers Impacted: Affects all clients.

Workaround Before Fix: Use role-based access to hide the Reports workspace from users that are not set up in BPM.

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