Beacon 7.03 Release Notes

Welcome to Beacon 7.03! Now that the end-of-FY scramble is complete, we spent this iteration focusing on user requests and bug fixes. As a result, you'll see lots of minor improvements reflected: tidier screens, new filtering and data entry options, etc. We're also delighted by the response we've had from FLOW, so we have given lots of love to that module this time.

Highlights from this release

- **Throughout:** We've been adding in your points of contact. Please take a moment and review them from the admin screens in either HR or Finance.
- **Beacon FLOW:** We've made numerous improvements, based on your feedback, that should improve usability, reduce visual clutter, and make review/approval steps clearer.
- **Beacon Finance:** We've built in some enhancements long requested by users, including some new filters on Transactions, and ability to set some custom behaviors on several screens.
- **Beacon HR:** Our focus this time was on several user-requested enhancements (more flexibility in certain fields) and data cleanup (preventing bad data from being entered, either automatically or by users).
- **Beacon Dashboard:** Added three new cards inspired by discussions with our users: Multi-Year Spending Rate, Obligations by Mechanism, and a pie chart version of Obligations by OC Code.

Specifics

Module	What we did	Why we did it
All	Updated POC data for each institute (ongoing).	Beacon allows you to designate several points of contact for HR and Finance. We're ensuring that they have our current "go to" contacts for both Intramural and Extramural programs – you can and should update them as needed!
All	Fixed report services to properly sync with user accounts.	Access to the custom report server requires that permissions in our tool match your windows AD account. Users who need access to custom reporting services weren't always synced properly. Now they are!
All	Fixed occasional issues with "Ask Sean" reporting the wrong user had requested help.	While rare, this was an annoyance to users and to our staff in trying to resolve issues. Customer communication matters to us.
FLOW	Signature screen now shows entire reviewer process.	Previously, only minimal information was shown. This reassures approvers that prior steps have been completed, by whom, and when.

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FLOW	You can now add comments to the signature screen at any point in the approval process.	Comments were only available at key approval points.
FLOW	You can now clone templates.	This allows you to clone an existing template and modify it – saving time when creating similar approval process templates.
FLOW	Review buttons are now disabled until the workflow has been submitted for review.	Under some circumstances, review buttons could be clicked before the form had been submitted for review. Now, they're disabled until the form is properly submitted.
FLOW	Cleaned up the home screen to a consolidated list panel. Now the same panel displays your inbox or the list of in-progress templates and offers some filtering options to make it manageable.	There was too much clutter on the screen, and two competing lists to worry about. Consolidating the list made the screen much more user-friendly.
FLOW	Revised the "Completed" screen for visual clarity. The final document is more obvious, and the list of review/approval steps now more closely matches the prior screens.	The final Completed screen had not yet been updated to reflect changes made to review/approval screens. We also wanted it to be very clear which document was the final version with all the approval points reflected.
Finance	Made the "Shortcut to Transactions" checkbox persistent on the OC Detail screen. Made the "Doc #" checkbox persistent on the Transactions screen.	Users requested that both options be "sticky" and stay checked to reflect their preferred behavior.
Finance	You can now filter by absolute value of commitments on the Transactions screen, and save your search.	Users wanted to see commitments and de-commitments to more easily track open commitments.
Finance	You can now filter the Transactions screen by requisition number and save that criteria for later use.	User requests.
Finance	Fixed an error that sometimes forced users to log out when distributing budgets.	Bug fix.
HR	Made "Next Four-Year Review Date" editable, while defaulting to four years after the last four-year review date.	This used to be a calculated field only; people wanted to set specific dates.
HR	On career screen, you can now enter projected increases with a precision of up to two decimal points.	Previously, you could only enter whole number percentages. Now you can specify up to two points of precision, so projecting a 2.25% raise is possible.
HR	Added filtering by date range to the Employee Summary Report.	Previously, you could only filter by FY, but users requested the ability to filter by date range as well.

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HR	Fixed Accession PLR screen so it no longer allows users to overwrite saved data when the position is filled.	In some cases, users were able to overwrite existing HR records with planning records and create discrepancies that weren't intended. Additional error handling on the user interface will prevent this issue going forward. Yay!
HR	Added more information to the HR One Sheet screen, particularly more data from the Position Details and Dates sections.	Based on user feedback, we've added more HR information to the new One Sheet screen. The One Sheet screen is a very useful at-a-glance view of an employee record. Please take a look and let us know what you think.
HR	Fixed a display issue where the audit log sometimes reported the wrong user as having modified a record.	While a rare occurrence, nobody wants bad data getting into the mix.
Dashboard	Added new Beacon cards: **Multi-Year Spending Rate** (shows you monthly cumulative expenditures over a four-year period) **Obligations by Mechanism** (shows you what you've spent by Mech Code) **Obligations by OC Code** (now available as a pie chart that shows obligations by OC Code)	Inspired by discussions with the finance community. If you have any Beacon card ideas, please let us know. You can send feedback to support@netcomm.net.