Beacon 7.05 Release Notes

As we start a new calendar year, here's Beacon 7.05.

Highlights from this release

- **Beacon:** We've added more videos to our support site. You'll find them in the "Got it!" popup that announces version updates, and as always, on the support site at https://support.netcomm.net/.
- **Beacon Excel Add-In:** Fixed issues with data pulls based on NED ID.
- **Beacon Dashboard:** New daily transactions card available.
- **Beacon FLOW:** Now available to all users of Beacon Suite! Now tracks additional information about when workflows are initiated and as they progress. Also fixed an issue with merging secure PDFs.
- **Beacon Finance:** Users can search across FYs and across views for transactions by item description as well as other filters, and can limit their search to a subset of prior FYs. POTS screens now enable OC code filtering.
- **Beacon HR:** Positions list now shows compensation data relative to selected date range (rather than most current for the position shown). Added new Fellow History report. Created Non-FTE versions of FTE reports. Improved accuracy of FTE projections for current and future years. Added an alert for changes to organization info.

Specifics

Module	What we did	Why we did it
Excel Add-In	Fixed a few bugs in the Excel Add-in, when pulling HR data by NED ID.	Recently, we added to our Excel Add-In the ability to pull select HR positions data when you provide a NED ID, but not all data was returned properly.
Dashboard	Added new card to show daily transactions for specific CAN or OC Code	Sometimes you need to pay particular attention to activity for a specific account. This simplifies the process of showing recent transaction activity.
FLOW	You can now merge PDF documents that are secured.	Previously, the system could not merge documents that were secured, and produced an error.
FLOW	FLOW now tracks and displays more information about when a workflow is initiated and as it progresses through various reviews and approvals.	Adding more data points in the process allows users to more effectively track progress and improve efficiency.
FLOW	Removed the user management options from FLOW.	FLOW is now available for all users of Beacon, so FLOW-specific users no longer need to be managed separately.

Module	What we did	Why we did it
Finance	Added ability to filter by full or partial OC code on POTS data screens (Approved Requests, Unapproved Requests, and Manual Orders).	OC code is almost universally useful in tracking down expenses throughout the system, so most other screens within Beacon Finance allow users to filter by OC code.
Finance	Added ability to search transactions based on item description, and across multiple years, from the Account Structure or Transactions screens. You can even search the entire database if you have access to the master view.	Users requested the ability to search by item description to aid in tracking purchases that may not have come through as expected.
Finance	Within transactions, you can now choose to limit multiple FY searches based on selection.	Prior-year-funded transactions can be challenging to locate because you need to see multiple years. Previously, multi-year search looked at all prior FY data, when often users only need data from a more recent FY.
Finance	Fixed CAN filter on multi-FY transaction screen.	Users who reached the multiyear transaction screen (via the Advanced Options" link when searching) reported that the CAN filter wasn't working.
HR	Add Fellow History report as a new standard report.	Users requested a report showing 5-year history of stipends for each current fellow.
HR	Created Non-FTE reports to mirror existing FTE reports.	As the workforce shifts and Non-FTE has gained importance, reports limited to FTEs show less of the whole picture. Users requested a set of standard reports that showed NFTE positions.
HR	Revised the front Positions list so that compensation data is returned relative to the selected timeframe, rather than most current for the displayed position.	When reviewing historical data, users often wanted to see compensation as of the selected date range. It now shows the most recent compensation values for the selected timeframe – the compensation as of the last date selected.
HR	Fixed a defect in how we calculate current and future year projections for FTEs.	Current year projections were slightly inflated.
HR	Added a new alert that fires when organizations change.	Users requested a way to be notified of changes to the organization lookup chart.