Beacon 8.01 Release Notes

Beacon FLOW now supports action tracking checklists. What does this mean? Now, you can not only create workflows and route documents for review and approval, but you can also track action items associated with a workflow which may occur outside the main approval workflow process (i.e. confirm termination in ITAS, confirm exit interview).

We launched a new FLOW template example show-casing the power of combining action tracking checklists with routing a workflow in our new Beacon HR off-boarding process. However, this new action tracking feature is available to all Beacon FLOWs.

Behind the scenes, we continue to prep for FY2020 changes to Beacon financial data to include support of 5-digit OC codes and task numbers.   We will be communicating with the Beacon Finance community regularly throughout this spring and early summer to announce training sessions and showcase changes coming down the pike.

We're also showcasing some features and functions you may have missed in prior releases as well as covering some minor features enhancement and bug fixes new in this release requested by the Beacon user community.

Feature spotlight

- Beacon Messaging: Beacon supports embedded messaging throughout the suite, accessible from the envelope icon in the top navigation bar. The messaging system is integrated with various functions throughout Beacon, allowing you to share cards, saved search settings, and share information with other users. Messaging keeps relevant information at everyone's fingertips within the suite, rather than buried in your email as internal Beacon messages are tied to individual Beacon HR or Finance record. You can even create Circles (lists of users) within Dashboard to simplify sharing.

Highlights from this release

- **Beacon:** System now warns you when attempting to change an AD user name on a user profile to an AD user name already in use.
- **Beacon FLOW:** Enhanced action tracking checklist and routing functionality extends the FLOW application's ability to build successful workflow packages with date trackable checklist items, linkable external document URLs, and additional notes fields for reviewer and approvers.
- **Beacon FLOW**: Preloading an Offboarding workflow template to provide an example of the new action tracking checklist functionality of the Beacon FLOW product.
- **Beacon Finance:** FY19 Commitments column is now available (and always reflects the active FY). Transaction details are now accessible for non-numeric, non-7-digit CAN values. Revised Missing CANs report to only show cans that have data.
- **Beacon HR:** Group Award Nomination screen now saves automatically when you add individuals to a new group award.

Specifics

Module	What we did	Why we did it
Beacon	Added a warning when users of Finance or HR attempt to change an AD user name to one already in use by the system.	Users reported the error. While it occurs rarely, updates and corrections sometimes require such updates.
FLOW	Add and Manage Templates screens now feature a more robust action tracking checklist, with Date Clicked, Linked Document, and Notes fields.	Existing document checklist feature lacked some information needed for Flow initiators to ensure the package is properly assembled to include coverage of actions which need to occur in other systems.
Finance	We changed the date range in your early AM Finance download so that it will pull in transactions processed in the early AM hours.	So you now have access to more current data and keeping pace with changes upstream.
Finance	On Account Structure screen, added "FY19 Commitments" column (which reflects the active FY's year) to show YTD current-FY-funded commitments. Clicking the link will drill into the FY-funded OC Detail screen.	Users needed a column that clearly reflected current-FY-funded commitments. We took our cues from the "FY19 Obligations" column we added last iteration.
Finance	Users can display Transaction details for non-numeric and non-7-digit blank CANs by checking the account in the Account Structure screen and clicking the $TRA button.	Originally, all CANs followed the same format, and the system was built to that expectation. Going forward, there is greater flexibility in CAN formatting.
Finance	Updated the CANs Missing from Master View report to show missing CANs with associated funding or spending, as well as the associated obligations, commitments, accruals, and disbursements.	Users maintaining the Master View need to see CANs that have associated dollar amounts but may have been mistakenly deleted. They also needed information about costs (obligations, commitments, accruals, and disbursements) associated with those missing CANs. The updated report provides that data, while ignoring deleted CANs with no associated funds or spending.
Finance	Fixed a bug that prevented the FY Obligations column from correctly reflecting the active FY in the title on some screens.	In some cases, the "FY19 Obligations" column title wasn't changing to reflect the active FY, though the data was.
Finance	Columns are sequenced alphabetically on the Account Structure column selector	This makes it easier for users to locate the columns they want to add.
Finance	On the Transaction screen, when "display all" is checked then the dollar amounts should be the same as after checking Summarize by Order #	In some cases, these numbers did not match Now they do! Users reported this bug.

Module	What we did	Why we did it
Finance	ORS Revenue Transaction detail can be filtered on process date now, and the Export to Excel process includes column headers.	Users reported this bug.
HR	When creating a new group award nomination, the award will automatically save if you begin adding individuals to the award.	Previously, the screen required users create and save a group award prior to adding individuals to it, or it would throw an error. This reduces steps and frustration.
HR	Enhanced the Length of Service Beacon dashboard card to show data for 5-year milestones.	We improved this card based on user feedback, and the desire to cover service milestones from 10 through 60 years.
HR	New FLOW Timeline and Tracking standard report available in the Reports module tracks Beacon FLOWs grouped by initiator and type of workflow tracking time to completion.	This allows Beacon FLOW administrators to review metrics on workflow times to completion to better identify any bottlenecks in the process.