

Deltek.

Maconomy Essentials

Create a Job
Quick Steps



Create a Job

1

Step 1: Create a job.

2

Step 2: Edit a job.

3

Step 3: Create and detach a sub-job.

4

Step 4: Attach a document to a job, and view a document.

5

Step 5: Submit a job.

6

Step 6: Approve or reject a job.

Overview of Quick Steps procedure

Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

Customer Balance Due

DKK0.00

Risks

Risk Profile: None

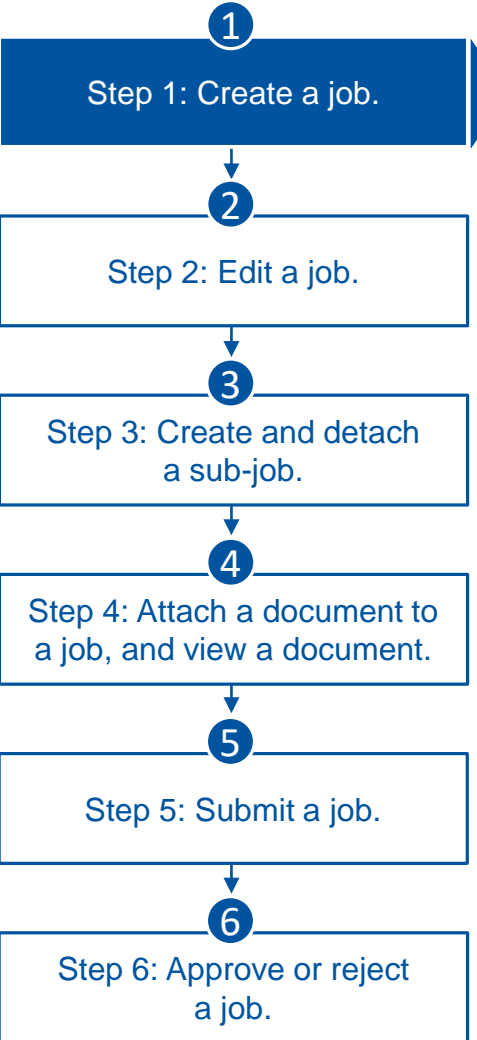
Approved Risk Fund:

DKK 0.00

Weighted Assigned Risk Fund:

DKK 0.00

Create a Job



A Under the Jobs menu, go to the Job Home workspace.

B Click + New Job.

C On the Select Template Job wizard, select a template job, and click **Continue**.

Follow the steps on the next slide to continue creating a new job.

Job Home My Open Jobs

Fixed Price, Excluding
Hjemmemiljø A/S 31003100

0%

Customer Balance Due
DKK0.00

Project Manager: Jim Jarrett 11

Invoicing Method: Fixed Price

| Estimate To Completion | Dates | Pending Approval | Risks |
|------------------------|---------------------------|--------------------|---------------------------------------|
| Actuals: DKK 0.00 | Start and End Dates: None | Time: DKK 0.00 | Risk Profile: None |
| ETC: DKK 0.00 | Next Invoicing Date: None | Expenses: DKK 0.00 | Approved Risk Fund: DKK 0.00 |
| Total: DKK 0.00 | Last Invoice Date: None | Mileage: DKK 0.00 | Weighted Assigned Risk Fund: DKK 0.00 |

Job: _____

Template Job: _____

Continue Cancel

T01-T&M
Time & Material job

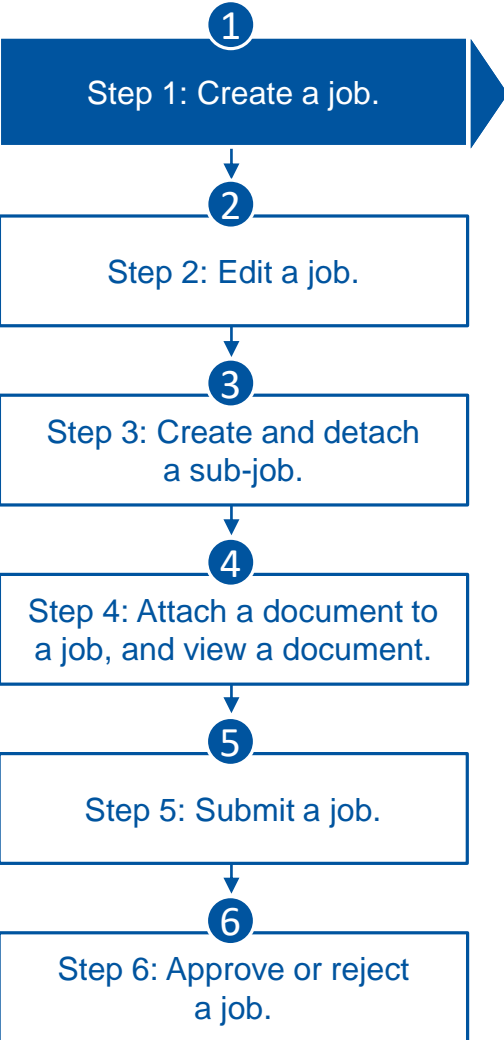
T02-T&M-WIP_Eval
Time & Material job with WIP evaluation

T03-T&M-RRCPM
Time & Material job with revenue recognition with completion percentage

T04-T&M-JInv_Alloc

More search results

Create a Job



- MAIN MENU
- JOBS
- Job Home
- Estimating
- Budgeting
- Quotes
- Risk Management
- Progress Evaluation
- WIP Invoice
- Invoice on Account
- Reports

Job Specific Information

Job: _____

Template Job: Time & Material job

Customer: _____*

Company: _____

Job Name: Time & Material job

Project Manager: Jim Jarrett

Location: _____

Job Group: _____

Buttons: Back, **Create**, Cancel

- C** Select a customer, which is a mandatory field, and a company.
- D** Update the job name, and the project manager if needed. By default, the **Project Manager** field displays the user.
- E** Select a project manager, location (responsible department), and job group.
- F** Click **Create**.

Job Home

Fixed Price, Excluding

Hjemmemiljø A/S 31003100

OVERVIEW DETAILS

Risk Profile

Project Manager: Jim Jarrett 11

Invoicing Method: Fixed Price

Estimate To Completion

Actuals:

ETC:

Total:

0 140 ?

+ New Job

Save Revert Submit Other Actions

Approved Risk Fund: DKK 0.00

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Step 6: Approve or reject a job.

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- JOBS
 - Job Home
 - Estimating
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Job Home My Open Jobs Search for Jobs 25+ records + New Job

Save Revert Submit Other Actions

OVERVIEW DETAILS CUSTOMER SUB-JOBS TASKS EMPLOYEES PRICES DOCUMENTS

Job Home My Open Jobs Search for Jobs 25+ records + New Job

Time & Material job 20250001

Standard debtor 100000

OVERVIEW DETAILS CUSTOMER SUB-JOBS TASKS

Margin %, Invoiced 0.00%

Billing Price Up/Down DKK0.00

DKK0.00

DKK0.00

DKK0.00

Project Manager: Kisuke Urahara 0001

Invoicing Method: Time and Material

| Budget vs Actuals | | |
|-------------------|----------|----------|
| | Cost | Sales |
| Budget | DKK 0.00 | DKK 0.00 |
| Actuals | DKK 0.00 | DKK 0.00 |
| Invoiced | DKK 0.00 | DKK 0.00 |

Dates: Start And End Dates, Last Invoice Date

Pending Approval: Time (DKK 0.00), Expenses (DKK 0.00), Mileage (DKK 0.00)

Risks: Risk Profile, Approved Risk Fund (DKK 0.00), Weighted Assigned Risk Fund (DKK 0.00)

file: None
d Risk Fund: DKK 0.00
d Assigned Risk Fund: DKK 0.00

Cancel Save Open

Close Reopen Copy... Edit

A Select a job from the filter list.

B From the Other Actions dropdown list, select Edit.

C Click the tab you want to update, and edit the fields as needed.

D If you want to revert your changes, click Revert. Otherwise, click Save.

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Step 6: Approve or reject a job.

Create Sub-Job

Derived from main job

Main Job

Time & Material job

20250001

Customer

Standard debtor

100000

Template Job

Time & Material job

T01-T&M

Sub job

Job Name

Project Manager

Jim Jarrett

11

Location

Job Group

Create

Cancel

B The **Customer** field will populate with the customer from the Main Job. Change the customer if required. This is a mandatory field.

A In the Sub-jobs tab, click **Create Sub-Job....**

C The **Template Job** field will populate with the template job from the Main Job. Change the template job if required.

D Enter a job name, location (responsible department), and job group.

E Click **Create**.

When a sub-job is created, the Main Job tab becomes visible. iAccess automatically navigates to the sub-job you just created within this tab, and save your changes.

Follow the step on the next slide to detach a sub-job.

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MAIN MENU

JOBS

Job Home

Estimating

Budgeting

Quotes

Risk Management

Progress Evaluation

WIP Invoice

Invoice on Account

Reports

Job Home

My Open Jobs

Search for Jobs

25+ records

+ New Job

Time & Material job 20250001

Standard debtor 100000

Save Revert Submit Other Actions

Open

OVERVIEW DETAILS CUSTOMER SUB-JOBS TASKS EMPLOYEES PRICES DOCUMENTS INVOICING PLAN ENTRIES PENDING ACTIONS

Create Sub-Job...

Includes Sub-Jobs: No

Main Job Invoice Selection: No

Invoicing Group: None

Combine Invoice Printout Lines: No

Allocation: 100.00 %

Job State: Initialized

Price

Pricing Principle: Time and Material

Fixed Price on Main Job:

DKK 0.00

Fixed Price incl. Subjobs:

DKK 0.00

Fixed Price for Main Job Inv.:

DKK 0.00

Main Job Invoicing Criteria

Company No.: 2

Bill to Customer: 100000

Department: Main Department

Currency: DKK

Company Tax Code: Standard

Pricing Principle: Time and Material

Time Unit: Hours

Blanket Invoice: No

Sub-Jobs

| Tax | Currency | Status | Project Manager No. | Project Manager Name | Responsible | Blocked For Budgeting | Blocked For Time... | Blocked For Amount... | Blocked For Invoicing | Closed |
|-----|----------|--------|---------------------|----------------------|-------------|-----------------------|---------------------|-----------------------|-----------------------|--------|
| ✓ | DKK | Order | 11 | Jim Jarrett | Administ | | | | | |

F
To detach a sub-job, select a sub-job line from the table part and from the row tools, click **Detach Sub-Job**.

Detach Sub-Job

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Step 6: Approve or reject a job.

A Select a job from the filter list.

B Go to the Documents tab.

C To upload one or more documents, click **Attach Documents**.

D In the dialog that opens, click **Choose Files** to open your file explorer.

E Select the files you want to upload, and click **Open**, or press **ENTER**.

F Click **OK**.

G To view the document, click the link in the **Document** field of the line. The file is downloaded to your computer/device.

From the row tools, you may also update, delete or view a selected document.

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MAIN MENU

JOBS

Job Home

Estimating

Budgeting

Quotes

Risk Management

Progress Evaluation

WIP Invoice

Invoice on Account

Reports

Job Home

My Open Jobs

Search for Jobs

1 of 25+

+ New Job

Fixed Price, Hjemmemiljø A/S 3

10Job000001
Fixed Price, Excluding outlays (Hjemmemiljø A/S)
Jim Jarrett

OVERVIEW

10Job000001-01
Sample (Hjemmemiljø A/S)
Jim Jarrett

Docume

10Job000002
Fixed Price, Excluding outlays, GBP, 4966600552 (Water Beds Ltd.)
Jim Jarrett

A
Use the search filter and/or the Search field to select a job.

B
Click Submit.

Save | Revert | Submit | Other Actions

Open

Attach Documents

Remark

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MAIN MENU

JOBS

Job Home

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WIP Invoice

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Reports

Job Home

My Open Jobs

Search for Jobs

Fixed Price, Excluding outlays 10Job000001

Hjemmemiljø A/S 31003100

OVERVIEW

DETAILS

CUSTOMER

SUB-JOBS

TASKS

EMPLOYEES

Document

Type

Size

Changed On

Reject Line

Rejection

Remarks

Reject

Cancel

A

Use the search filter and/or the **Search** field to select a job.

B

To approve a job, click **Approve**.

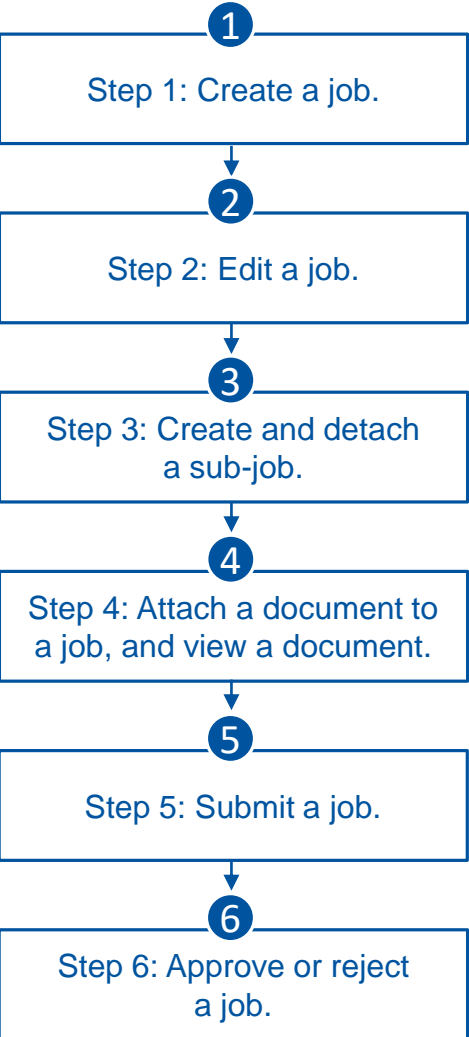
C

To reject a job, click **Reject Job...** On the Reject Line wizard, enter a rejection reason. This is a mandatory field.

D

Click **Reject**.

Create a Job



MAIN MENU

JOB

Job Home

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Job Home

My Open Jobs

Search for Jobs

1 of 25+

+ New Job

Fixed Price, Excluding outlays 10Job000001

Hjemmemiljø A/S 31003100

OVERVIEW

DETAILS

CUSTOMER

SUB-JOBS

TASKS

EMPLOYEES

PRICES

DOCUMENTS

INVOICING PLAN

ENTRIES

PENDING ACTIONS

Risk Profile

Customer Balance Due

DKK0.00

This concludes
Create a Job Quick Steps.

Project Manager: Jim Jarrett 11

Invoicing Method: Fixed Price

Estimate To Completion

Dates

Pending Approval

Risks

Actuals:

DKK 0.00

Start and End Dates: None

Time:

DKK 0.00

Risk Profile: None

ETC:

DKK 0.00

Next Invoicing Date: None

Expenses:

DKK 0.00

Approved Risk Fund:

DKK 0.00

Total:

DKK 0.00

Last Invoice Date: None

Mileage:

DKK 0.00

Weighted Assigned Risk Fund:

DKK 0.00