

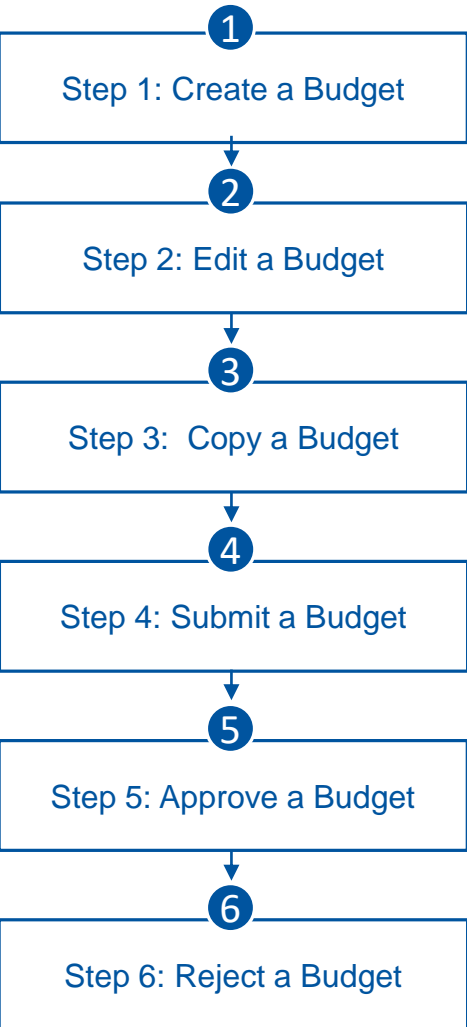
Deltek.

Maconomy Essentials

Enter a Budget Against a Project
Quick Steps



Overview of Steps



Deltek Talent Management

Application Development Testing Company English

Employees

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Main Dashboard

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.

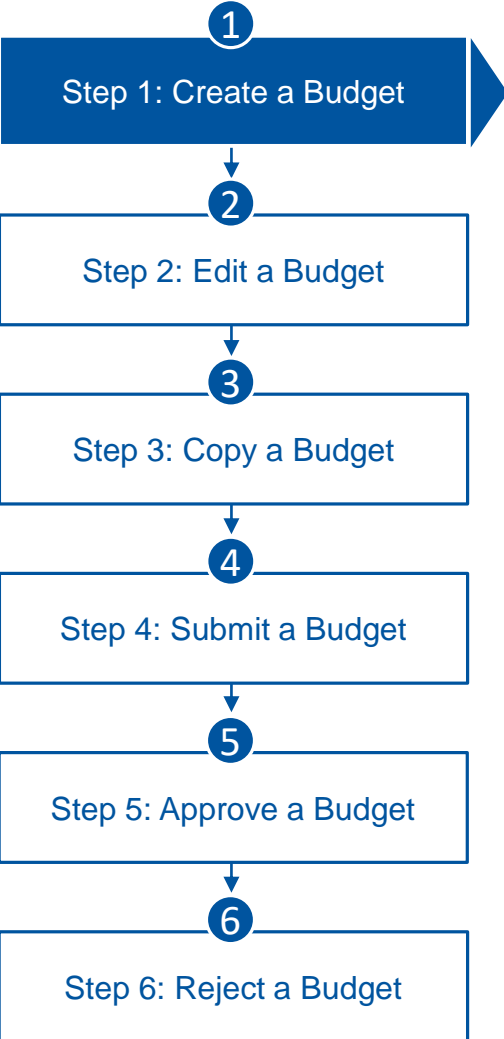
Get More Widgets

Begin

Kathryn Admin	12 Apr 2018	12 May 2018	+
Reine Admin	18 Apr 2018	None	+
Eped to Administrator			+

Best viewed in IE or Adobe PDF Reader.

Create a Budget



← MAIN MENU

- JOB**
- Job Home
- Estimating
- Budgeting
- Risk Management
- Progress Evaluation
- WIP Invoice
- Invoice on account

Budgeting

1 of 1

Save

Submit Budget | Other Actions

Open

WORKING BUDGET | BASELINE | REVISIONS

	Hours	Cost	Billing Price
Time	0.00	DKK 0.00	DKK 0.00
Amount		DKK 0.00	DKK 0.00
Total	0.00	DKK 0.00	DKK 0.00

FULL BUDGET | TIME | AMOUNT

Description	Line Type	Task	Empl.	Incl. In	Employee	FP	Qty	Cost	Total Cost	Billing Price	Total Billing	GM	Markup
Project management	Time	100	Project m										
Consulting	Time	110	Consultan										
Travel time	Time	190	Consultan										
Project purchases	Amount	400											
Subcontractor costs	Amount	410				✓	0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Hotel	Amount	500				✓	0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Air fares	Amount	510				✓	0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Transportation	Amount	520				✓	0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Other travelling costs	Amount	530				✓	0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Other costs	Amount								DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Entertainment	Amount								DKK 0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %

+ Add Budget Line

A Under Jobs, go to the Budgeting workspace.

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

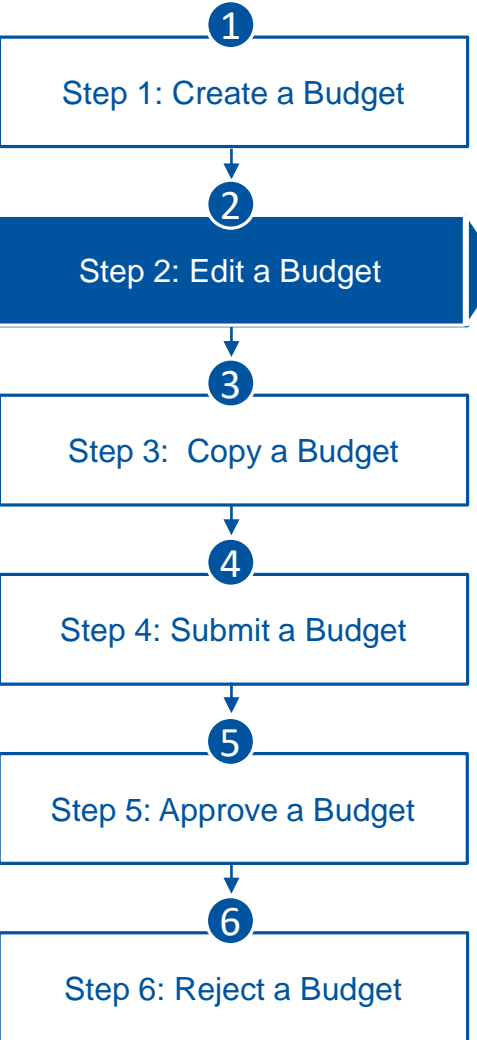
C Depending on the budget you wish to create, click Working Budget or Baseline. The available tabs depend on the setup of your job.

D Typically the base of your budget is populated from your Job template. If there is no budget from your template then Click Create Working / Baseline

E To add budget lines, click + Add Budget Line, and enter information as needed.

E Click Save.

Edit a Budget



A Use the filter or Search to select a job.

B Click the tab you want to update.

D Click Edit, then edit the lines as needed.

	Hours	Cost	Billing Price		
Time	0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Amount		DKK 600.00	DKK 600.00	DKK 0.00	0.00 %
Total	0.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

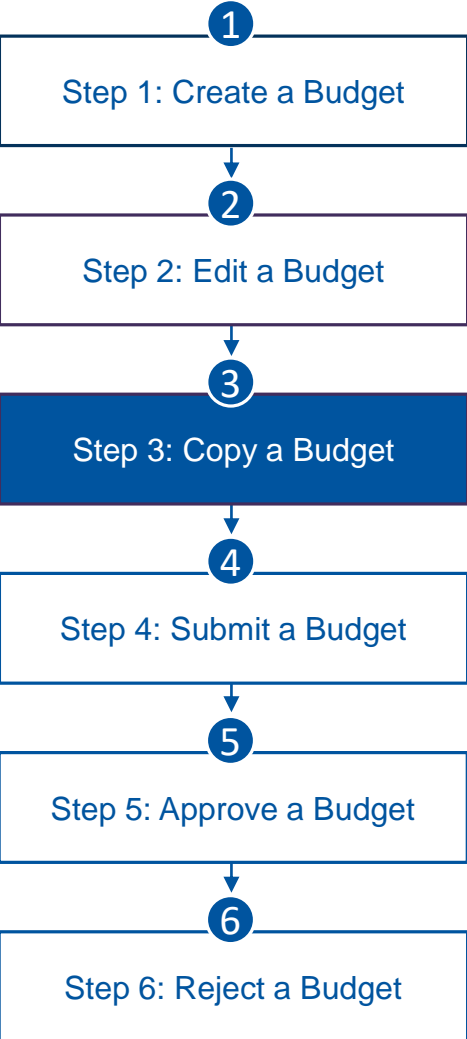
C If you are amending a previous budget revision click Reopen Budget.

Description	Line Type	Task	Empl. Category	Employee	Incl. In FP	Qty	Cost	Total Cost	Billing Price	Total Billing Price	GM	Markup
materialer	Amount	205			✓	1.00	DKK 600.00	DKK 600.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

You can edit a budget to add or modify information regarding your expenses on the job. However, if it has already been submitted or approved, the budget is reopened to create a new revision.

E When done, click Save, or press Enter.

Copy a Budget



A Use the filter or Search to select a job.

Project A 10000

Merck 10007

WORKING BUDGET BASELINE REVISIONS

	Hours	Cost	Billing Price	GM	GM %
Time	0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Amount		DKK 600.00	DKK 600.00	DKK 0.00	0.00 %
Total	0.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

FULL BUDGET TIME AMOUNT

Description
There are no records to show in this view.

D A wizard displays. To copy a budget:

- Populate Copy From Job No. (leave blank if you are copying from the current Project).
- Populate Copy from Budget (mandatory field).
- In Copy from Revision No. choose the revision you want to copy.
- Select other fields as appropriate and click Copy.

C From the Other Actions dropdown, select Copy Budget.

Other Actions

- Remove All Lines
- Recalculate Budget
- Copy Budget...

Copy From Job Budget

The lines from the selected Job Budget will be added to the current Job Budget

Copy From Job No.

Copy From Budget

Copy From Revision No.

Overwrite Duplicate Lines

Only Copy New Lines

Submit Budget

1

Step 1: Create a Budget

2

Step 2: Edit a Budget

3

Step 3: Copy a Budget

4

Step 4: Submit a Budget

5

Step 5: Approve a Budget

6

Step 6: Reject a Budget

A Use the filter or Search to select a job.

B Click Submit Budget.

C If you do not use approval hierarchies for Job Budgets you will be able to click Approve Budget to lock down this revision of your budget.

Project A 10000

Merck 10007

WORKING BUDGET BASELINE REVISIONS

	Hours	Cost	Billing Price	GM	GM %
Time	0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Amount		DKK 600.00	DKK 600.00	DKK 0.00	0.00 %
Total	0.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

FULL BUDGET TIME AMOUNT

Description	Line Type	Task	Empl. Category	Employee	Markup
There are no records to show in this grid.					

When you have finalized all details in the budget, you can submit it for approval.

Approve Budget

← MAIN MENU

JOBS

- Job Home
- Estimating
- Budgeting**
- Risk Management
- Progress Evaluation
- WIP Invoice
- Invoice on Account

Budgeting

All Jobs ▾ project a

A Use the filter or Search to select a job.

Project A 10000

Merck 10007

WORKING BUDGET BASELINE REVISIONS

	Hours	Cost	Billing Price	GM	GM %
Time	0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Amount		DKK 600.00	DKK 600.00	DKK 0.00	0.00 %
Total	0.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

FULL BUDGET TIME AMOUNT

Description	Line Type	Task	Empl. Category	Employee	Incl. In FP	Qty	Cost	Total Cost	Billing Price	Total Billing Price	GM	Markup
materialer	Amount	205			✓	1.00	DKK 600.00	DKK 600.00	DKK 600.00	DKK 600.00	0.00	0.00%

Approve Budget Reject Budget... Other Actions ▾

B To approve the budget, click Approve Budget.

Review then approve or reject new/updated budgets submitted for your approval.

Note: If you are using approval hierarchies for Job Budgeting, you can also approve (and reject) budgets in the Approval Center workspace.

+ Add Budget Line

1

Step 1: Create a Budget

2

Step 2: Edit a Budget

3

Step 3: Copy a Budget

4

Step 4: Submit a Budget

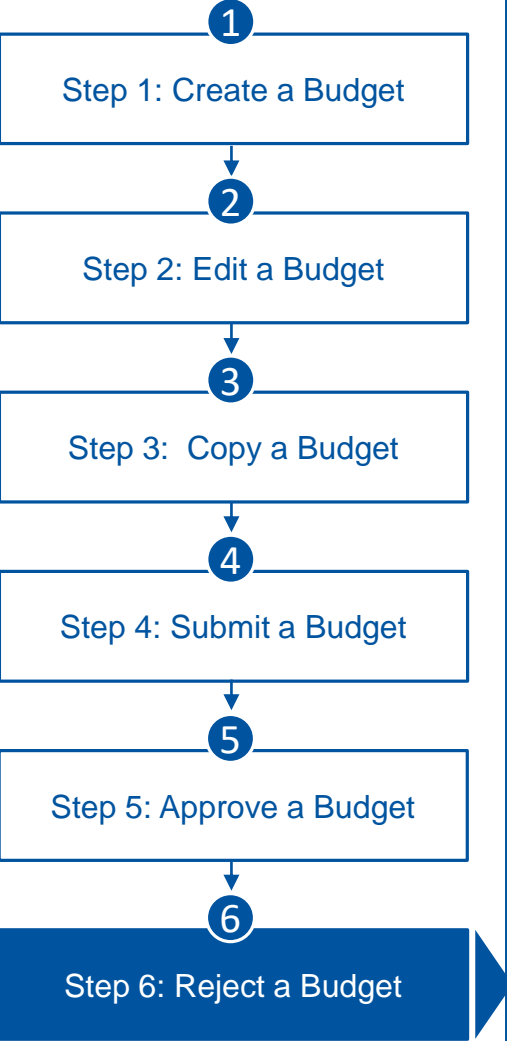
5

Step 5: Approve a Budget

6

Step 6: Reject a Budget

Reject Budget



MAIN MENU

JOBS

- Job Home
- Estimating
- Budgeting
- Risk Management
- Progress Evaluation
- WIP Invoice
- Invoice on Account

Budgeting

All Jobs project a

A Use the filter or Search to select a job.

Project A 10000

Merck 10007

WORKING BUDGET BASELINE REVISIONS

	Hours	Cost	Billing Price	GM	GM %
Time	0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Amount		DKK 600.00	DKK 600.00	DKK 0.00	0.00 %
Total	0.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

Approve Budget Reject Budget... Other Actions

B To reject the budget, click Reject Budget. iAccess displays the Reject Line wizard.

FULL BUDGET TIME AMOUNT

Description	Line Type	Task	Empl. Category	Employee	Incl. In FP	Qty	Cost	Total Cost	Billing Price	Price	GM	Markup
materialer	Amount	205			✓	1.00	DKK 600.00	DKK 600.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

C Enter a rejection reason. This is a required field.

Reject Line

Rejection _____

Remarks _____ *

Reject Cancel

D Click Reject.

Budget Procedures

1

Step 1: Create a Budget

2

Step 2: Edit a Budget

3

Step 3: Copy a Budget

4

Step 4: Submit a Budget

5

Step 5: Approve a Budget

6

Step 6: Reject a Budget

	Hours	Cost	Billing Price	GM	GM %
Time	0.00	DKK 0.00	DKK 0.00	DKK 0.00	0.00 %
Amount		DKK 600.00	DKK 600.00	DKK 0.00	0.00 %
Total	0.00	DKK 600.00	DKK 600.00	DKK 0.00	0.00 %

materialer

DKK 0.00 0.00%

This concludes
Enter Budget Against a Project Quick Steps.