

Deltek.

# Maconomy Essentials

*Introduction to the Workspace Client*  
Quick Steps

Begin

A photograph of three business professionals in a modern office setting. A woman in a striped shirt is holding a tablet, and a man in a blue sweater is pointing at the screen. Another woman in a black shirt is looking on. The background shows office equipment and a bright, clean environment.

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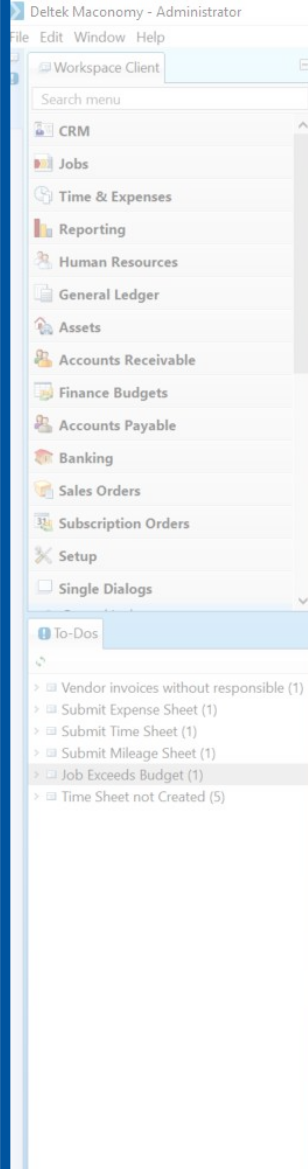
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## Overview of Quick Steps

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

Click **Next** to proceed through each step and sub-step.

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Best viewed in IE or Adobe PDF Reader.

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The Workspace Client is the Maconomy desktop client.

It is a system consisting of modules, organized hierarchically around a:

- Business entity (such as a customer)
- Role (such as a project manager)
- Process (such as financial reporting)

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## To log in to Maconomy:

Login to Deltek Maconomy

User name

Password

Language English (United States)

[Server Configuration](#)

A

Enter your User Name and Password.

Note: If your organization uses MFA, you must also enter an authorization code.

B

Select the language you want the system to use.

C

Click Login.

Login to Deltek Maconomy

User name

Password

Language English (United States)

[Server Configuration](#)

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- Search menu
- CRM
- Jobs
- Time & Expenses**
- Reporting
- Human Resources
- General Ledger
- Assets
- Accounts Receivable
- Finance Budgets
- Accounts Payable
- Banking
- Sales Orders
- Subscription Orders
- Setup
- Single Dialogs

- > Vendor invoices without responsible (1)
- > Submit Expense Sheet (1)
- > Submit Time Sheet (1)
- > Submit Mileage Sheet (1)
- > Job Exceeds Budget (1)
- > Time Sheet not Created (5)

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Workspace modules display according to your role and access.

Each module contains one or more workspaces designed for specific tasks.

Deltek Maconomy

**Modules**

Click a module to view available workspaces.

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**A** To open a workspace, double-click it in the menu.

**B** To close, click the X on the workspace tab.

**Workspaces**

You can open several workspaces simultaneously.

You can also open the same workspace more than once. This is useful, for example, when you work with a number of jobs at the same time.

Contract	Actuals
300,000	300,000

Item	Value
Hours Registered	319.70
Open Billing Price, Time	287,500.00 NOK
Open Cost Price, Time	143,750.00 NOK
Billing Price Registered, Time	319,700.00 NOK
Cost Price Registered, Time	159,850.00 NOK

Item	Value
Open Cost Price, Amount	0.00 NOK
Open Billing Price, Amount	0.00 NOK

Item	Value
Billing Price, Amount	0.00 NOK

Item	Value
Revenue Recognized, Total	322,308.70 NOK
Gross Margin, Invoiced	16,100.00 NOK
Gross Margin Percenta...	46.25
Markup Percentage, In...	86.06

Item	Value
Customer Balance	43,510.88 NOK
Customer Balance Due	43,510.88 NOK

Item	Value
Estimated Ending Date	-
Work Completed On	-
Closed	No
Actual Completion	-

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The screenshot shows the Delttek workspace interface. At the top, there are tabs for 'Time & Expenses', 'Absence', and 'Absence Approval'. Below these are sub-tabs for 'Employees', 'Monthly Overview', 'Absence Requests', and 'Allowance Requests'. A 'Show Filter List' button is in the top right. The main content area includes a calendar for January 2022, a legend for absence statuses (Open, Submitted, Approved, Rejected, Overlap), and sections for 'Vacation Period' and 'Employee Information'. A 'Search Filter' box is on the right. At the bottom, there are sub-tabs for 'Absence Requests', 'Allowance Requests', 'Year Overview', 'Team Overview', and 'Allowance History'. A 'Sliding Panel' is visible on the right side, labeled 'Request Details'. A 'Tab' is highlighted on the 'Absence' sub-tab, and 'Sub-tabs' are indicated by the bottom row of sub-tabs.

## Anatomy of a Workspace

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### Navigating a Workspace

Workspaces may include sections, tabs, sub-tabs, and sliding panels.

Click the area to display it and navigate through sub-areas and thus through Maconomy.

You can often add information in the sub-tab.

Click the arrow to expand or collapse the filter.

The 'Request Details' dialog box is open, showing the following information:

- Absence**
  - First Day of Absence: [Field]
  - Duration: [Field]
  - Working Time: [Field]
  - Last Day of Absence: [Field]
  - Absence Type: [Field]
  - First Day is Half Day
  - Last Day is Half Day
  - Temporary
  - Remarks: [Field]
  - Synchronized with Tim...: [Field]
  - Time Unit: [Field]
  - Hours, First Day: [Field]
  - Hours, Last Day: [Field]
- Status**
  - Submitted: No
  - Approved: No
  - Rejected: No
  - Reopened: [Field]

Click the arrow to expand or collapse sliding panels.

Use the panel to edit or review data.

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Workspace Client

Search menu

Time & Expenses

Time & Expenses

- Time
- Express Purchase Orders
- Purchase Orders
- Supervisor Time & Expens
- Project Manager Approva
- Time Sheet Audit
- Absence
- Absence Approval
- Absence Administration
- Approval Center

Reporting

To-Dos

- Vendor invoices without resp
- Submit Expense Sheet (1)
- Submit Time Sheet (1)
- Submit Mileage Sheet (1)
- Job Exceeds Budget (1)
- Time Sheet not Created (4)
- New Job (7)

Time & Expenses

Expense Sheet

PH Expense 10700005

Job Currency project 1020003

Employee Sean Williams (101)

Total Amount 0.00 NOK

Period Period

Status Submitted Approved

Registrations Documents

Document Name	Document Type	Document Size (Bytes)	Locked	Lo	Close				Changed by
1 DeltekMaconomyBPM...	Adobe Acrobat	8428762			<input type="checkbox"/>	1			1/11/2022 Administrator
2 Official Receipt.pdf	Adobe Acrobat	55283			<input type="checkbox"/>	1			1/12/2022 Administrator
3 Official Receipt_2.pdf	Adobe Acrobat	55283			<input type="checkbox"/>	1			1/12/2022 Administrator
4 Official Receipt_3.pdf	Adobe Acrobat	55283			<input type="checkbox"/>	1			Administrator

For example, to add an Expense document, navigate through the following areas:

1. Time & Expenses [module]
2. Time & Expenses [workspace]
3. Expenses [section]
4. Expense Sheet [tab]
5. Documents [sub-tab]

**Navigating a Workspace Example**

This type of sequence appears in Maconomy documentation in the format:

Time & Expenses » Time & Expenses » Expenses » Expense Sheet » Documents

Next

Time x Time & Expenses x Jobs x

Job List New Job Copy Job Import

how:  My Open Jobs  All My Jobs  Department Jobs  Open Jobs  Invoicing  All Jobs  Responsible

Showing 1 - 16 of 16 results << Prev Next >>

Job No.	Job Name	Customer	Location	Project Manager No.	Project Manager Name	Fixed Price, Currency	Hou...	Reg. Cost, Base	Reg. Billing, B
1	1020000 Consulting	Cap Gemini	1010		Sean Williams	00.00 NOK	319....	162,458.70 NOK	322,308.70
2	1020000-01 sub	Cap Gemini				NOK	0.00	0.00 NOK	0.00
3	1020001 WSC consultancy	WSC Contact Con				NOK	0.00	2,000.00 NOK	2,000.00
4	1020002 iAccess consultancy	iAccess Customer				NOK	90.00	55,000.00 NOK	100,000.00
5	1020003 Currency project	WSC Customer			Sean Williams	0.00 USD	1.00	50.00 NOK	50.00
6	1020007 Firmaavledning	Cap Gemini	1010	101	Sean Williams	0.00 M			
7	1020008 teste test	Cap Gemini	1010	101	Sean Williams	0.00			
8	1020009 Testkonvertering til salg	Cap Gem			Sean Williams	0.00			
9	1020010 Endre litt på rapporter	Test kont			Sean Williams	0.00			
10	1020011 PWC-CRM rapp	Cap Gem			Sean Williams	0.00 NOK	0.00	0.00 NOK	0.00
		Klarna			Sean Williams	0.00 NOK	0.00	0.00 NOK	0.00
		Klarna			Sean Williams	0.00 NOK	0.00	0.00 NOK	0.00
		Klarna			Sean Williams	0.00 NOK	0.00	0.00 NOK	0.00
14	Intern100 Intern tid / admin	Interkunde firma 10	1010	101	Sean Williams	0.00 NOK	0.00	0.00 NOK	0.00
15	Intern101 Ferie og fravær	Interkunde firma 10	1010	101	Sean Williams	0.00 NOK	7.50	3,750.00 NOK	0.00
16	Intern102 Justering flex/ferie	Interkunde firma 10	1010	101	Sean Williams	0.00 NOK	0.00	0.00 NOK	0.00

Partial match

Show Filter List Close Filter List

No of results to show: 25

Select a radio button to filter by category

Toggle the arrow to Show or Close the Filter List

Control the number of items to display

Use the text fields to search for specific information

Filters

Each workspace has one or more Filter Lists. Double-click on a row to view detail or edit.

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The screenshot displays the 'Expense Sheet' form in the Deltak application. The form includes fields for 'Expense Sheet' (PH Expense), 'Job' (Currency project), 'Employee' (Sean Williams), and 'Total Amount' (0.00 NOK). It also shows 'Period' (1/3/2022 - 1/7/2022) and 'Status' (Submitted). Below the form is a table with columns: Entry Date, Favorite, Job Name, Customer Name, Task Description, Description, Expense Justification, and Reference. The first row contains: 1, 1/7/2022, Currency project, Currency project, WSC Customer, Hotell, Hotell.

Callout box A points to the toolbar of the 'Expense Sheet' tab, which contains buttons for 'Submit', 'Reopen', and 'Copy'. Callout box B points to the 'Create favorite' button in the 'Documents' sub-tab toolbar. Another callout box points to the 'Hotell' entry in the table's 'Description' column.

**A**

Actions are generally buttons on the toolbar on tabs and sub-tabs.

They are also available in some filter and dropdown lists.

**B**

To use an action, click on it.

Actions help you perform a task.

**Actions**

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Time & Expenses x Time x Absence Approval x Jobs x \*Work Orders x

Work Order List + New Work Order

Show: My Open Work Orders All M Invoicing All Wo

Now showing: 0 results << Prev Next >>

Job No. Customer Project Manager Na

Work Order Na...

Select Template

Template Template Name Templ... \*

Details

Customer Name 1 Custo... \*

Company Name Number \*

Location Description Name \*

Create Cancel

Wizards are often triggered by actions.

In this example, when you click the **+New Work Order** action, the **Create Work Order** wizard displays to guide you through the steps.

Complete the fields and click Create.

Wizards are special pop-up windows that help you perform a specific task in Maconomy.

Wizards combine steps in a sequence to guide you through a task both common and complex.

**Wizards**

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The screenshot shows the Deltak Maconomy application window. The 'File' menu is open, and the 'Exit' option is highlighted. A blue arrow points from the 'Exit' option to a callout box. The main window displays an 'Expense Sheet' for 'PH Expense (10700005) Sean Williams' with various fields for 'Expense Sheet', 'Job', 'Employee', 'Period', 'Exchange Rate', and 'Status'. Below this is a table with columns for 'Entry Date', 'Favorite', 'Job Name', 'Customer Name', 'Task Description', 'Description', 'Expense Justification', and 'Ref... Qu'. The first row shows '1/7/2022', 'Currency ...', 'Currency project', 'WSC Customer', and 'Hotell'.

Select File » Exit.  
The system automatically logs you out.

Exit Maconomy when done.

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