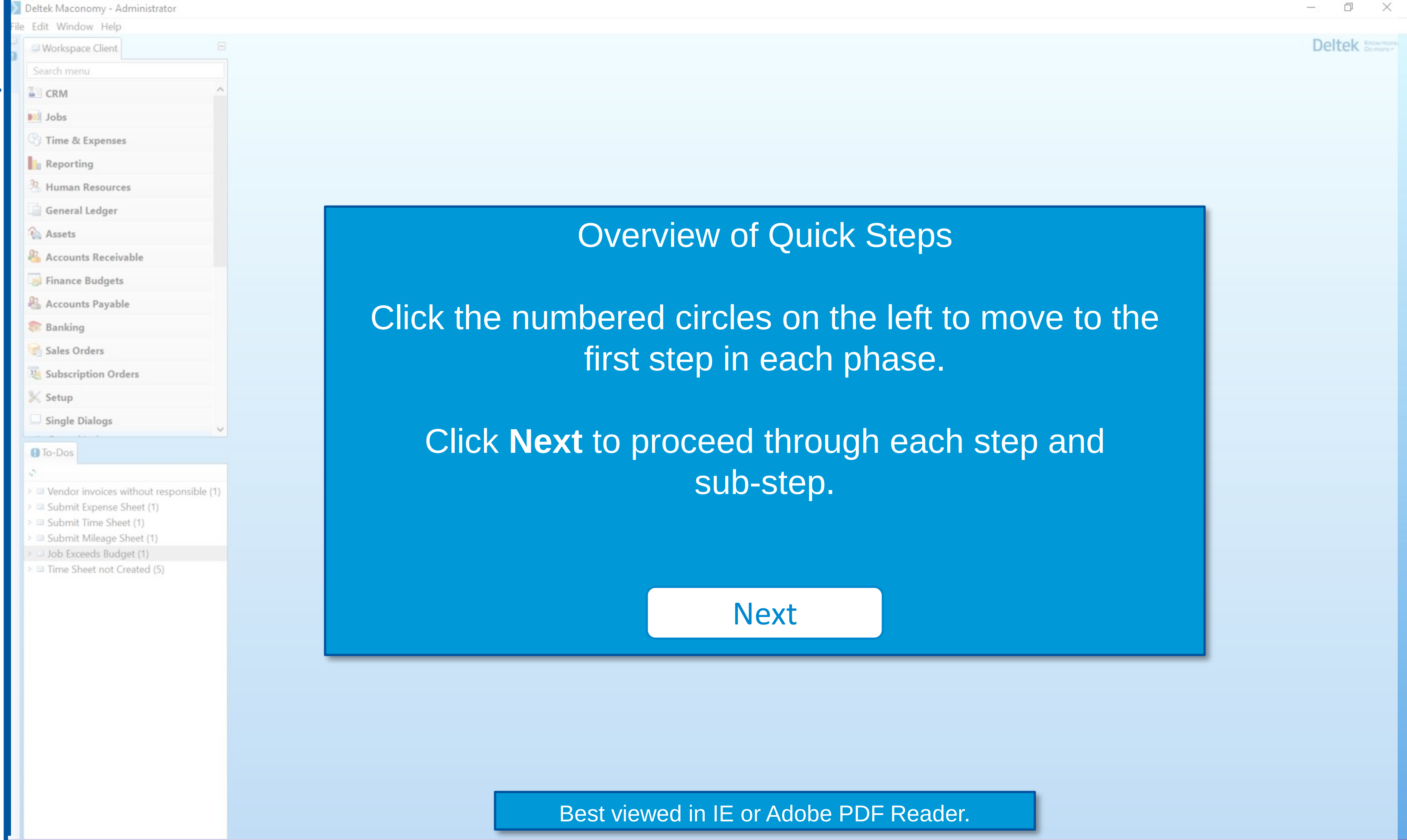
Deltek

Maconomy Essentials

Introduction to the Workspace Client

Quick Steps

Begin



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.

Next

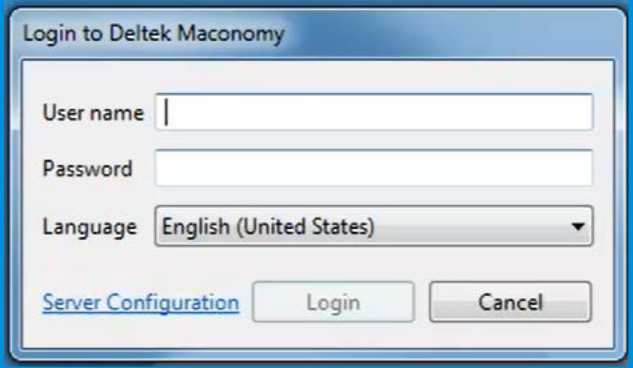
Best viewed in IE or Adobe PDF Reader.

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

To log in to Maconomy:

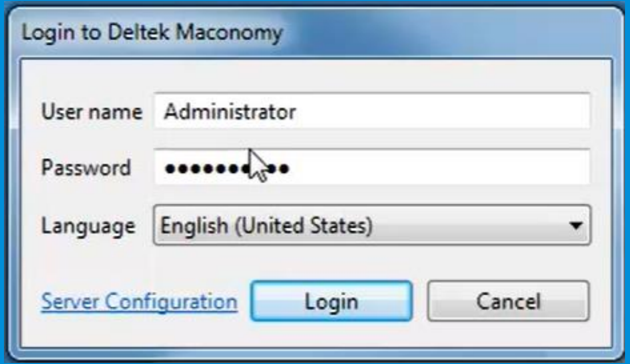


A Enter your User Name and Password.

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.



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4. Workspaces
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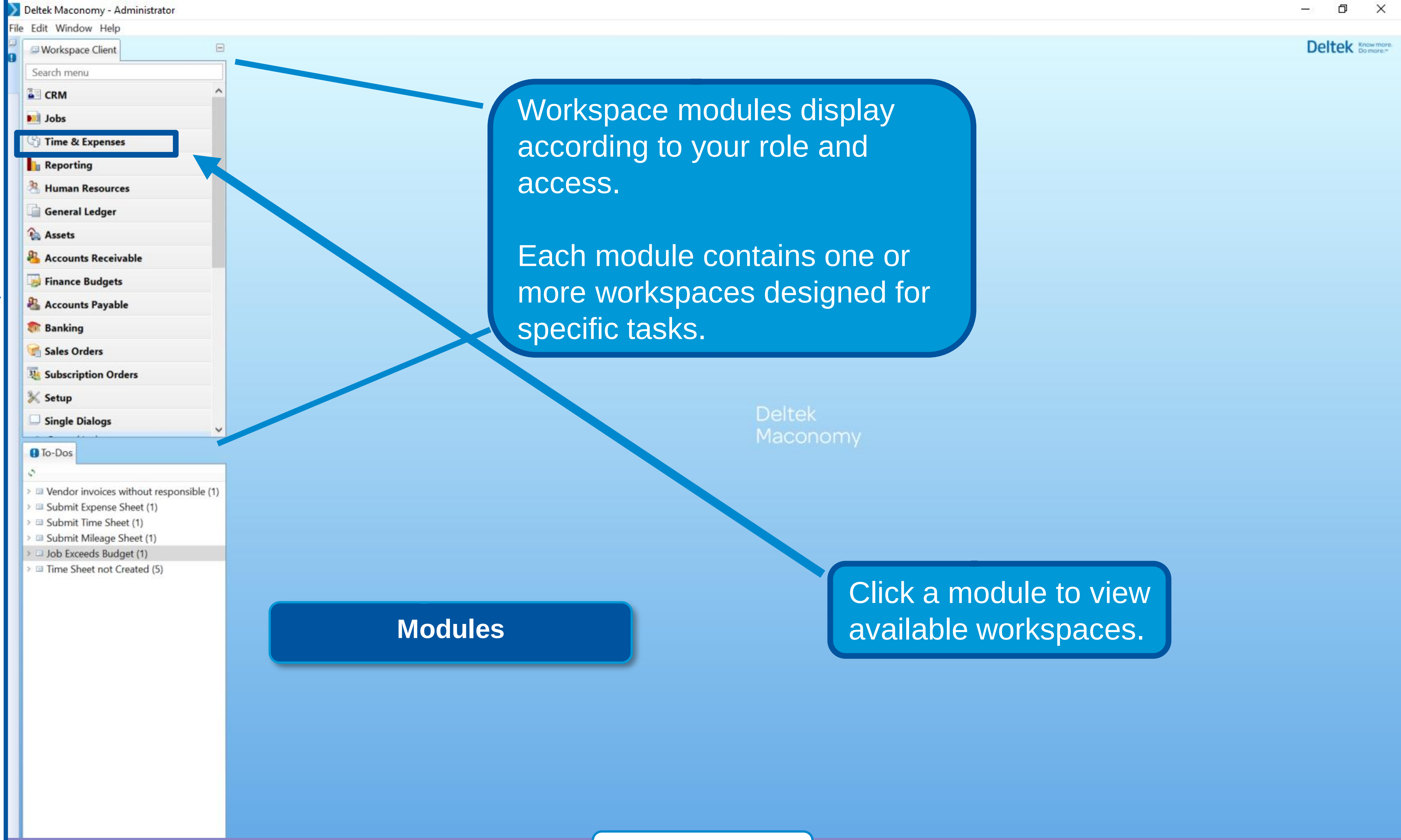
8. Exit Maconomy



Workspace modules display according to your role and access.

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

Modules

Click a module to view available workspaces.

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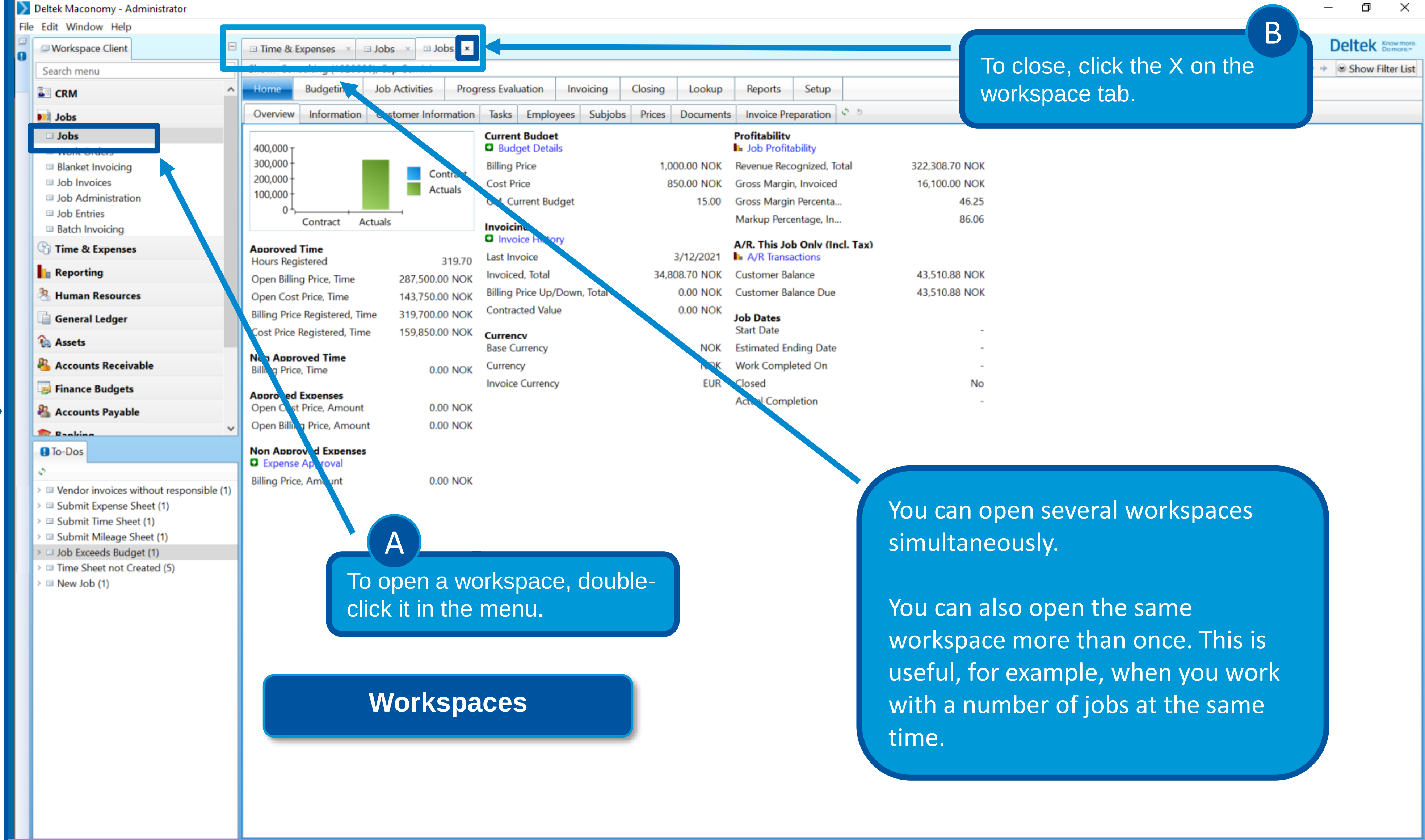

B To close, click the X on the workspace tab.

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

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.

Workspaces

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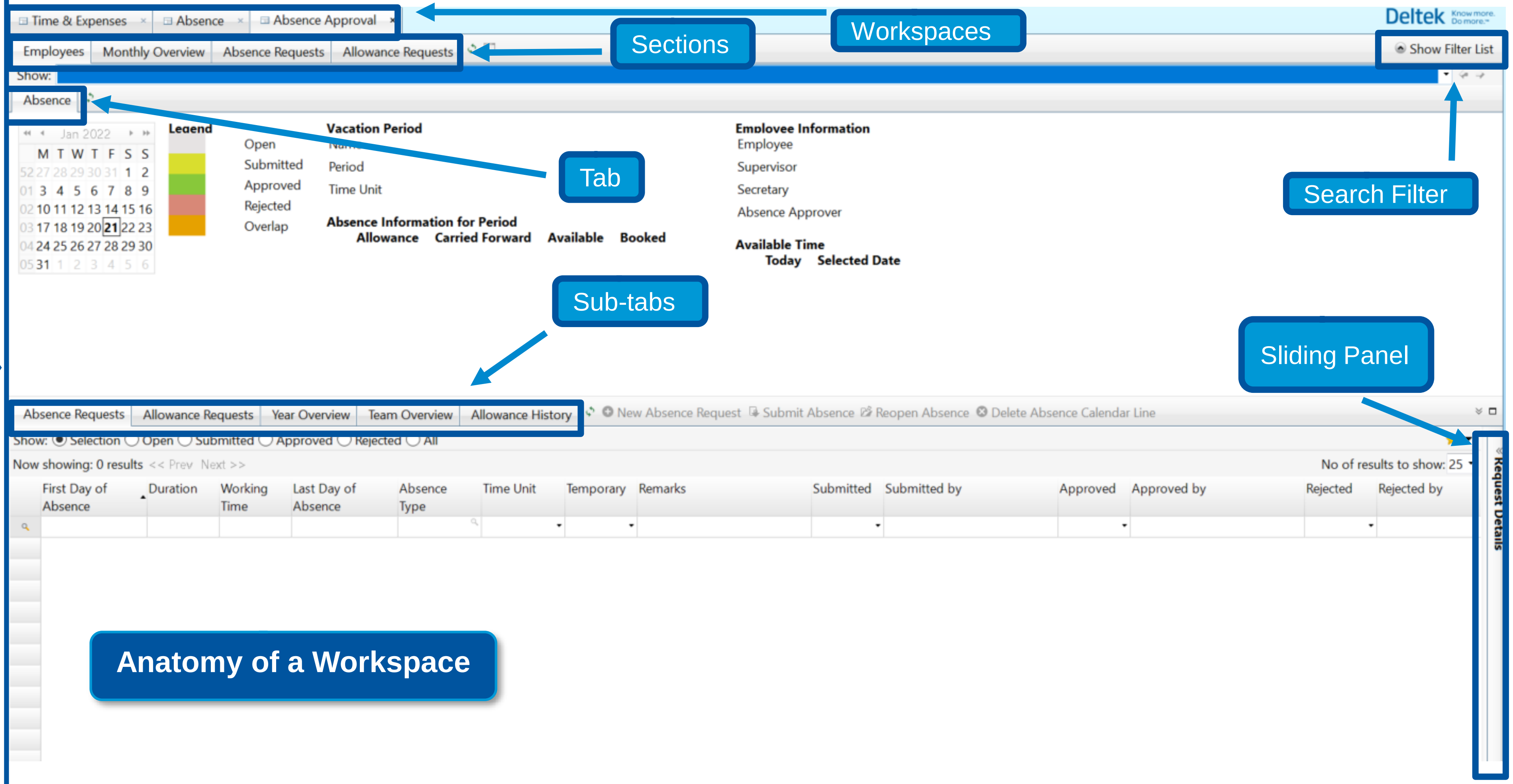
Anatomy of a Workspace



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Navigating a Workspace

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

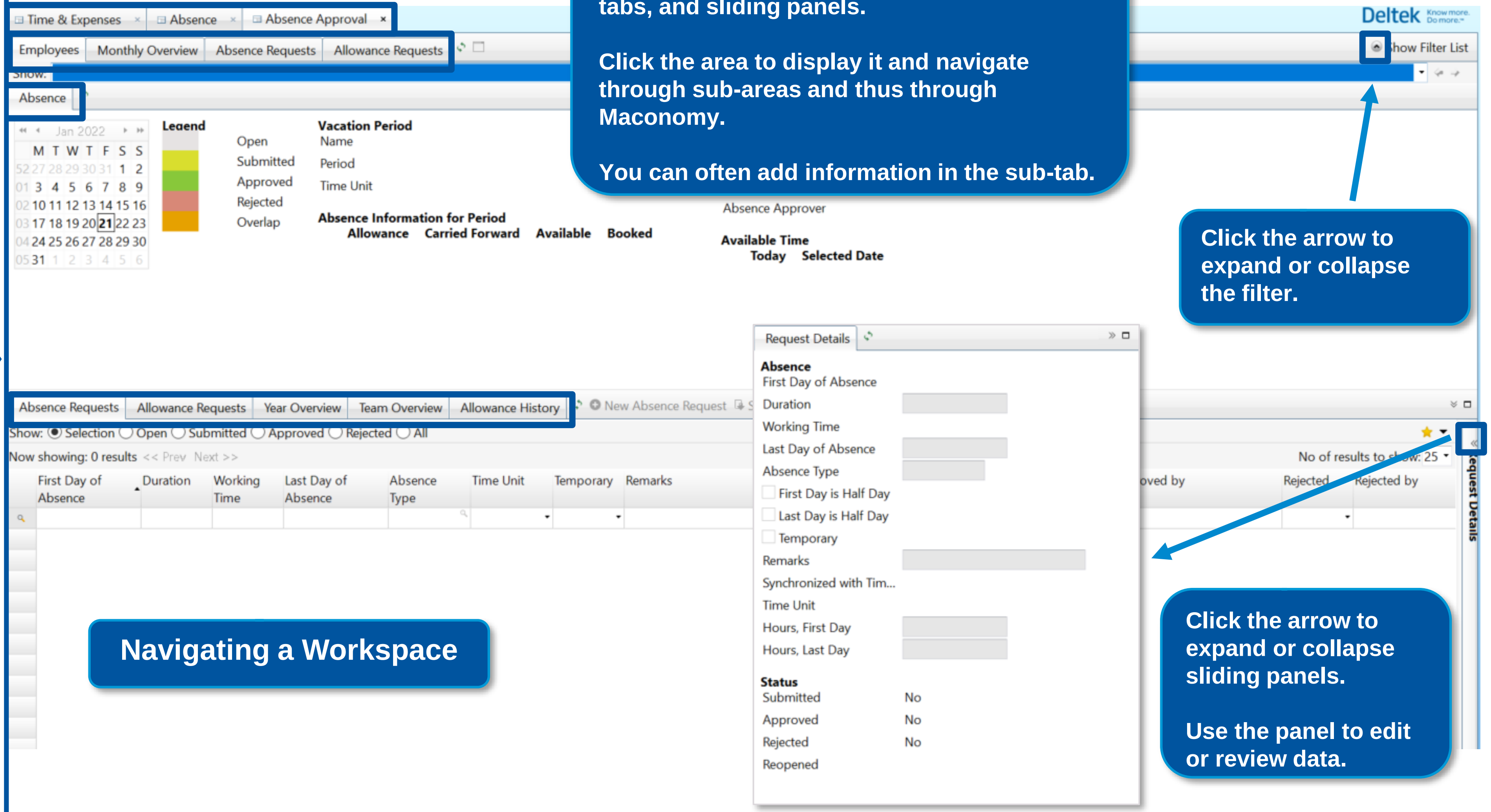
Click the area to display it and navigate through sub-areas and thus through Maconomy.

You can often add information in the sub-tab.

Click the arrow to expand or collapse the filter.

Click the arrow to expand or collapse sliding panels.

Use the panel to edit or review data.



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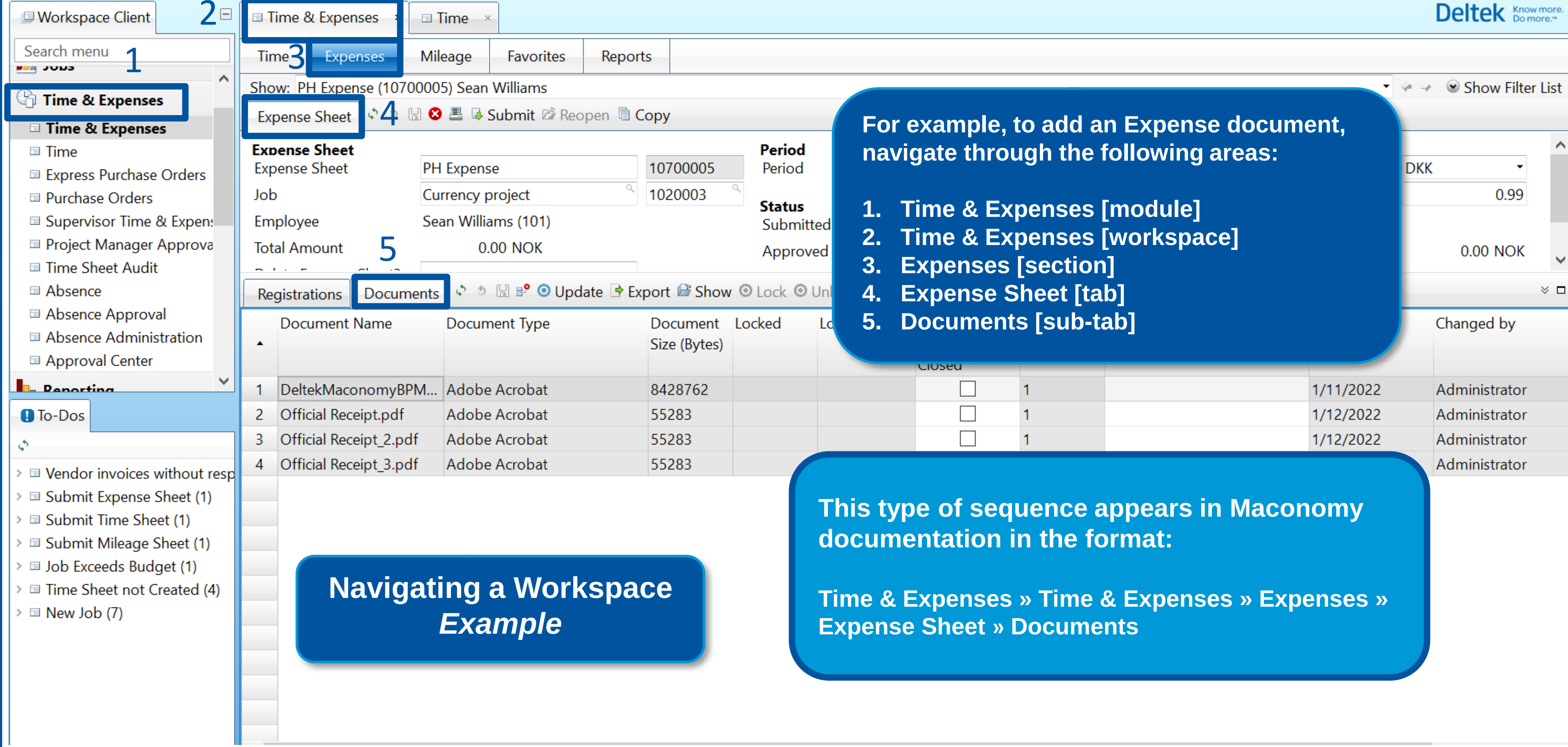

For example, to add an Expense document, navigate through the following areas:

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

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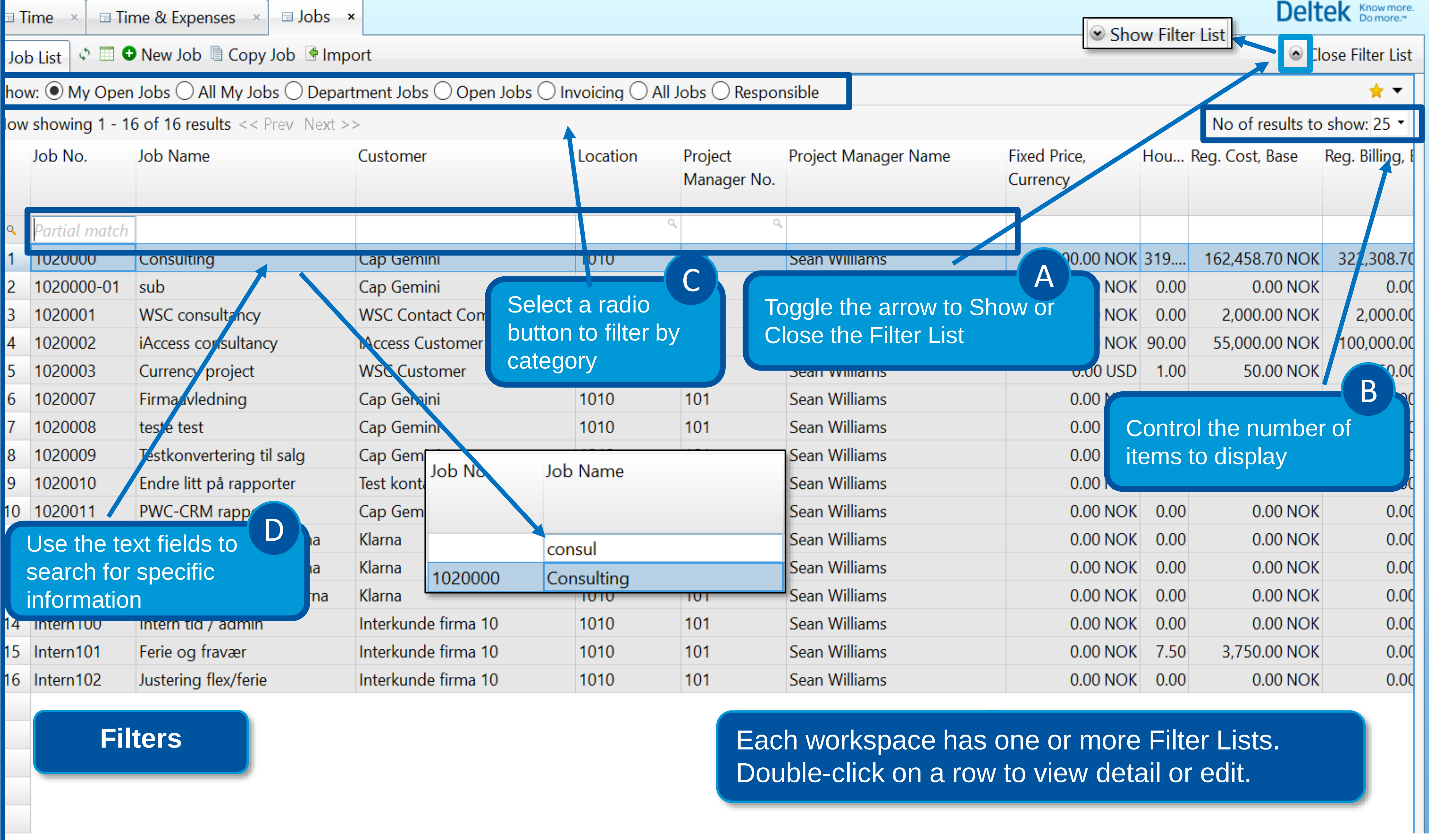
Filters



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

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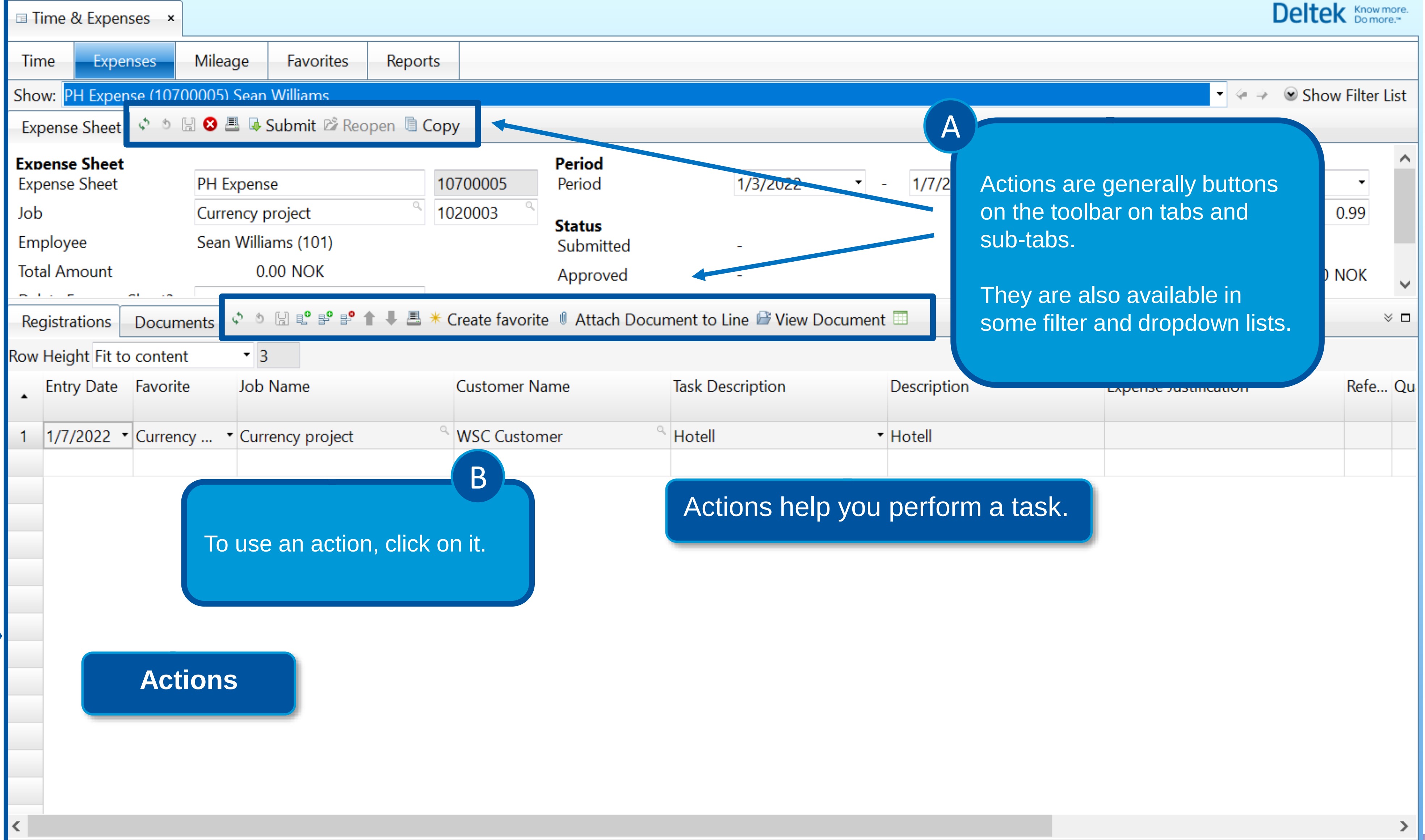

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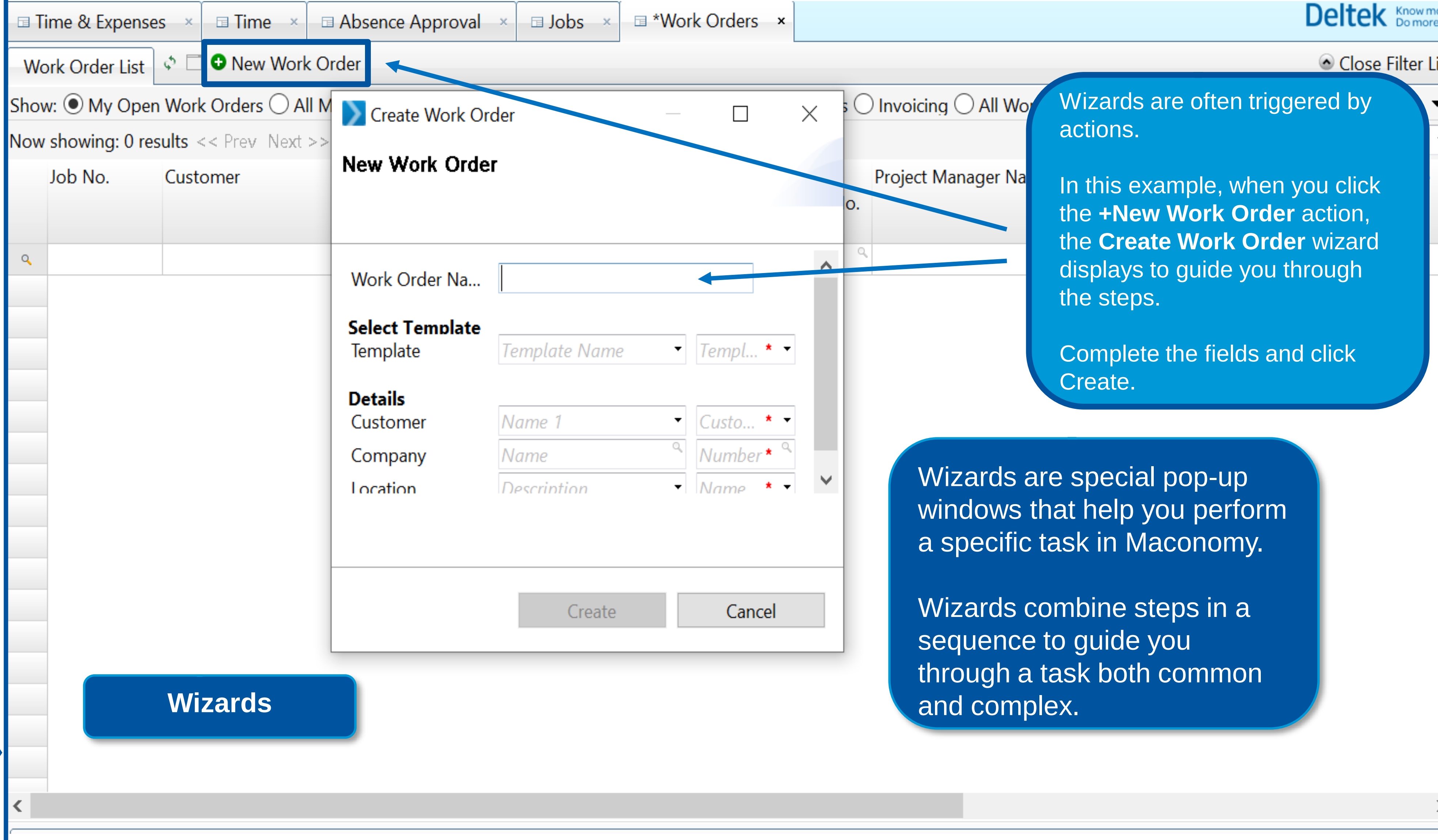
Wizards



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.

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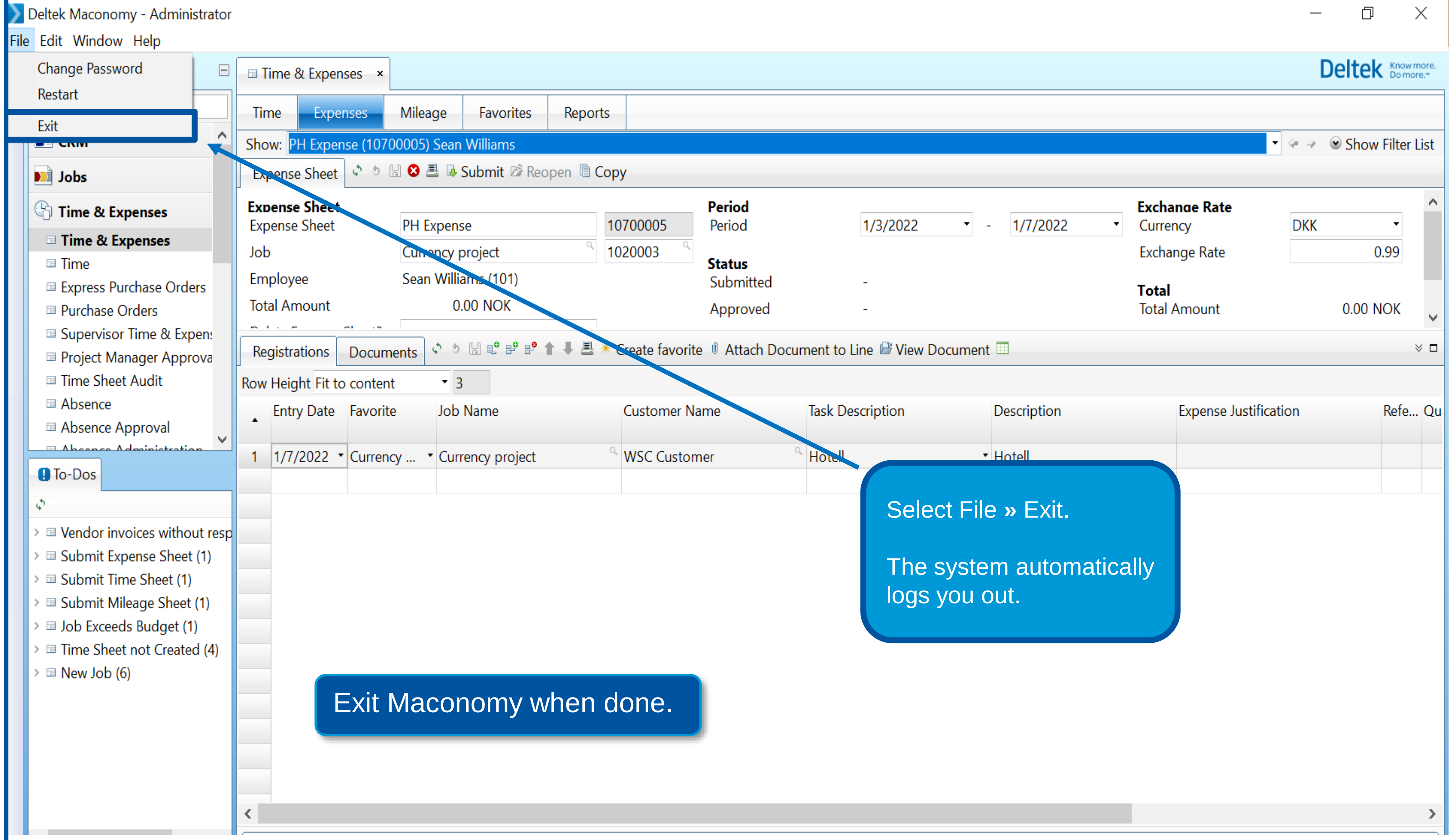

Select File » Exit.

The system automatically logs you out.

Exit Maconomy when done.

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This concludes the introduction to Workspace Client Quick Steps.