

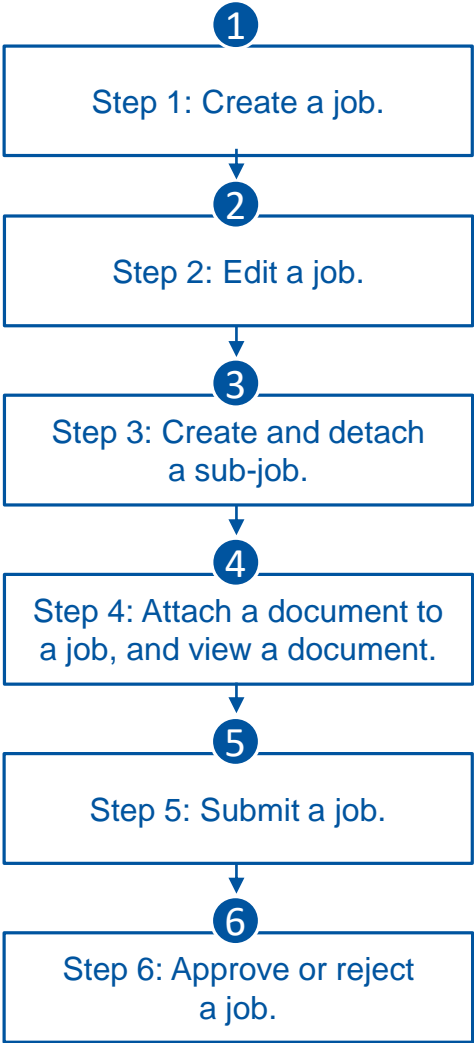
Deltek

Maconomy Essentials

Create a Job
Click Guide



Create a Job



Deltek iAccess

MAIN MENU

JOB

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, Excluding outlays 10Job000001

Hjemmemiljø A/S 31003100

OVERVIEWDETAILSCUSTOMERSUB-JOBSTASKSEMPLOYEESPRICESDOCUMENTSINVOICING PLANENTRIESPENDING ACTIONS

Risk P

Project M

Invoicing

Estimate

Actuals:

ETC:

Total:

Overview of click guide 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

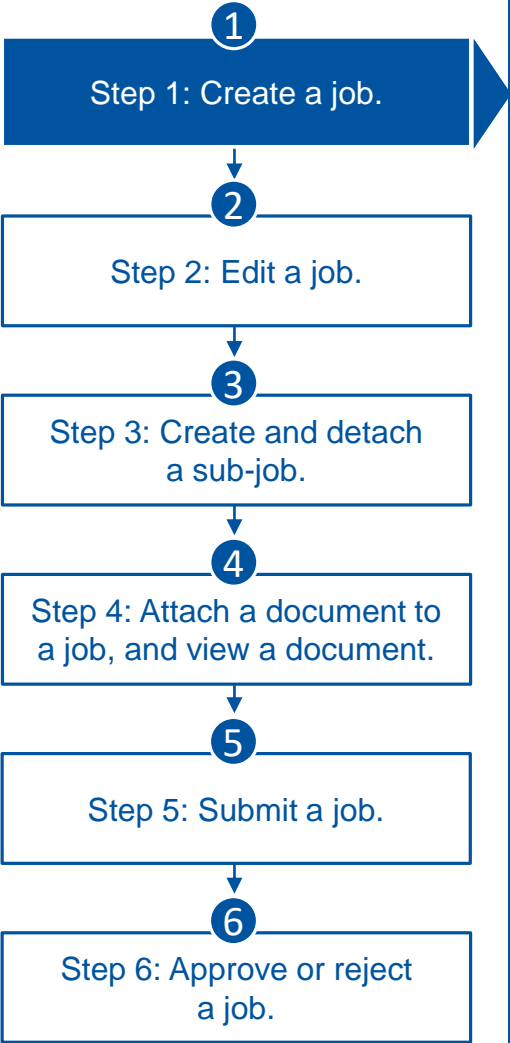
Risk Profile: None

Approved Risk Fund: DKK 0.00

Weighted Assigned Risk Fund: DKK 0.00

Best viewed in IE or Adobe PDF Reader.

Create a Job



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Job Home

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Fixed Price, Excluding

Hjemmemiljø A/S 31003100

Project Manager: Jim Jarrett 11

Invoicing Method: Fixed Price

Estimate To Completion

Actuals: DKK 0.00

ETC: DKK 0.00

Total: DKK 0.00

Dates

Start and End Dates: None

Next Invoicing Date: None

Last Invoice Date: None

Pending Approval

Time: DKK 0.00

Expenses: DKK 0.00

Mileage: DKK 0.00

Risks

Risk Profile: None

Approved Risk Fund: DKK 0.00

Weighted Assigned Risk Fund: DKK 0.00

Customer Balance Due

DKK0.00

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.

A

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

B

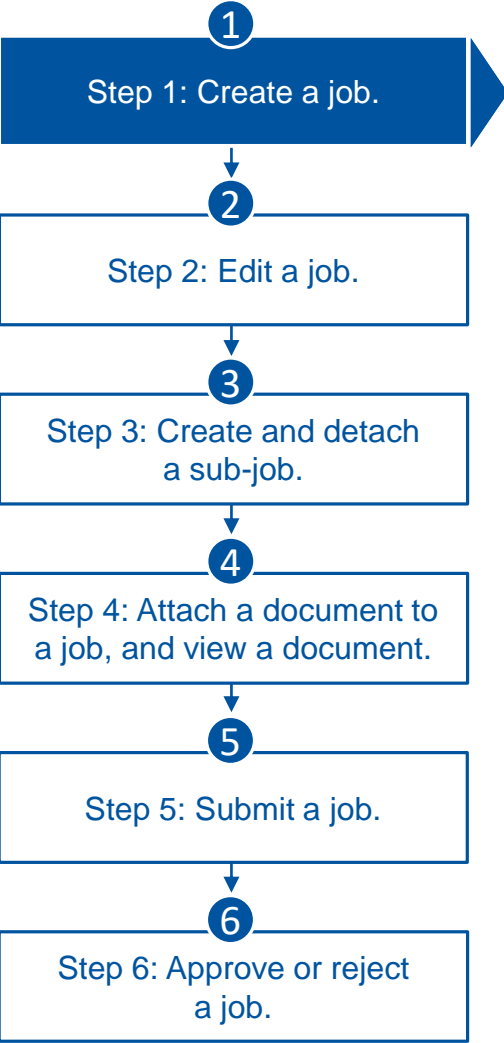
Click + New Job.

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.

Create a Job



Deltek iAccess

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Hjemmemiljø A/S 31003100

OVERVIEW

DETAILS

Risk Profile

Project Manager: Jim Jarrett 11

Invoicing Method: Fixed Price

Estimate To Completion

Actuals:

ETC:

Total:

Job Specific Information

Job

Template Job

Time & Material job

T01-T&M

Customer

Company

Job Name

Time & Material job

Project Manager

Jim Jarrett

11

Location

Job Group

Back

Create

Cancel

Save

Revert

Submit

Other Actions

Open

DKK 0.00

Approved Risk Fund:

DKK 0.00

DKK 0.00

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.

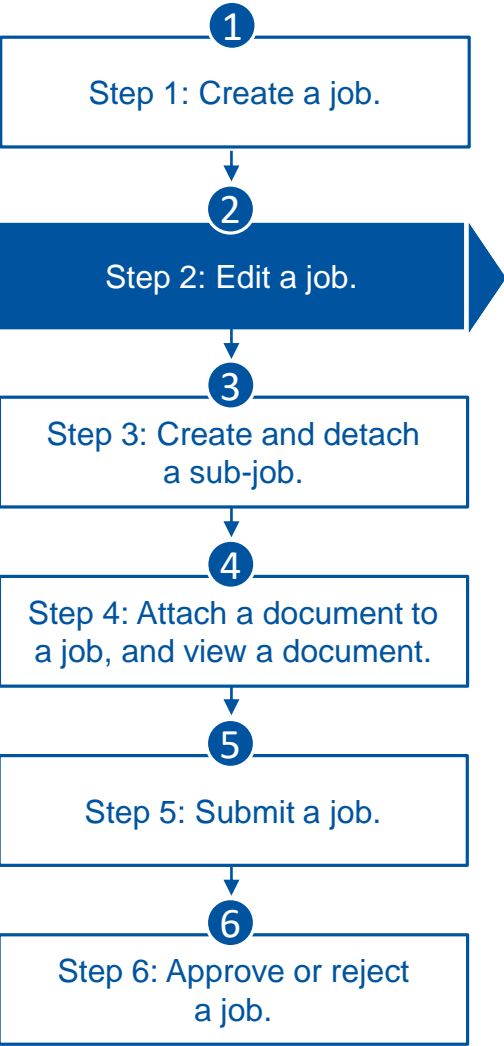
E

Select a project manager, location (responsible department), and job group.

F

Click **Create**.

Create a Job



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⌵ MAIN MENU

JOBS

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Job Home

My Open Jobs ▾ Search for Jobs

◀ 25+ records ▶

+ New Job ⌵

Save

Revert

Submit

Other Actions ▾

⌵

OVERVIEW

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SUB-JOBS

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EMPLOYEES

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DOCUMENTS

Job Home

My Open Jobs ▾ Search for Jobs

◀ 25+ records ▶

+ New Job ⌵

Time & Material job

20250001

Standard debtor

100000

Open

OVERVIEW

DETAILS

CUSTOMER

SUB-JOBS

TASKS

Margin %, Invoiced

0.00%

Billing Price Up/Down

DKK0.00

DKK0.00

DKK0.00

Project Manager

Kisuke Urahara ▾

0001 ▾

Invoicing Method

Time and Material

Budget vs Actuals

Dates

Pending Approval

Risks

	Cost	Sales
Budget	DKK 0.00	DKK 0.00
Actuals	DKK 0.00	DKK 0.00
Invoiced	DKK 0.00	DKK 0.00

Start And End Dates

⌵ - ⌵

Last Invoice Date

⌵

Time

DKK 0.00

Expenses

DKK 0.00

Mileage

DKK 0.00

Risk Profile

⌵

Approved Risk Fund

DKK 0.00

Weighted Assigned Risk Fund

DKK 0.00

Cancel

Save

Open

Edit

Close

Reopen

Copy...

A

Select a job from the filter list.

B

From the Other Actions drop-down 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**.

Create a Job

1

Step 1: Create a job.

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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.

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

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

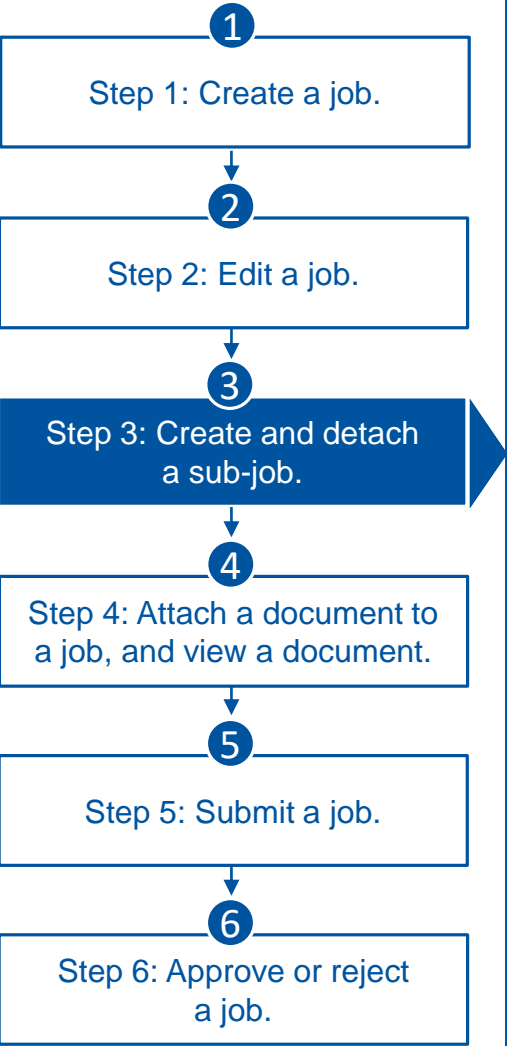
Click **Create**.

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

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.

Create a Job



◀ MAIN MENU

JOBS

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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

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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

Create a Job

1

Step 1: Create a job.

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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.

B

Go to the Documents tab.

A

Select a job from the filter list.

C

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

D

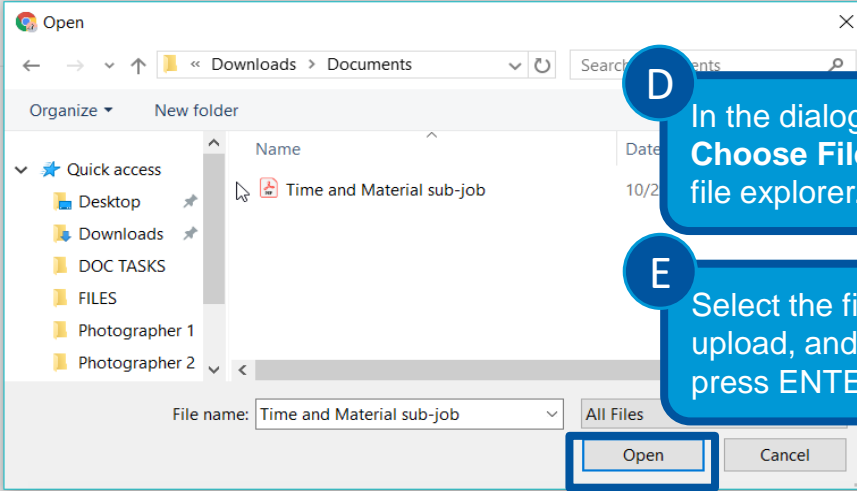
In the dialog that opens, click **Choose Files** to open your file explorer.

E

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

F

Click OK.



Attach Document

Select a file

Choose Files

No file chosen

Ok

Cancel

Document

Time and Material sub-job.pdf

G

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

Changed On

1/17/20

Changed By

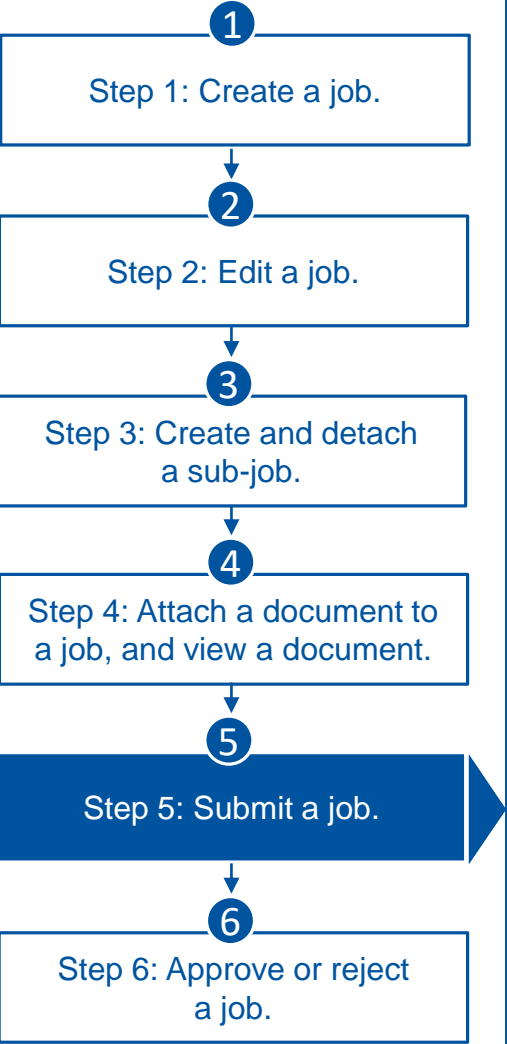
Administrator

Remark

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

Update Document
Delete Document
View Document

Create a Job



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MAIN MENU

JOBS

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Fixed Price, Hjemmemiljø A/S 3

OVERVIEW

Docume

My Open Jobs ▾

Search for Jobs

10Job000001

Fixed Price, Excluding outlays (Hjemmemiljø A/S)

Jim Jarrett

10Job000001-01

Sample (Hjemmemiljø A/S)

Jim Jarrett

10Job000002

Fixed Price, Excluding outlays, GBP, 4966600552 (Water Beds Ltd.)

Jim Jarrett

◀

1 of 25+

▶

+ New Job

⋮

Save

Revert

Submit

Other Actions ▾

Open

Attach Documents

Remark

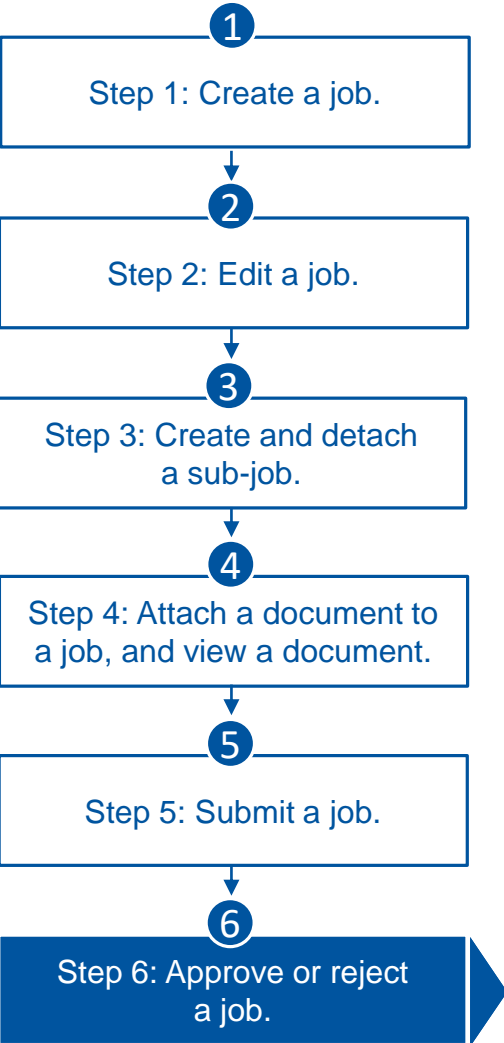
A

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

B

Click **Submit**.

Create a Job



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**.

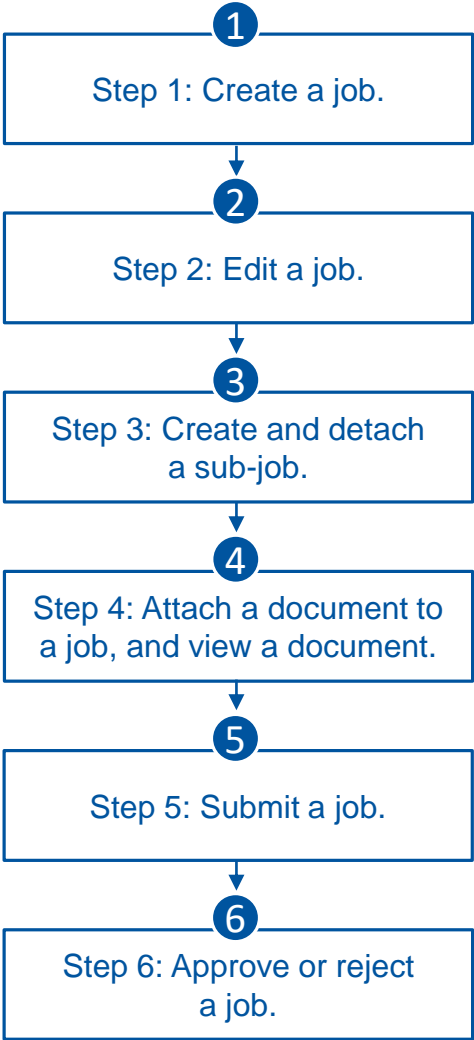
C

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



Fixed Price, Excluding outlays 10Job000001

Hjemmemiljø A/S 31003100

Save Revert Submit Other Actions

Open

OVERVIEW

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CUSTOMER

SUB-JOBS

TASKS

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Risk Profile

This concludes the
Create a Job click guide.

Customer Balance Due

DKK0.00

Project Manager: Jim Jarrett 11

Invoicing Method: Fixed Price

Estimate To Completion

Actuals:

DKK 0.00

ETC:

DKK 0.00

Total:

DKK 0.00

Dates

Start and End Dates: None

Next Invoicing Date: None

Last Invoice Date: None

Pending Approval

Time:

DKK 0.00

Expenses:

DKK 0.00

Mileage:

DKK 0.00

Risks

Risk Profile: None

Approved Risk Fund:

DKK 0.00

Weighted Assigned Risk Fund:

DKK 0.00