

Deltek.

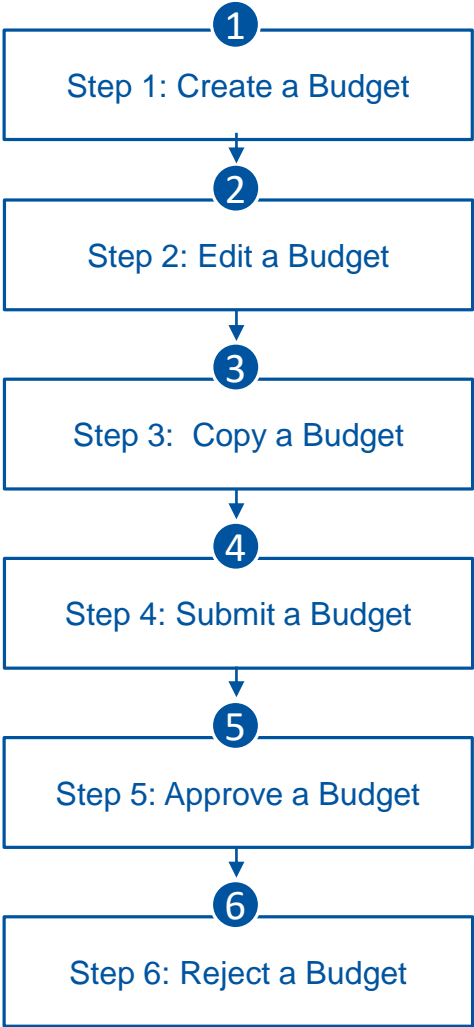
# Maconomy Essentials

*Enter a Budget Against a Project*

[Click Guide](#)



# Overview of Steps



Deltak Talent Management

Application Development Testing Company

English

1

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

Main Dashboard

Overview of click-thru 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

Kathryn Admin

12 Apr 2018

12 May 2018

+

Rene Admin

18 Apr 2018

None

+

Epe to

Admin

18 Apr 2018

None

+

Best viewed in IE or Adobe PDF Reader.

# Create a Budget

Step 1: Create a Budget

Step 2: Edit a Budget

Step 3: Copy a Budget

Step 4: Submit a Budget

Step 5: Approve a Budget

Step 6: Reject a Budget

Under Jobs, go to the Budgeting workspace.

Budgeting

My Open Jobs

Billable Project JK2 1020023

Chr. Hansen 10001

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

</

+ Add Budget Line

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

Depending on the budget you wish to create, click Working Budget or Baseline.

The available tabs depend on the setup of your job.

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

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

Click Save.

# Edit a Budget

Step 1: Create a Budget

Step 2: Edit a Budget

Step 3: Copy a Budget

Step 4: Submit a Budget

Step 5: Approve a Budget

Step 6: Reject a Budget

## Budgeting

All Jobs

Pro

1 of 25+

1 of 25+

### Project A 10000

Merck 10007

WORKING BUDGET

BASELINE

REVISIONS

	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 %

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 %

A Use the filter or Search to select a job.

B Click the tab you want to update.

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

E When done, click Save, or press Enter.

D Click Edit, then edit the lines as needed.

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.

# Copy a Budget

Step 1: Create a Budget

Step 2: Edit a Budget

Step 3: Copy a Budget

Step 4: Submit a Budget

Step 5: Approve a Budget

Step 6: Reject a Budget

Budgeting

All Jobs 10000

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

X 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.

From the Other Actions drop-down, 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.

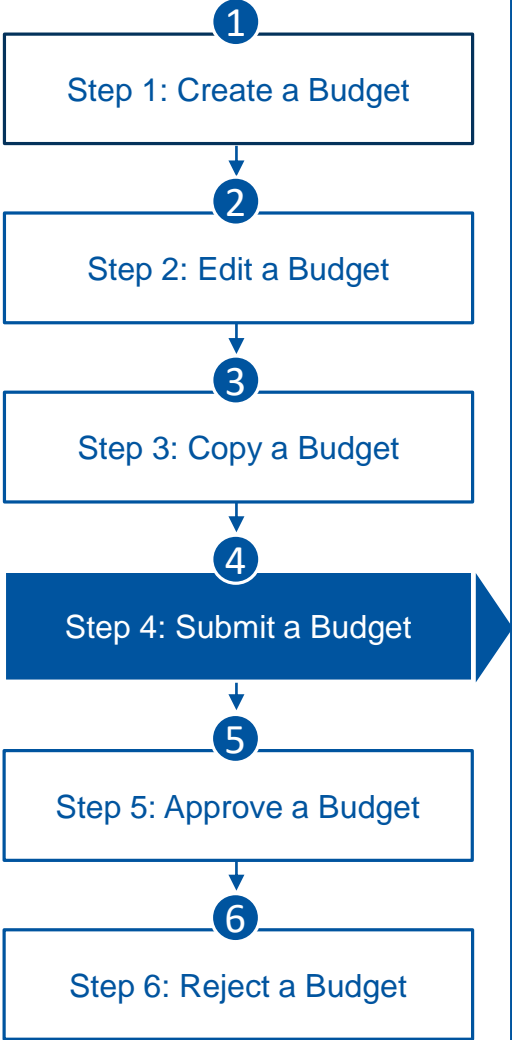
Overwrite Duplicate Lines

Only Copy New Lines

Copy

Cancel

# Submit Budget



## Budgeting

All Jobs 10000

### 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

X Description Line Type Task Empl. Category Employee

There are no records to show in this grid.

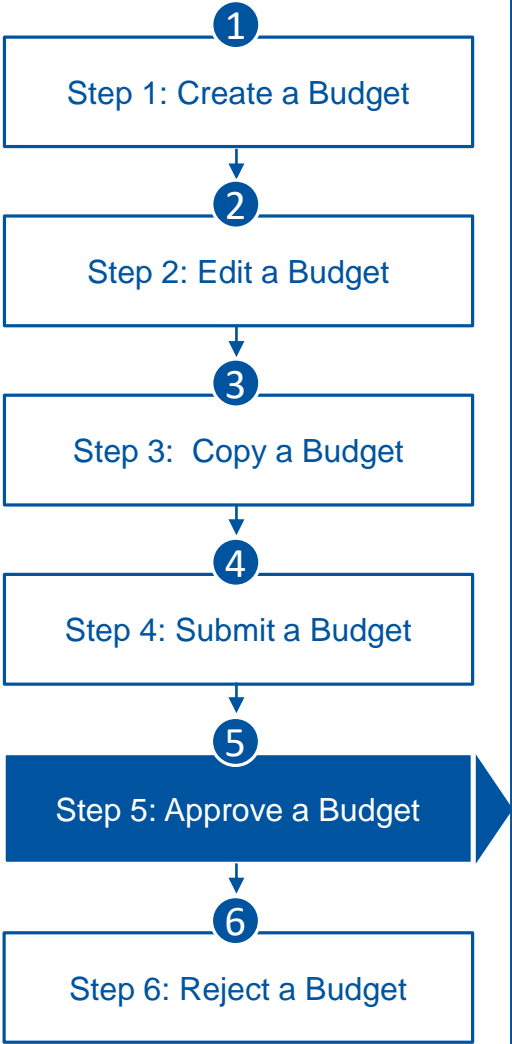
A Use the filter or Search to select a job.

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.

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

# Approve Budget



## 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 ▼ Submitted

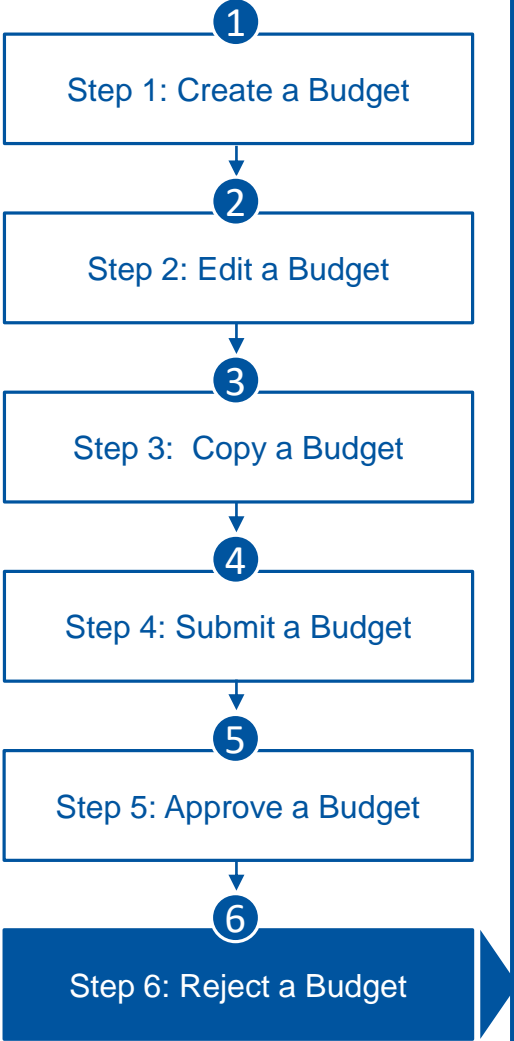
B To approve the budget, click Approve Budget.

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.



# Reject Budget



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

Budgeting

All Jobs project a

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	Price	GM	Markup
materialer	Amount	205			✓	1.00	DKK 600.00	DKK 600.00	DKK 600.00	DKK 600.00	0.00	0.00 %

Reject Line

Rejection

Remarks

Reject

Cancel

A

Use the filter or Search to select a job.

B

To reject the budget, click Reject Budget.

iAccess displays the Reject Line wizard.

C

Enter a rejection reason. This is a required field.

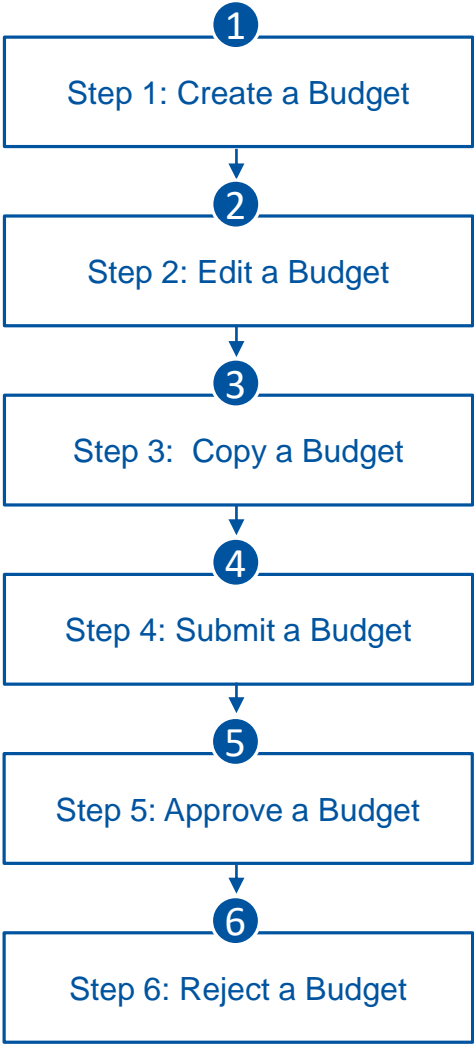
D

Click Reject.

+ Add Budget Line



# Budget Procedures



	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 %

Description
materialer

This concludes the  
Enter Budget Against a Project Click Guide.