

## Maconomy iAccess

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## iAccess Overview

Maconomy iAccess is designed for streamlined access to daily and weekly time and expense activities.

The user interface is based on Maconomy concepts while featuring a simple, easy-to-use tab design that allows you to click between workspaces. The browser-based application is optimized for in-office as well as remote access use. Look-ups provide quick and easy searches for data and favorites.

Use iAccess for:

- Daily or weekly time sheets
- Mileage and expense reports
- Favorites management
- Absence management
- Purchase orders
- Employee information
- Absence and allowance approval
- Viewing reports

Following are the main features of iAccess:

- **Weekly Time Entry** - Register time for the week, specifying a job, task, hours or days, and a description. Use both the Keep and Favorites features for more efficient weekly time entry.
- **Daily Time Entry** - Register time for the day, specifying a customer, job, task, hours or days, and a description. Use both the Keep and Favorites features for more efficient daily time entry.
- **Expense Entry** - Create new expense sheets and register expenses by entering the job, task, description, quantity, price and currency. Also, change the exchange rate, or reference a receipt attachment. Attach receipts in batch, and choose to attach individual documents to an expense sheet line. Use the same Favorites feature as in the time sheets to accommodate more efficient expense entry.
- **Mileage Entry** - Create new mileage sheets and register mileage by identifying the job, miles driven, and the From and To locations. The mileage sheet leverages the mileage rules setup in core Maconomy to establish the mileage rate
- **Favorites Management** - Create saved combinations of project and task so you have easy access to them when doing time and expense registration.
- **Absence Management** - Create and submit absence requests for approval, and view your available and booked absence time.
- **Purchase Orders** - Create, edit, and submit POs. You can attach documents to POs, and view the status of a PO's header/lines.
- **Employee Information** - Review and update your personal data, or that of other employees.

- **Absence and Allowance Approval** - Managers/designated approvers can access and review employee absence and allowance requests. They can then approve or reject the requests.
- **Viewing Reports** - Access BPM reports from within iAccess.
- **Notifications** - Use basic notification coverage for time sheets, expense/mileage sheets, absence management, and absence approval. Select a notification to navigate to the needed record.
- **Online Help** - Access the online help directly from the iAccess menu, which opens in a new web page. Find field descriptions, workspace overviews, and step-by-step procedures.
- **Settings** - Manage your personal settings, including establishing the date format, decimal symbol, digit grouping system, and adjusting the time setting to interpret minutes or hours in certain instances on the time sheet.
- **Change Password** - Use the change password feature to change your Maconomy login password.

## Getting Started


This section discusses overall navigation and concepts to get you started with Maconomy iAccess.

There are several basic features that are used throughout the iAccess application.

### Starting iAccess and Logging In

The iAccess Login dialog box displays when you start iAccess.

**To start iAccess and log in:**

1. Click the iAccess link to launch the application.
2. Enter your user name and password.
3. Click .



Maconomy iAccess sessions expire after a certain period of inactivity. The default time is 20 minutes, but this is configurable.

If your session has timed out, iAccess redirects you to the login screen and informs you that your session has expired. You have to relogin and navigate back to the workspace where you were working prior to the timeout.

### Multiple Languages


A list of all of the languages that your firm has enabled displays when you log into iAccess.

Select the language that you want to use. For example, if you click the Español link on the login dialog box, all the parts of the iAccess user interface (menu, workspaces, and so on) display in Spanish after you log in. However, if only one language is enabled, you will not see a list of languages.

### Change Your Password

You can change your password as needed.

**To change your password:**

1. Click  and select Change Password.
2. Enter your old password.



Passwords are case-sensitive.

3. Enter your new password.
4. Enter the new password again to confirm.

5. Click **OK**.  
iAccess prompts you to confirm the change.

## Reset Your Password

You can reset your password from the iAccess login screen.

To reset your password:

1. Click **Forgot your password?**.
2. Enter your user name, and click **Reset**.  
iAccess sends a password reset token to your registered e-mail address.
3. Enter the token.
4. In the **New Password** and **Confirm New Password** fields, enter your new password.
5. Click **Log In**.

## Change Your Settings

You can change the default settings for how your dates appear, as well as whether line items display as separated by a comma or period.

Additionally, you can set iAccess to convert minutes to hours if you enter more than a certain number.

To change your default settings:

1. In the **Short Date** field, select the default date as:
  - **day - month - year** - Select to use the European date format.
  - **month / day / year** - Select to use the U.S. date format.
2. In the **Digital Grouping System** field, select the default format as:
  - **. (period)** - Select to use a period ( . ) to indicate the numeric grouping system. For example, 1.000.000 (European format).
  - **, (comma)** - Select to use a comma ( , ) to indicate the numeric grouping system. For example, 1,000,000 (U.S. format).
  - **' (apostrophe)** - Select to use an apostrophe ( ' ) to indicate the numeric grouping system. For example, 1'000'000.
3. In the **Decimal Symbol** field, select the default format as:
  - **, (comma)** - Select to use a comma ( , ) to indicate the decimal point in a number. For example, 1.000.000,00 (European format).
  - **. (period)** - Select to use a period ( . ) to indicate the decimal point in a number. For example, 1,000,000.00 (U.S. format).



If a comma is used for digital grouping, a period must be used for decimals, and vice versa.



4. Use the **Interpret Hour Entry as Minutes When Above** field if you need to track time in increments of minutes as well as hours. The number you enter is the interval at which time will switch from being registered as hours to being registered as minutes.

For example, if you set the field to 10, any number entered that is equal to or below 10 is interpreted as hours, and any number above 10 is interpreted as minutes.

If the value in this field is set to 10, registered time appears as follows:

- If you enter 8, the field displays as 8:00 hours.
- If you enter 10, the field displays as 10:00 hours.
- If you enter 10, the field displays as 10:00 hours.
- If you enter 30, the field displays as 0:30 minutes.



You can also enter time in decimals, so that 0.5 is interpreted as 0:30 or 0.9 is interpreted as 0:54. The **Interpret Hour Entry as Minutes When Above** setting does not affect decimal entries.

5. Click **Default** in order to restore default values for all fields.
6. Click **OK** when done.





## iAccess Menu

The iAccess menu includes options to open the different workspaces in the application, as well as show To-Dos, settings, and online help.

Click one of the following menu items to navigate to a specific workspace:

- **Weekly Time Sheets**
- **Daily Time Sheets**
- **Expenses**
- **Mileage**
- **Favorites**
- **Absence**
- **Purchase Orders**
- **Employee Self Service**
- **Employee Information**
- **Absence Approval**
- **Job Reports**
- **Management Reports**







The following table describes additional buttons found in the menu:

Button	Description
	Click to hide/display the list of workspaces in the menu.
	Click to access your list of To-Dos. Click on the number (in this instance, 7), and a drop-down list displays the To-Dos. You can then select one and take action.
	Click to open the iAccess online help system.
	Click to open the system settings options for the user.


## Actions


Action buttons and the Actions drop-down list appear in the various workspaces of Maconomy iAccess.







The following table describes these actions:





Button	Description
	Click this icon to access the calendar. Select the appropriate day or week to enter time sheet or absence information.   This is available in the Weekly Time Sheet, Daily Time Sheet, and Absence workspaces only.
 Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
 Revert	Click this action to undo changes made to the current record, or to any of its lines.
 Edit	Click this action to edit the current record.   This is available in the Favorites, Absence, and Employee Self Service workspaces only.
Actions ▼	Each workspace includes an <b>Actions</b> drop-down list. Available actions vary slightly from one workspace to another.  In the Weekly and Daily Time Sheet workspaces, the drop-down list includes the following actions: <ul style="list-style-type: none"> <li>▪ <b>Edit</b></li> <li>▪ <b>Create</b></li> </ul>

Button	Description
	<ul style="list-style-type: none"> <li>▪ <b>Submit</b> - Select this action to submit the current time sheet for processing. After submission, the time sheet status is updated, and this action is disabled until you make additional changes.</li> <li>▪ <b>Reopen</b> - Select this action to reopen a closed/approved time sheet.</li> <li>▪ <b>Print</b></li> <li>▪ <b>Copy From</b> - Select this action to copy lines from a weekly/daily time sheet, and add these lines to the weekly/daily time sheet you are currently working on.</li> </ul> <p>In the Expenses and Mileage workspaces, the drop-down list includes the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Edit</b></li> <li>▪ <b>Submit</b></li> <li>▪ <b>Reopen</b></li> <li>▪ <b>Print</b></li> <li>▪ <b>Copy From</b> - Select this action to copy lines from an expense/mileage sheet, and add these lines to the expense/mileage sheet you are currently working on.</li> <li>▪ <b>Duplicate</b> - Select this action to duplicate an existing expense/mileage sheet, and create a new expense/mileage sheet.</li> <li>▪ <b>Attach Receipts</b> (for expense sheets) or <b>Attach Documents</b> (for mileage sheets)</li> <li>▪ <b>Delete Expense Sheet</b> or <b>Delete Mileage Sheet</b></li> </ul> <p>In the Purchase Orders workspace, the drop-down list includes the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Edit</b></li> <li>▪ <b>Submit</b></li> <li>▪ <b>Close</b></li> <li>▪ <b>Reopen</b></li> <li>▪ <b>Print</b></li> <li>▪ <b>Copy From</b> - Select this action to copy lines from a PO, and add these lines to the PO you are currently working on.</li> <li>▪ <b>Attach Documents</b></li> <li>▪ <b>Delete Purchase Order</b></li> </ul> <p>In the Employee Information workspace, the drop-down list includes the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Edit</b></li> </ul>

Button	Description
	<ul style="list-style-type: none"> <li>▪ <b>Attach Documents</b></li> </ul> <p>In the Absence Approval workspace, the drop-down list includes the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Edit</b></li> <li>▪ <b>Submit</b></li> <li>▪ <b>Approve</b></li> <li>▪ <b>Reject</b></li> <li>▪ <b>Reopen</b></li> </ul> <p>In the Allowance Approval workspace, the drop-down list includes the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Edit</b></li> <li>▪ <b>Approve</b></li> <li>▪ <b>Reject</b></li> </ul>
	<p>The ellipsis drop-down list allows you to add lines/information to the lines of a record. Available actions at this level vary from one workspace to another.</p> <p>For time sheet lines, choose from the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Insert Time Sheet Line</b></li> <li>▪ <b>Delete Time Sheet Line</b></li> <li>▪ <b>Create favorite</b> - Select to save the current line as a favorite. Afterwards, this line appears in the Favorites workspace.</li> </ul> <p>For expense sheet lines, choose from the following actions:</p> <p><b>Registrations Tab</b></p> <ul style="list-style-type: none"> <li>▪ <b>Insert Expense Sheet Line</b></li> <li>▪ <b>Delete Expense Sheet Line</b></li> <li>▪ <b>Create favorite</b></li> <li>▪ <b>Attach Receipt To Line</b></li> <li>▪ <b>View Receipt</b></li> </ul> <p><b>Receipts Tab</b></p> <ul style="list-style-type: none"> <li>▪ <b>Update Receipt</b> - Click this action to change the file attached to the expense sheet.</li> <li>▪ <b>Delete Receipt</b></li> <li>▪ <b>View Receipt</b> - Click this action to view the file attached to the expense sheet.</li> </ul> <p>For mileage sheet lines, choose from the following actions:</p>

Button	Description
	<p><b>Registrations Tab</b></p> <ul style="list-style-type: none"> <li>Insert Mileage Sheet Line</li> <li>Delete Mileage Sheet Line</li> <li>Create favorite</li> <li>Attach Document to Line</li> <li>View Document</li> </ul> <p><b>Documents Tab</b></p> <ul style="list-style-type: none"> <li>Update Document</li> <li>Delete Document</li> <li>View Document</li> </ul> <p>For Favorite lines, choose from the following actions:</p> <ul style="list-style-type: none"> <li>Insert Favorite</li> <li>Delete Favorite</li> </ul> <p>For absence and allowance request lines, choose from the following actions:</p> <ul style="list-style-type: none"> <li>Submit Request</li> <li>Reopen Request</li> <li>Delete Request</li> </ul> <p>For purchase order lines, choose from the following actions:</p> <p><b>Specifications Tab</b></p> <ul style="list-style-type: none"> <li>Insert Purchase Order Line</li> <li>Delete Purchase Order Line</li> </ul> <p><b>Documents Tab</b></p> <ul style="list-style-type: none"> <li>Update Document</li> <li>Delete Document</li> <li>View Document</li> </ul> <p>For employee self-service and employee information lines, choose from the following actions:</p> <p><b>Emergency Contacts Tab</b></p> <hr/> <div>  <p>This tab and its action/s are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.</p> </div> <hr/> <ul style="list-style-type: none"> <li>Insert Emergency Contact</li> </ul>

Button	Description
	<ul style="list-style-type: none"> <li>Delete Emergency Contact</li> </ul> <b>Parental Status Tab</b> <hr/>  This tab and its action/s are only available if you are running Maconomy 2.4 LA1 (or later) in the backend. <hr/> <ul style="list-style-type: none"> <li>Insert Parental Status</li> <li>Delete Parental Status</li> </ul> <b>Education and Qualifications Tab</b> <hr/>  This tab and its action/s are only available if you are running Maconomy 2.4 LA1 (or later) in the backend. <hr/> <ul style="list-style-type: none"> <li>Insert Education and Qualification</li> <li>Delete Education and Qualification</li> </ul> <b>Work Eligibility Tab</b> <hr/>  This tab and its action/s are only available if you are running Maconomy 2.4 LA1 (or later) in the backend. <hr/> <ul style="list-style-type: none"> <li>Insert Work Eligibility</li> <li>Delete Work Eligibility</li> </ul> <b>Employee Skills Tab</b> <ul style="list-style-type: none"> <li>Delete Employee Skill</li> </ul> <b>Documents Tab</b> <hr/>  This tab appears in the Employee Information workspace only. <hr/> <ul style="list-style-type: none"> <li>Update Document</li> <li>Delete Document</li> <li>View Document</li> </ul>
<b>+ Add Time Sheet Line</b>	Click this action to add another entry line to the bottom of the time sheet.
 	Click <b>Collapse / Expand</b> to toggle the expand / hide detail feature in weekly/daily time sheets.


Button	Description
<b>+ New Expense Sheet</b>	Click this action to create an expense sheet.
<b>+ Add Expense Sheet Line</b>	Click this action to add another entry line to the bottom of the expense sheet.
<b>+ New Mileage Sheet</b>	Click this action to create a mileage sheet.
<b>+ Add Mileage Sheet Line</b>	Click this action to add another entry line to the bottom of the mileage sheet.
<b>+ Add Favorite</b>	Click this action to add another entry line to the bottom of the Favorites list.
<b>+ New Absence Request</b>	Click this action to create an absence request.
<b>+ New Allowance Request</b>	Click this action to create an allowance request.
<b>+ New Purchase Order</b>	Click this action to create a purchase order.
<b>+ Add Purchase Order Line</b>	Click this action to add another entry line to the bottom of the purchase order.
<b>+ Add Employee</b>	Click this action to add a new employee.
<b>+ Add Emergency Contact</b>	<p>Click this action to add another emergency contact to your list (or to another employee's list, if you have the requisite access rights).</p> <hr/>  This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.
<b>+ Add Parental Status</b>	<p>Click this action to update your personal information with your parental status. If you have the requisite access rights, you can also update another employee's parental status information.</p> <hr/>  This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.
<b>+ Add Education and Qualification</b>	<p>Click this action to add to your list of educational qualifications. If you have the requisite access rights, you can also update another employee's list.</p> <hr/>  This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.
<b>+ Add Work Eligibility</b>	<p>Click this action to add to your work eligibility information. If you have the requisite access rights, you can also update another employee's list.</p> <hr/>  This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Button	Description
<b>+ Add Employee Skill</b>	Click this action to add to your list of skills (or to another employee's list, if you have the requisite access rights).

## Lookups

Many of the time and expense sheet table columns include lookups, which allow you to select from a group of records based on your access rights, system defaults, and the use of validations.

Some of the fields in the time and expense sheet tables enable a quick find and favorites lookup, as follows.

- **Search as You Type** - Enter all or part of a number or name in the Job or Task fields, and iAccess displays a lookup list with potential matching records. Scroll and click to select.
- **Favorites** - Click  to display a list of favorites from which to choose.

## Info Bubbles

Info bubbles provide more information about the contents of a field, and are available by default in the card/table part of some workspaces.

If you want to display additional info bubbles, or customize an info bubble's format and/or the information it contains, you can customize the layout for the relevant workspace.

To view a field's info bubble, click once on that field. Note that you can only view info bubbles for fields displayed with blue font (that is, not in Edit mode).



## Time Sheets Overview


The Time Sheet application is a time tracking tool that allows you to enter work hours on time sheets and submit them for processing.

### Timesheet Concepts

Use time sheets to enter:

- Job, Task, Description, and Hours for each charge on a time sheet.
- Hours for each day in a period.

When you record hours worked, you can:

- Enter or edit time sheet data on an open time sheet.
- Click  to view time sheet totals.
- Add any number of time sheet rows to record hours worked.
- Enter a description for time entered.
- Submit a time sheet for approval.

### Notifications

Notifications quickly inform the relevant employees when a specific action is needed. Notifications come as line items in the red Notifications bubble in the top right of the screen.

The following notifications are included:

- **Submit Time Sheet** - Appears for the user to indicate the pending submission of time sheets. This notification points to the relevant time sheet.
- **Submit Daily Time Sheet** - Appears for the user to indicate the pending submission of daily time sheets. This notification points to the relevant daily time sheet.
- **Rejected Time Sheet** - Appears for the user to indicate that a submitted time sheet has been rejected. This notification points to the relevant time sheet.
- **Rejected Time Sheet Lines** - Appears for the user to indicate that a submitted time sheet line has been rejected. This notification points to the relevant time sheet, with the rejected line highlighted.



Approvals/rejections in iAccess rely on the approval hierarchies set up in your company's core Maconomy installation.

## Timesheet Workspaces

Use the daily and weekly Time Sheet workspaces to enter personal time sheet information, which may include job, task, time, and other values for each labor charge on a time sheet.

Each time sheet workspace displays fields and a table. The fields list the general time sheet data, including period, number of hours, status information, totals, and related comments, while the table displays specific labor charge and time details.

### Weekly Time Sheet Fields


This topic describes the fields and definitions on the Weekly Time Sheet workspace.

#### Card Part Fields

Field	Description
Week #	<p>This field displays the start and end dates of the time sheet labor period in weekly format.</p> <p>To select a different week, use the left/right arrows or click the calendar widget.</p>
Name	<p>This field shows the employee name and number related to this time sheet.</p> <p>If you have the necessary permissions, this field displays as a drop-down list and you can select the name of other employees to view/edit their time sheets.</p>
Time Sheet Status	<p>The time sheet status displays as follows:</p> <ul style="list-style-type: none"> <li>▪ <b>Due</b> - This time sheet is in the process of being completed and has not been submitted. You can enter time sheet data and edit time sheet data.</li> <li>▪ <b>Submitted</b> - The time sheet is submitted for processing, but is not approved. You can open the time sheet, but you cannot enter or edit time sheet data unless your security access allows you to resubmit time sheets.</li> <li>▪ <b>Approved</b> - The Header portion is approved but that certain lines may need approval from the project manager.</li> <li>▪ <b>Fully Approved</b> - The time sheet is approved and is ready for posting.</li> <li>▪ <b>Rejected</b> - The time sheet can have this status if one or more of the lines have been rejected by the approver.</li> </ul>

#### Table Fields

Field	Description
Keep	Select this field to automatically copy this line from the previous period at the creation of time sheets. New lines created will inherit this status, which means that they will automatically be copied to all new time sheets until you remove the mark from this field on the lines in question.
Favorite	In this field, you can select a favorite.

Field	Description
	 Choosing a favorite may change other details specified for the time sheet line, such as the job or task.
Job No.	Use this or the <b>Job Name</b> field to specify the job for which you are charging time. Filling out one field will auto-populate the other.
Job Name	Use this or the <b>Job No.</b> field to specify the job for which you are charging time. Filling out one field will auto-populate the other.
Task	This field is available if the phase you selected has associated tasks.
Mon - Sun	Use these fields to specify the hours worked per day.
Total	This field displays the total hours for this line.
Status	This field displays the time sheet line's approval status.

### Summary Lines

The lower section of the Time Sheet form displays time sheet totals for the whole time sheet.

Field	Description
Total	This field displays the combined total hours for the week.
Fixed	The fixed number of hours as defined by your administrator on your employee card. This may just be for reference, or a separate setting may also require you enter a minimum of the fixed hours before you submit the time sheet.
Balance	The difference between the number of hours you entered and the Fixed number that are required of you per your employee card.
Invoiceable	The total hours entered in the table that are against billable activities.
Invoiceable %	The above invoiceable amount represented as a percentage.

### Daily Time Sheet Fields


This topic describes daily time sheet fields and definitions.

#### Card Part Fields

Field	Description
Day	This field displays the day for the time sheet.

Field	Description
	To select a day in a different week, use the left/right arrows or click the calendar widget.
Name	<p>This field shows the employee name and number related to this time sheet.</p> <p>If you have the necessary permissions, this field displays as a drop-down list and you can select the name of other employees to view/edit their time sheets.</p>
Time Sheet Status	<p>The time sheet status displays as follows:</p> <ul style="list-style-type: none"> <li>▪ <b>Due</b> - This time sheet is in the process of being completed and has not been submitted. You can enter time sheet data and edit time sheet data.</li> <li>▪ <b>Submitted</b> - The time sheet is submitted for processing, but is not approved. You can open the time sheet, but you cannot enter or edit time sheet data unless your security access allows you to resubmit time sheets.</li> <li>▪ <b>Approved</b> - The Header portion is approved but that certain lines may need approval from the project manager.</li> <li>▪ <b>Fully Approved</b> - The time sheet is approved and is ready for posting.</li> <li>▪ <b>Rejected</b> - The time sheet can have this status if one or more of the lines have been rejected by the approver.</li> </ul>

### Table Fields

Field	Description
Keep	Select this field to automatically copy this line from the previous period at the creation of time sheets. New lines created will inherit this status, which means that they will automatically be copied to all new time sheets until you remove the mark from this field on the lines in question.
Favorite	<p>In this field, you can select a favorite.</p> <div>  <p>Choosing a favorite may change other details specified for the time sheet line, such as the job or task.</p> </div>
Customer	Use this field to specify the customer for whom you are charging time.
Job No.	<p>Use this or the <b>Job Name</b> field to specify the job for which you are charging time.</p> <p>Filling out one field will auto-populate the other.</p>
Job Name	<p>Use this or the <b>Job No.</b> field to specify the job for which you are charging time.</p> <p>Filling out one field will auto-populate the other.</p>
Task	This field is available if the phase you selected has associated tasks.

Field	Description
Daily Description	Enter a description of the task specified on the current line.
Hours	Enter the hours of work spent on this task for this day.
Status	This field displays the time sheet line's approval status.

### Summary Lines

The lower section of the Time Sheet form displays time sheet totals for the whole time sheet.

Field	Description
Total	This field displays the total hours for each day as well as the total hours for the week.
Fixed	The fixed number of hours as defined by your administrator on your employee card. This may just be for reference, or a separate setting may also require you enter a minimum of the fixed hours before you submit the time sheet.
Balance	The difference between the number of hours you entered and the Fixed number that are required of you per your employee card.
Invoiceable	The total hours entered in the table that are against billable activities.
Invoiceable %	The above invoiceable amount represented as a percentage.

## Time Sheet Procedures

This section describes all the steps you need to work with time sheets.

Use Maconomy iAccess daily or weekly time sheets to do the following:

### Enter Data in a Time Sheet

You can enter time sheet charges and associated hours in a Weekly or Daily Time Sheet.

**To enter data on a time sheet:**

1. Click **Weekly Time Sheets** or **Daily Time Sheets**.
2. Select an Employee Name from the drop-down list. Specify your name, or that of another employee (if you are registering by proxy).
3. Select the time sheet and click on a row to enter your hours for the respective category or charge that is displayed.
4. To access blank lines and record additional charge information, click **Add Lines**. This inserts a blank row beneath the currently selected row.
5. Exit the panel when done. Your information auto-saves as you type.

## Copy from a Weekly Time Sheet

You can create additional lines on a weekly time sheet by using the **Copy From** action.

This action copies lines from the weekly time sheet you specify, and adds the lines to the time sheet you are currently editing. While task and job information are carried over, registered time is reset to zero. Lines that pertain to blocked activities or blocked/closed jobs are not copied.

To copy lines from a weekly time sheet:

1. Select the weekly time sheet you want to edit.
2. From the Actions drop-down list, click **Copy From**.  
The Copy Time Sheet wizard displays.
3. To select the weekly time sheet from which you want to copy lines, you can either specify the week's start date or the week number.  
By default, the fields in the wizard specify the previous week, but you can easily change the values.
4. Click **Copy Time Sheet**.  
iAccess adds the copied lines to the current weekly time sheet and automatically saves your changes.

## Copy from a Daily Time Sheet

You can copy lines from an existing daily time sheet.

To copy from a daily time sheet:

1. Select the daily time sheet you want to edit.
2. In the Actions drop-down list, select **Copy From**.  
The Copy Time Sheet wizard displays.
3. Specify the date of the daily time sheet from which you want to copy lines.
4. Click **Copy Time Sheet**.  
iAccess adds the copied lines to the current time sheet and automatically saves your changes.

## Edit a Time Sheet

You can edit hours for time sheets that are not yet submitted.


To edit a time sheet:

1. Select the time sheet you would like to edit, and double-click the line. The line displays as editable text.
2. Edit the hours field as needed.
3. Exit the panel when done. Your information auto-saves as you type.


## View Time Sheet Totals

You can change the time sheet view to display totals for the time sheet hours.

### To view time sheet totals:

1. Open the time sheet panel and select a time sheet.
2. Click  to expand the time sheet totals that display.

The following totals display:

- **Fixed** - The fixed number of hours as defined by your administrator on your employee card. This may just be for reference, or a separate setting may also require you enter a minimum of the fixed hours before you submit the time sheet.
  - **Balance** - The difference between the number of hours you entered and the **Fixed** number that are required of you per your employee card.
  - **Invoiceable** - The total hours entered in the table that are against billable activities.
  - **Invoiceable %** - The above represented as a percentage.
3. Click  to hide the time sheet totals.

## View Time Sheet Status

View the time sheet status to determine next actions as needed.

### To view time sheet status:

View the Time Sheet status at the top right corner of the time sheet.  
Time Sheet status displays as follows:

- **Due** - This time sheet is in the process of being completed and has not been submitted. You can enter time sheet data and edit time sheet data.
- **Submitted** - The time sheet is submitted for processing, but is not approved. You can open the time sheet, but you cannot enter or edit time sheet data unless your security access allows you to resubmit time sheets.
- **Approved** - The Header portion is approved but certain lines may need approval from the project manager.
- **Fully Approved** - The time sheet is approved and is ready for posting.
- **Rejected** - The time sheet can have this status if one or more of the lines have been rejected by the approver.

## Print a Time Sheet

Use these steps to print a time sheet

### To print a time sheet:

1. Select a time sheet.
2. From the Actions drop-down list, click **Print**.

## Submit a Time Sheet

After you enter a time sheet's data, you can submit the time sheet for approval and processing.

### To submit a time sheet:

1. Open a time sheet, review the time sheet for accuracy, and make changes if necessary. Changes are automatically saved.
2. From the **Actions** drop-down list, select **Submit**.



## Expenses Overview

The Expenses application is a tracking tool that allows you to enter work-related expenses and submit them for processing.

### Expense and Mileage Concepts

You can enter:

- Job, Task, Description, for expenses you submit.
- A justification for specific expense sheet lines, if required.
- Associate a receipt with an expense sheet line.
- Mileage incurred with work-related travel on the job.

When you record expenses, you can:

- Enter or edit expense information for an open posting period.
- Submit your expenses and / or mileage to a designated administrator for approval and reimbursement.

### Notifications

Notifications quickly inform the relevant employees when a specific action is needed. Notifications come as line items in the red Notifications bubble in the top right of the screen.

The following notifications are included:

- **Submit Expense Sheet** - Appears for the user to indicate the pending submission of expense sheets. This notification points to the relevant expense sheet.
- **Submit Mileage Sheet** - Appears for the user to indicate the pending submission of mileage sheets. This notification points to the relevant mileage sheet.
- **Rejected Expense Sheet** - Appears for the user to indicate that a submitted expense sheet has been rejected. This notification points to the relevant expense sheet.
- **Rejected Expense Sheet Lines** - Appears for the user to indicate that a submitted expense sheet line has been rejected. This notification points to the relevant expense sheet, with the rejected line highlighted.
- **Rejected Mileage Sheet** - Appears for the user to indicate that a submitted mileage sheet has been rejected. This notification points to the relevant mileage sheet.
- **Rejected Mileage Sheet Lines** - Appears for the user to indicate that a submitted mileage sheet line has been rejected. This notification points to the relevant mileage sheet, with the rejected line highlighted.

## Expense Fields

This topic describes the fields and definitions on the Expenses workspace.


### Card Part Fields

Field	Description
Expense Sheet No.	This field shows the number of this expense report.
Job	This field displays the name and number of the job for which the expenses in the current record were incurred.
Employee	This field shows the name of the employee whose expense entries are listed in the workspace.
Total Amount	<p>This field displays the following information:</p> <ul style="list-style-type: none"> <li>The base currency used by the employee's company</li> <li>The total amount (including tax) for the lines in the table part</li> </ul>
Period	This field shows the period during which this expense occurs.
Currency	<p>This field displays the specified currency for the expense sheet.</p> <p>Specifying a value in the <b>Exchange Rate</b> field overrides the default exchange rate iAccess uses for this currency. iAccess then applies the specified exchange rate to the lines of the expense sheet that use this currency.</p>
Exchange Rate	<p>This field displays the exchange rate for the specified currency.</p> <p>If a user does not specify an exchange rate, iAccess uses the default rate for the currency. If a user changes the value of this field, iAccess uses that value instead.</p>
Status	<p>This field displays the status of the current expense sheet. It can have one of the following values:</p> <ul style="list-style-type: none"> <li>New</li> <li>Approved</li> <li>Rejected</li> <li>Submitted</li> <li>In Progress</li> </ul>
Settlement Status	This field shows whether the related vendor entries have been settled (paid).
Copy from Expense Sheet	If you copied lines from another expense sheet, this field displays that expense sheet's number.

## Registrations Tab

This topic describes the fields and definitions on the Registrations tab of the Expenses workspace.

### Tab Fields

Field	Description
Entry Date	Enter a date for this expense.
Favorite	<p>In this field, you can select a favorite.</p>  <p>Choosing a favorite may change other details specified for the expense sheet line, such as the job or task.</p>
Job No.	<p>Use this or the <b>Job Name</b> field to specify the job for which you are incurring the expense.</p> <p>Filling out one field will auto-populate the other.</p>
Job Name	<p>Use this or the <b>Job No.</b> field to specify the job for which you are incurring the expense.</p> <p>Filling out one field will auto-populate the other.</p>
Task	Enter the task assigned to the specified expense.
Description	Enter a description for the task specified on the current line.
Quantity	Specify the number of units of the current activity for which an expense is incurred.
Unit Price	Enter the price per unit.
Currency	Enter the currency in which the expense was incurred.
Amount	This field shows the total expense amount for the current activity in the currency chosen in the <b>Currency</b> field. The amount is calculated as the value in the <b>Quantity</b> field multiplied by the value in the <b>Unit Price</b> field.
Just. Req.	<p>This field is checked if the user is required to enter a justification for that expense line.</p> <p>Whether this field is checked depends on setup performed outside of iAccess.</p>
Receipt	<p>Use this field to attach a receipt to the current expense sheet line.</p> <p>You can attach a document from your local storage, or select one from those already uploaded to the Receipts tab of this workspace.</p>

## Justification Part Fields



Whether these fields are enabled depends on setup performed outside of iAccess.

Field	Description
Heading	<p>The values available in the drop-down list depend on the task specified on the expense sheet line.</p> <p>Select the appropriate value for the expense. For example, if you specified "Hotel" in the <b>Task</b> field on the expense sheet line, select the value "Hotel Name" here.</p> <p>If the <b>Just. Req.</b> field is checked, this field is required.</p>
Value	<p>The values available in the drop-down list depend on the task specified on the expense sheet line.</p> <p>Select the appropriate value for the expense. For example, if you specified "Hotel" in the <b>Task</b> field on the expense sheet line, select the name of the hotel here.</p> <p>If the <b>Just. Req.</b> field is checked, this field is required.</p>
Date	<p>Enter the date the specific expense was incurred.</p> <p>If the <b>Just. Req.</b> field is checked, this field is required.</p>

## Receipts Tab

This topic describes the fields and definitions on the Receipts tab of the Expenses workspace.

### Tab Fields

Field	Description
Document Name	<p>This field displays the file name of any document uploaded to the Receipts tab. This tab serves as an archive for the current expense sheet, and you can attach any of the documents listed here to the lines of the expense sheet.</p> <p>If you attach a document straight from your local storage, iAccess automatically uploads this document to the Receipts tab as well.</p>
Type	<p>This field displays the document's file type/format-for example, .doc, .xls, .ppt, and so on. This field is automatically filled in by iAccess and cannot be changed manually.</p>
Size	<p>This field displays the document's file size (in bytes).</p>
Changed On	<p>This field displays the date when the file/document was last modified. If the file has not been modified, this field displays the date when the file was uploaded to the Receipts tab/attached to an expense sheet line.</p>
Changed By	<p>This field displays the name of the last user to upload the file/document to the Receipts tab, or attach the file to an expense sheet line.</p>

Field	Description
Attached to Expense Sheet Line	This field is selected if the document specified in the line is attached to an expense sheet line.

## Expense Procedures



This section describes the steps you need to work with expenses.

Use Maconomy iAccess expense sheets to do the following:

### Create an Expense Sheet

Use these steps to create an expense sheet.

#### To add a new Expense Sheet:

1. After logging in to iAccess, navigate to the Expenses workspace.
2. Click **+ New Expense Sheet**.  
The Create Expense Sheet wizard displays.
3. Enter a Description. This is a free-text field.
4. Enter a Job for which the expense was incurred.
5. Enter the Start and End Dates for this expense.
6. Select an Employee Name from the drop-down list. Specify your name, or that of another employee (if you are registering by proxy).
7. Enter the Currency in which the expense was incurred.
8. Click **Create**.  
iAccess automatically displays the expense sheet you just created.
9. To add lines to the expense sheet, click **+ Add Expense Sheet Line**.
10. Fill out the line fields as needed.
11. Click  **Save**.
12. If the **Just. Req.** field is selected for the line, fill out the fields in the Justification pane as well.
13. Click  **Save**.

### Copy from an Expense Sheet

You can copy lines from an existing expense sheet. This action copies job and task numbers, but resets quantities and amounts to zero.

#### To copy from an expense sheet:

1. Select the expense sheet you want to edit.

2. In the Actions drop-down list, select **Copy From**.  
The Copy From Expense Sheet wizard displays.
3. Select the expense sheet from which you want to copy lines.
4. Click **Copy from Expense Sheet**.  
iAccess adds the copied lines to the Registrations tab of the current expense sheet and automatically saves your changes.

## Edit an Expense Sheet




Use these steps to edit an expense sheet.

### To edit an expense sheet:

1. Use the Search Tool to select an existing expense report to edit.



You can only edit reports that are not yet submitted/have been reverted to unsubmitted status.

2. In the **Actions** drop-down list, click **Edit**.  
The Edit Expense Sheet page displays.
3. Edit the fields as needed.
4. Click  **Save**.
5. To add additional lines to the expense sheet, click **+ Add Expense Sheet Line**.
6. Fill out the line fields as needed.
7. Click  **Save**.
8. If the **Just. Req.** field is selected for the line, fill out the fields in the Justification pane as well.
9. Click  **Save**.

## Duplicate an Expense Sheet

Use these steps to duplicate an existing expense sheet. The **Duplicate...** action copies header information, job and task numbers, and quantities and amounts.

### To duplicate an expense sheet:

1. Select an expense sheet from the filter list.
2. From the Actions drop-down list, select **Duplicate...**  
In the dialog that opens, iAccess displays the following message: A new expense sheet will be created with a copy of the current fields and lines.
3. Click **Duplicate**.  
iAccess navigates to the new expense sheet duplicated from the original, and displays the following message: A new expense sheet ([expense sheet no.]) has been created from [expense sheet no. of the original].
4. Click **OK**.

## Attach a Receipt to an Expense Sheet Line

When associating a receipt with an expense sheet line, you have two options. You can attach the receipt directly from your local drive, or you can choose to associate an expense sheet line with an existing receipt.

**To attach a receipt to an expense sheet:**

1. Navigate to **Expenses workspace » Registrations tab**.
2. Select the line you want to update.
3. To attach a receipt from your local drive:
  - a) From the ellipsis drop-down list, select **Attach Receipt To Line**.
  - b) In the dialog that opens, click **Choose File** to open your file explorer.
  - c) Select the file you want to upload.
  - d) Click **Open**, or press ENTER.
  - e) Click **Ok**.  
The receipt is attached to the expense sheet line. It is also added to the Receipts tab of the Expenses workspace.
4. To attach a receipt from the Receipts tab:
  - a) In the **Receipt** field, select a file from the drop-down list.
  - b) Click **Save**.  
The receipt is attached to the expense sheet line.

## Add Receipts to the Receipts Tab

To add several receipts at once, perform a batch upload from the Receipts tab.

**To upload several receipts:**

1. Navigate to **Expenses workspace » Receipts tab**.
2. From the Actions drop-down list, select **Attach Receipts**.
3. In the dialog that opens, click **Choose Files** to open your file explorer.
4. Select the files you want to upload.
5. Click **Open**, or press ENTER.
6. Click **Ok**.  
The files are uploaded and listed in the Receipts tab.

## View a Receipt

You can view any receipt attached to an expense sheet line in the Registrations tab, or listed in the Receipts tab.

**To view a receipt:**

1. Select a line.
2. From the ellipsis drop-down list, select **View Receipt**.

The file is downloaded to your computer/device.

## Delete an Expense Sheet

Use these steps to delete an expense sheet.

To delete an expense sheet:

1. Use the Search Tool to select an existing expense report to delete.



You can only delete reports that are not yet submitted.

2. In the **Actions** drop-down list, click **Delete Expense Sheet**.  
A confirmation window appears.
3. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.

## Print an Expense Sheet

Use these steps to print an expense sheet.

To print an expense sheet:

1. Select the expense sheet.
2. In the **Actions** drop-down list, click **Print**.  
The expense sheet prints at your default printer.

## Submit an Expense Sheet

Use these steps to submit an expense sheet.

To submit an expense sheet:

1. Use the Search Tool to select an existing expense report to submit.



You can only submit open expense sheets.

2. In the **Actions** drop-down list, click **Submit**.  
A confirmation window appears.
3. Click **Submit** to confirm submission, or **Cancel** to exit without submitting.



## Mileage Fields

This topic shows the fields and descriptions on the Mileage workspace.


### Card Part Fields

Field	Description
Mileage Sheet No.	This field shows the number of this mileage sheet.
Job	This field displays the name and number of the job for which the mileage expenses in the current record were incurred.
Employee	This field shows the name of the employee whose mileage entries are listed in the workspace.
Period	This field displays the period during which the mileage expenses in the current record were incurred.
Total Amount	This field displays the following information: <ul style="list-style-type: none"> <li>▪ The base currency used by the employee's company</li> <li>▪ The total amount (including tax) for the lines in the table part</li> </ul>
Status	This field displays the status of the current mileage sheet. It can have one of the following values: <ul style="list-style-type: none"> <li>▪ New</li> <li>▪ Approved</li> <li>▪ Rejected</li> <li>▪ Submitted</li> <li>▪ In Progress</li> </ul>
Copy from Mileage Sheet	If you copied lines from another mileage sheet, this field displays that mileage sheet's number.

## Registrations Tab

This topic describes the fields and definitions on the Registrations tab of the Mileage workspace.

### Tab Fields

Field	Description
Entry Date	Enter a date for this mileage expense.
Favorite	In this field, you can select a favorite.  Choosing a favorite may change other details specified for the mileage sheet line, such as the job or task.

Field	Description
Job No.	Use this or the <b>Job Name</b> field to specify the job for which you are incurring the mileage expense. Filling out one field will auto-populate the other.
Job Name	Use this or the <b>Job No.</b> field to specify the job for which you are incurring the mileage expense. Filling out one field will auto-populate the other.
Quantity	Specify the number of units of the current activity for which a mileage expense is incurred.
From	Enter the starting point of the mileage expense. This is a free-text field.
To	Enter the ending point of the mileage expense. This is a free-text field.
Amount	This field shows the total expense amount for the current activity in the currency chosen in the <b>Currency</b> field. The mileage rate is derived by setup in the system.
Document	Use this field to attach a document to the current mileage sheet line. You can attach a document from your local storage, or select one from those already uploaded to the Documents tab of this workspace.

## Documents Tab

This topic describes the fields and definitions on the Documents tab of the Expenses workspace.

### Tab Fields



This tab and its fields are only available if you are running iAccess with Maconomy 2.4 LA1 (or later) in the backend.

Field	Description
Document Name	This field displays the file name of any document uploaded to the Documents tab. This tab serves as an archive for the current mileage sheet, and you can attach any of the documents listed here to the lines of the mileage sheet.  If you attach a document straight from your local storage, iAccess automatically uploads this document to the Documents tab as well.
Type	This field displays the document's file type/format-for example, .doc, .xls, .ppt, and so on. This field is automatically filled in by iAccess and cannot be changed manually.
Size	This field displays the document's file size (in bytes).
Changed On	This field displays the date when the file/document was last modified. If the file has not been modified, this field displays the date when the file was uploaded to the Documents tab/attached to a mileage sheet line.

Field	Description
Changed By	This field displays the name of the last user to upload the file/document to the Documents tab, or attach the file to a mileage sheet line.
Attached to Line	This field is selected if the document specified in the line is attached to a mileage sheet line.

## Mileage Procedures

This section describes the steps you need to work with mileage sheets.

Use Maconomy iAccess to do the following:

### Create a Mileage Sheet

Use these steps to add a new mileage sheet.

**To create a mileage sheet:**

1. Click **Mileage**.
2. Click **+ New Mileage Sheet**.  
The Create Mileage Sheet wizard displays.
3. Select an Employee Name from the drop-down list. Specify your name, or that of another employee (if you are registering by proxy).
4. Enter a Description. This is a free-text field.
5. Select the Job for which the mileage expense was incurred.
6. Click **Create**.  
iAccess automatically displays the mileage sheet you just created.
7. To add lines to the mileage sheet, click **+ Add Mileage Sheet Line**.
8. Fill out the line fields as needed.
9. Click **Save**.

### Copy from a Mileage Sheet

You can copy lines from an existing mileage sheet. This action copies job and task numbers, but resets quantities and amounts to zero.

**To copy from a mileage sheet:**

1. Select the mileage sheet you want to edit.
2. In the Actions drop-down list, select **Copy From**.  
The Copy From Mileage Sheet wizard displays.
3. Select the mileage sheet from which you want to copy lines.
4. Click **Copy From Mileage Sheet**.  
iAccess adds the copied lines to the current mileage sheet and automatically saves your changes.

## Edit a Mileage Sheet

Use these steps to edit a mileage sheet.

### To edit a mileage sheet:

1. Use the Search Tool to select an existing mileage sheet to edit.



You can only edit mileage sheets that are not yet submitted.

2. Select **Edit** from the **Actions** drop-down list.  
The Edit Mileage Sheet page displays.
3. Edit the fields as needed.
4. Click **Save**.
5. Click **+ Add Mileage Sheet Line** to add additional lines to this mileage sheet.
6. Edit the fields as needed.
7. Click **Save**.

## Duplicate a Mileage Sheet

Use these steps to duplicate an existing mileage sheet.

### To duplicate a mileage sheet:

1. Click **Mileage**.
2. Select a mileage sheet from the filter list.
3. From the Actions drop-down list, select **Duplicate....**  
In the dialog that opens, iAccess displays the following message: A new mileage sheet will be created with a copy of the current fields and lines.
4. Click **Duplicate**.  
iAccess navigates to the new mileage sheet duplicated from the original, and displays the following message: A new mileage sheet ([mileage sheet no.]) has been created from [mileage sheet no. of the original].
5. Click **OK**.

## Attach a Document to a Mileage Sheet Line

When associating a document with a mileage sheet line, you have two options. You can attach the document directly from your local drive, or you can choose to associate a mileage sheet line with an existing document.

### To attach a document to a mileage sheet line:

1. Navigate to **Mileage workspace » Registrations tab**.
2. Select the line you want to update.
3. To attach a document from your local drive:

- a) From the ellipsis drop-down list, select **Attach Document to Line**.
  - b) In the dialog that opens, click **Choose File** to open your file explorer.
  - c) Select the file you want to upload.
  - d) Click **Open**, or press ENTER.
  - e) Click **Ok**.  
The document is attached to the mileage sheet line. It is also added to the Documents tab of the Mileage workspace.
4. To attach a document from the Documents tab:
- a) In the **Document** field, select a file from the drop-down list.
  - b) Click **Save**.  
The document is attached to the mileage sheet line.

### Add Documents to the Documents Tab

To add several documents at once, perform a batch upload from the Documents tab.

To upload several documents:

1. Navigate to **Mileage workspace » Documents tab**.
2. From the Actions drop-down list, select **Attach Documents**.
3. In the dialog that opens, click **Choose Files** to open your file explorer.
4. Select the files you want to upload.
5. Click **Open**, or press ENTER.
6. Click **Ok**.  
The files are uploaded and listed in the Documents tab.

### View a Document

You can view any document attached to a mileage sheet line in the Registrations tab, or listed in the Documents tab.

To view a document:

1. Select a line.
2. From the ellipsis drop-down list, select **View Document**.  
The file is downloaded to your computer/device.

### Delete a Mileage Sheet

Use these steps to delete a mileage sheet.

To delete a mileage sheet:

1. Use the Search Tool to select an existing mileage sheet to delete.



You can only delete reports that are not yet submitted.

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2. Select **Delete Mileage Sheet** from the **Actions** drop-down list.  
A confirmation window appears.
3. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.

## Print a Mileage Sheet

Use these steps to print a mileage sheet.

To print a mileage sheet:

1. Select the mileage sheet.
2. Select **Print** from the **Actions** drop-down list.  
The mileage sheet prints at your default printer.

## Submit a Mileage Sheet

Use these steps to submit a mileage sheet.

To submit a mileage sheet:

1. Use the Search Tool to select an existing mileage sheet to submit.



You can only submit open mileage sheets.

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2. Select **Submit** from the **Actions** drop-down list.  
A confirmation window appears.
3. Click **Submit** to confirm submission, or **Cancel** to exit without submitting.

## Favorites Overview

Favorites are saved combinations of a project and a task that enable you to have easy access to them when entering time and expense information.




### Favorite Concepts

You can access your current Maconomy Favorites from iAccess as well as create favorites from within the application.

### Favorites Fields

This topic describes the fields and definitions on the Favorites workspace.

#### Favorites Fields

Field	Description
Favorite	Enter a name for this Favorite. This is a free-text field.
Job No.	Click  to select a job number with which this Favorite is associated.
Job Name	Click  to select a job name with which this Favorite is associated.
Task	Click  to select a task with which this Favorite is associated.
Time	This field indicates that the Favorite is available on time sheets.
Expe...	This field indicates that the Favorite is available on Expense Sheets.
Mile...	This field indicates that the Favorite is available on Mileage Sheets.

### Favorites Procedures

This section describes the steps you need to follow to work with favorites.



Use favorites to do the following:

#### Create a Favorite

Use these steps to create a favorite.

**To create a favorite:**

1. Click **Favorites**.

2. Click **+ Add Favorite**.
3. In the **Favorite** field, enter a name for this Favorite. This is a free-text field.
4. In the **Job No.** or **Job Name** field, click ▼ to select a job with which this Favorite is associated.
5. If you want to undo your changes, click  **Revert** or select **Revert** from the Ellipsis dropdown on the line itself. Otherwise, click  **Save**.

## Create a Favorite from a Time/Expense/Mileage Sheet Line

Use these steps to create a favorite from within a time/expense/mileage sheet.

### To create a favorite:

1. Navigate to one of the following workspaces:
  - Weekly Time Sheets
  - Daily Time Sheets
  - Expenses
  - Mileage
2. Select the line you want to make a Favorite, then click **Create Favorite** from the ellipsis drop-down.  
Your changes are saved automatically, and the line is added to Favorites.

## Use Favorites

Use these steps to use favorites in Time, Expense, and Mileage Sheets.

### To use favorites:

1. From within the Time, Expense, or Mileage Sheet, click ▼ in the **Job**, **Job Name**, or **Task** field. A list of Favorites displays.
2. Scroll and select the Favorite to use on this line.

## Delete a Favorite

Use these steps to delete a favorite.

### To delete a favorite:

1. In the Favorites workspace, select an existing Favorite to delete.
2. Click **Delete** from the Ellipsis dropdown.  
A confirmation window appears.
3. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.



# Absence Management Overview

Absence Management enables you to manage your own absences.

## Absence Management Concept

Use the Absence workspace to easily create and submit absence requests for approval, and view your available and booked absence time. This workspace enables the following processes:

- Creating and submitting a new absence request
- Creating and submitting allowance requests (such as requests for additional time-in-lieu)
- Viewing a period summary of the employee's own absences
- Viewing approved and rejected absence requests
- Viewing approved and rejected allowance requests



For both absence and allowance requests, you can view all requests of all statuses (unsubmitted, submitted, approved, or rejected).

### General Process

In general, you request absences by creating a request with the start and end dates, and type of absence (such as vacation). An absence approver is notified of such a request, and they can approve or reject the request, and give a reason.

You have a certain number of allowed absence days in a vacation period, and you can only request time that is available in a period.



For complete Absence Management functionality information, including setup, refer to Maconomy Workspace Client documentation, including online help and Concepts Guide.

## General Process for Everyday Use

This topic shows the everyday process you use for managing absences.

This is the everyday process for Absence Management:

- Employees request absences and view their overall absence information as needed.
  - Use the Absence Requests workspace for this step.
  - A notification is sent to the approver.
- Absence approvers accept or reject the request. They can view all employee absence information as well as overall team absence information to help make the decision.
  - Approvers use the Absence Approval workspace in Maconomy for this step.
  - A notification is sent to the employee in iAccess.

## Notifications

Notifications for requesting and approving absence quickly inform the relevant employees when action is needed. Notifications come as line items in the red Notifications bubble in the top right of the screen.

The following notifications are included:

- **Approved Absence-** Appears for the absence requester to indicate that the absence request is approved. It also indicates the relevant request in the Absence workspace.
- **Rejected Absence-** Appears for the absence requester to indicate that the absence request has been rejected. This notification will point to the relevant request in the Absence workspace.
- **Submit Allowance Request-** Appears to alert employees that they have created but not submitted an allowance request.
- **Approved Allowance Request-** Similar to "Approved Absence," but for Allowance requests.
- **Rejected Allowance Request** - Similar to "Rejected Absence," but for Allowance requests.

## Absence Requests Fields

Use this tab to easily create and submit absence requests for approval, and view your available and booked absence time. Available time is shown in the header and in the Period Overview tab.

### Absence Card Part Fields

Field	Description
Employee	This field displays the name and number of the employee currently logged in.
Date Selected	This field displays the date you selected using the left/right arrows or the calendar widget found in the top portion of the workspace.

## Absence Requests Tab

This topic describes the fields and definitions on the Absence Requests tab of the Absence workspace.

### Absence Requests Tab

Field	Description
First Day of Absence	This field shows the first day of the absence request period in this request. This field is editable only when you are creating a new absence request. Click the calendar icon in the field to select a date.
1/2 Day	Select this check box if the first day of the absence request period is a half-day.

Field	Description
Last Day of Absence	In this field, specify the last day of the absence request period. Click the calendar icon in the field to select a date.
1/2 Day	Select this check box if the last day of the absence request period is a half-day.
Duration	In this field, enter the total number of calendar days spanned by the absence request period.
Working Days	This field displays the number of working days spanned by the absence request period.
Absence Type	<p>Select the applicable absence type from the drop-down list. The system administrator can configure the list of available options. For example, the drop-down list could include the following absence types:</p> <ul style="list-style-type: none"> <li>▪ Illness</li> <li>▪ Time in Lieu</li> <li>▪ Vacation</li> </ul> <p>This is a required field.</p>
Remarks	Enter any additional remarks in this field.
Submitted	This check box is selected if the current absence request line has been submitted.
Approved	This check box is selected if the current absence request line has been approved.
Rejected	This check box is selected if the current absence request line has been rejected.

## Allowance Requests Tab

Create and submit allowance requests if you need to add absence time to your available pool of time. For example, if you put in extra hours on a project, you might ask for compensation of those hours as time-in-lieu, and you can state the reason in the **Reason** field on the request.

After the request is submitted, it is approved or rejected. If it's approved, the approver can put restrictions on the allowance, such as that the newly allowed time-in-lieu day is only available for the next two weeks.



*An **allowance request** is different from an **absence request**. The former will add days to the employee's pool of available absence, while the latter is used to book an actual absence period.*

Use the Allowance Requests tab to create a new allowance request, specifying the number of days, the absence type, and a reason for requesting this allowance. For example, request five time-in-lieu days with a reason as well as the job number for a project on which you work.

### Allowance Requests Tab


Field	Description
Entry Date	<p>This field displays the date on which the allowance request was entered. iAccess then suggests this to the approver as the "From Date" for the new allowance's validity period.</p> <p>When creating or editing an allowance request, you can change the date specified in this field.</p>
Absence Type	<p>In this field, specify the absence type for which you are requesting an allowance. Select a value from the drop-down list.</p> <p>The system administrator can configure the list of available options. For example, the drop-down list could include the following absence types:</p> <ul style="list-style-type: none"> <li>▪ Leave</li> <li>▪ Time in Lieu</li> <li>▪ Vacation</li> </ul> <p>This is a required field.</p>
Number of Days	In this field, specify the number of days you want to add to your pool of available absence.
Reason	Enter a reason for the allowance request.
Valid Till	This field shows the date through which the allowance is available. This field will only have a value once the request is approved.
Submitted	This check box is selected if the current allowance request line has been submitted.
Approved	This check box is selected if the current allowance request line has been approved.
Rejected	This check box is selected if the current allowance request line has been rejected.

### Period Summary Tab

Use the Period Summary tab to see booked and available absence time to help gauge when is the best time for planned absences.

This tab shows your absence allowance, as well as used, carried forward, and remaining days for the selected vacation period for each relevant absence type.

Field	Description
Allowance	<p>This portion shows the time that has been granted for absence bookings for the whole period, broken down according to the following:</p> <ul style="list-style-type: none"> <li>▪ Illness</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>▪ Leave</li> <li>▪ Vacation</li> <li>▪ Time in Lieu</li> </ul> <p>These numbers does not change as you book absences. It only changes if your manager changes your allowance.</p>
Carried Forward	<p>This portion shows time that is carried forward from another absence period for each absence type, broken down according to the following:</p> <ul style="list-style-type: none"> <li>▪ Illness</li> <li>▪ Leave</li> <li>▪ Vacation</li> <li>▪ Time in Lieu</li> </ul>
Available	<p>This portion shows how many days you have left for booking in this vacation period, broken down according to the following:</p> <ul style="list-style-type: none"> <li>▪ Illness</li> <li>▪ Leave</li> <li>▪ Vacation</li> <li>▪ Time in Lieu</li> </ul> <p>It uses this formula: Available = Allowance + Carried Forward (to this period) - Booked - Carried Forward To Following Period.</p> <hr/> <p> There is no field to show the last term.</p> <hr/> <p>For example, if you started the period with 25 days of allowance, but then booked 5 days of vacation, this number shows 20.</p>
Booked	<p>This portion shows time that is planned, approved, and scheduled, broken down according to the following:</p> <ul style="list-style-type: none"> <li>▪ Illness</li> <li>▪ Leave</li> <li>▪ Vacation</li> <li>▪ Time in Lieu</li> </ul>

## Absence Procedures

This section describes the steps you need to follow to work with absences.

Use Maconomy iAccess absence management to do the following:

## Create an Absence Request

Use these steps to create an absence request.

### To create an absence request:

1. Navigate to **Absence workspace » Absence Requests tab**.
2. Click **+ New Absence Request**.
3. In the **First Day of Absence** field, specify the first date of the absence period.
4. If the date you specified is a half day, select the **½ Day** check box.
5. In the **Last Day of Absence** field, specify the last day of the absence period.
6. If the date you specified is a half day, select the **½ Day** check box.
7. In the **Duration** field, enter the number of calendar days spanned by the absence request.
8. In the **Absence Type** field, select an absence type from the drop-down list.
9. Enter additional remarks if needed.
10. Click **Save**.  
iAccess displays your absence request as a line in the Absence Requests tab. You can then edit, submit, or delete your absence request.

## Edit an Absence Request

Use these steps to edit an absence request.

### To edit an absence request:

1. Navigate to **Absence workspace » Absence Requests tab**.
2. Select the line you want to edit.
3. Edit the fields as needed, per instructions in Create an Absence Request.
4. To save your changes, click **Save** or press ENTER.

## Edit / Reopen a Submitted Absence Request

Use these steps to edit or reopen a submitted absence request.

### To edit / reopen a submitted request:

1. Navigate to **Absence workspace » Absence Requests tab**.
2. Select the line you want to edit.
3. In the line's ellipsis drop-down list, select **Reopen Request**.
4. Edit the fields as needed, per instructions in Create an Absence Request.
5. To save your changes, click **Save** or press ENTER.

## Submit an Absence Request

Use these steps to submit an absence request.

To submit an absence request:

1. Navigate to **Absence workspace » Absence Requests tab**.
2. Select the line you want to submit.
3. In the line's ellipsis drop-down list, select **Submit Request**.



iAccess displays an error message if you do not have sufficient time available for this absence request.

Once you successfully submit the absence request, iAccess sends a notification to the absence approver, who can either approve or reject your request.

## Delete an Absence Request

Use these steps to delete an absence request.

To delete an absence request:

1. Navigate to **Absence workspace » Absence Requests tab**.
2. Select the line you want to delete.
3. In the line's ellipsis drop-down list, select **Delete Request**.  
iAccess deletes the line, and automatically refreshes the workspace.

## Allowance Procedures

This section describes the steps you need to work with allowances.

Use allowance management to do the following:

### Create an Allowance Request

Use these steps to create an allowance request.

To create an allowance request:

1. Navigate to **Absence workspace » Allowance Requests tab**.
2. Click **+ New Allowance Request**.
3. In the **Entry Date** field, specify the date from which you would like the allowance to be available.



Allowance is valid only within the period from Entry Date to the Valid Till date, which is set by the absence approver. The granted days cannot be booked before or after that period.

4. In the **Absence Type** field, select an absence type from the drop-down list.
5. In the **Number of Days** field, enter the number of days you want to add to your allowance.

6. In the **Reason** field, enter the reason for your request or provide relevant comments.
7. Click **Save**.  
iAccess displays your allowance request as a line in the Allowance Requests tab. You can then edit, submit, or delete your allowance request.

### Edit an Allowance Request

Use these steps to edit an allowance request.

**To edit an allowance request:**

1. Navigate to **Absence workspace » Allowance Requests tab**.
2. Select the line you want to edit.
3. Edit the fields as needed, per instructions in Create an Allowance Request.
4. To save your changes, click **Save** or press ENTER.

### Edit / Reopen a Submitted Allowance Request

Use these steps to edit or reopen a submitted request.

**To edit / reopen a submitted allowance request:**

1. Navigate to **Absence workspace » Allowance Requests tab**.
2. Select the line you want to edit.
3. In the line's ellipsis drop-down list, select **Reopen Request**.
4. Edit the fields as needed, per instructions in Create an Allowance Request.
5. To save your changes, click **Save** or press ENTER.

### Submit an Allowance Request

Use these steps to submit an allowance request.

**To submit an allowance request:**

1. Navigate to **Absence workspace » Allowance Requests tab**.
2. Select the line you want to submit.
3. In the line's ellipsis drop-down list, select **Submit Request**.

Once you successfully submit the allowance request, iAccess sends a notification to the allowance approver, who can either approve or reject your request.

If the absence is approved, iAccess adds the requested number of days to your pool of available days for the chosen absence type. You can then use those days to book absence in the Absence Requests tab.

### Delete an Allowance Request

Use these steps to delete an allowance request.

**To delete an allowance request:**



1. Navigate to **Absence workspace » Allowance Requests tab**
2. Select the line you want to delete.
3. In the line's ellipsis drop-down list, select **Delete Request**.  
iAccess deletes the line, and automatically refreshes the workspace.

## Purchase Orders Overview

The Purchase Orders application allows you to create and maintain purchase orders.

### Purchase Order Concepts

You can:

- Create, edit, submit, and print POs.
- Add documents as attachments to the PO.
- View the status of a PO's header/lines.

### Notifications

Notifications quickly inform the relevant employees when a specific action is needed. Notifications come as line items in the red Notifications bubble in the top right of the screen.

The following notification is included:

- **Rejected Purchase Order** - Appears for the user to indicate that a submitted PO has been rejected. This notification points to the relevant PO.

### Purchase Order Fields

This topic describes the fields and definitions on the Purchase Orders workspace.

#### Card Part Fields

Field	Description
Description	<p>This field shows a brief description of the PO.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p> <p>This is a free-text field.</p>
Purch. Order No.	<p>This field shows the PO number.</p> <p>You can enter a PO number when creating the PO.</p> <p>If you do not use manual numbering, or if you do not enter a number, iAccess automatically allocates the next available PO number from the PO numbers series. You cannot change the number once the purchase order has been created.</p>
Requisitioner	<p>This field shows the employee name or number of the employee who requisitioned the items on the current PO.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>

Field	Description
	If you do not specify a value, iAccess automatically selects the employee name of the user creating the PO.
Submitted	This field shows whether the current PO has been submitted.
Submitted by	This field shows the name of the employee who submitted the current PO.
Approved	This field shows whether the current PO is fully approved.
Approved by	<p>This field shows the name of the employee who performed the final approval of the current PO.</p> <p>If you use approval hierarchies for the approval of POs, and if the current PO has been approved by more than one employee, this field displays the name of the employee who made the latest approval of the purchase order.</p>
Closed	This field shows whether the current PO is closed.
Closed by	This field shows the name of the user who closed the current PO.
Remarks	<p>This field shows remarks about the purchase order.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>
Company	<p>This field displays the name and number of the company responsible for the purchase order.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>
Location	This field displays the value for the Location dimension.
Entity	This field displays the value for the Entity dimension.
Project	This field displays the value for the Project dimension.
Copy from	Use this field to specify the PO from which you want to copy information.
Vendor	<p>This field displays the name and number of the pay to vendor.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>
Attention	This field shows the name of the vendor's designated person-in-charge.

Field	Description
	You can enter a value for this field or update it when the PO is in Edit mode.
Currency	<p>This field shows the vendor's currency.</p> <p>You can select a value for this field or update it when the PO is in Edit mode.</p>
Line Sum, Currency	This field shows the sum of prices based on values entered in the <b>Price</b> field on the Specifications tab. The value in this field is displayed in the currency of the PO.
Invoice Discount %	<p>This field shows the invoice discount percentage.</p> <p>The invoice discount is deducted from the line sum, and this is shown on the purchase order printout. The vendor can then see how much you expect to be invoiced for.</p> <p>Note that an invoice discount % is added to any discount entered on individual purchase order table lines.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>
Invoice Discount, Currency	<p>This field shows the invoice discount amount specified in the purchase order.</p> <p>For PO lines with items, any invoice discount is deducted from prices for the individual item lines, before the items are placed in the warehouse. This ensures that costs are correct.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>
Expense %	<p>This field shows an expense percentage, such as for a handling charge.</p> <p>You can enter an estimated expense percentage (based on previous charges), or update the value when the PO is in Edit mode.</p>
Delivery Costs	<p>This field shows the amount representing expenses for items purchased on the current order, such as for a handling charge.</p> <p>You can enter an estimated amount (based on previous charges), or update the value when the PO is in Edit mode.</p>
Invoice Tax Sum	This field displays the total amount in taxes.
Invoice Amount	This field displays the total invoice amount including tax and discounts.

## Specifications Tab

This topic describes the fields and definitions on the Specifications tab of the Purchase Orders workspace.

### Tab Fields

Field	Description
Job No.	Enter the number of a job.
Job Name	This field shows the name of the job specified in the <b>Job No.</b> field on the selected line.
Task	For lines with a job number, enter or select a task from the drop-down list.  If you enter a value in the field, iAccess checks that a task list has been assigned to the job and that the listing contains the specified task.
Empl. No.	Enter or select from the drop-down list the number of the employee assigned to the PO line.
Quantity	Enter the quantity of services or items ordered.
Unit Price	Enter the unit price of the item. iAccess checks that the amount is positive. The amount must be exclusive of tax.
Price	Enter the price of the PO line.  The amount is calculated as quantity times unit price less any discount. If you manually enter an amount in this field, iAccess recalculates the unit price based on the total amount in this field.
Line Remarks	Enter any remarks you wish to add to the PO line.  This is printed on the PO.
Description	Enter a description of the PO line.
Delivery Date	Select the delivery date.
Approval Status	This field shows the approval status of the current line.

## Documents Tab

This topic describes the fields and definitions on the Documents tab of the Purchase Orders workspace.

### Tab Fields

Field	Description
Document Name	This field shows the file name of the document attached to the PO. The field is automatically filled in by iAccess and cannot be changed manually.

Field	Description
Type	This field shows the file type/format of the document attached to the PO (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by iAccess and cannot be changed manually.
Size	This field shows the file size (in bytes) of the document attached to the PO.
Changed On	This field shows the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the PO.
Changed By	This field shows the name of the last user to upload the file/document to the current PO.


## Purchase Order Procedures

This section describes the steps you need to follow to work with purchase orders.

### Create a Purchase Order

Use these steps to add a new purchase order.

**To create a purchase order:**


1. Click **Purchase Orders**.
2. Click **+ New Purchase Order**.  
The Create Purchase Order wizard displays.
3. Enter a description. This is a free-text field.
4. Specify a requisitioner. This field defaults to the employee name of the user currently logged in, but you can select another employee.
5. Select a vendor. This is a required field.
6. Click **Create**.  
iAccess automatically navigates to the PO you just created, and saves your changes.
7. To add PO lines, click **+ Add Purchase Order Line**.
8. Enter a job number.
9. Enter a task.
10. Fill out the other fields as needed.
11. Click  **Save**.

### Edit a Purchase Order

Use these steps to edit a purchase order.

**To edit a purchase order:**


1. Select a PO from the filter list.

2. Under the Actions drop-down list, click **Edit**.
3. Edit the fields as needed.
4. Click  **Save**.

## Attach Documents to a Purchase Order

Use these steps to attach documents to a purchase order.

**To attach a document to a purchase order:**

1. Select a PO from the filter list.
2. Under the Actions drop-down list, click **Attach Documents**.
3. Click **Choose Files**.
4. In the file explorer window that opens, select the file.
5. Click **Open**.
6. Click **OK**.
7. Click  **Save**.

The attachment is now listed in the Documents tab of the PO.

## Submit a Purchase Order

Use these steps to submit a purchase order.

**To submit a purchase order:**

1. Select a PO from the filter list.
2. Under the Actions drop-down list, click **Submit**.

## Close a Purchase Order

Use these steps to close a purchase order.

**To close a purchase order:**

1. Select a PO from the filter list.
2. Under the Actions drop-down list, click **Close**.

## Reopen a Purchase Order

Use these steps to reopen a purchase order.

**To reopen a purchase order:**

1. Select a PO from the filter list.
2. Under the Actions drop-down list, click **Reopen**.

## Print a Purchase Order

Use these steps to print a purchase order.

**To print a purchase order:**

1. Select a PO from the filter list.
2. Under the Actions drop-down list, click **Print**.

## Copy from another Purchase Order

Use these steps to copy lines from an existing PO to the PO you are currently working on.

**To copy lines from another purchase order:**

1. Select the purchase order you want to edit.
2. In the Actions drop-down list, select **Copy From**.  
The Copy From Purchase Order wizard displays.
3. Specify the PO from which you want to copy lines.
4. Click **Copy From Purchase Order**.  
iAccess adds the copied lines to the Specifications tab of the current PO and automatically saves your changes.



## Employees Overview

The Employee applications let you review and update your own data. These also allow users with the requisite access rights (for example, HR managers) to make changes to other employees' information.

### Employee Concepts

Use the various tabs of the Employee Self Service workspace to view and/or make changes to your personal data. Specifically, you can update the following:

- Preferred name
- Contact information
- Bank details
- List of skills



If you are running iAccess with Maconomy 2.4 LA1 in the backend, you can also view and edit the following information:

- Emergency contacts
- Parental status
- Education and qualifications
- Work eligibility

If you have the requisite access rights, use the various tabs of the Employee Information workspace to view and/or make changes to other employees' information. Specifically, you can update the following:

- Employee name
- Organizational information
- Contact information
- Bank details
- List of skills
- Documents related to hiring and employment



If you are running iAccess with Maconomy 2.4 LA1 in the backend, you can also view and edit the following information:

- Emergency contacts
- Parental status
- Education and qualifications
- Work eligibility

Regular employees do not have access to this workspace or any of its tabs.

## Employee Self Service Fields

This topic shows the fields and descriptions on the Employee Self Service workspace.

### Card Part Fields

Field	Description
Employee Name	This field displays your employee name.
Employee No.	This field displays your employee number.
Supervisor	This field displays the name and employee number of your manager.
Secretary	This field displays the name and employee number of the secretary to whom you are assigned.
Position	This field displays your position/job title.
Company	These fields display the name and number of the company in which you are employed.
Location	This field displays the specified value for the Location dimension, if applicable. Click <b>Edit</b> to update this information.
Address	These fields display your address. Click <b>Edit</b> to update this information.
Zip Code	This field displays the zip code of the postal district for your address. Click <b>Edit</b> to update this information.
Postal District	This field displays the postal district of your address. Click <b>Edit</b> to update this information.
Country	This field displays the country in which you reside. Click <b>Edit</b> to update this information.
Phone	This field displays your primary phone number. Click <b>Edit</b> to update this information.
Mobile	This field displays your primary mobile phone number. Click <b>Edit</b> to update this information.
E-mail	This field displays your work e-mail address.
Bank Name	This field displays the name of your bank. Click <b>Edit</b> to update this information.

Field	Description
Reg. No.	This field displays your bank's registration number. Click <b>Edit</b> to update this information.
Bank Acc. No.	This field displays your bank account number. Click <b>Edit</b> to update this information.

## Emergency Contacts Tab

This topic describes the fields and definitions on the Emergency Contacts tab of the Employee Self Service workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Dependent	When you add an emergency contact, select this check box if the person is your dependent.
Emergency Contact	Select this check box if the person is your emergency contact.
Name	In this field, enter the emergency contact's name.
Address 1-4	In these fields, enter the emergency contact's address.
Zip Code	In this field, you can enter the zip code of the postal district for your emergency contact's address.
Postal District	In this field, you can specify the postal district for your emergency contact's address.
Country	In this field, you can specify the country where your emergency contact resides.
Home Phone	In this field, you can specify your emergency contact's home phone number.
Mobile Phone	In this field, you can specify your emergency contact's mobile phone number.
Email	In this field, you can specify your emergency contact's e-mail address.
Relationship	In this field, enter the emergency contact's relationship to you.

## Parental Status Tab

This topic describes the fields and definitions on the Parental Status tab of the Employee Self Service workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Parental Status Type	<p>Select one of the following values from the drop-down list:</p> <ul style="list-style-type: none"> <li>Solo Parent</li> <li>With Spouse</li> </ul> <p>Companies set up the options that appear in the drop-down list. Define values for the Parental Status popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Description	<p>In this field, enter additional information about your parental status.</p> <p>This is a free-text field.</p>

## Education and Qualifications Tab

This topic describes the fields and definitions on the Education and Qualifications tab of the Employee Self Service workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Country	Choose the country where you obtained the qualification from the drop-down list.
Qualification Type	<p>Choose the type of qualification from the drop-down list.</p> <p>Companies set up the options that appear in the drop-down list. Define values for the Qualification Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Qualification Suffix	Enter the qualification suffix.
Education Institution	Choose the institution where you received your qualification from the drop-down list.

Field	Description
	<p>Companies define their own values for this drop-down list, with the options changing depending on the country specified in the <b>Country</b> field.</p> <p>You can also type in the name of the institution.</p>
Education Subject	Enter the subject in which you received your qualification.
Qualification Level	<p>Choose your qualification level from the drop-down list.</p> <p>Companies set up the options that appear in the drop-down list. Define values for the Qualification Level popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Qualification Date	Click the calendar icon to choose the date on which you became qualified.
Expiry Date	Click the calendar icon to choose the date on which this qualification expires.
Document Check Date	Click the calendar icon to choose the date on which your education and qualifications document was checked.
Document Check Person Empl. No.	<p>Choose the employee number of the person who performed the document check from the drop-down list.</p> <p>If you specify a value here, iAccess auto-populates the <b>Document Check Person</b> field (and vice versa).</p>
Document Check Person	<p>Choose the name of the employee who performed the document check from the drop-down list.</p> <p>If you specify a value here, iAccess auto-populates the <b>Document Check Person Empl. No.</b> field (and vice versa).</p>
Qualification Held	This field calculates and displays the number of years you have had this qualification.

## Work Eligibility Tab

This topic describes the fields and definitions on the Work Eligibility tab of the Employee Self Service workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Eligibility Country	This field displays the country in which you are eligible to work.
Eligibility Status	Choose your eligibility status from the drop-down list.  The values available in the drop-down list are dependent on the Eligibility Status option list specified for the country you selected in the <b>Eligibility Country</b> field.
Eligibility Type	Choose your eligibility type from the drop-down list.  Companies set up the options that appear in the drop-down list. Define values for the Eligibility Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Eligibility Document	Choose your eligibility document from the drop-down list.  The values available in the drop-down list are dependent on the Eligibility Document option list specified for the country you selected in the <b>Eligibility Country</b> field.
Document Number	In this field, enter the document number for your eligibility document.
Start Date	Click the calendar icon to choose the date when your eligibility period begins.
Expiry Date	Click the calendar icon to choose the date when your eligibility period begins.
Issuer	In this field, enter the name of the organization that issued your eligibility document.
Issuing Sponsor	In this field, enter the name of the sponsor who issued your eligibility document.
Document Check Date	Click the calendar icon to choose the date on which your eligibility document was checked.
Document Check Person No.	In this field, choose the employee number of the person who performed the document check from the drop-down list.  If you specify a value here, iAccess auto-populates the <b>Document Check Person</b> field (and vice versa).
Document Check Person	In this field, choose the name of the employee who performed the document check from the drop-down list.  If you specify a value here, iAccess auto-populates the <b>Document Check Person No.</b> field (and vice versa).

## Employee Skills Tab

This topic describes the fields and definitions on the Employee Skills tab of the Employee Self Service workspace.

### Tab Fields

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Skill Type	<p>This field displays the classification of the specified skill. Examples of skill types are Languages, Travel Preferences, or Technical.</p> <p>Companies set up all skill-related information in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for the <b>Skill No.</b> field, iAccess auto-populates this field with the corresponding skill type.</p>
Skill No.	<p>Choose the skill number from the drop-down list.</p> <p>Companies set up the values that appear in the drop-down list (and other skill-related information) in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for this field, iAccess auto-populates the <b>Skill Type</b> and <b>Skill Name</b> fields.</p>
Skill Name	<p>This field displays the name of the skill that is associated with the specified skill number.</p> <p>Companies set up all skill-related information in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for the <b>Skill No.</b> field, iAccess auto-populates this field with the corresponding skill name.</p>
Level	<p>Choose your proficiency level in this skill from the drop-down list.</p> <p>If automatic level specification is enabled in the Skills single dialog in the Workspace Client, iAccess auto-populates this field.</p>
Skill Acquired	Click the calendar icon to choose the date on which you acquired this skill.
Level Acquired	Click the calendar icon to choose the date on which you attained the level you specified for this skill.

## Employee Self Service Procedures

This section describes the steps you need to follow to update your personal data.

Use the Maconomy iAccess Employee Self Service workspace to do the following:

## Update Your Information

Use these steps to update your personal data.

To update your personal information:

1. Navigate to the Employee Self Service workspace.
2. Click **Edit**.
3. Update the card fields as needed.
4. Click **Save**.
5. If you need to make changes in any of the tabs, navigate to a specific tab.
6. To add line information, click the **+ Add...** action found in the lower portion of the tab.
7. Fill out the line fields as needed.
8. Click **Save**.
9. To edit existing line information, click **Edit**.
10. Edit the line fields as needed.
11. Click **Save**.

## Employee Information Fields

This topic describes the fields and definitions on the Employee Information workspace. Regular employees do not have access to this workspace or any of its tabs.

### Card Part Fields

Field	Description
Employee Name	This field displays the employee's name.
Employee No.	This field displays the employee's number.
Supervisor	This field displays the name and employee number of the employee's manager.
Secretary	This field displays the name and employee number of the secretary to whom the employee is assigned.
Position	This field displays the employee's position/job title.
Company	These fields display the name and number of the company in which the employee is employed.
Location	This field displays the specified value for the Location dimension, if applicable.  Click <b>Edit</b> to update this information.
Address	These fields display the employee's address.



Field	Description
	Click <b>Edit</b> to update this information.
Zip Code	This field displays the zip code of the postal district for the employee's address. Click <b>Edit</b> to update this information.
Postal District	This field displays the postal district of the employee's address. Click <b>Edit</b> to update this information.
Country	This field displays the country in which the employee resides. Click <b>Edit</b> to update this information.
Phone	This field displays the employee's primary phone number. Click <b>Edit</b> to update this information.
Mobile	This field displays the employee's primary mobile phone number. Click <b>Edit</b> to update this information.
E-mail	This field displays the employee's work e-mail address.
Bank Name	This field displays the name of the employee's bank. Click <b>Edit</b> to update this information.
Reg. No.	This field displays the bank's registration number. Click <b>Edit</b> to update this information.
Bank Acc. No.	This field displays the employee's bank account number. Click <b>Edit</b> to update this information.

## Emergency Contacts Tab

This topic describes the fields and definitions on the Emergency Contacts tab of the Employee Information workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Dependent	When you add an emergency contact for the employee, select this check box if the person is the employee's dependent.

Field	Description
Emergency Contact	Select this check box if this person is the employee's emergency contact.
Name	Enter the emergency contact person's name.
Address 1-4	In these fields, enter the emergency contact's address.
Zip Code	In this field, you can enter the zip code of the postal district for the emergency contact's address.
Postal District	In this field, you can specify the postal district for the emergency contact's address.
Country	In this field, you can specify the country where the emergency contact resides.
Home Phone	In this field, you can specify the emergency contact's home phone number.
Mobile Phone	In this field, you can specify the emergency contact's mobile phone number.
Email	In this field, you can specify the emergency contact's e-mail address.
Relationship	In this field, enter the emergency contact's relationship to the employee.

## Parental Status Tab

This topic describes the fields and definitions on the Parental Status tab of the Employee Information workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Parental Status Type	<p>Select one of the following values from the drop-down list:</p> <ul style="list-style-type: none"> <li>Solo Parent</li> <li>With Spouse</li> </ul> <p>Companies set up the options that appear in the drop-down list. Define values for the Parental Status popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Description	In this field, enter additional information about the employee's parental status.

Field	Description
	This is a free-text field.

## Education and Qualifications Tab

This topic describes the fields and definitions on the Education and Qualifications tab of the Employee Information workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Country	Choose the country where the employee obtained the qualification from the drop-down list.
Qualification Type	Choose the type of qualification from the drop-down list.  Companies set up the options that appear in the drop-down list. Define values for the Qualification Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Qualification Suffix	Enter the qualification suffix.
Education Institution	Choose the institution where the employee received the qualification from the drop-down list.  Companies define their own values for this drop-down list, with the options changing depending on the country specified in the <b>Country</b> field.  You can also type in the name of the institution.
Education Subject	Enter the subject in which the employee received the qualification.
Qualification Level	Choose the qualification level from the drop-down list.  Companies set up the options that appear in the drop-down list. Define values for the Qualification Level popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Qualification Date	Click the calendar icon to choose the date on which the employee became qualified.
Expiry Date	Click the calendar icon to choose the date on which this qualification expires.
Document Check Date	Click the calendar icon to choose the date on which the education and qualifications document was checked.

Field	Description
Document Check Person Empl. No.	Choose the employee number of the person who performed the document check from the drop-down list.  If you specify a value here, iAccess auto-populates the <b>Document Check Person</b> field (and vice versa).
Document Check Person	Choose the name of the employee who performed the document check from the drop-down list.  If you specify a value here, iAccess auto-populates the <b>Document Check Person Empl. No.</b> field (and vice versa).
Qualification Held	This field calculates and displays the number of years the employee has had this qualification.

## Work Eligibility Tab

This topic describes the fields and definitions on the Work Eligibility tab of the Employee Information workspace.

### Tab Fields



This tab and its fields are only available if you are running Maconomy 2.4 LA1 (or later) in the backend.

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Eligibility Country	This field displays the country in which the employee is eligible to work.
Eligibility Status	Choose the employee's eligibility status from the drop-down list.  The values available in the drop-down list are dependent on the Eligibility Status option list specified for the country selected in the <b>Eligibility Country</b> field.
Eligibility Type	Choose the employee's eligibility type from the drop-down list.  Companies set up the options that appear in the drop-down list. Define values for the Eligibility Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Eligibility Document	Choose the eligibility document from the drop-down list.  The values available in the drop-down list are dependent on the Eligibility Document option list specified for the country selected in the <b>Eligibility Country</b> field.
Document Number	In this field, enter the document number for the employee's eligibility document.
Start Date	Click the calendar icon to choose the date when the eligibility period begins.

Field	Description
Expiry Date	Click the calendar icon to choose the date when the eligibility period expires.
Issuer	In this field, enter the name of the organization that issued the employee's eligibility document.
Issuing Sponsor	In this field, enter the name of the sponsor who issued the employee's eligibility document.
Document Check Date	Click the calendar icon to choose the date on which the eligibility document was checked.
Document Check Person No.	In this field, choose the employee number of the person who performed the document check from the drop-down list.  If you specify a value here, iAccess auto-populates the <b>Document Check Person</b> field (and vice versa).
Document Check Person	In this field, choose the name of the employee who performed the document check from the drop-down list.  If you specify a value here, iAccess auto-populates the <b>Document Check Person No.</b> field (and vice versa).

## Employee Skills Tab

This topic describes the fields and definitions on the Employee Skills tab of the Employee Information workspace.

### Tab Fields

Fields are read-only by default. To update information, click **Edit**.

Field	Description
Skill Type	This field displays the classification of the specified skill. Examples of skill types are Languages, Travel Preferences, or Technical.  Companies set up all skill-related information in the Skills single dialog in the Workspace Client.  When you specify a value for the <b>Skill No.</b> field, iAccess auto-populates this field with the corresponding skill type.
Skill No.	Choose the skill number from the drop-down list.  Companies set up the values that appear in the drop-down list (and other skill-related information) in the Skills single dialog in the Workspace Client.  When you specify a value for this field, iAccess auto-populates the <b>Skill Type</b> and <b>Skill Name</b> fields.
Skill Name	This field displays the name of the skill that is associated with the specified skill number.

Field	Description
	Companies set up all skill-related information in the Skills single dialog in the Workspace Client.  When you specify a value for the <b>Skill No.</b> field, iAccess auto-populates this field with the corresponding skill name.
Level	Choose the employee's proficiency level in this skill from the drop-down list.  If automatic level specification is enabled in the Skills single dialog in the Workspace Client, iAccess auto-populates this field.
Skill Acquired	Click the calendar icon to choose the date on which the employee acquired this skill.
Level Acquired	Click the calendar icon to choose the date on which the employee attained the level specified for this skill.

## Documents Tab

This topic describes the fields and definitions on the Documents tab of the Employee Information workspace.

### Tab Fields

Field	Description
Document Name	This field displays the document name.
Type	This field displays the document file type.
Size	This field displays the document file size.
Changed On	This field displays the date on which the document was last changed.
Changed By	This field displays the name of the user who last changed the document.
Remarks 1	Enter any appropriate comments in this field.

## Employee Information Procedures

This section describes the steps you need to follow to update other employees' personal data.

Use the Maconomy iAccess Employee Information workspace to do the following:

## Update Another Employee's Information

Use these steps to update another employee's personal data.

### To update another employee's information:

1. Navigate to the Employee Information workspace.
2. Select an employee from the filter list.
3. In the Actions drop-down list, select **Edit**.
4. Update the card fields as needed.
5. Click **Save**.
6. If you need to make changes in any of the tabs, navigate to a specific tab.
7. To add line information, click the **+ Add...** action found in the lower portion of the tab.
8. Fill out the line fields as needed.
9. Click **Save**.
10. To edit existing line information, select **Edit** from the Actions drop-down list.
11. Edit the line fields as needed.
12. Click **Save**.

## Attach Another Employee's Documents

Use these steps to add hiring/employment documents to an employee's personal data.

### To attach documents:

1. Navigate to the Employee Information workspace.
2. Select an employee from the filter list.
3. Navigate to the Documents tab.
4. In the Actions drop-down list, select **Attach Documents**.  
The Attach Documents dialog displays.
5. Click **Choose Files** to open the file explorer.
6. Select a file, then click **Open**.
7. Click **Ok** to save the change.

## View Another Employee's Documents

Use these steps to view another employee's hiring/employment documents.

### To view documents:

1. Navigate to the Employee Information workspace.
2. Select an employee from the filter list.
3. Navigate to the Documents tab.
4. In the line for the document you want to view, click the ellipsis drop-down.

5. Select **View Document** to download a copy of the attached document.



## Approvals Overview

Use the Approval workspaces to quickly view and approve/reject absence and allowance requests.

### Absence and Allowance Approval Concepts

#### Absence Approval Workspace

This workspace allows managers to easily approve absence requests for employees in iAccess.

Managers can view the absence requests pending approval, and review information such as duration of absence, whether or not the absence is submitted for approval, and if the absence information is synchronized with time sheets. They can also approve or reject an absence in this view.



Configuration and back office tasks such as managing absence balances at year end are not supported by iAccess.

#### Allowance Approval Workspace

This workspace allows managers to easily approve allowance requests for employees.

Managers can view allowance requests pending approval, and approve/reject them.

#### Notifications

Notifications for approving absence and allowance requests inform the relevant managers when their action is needed. Notifications come as line items in the red Notifications bubble in the top right of the screen.

The following notifications are included:

- **Approve Absence** - Appears for the manager to indicate an absence request for approval. The notification points to the relevant request.
- **Approve Absence Allowance** - Appears for the manager to indicate an allowance request for approval. The notification points to the relevant request.

### Absence Approval Fields

This topic describes the fields and definitions on the Absence Approval workspace.

#### Status Part Fields

Field	Description
Submitted	This field shows whether the current absence request is submitted.

Field	Description
Reopened	This field shows whether the current absence request is reopened.
Approved	This field shows whether the current absence request is approved.
Rejected	This field shows whether the current absence request is rejected.

### Absences Part Fields

Field	Description
First Day of Absence	This field shows the first day in the range of dates covered by the current absence request.
Last Day of Absence	This field shows the last day of the absence period in the current absence request.
First Day is Half Day	This field indicates whether the first day of this absence request period is a half day.
Remarks	This field shows any remarks added to the absence request.
Rejection Reason	If the current absence request is rejected, this field shows the reason for its rejection.
Synchronized with Time Sheets	This field shows whether time sheet lines have been created automatically upon approval for the entire absence period.
Duration	This field shows the duration (in calendar days) of the current absence request period.
Absence Type	This field shows the reason for the absence request, such as vacation or illness.
Last Day is Half Day	This field indicates whether the last day of the absence request period is a half day.
Working Days	This field shows the total number of work days covered by the absence request period.

## Absence Approval Procedures

This section describes the steps you need to follow to work with absence approval.

Use Maconomy iAccess absence approval to do the following:

### Approve or Reject an Absence Request

Use these steps to approve or reject an absence request

**To approve or reject an absence request:**

1. Select an absence request for approval from the filter list, or from the list of notifications in the top right corner.
2. To approve the request:
  - a) From the Actions drop-down list, click **Approve**.
3. To reject the request:
  - a) From the Actions drop-down list, click **Reject**.  
iAccess displays the Reject Absence Request wizard.
  - b) Enter a rejection reason. This is a required field.
  - c) Click **Reject**.

## Allowance Approval Fields

This topic describes the fields and definitions on the Allowance Approval workspace.

### Status Part Fields

Field	Description
Submitted	This field shows whether the current allowance request is submitted.
Approved	This field shows whether the current allowance request is approved.
Rejected	This field shows whether the current allowance request is rejected.
Rejection Reason	This field shows the reason provided by the approver for the most recent rejection.

### Allowance Request Part Fields

Field	Description
Entry Date	This field displays the date on which the allowance request was entered. iAccess then suggests this to the approver as the "From Date" for the new allowance's validity period.
Absence Type	This field displays the absence type for which the employee is requesting an allowance.
Number of Days	This field displays the number of days that the employee requested. The approver has the option to edit this number before approving the request/ before the days are added to the employee's pool of available absence.
Reason	This field displays the reason provided by the employee for the allowance request.

## Allowance Approval Procedures

This section describes the steps you need to follow to work with allowance approval.

Use Maconomy iAccess allowance approval to do the following:

### Approve or Reject an Allowance Request

Use these steps to approve or reject an allowance request.

**To approve or reject an allowance request:**

1. Select an allowance request for approval from the filter list, or from the list of notifications in the top right corner.
2. To approve the request:
  - a) From the Actions drop-down list, click **Approve**.  
iAccess displays the Approve Allowance Request wizard.
  - b) In the **Valid Till** field, click the calendar icon to specify a date. This is a required field.
  - c) Click **Approve**.
3. To reject the request:
  - a) From the Actions drop-down list, click **Reject**.  
iAccess displays the Reject Allowance Request wizard.
  - b) Enter a rejection reason. This is a required field.
  - c) Click **Reject**.

## Reports Overview

BPM reports are available under the Reports section of the iAccess menu. This section lists reports, grouped by category, that are available to you. This enables you to easily access reports used by your company. You can configure iAccess (or the Workspace Client) to work with Single Sign In so that users can automatically log in to BPM.



Viewing BPM reports with Chrome is not officially supported. You can view the reports with the supported browsers listed in the [Deltek Product Support Compatibility Matrix](#).

## Reports Concepts

Use the Reports workspaces to easily access reports used by your company.

## Reports Workspaces

There are two workspaces with predefined BPM reports: Job Reports and Management Reports. Each workspace is displayed as an item under the Reports section of the menu. When you click a menu item, the workspace opens and shows a list of BPM reports. When you click a report within the workspace, it opens with InfoView in a separate tab on your browser. You can customize what reports are viewable to the user by adding or deleting reports from the list. You can also create your own workspace and specify what reports are available for each user group.

### Job Reports Workspace

The following BPM reports are available in this workspace:

- Job Profitability Summary
- Job Profitability Budget
- Job Profitability Budget, by Task
- Job Profitability Comparison
- Job Profitability Periodic
- Job Profitability Transactions
- Job Budget to Actuals YTD
- Job Budget to Actuals, by Task
- Job Status, by Task & Employee
- WIP Aging
- Revenue Analysis


### Management Reports Workspace

The following BPM reports are available in this workspace:

- Utilization, by Employee

- Realization, by Employee
- Realization, by Account Manager
- Job Profitability Summary, by Job
- Customer Profitability, by Customer
- AR Aging
- Profit and Loss
- Profit and Loss, by Dimension





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