Deltek Maconomy® 2.4.5

Getting Started with Workspace Client

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Workspace Client

Overview

This document is an introduction to the Maconomy client. It discusses general concepts and terms, as well as some frequently used actions and procedures.

Getting Started with the Maconomy Client

The subsequent sections discuss the following:

- Concepts and terms such as workspace, section, and panel
- The Search Capability and Search Favorites features
- How to use the keyboard for navigation and interaction

Workspaces

A workspace is a grouping of panels, organized hierarchically around a business entity (such as a customer), a role (such as a project manager), or a process (such as financial reporting).

You can think of a workspace of as a work area: all the tools and functionality that are needed for working with a customer, being a project manager, or doing financial reporting are in one place, clearly organized.

The Workspace Menu

The workspace menu shows the workspaces that have been setup for your role, and to which you have access. To open a workspace, double-click in the menu. To close it again, double-click the "X" on the workspace tab.

Several workspaces can be open simultaneously. Also, the same workspace can be opened more than once. This is useful, for example, when you work with a number of jobs at the same time.

Sections

Workspaces can be divided into sections, which divide larger workspaces into distinct areas. The sections typically represent the main activities in a workflow or major activities in a business lifecycle, or they represent different aspects of a business entity.

To switch between sections, click in the section bar (located in the top part of the workspace, below the filter, and above anything else in the workspace.)

Panels

A panel is where you do something: enter data, edit data, and review data. Panels correspond to what is also — in other contexts — called windows or dialogs. A panel can contain fields where you can enter and edit data, and labels that tell what the fields are for.

Panels can also have actions: steps that you can do. For example, in a panel that shows a quote, you could have an action that converts the quote to an order.

Search and Filters

You can use search and filters to find business entities that you need to work with.

There are three main search types:

- Search using filter lists (CTRL+F)
- Context-specific search (CTRL+G)
- Manual Search

  Use filter list searches to narrow down a list of business entities. In the "top" filters of many workspaces, for example, a filter list search is used to select exactly one business entity work with: one customer, one job, and so forth.

  Use context-specific searches to find business entities that are somehow associated with the entity you are working with. For example, if you are working with a job, you can use a context-specific search to find an employee that can be the project manager. If you are working with a time sheet, you can use a context-specific search to add a task to that time sheet.

  Use manual search to filter results and avoid performance-heavy searches. For example, if you know the specific filter criteria you would like to use for a search, you can manually choose that criteria to narrow down the search results without negatively impacting performance.

Search Using Filter Lists

Filter lists are used in many workspaces as a "top filter." This is the case in those workspaces that work with one business entity at a time.

An example is the Jobs workspace: in this workspace you have to select a Job to work with before you can do anything else. The filter list lets you do that. When you see the job that you want to work with in the list, you double-click it to start working with the job.

The filter list is minimized automatically when you select something in the list. You find a business entity by searching in the top filter that is "in front" of the workspace, so to speak. In most cases, however, you do not really "search" in a traditional sense at all:

- Predefined filter are can be set up to give one-click access to a filtered list. Examples could be My Open Jobs or All My Jobs.
- The top filter of a workspace can be set to open with a predefined filter. For example, the Jobs workspace could always open with the My Open Jobs filter already applied.

If the list is too long to be easily scanned, you can apply more filters by searching-as-you-type. This means that when you start typing in the top row of the filter list (the filter row), the text you enter is applied as a search in that column immediately.

If, for example, you start typing "maco" in the Job Name field in the filter row, Jobs with names such "Deltek Maconomy" as well as "pharmaco" are retrieved: wild cards are implied. The search is performed each time there is a brief pause in your typing.

You can sort the "search table" on any column by clicking the header of that column. The first time you click on a new column header, the column will be sorted by ascending values, and a second click will reverse the sort (to descending values.)

You can also customize what columns are shown in this way by right-click in somewhere in the column header row. You can now do two things:

- Hide the current column
- Open the Customize columns dialog

In the Customize columns dialog you can select and deselect columns ("fields") to show, and you can decide what order to show them in. And there is a simple link that will reset everything to the defaults.

There are keyboard shortcuts available for working with filter lists.

Work with a Filter List

When you select a business entity to work from a filter list by double-clicking, the filter list is automatically compacted (or minimized.)

This means that only one row is shown from the list. The list is fully functional while it is compacted, and you can switch from one element in the element in the list to another in two ways:

- Use the arrow keys that are next to the drop-down. This moves one element back and forward in the list, respectively.
- Use the drop-down list to select a specific element.

The contents of the compacted filter list are the same as they were in the expanded list when it was compacted. If you used a filter (for example, a predefined one such as My Jobs), the jobs that you can cycle through with the arrows or select from the drop-down list are "My Jobs." In order to see more jobs or different jobs in the compacted filter list, you must expand the list and set a new filter.

Context-Specific Search

Context-specific search is different from search using filters. In previous Maconomy versions it was informally known as CTRL+G because this keyboard shortcut was use to invoke the context- specific search. It has also been referred to as "foreign key search" which is precise, but does require some explanation.

The best way to explain what it is, is by using an example:

You want to add an employee to a job, so you open the Jobs workspace and select the job. In the Employees panel (in the Home section) you click in the Employee No. column in the Employees table. This creates a new, empty line where you can add the employee.

You can now use context-specific search to find an employee. If you start typing in the Employee No. field, it works almost like the inline search in a filter list: as you are typing (and there is a slight pause in your keystrokes) a search will begin, and the result appear in a drop-down. As you continue typing, the search will become more and more refined. And the drop-down list includes more than just the employee number: it also has a column with the name of the employee. That makes it easier to find and select the correct employee.

Context-specific search searches based on the context (here, the context is an employee as the search is triggered from the Employees No. field.) When it is possible to use context-sensitive search in a field, a small magnifying glass icon appears in the corner of the field.

If you click this icon or enter the CTRL+G keystroke, you open a dialog that makes it possible to search on more fields and in more advanced way: this dialog works just like a filter list.

Actions

Actions are things that you can do. They are similar to functions. An action could be as simple as Print or Delete, or it could more complicated, such as Assign Lines to Sales Orders.

Actions are generally represented as buttons that display in the toolbar at the top of a panel. Each panel has it is own actions, and an action acts on the business entity (or entities) in that panel. In general, the main, business related actions are in panels that show one business entity (the "card part" in Maconomy legacy terminology), while actions in the a form that contains tabular data (lines) generally either manipulates the layout of the table, or it acts on the selected lines.

Create actions (actions that create a new entity) are normally found in the filter panels where you would also search for existing entities.

Some icons (the most common ones, the ones that are in almost every panel) are shown as icons only (Print is an example.) Others are shown as icons and text. If a panel has many actions, the actions that are most often used are given priority and shown in the toolbar in the normal way, while less-used actions are shown in a drop-down list (or even more than one drop-down list in some rare instances.)

Wizards

Wizards are special windows that help you perform a specific task in Maconomy by guiding you through the steps that are necessary to perform the task.

Wizards are used extensively in Maconomy. They are meant to guide you safely through complex tasks, or through common but complicated tasks. When a wizard is used, it is possible to focus on important information, and it is possible to make are that required field are filled in.

A good example is the Create New Job wizard. You are first required to choose a template job. When the wizard proceeds, it will ask for then exact information that is required when creating a new job based on the template job you chose. When the wizard conclude and the new job has been created, required and important fields are sure to have data. You can refine information that is of a more optional nature later, at your leisure.

Wizards are invoked by actions - that is: clicking an action button may start a wizard. The online help explains how to start a wizard. There is no dedicated online help for the wizard itself, but all wizards have instructive labels that will guide you through using them.

To-Dos

It is possible to set up Maconomy so that users are notified when certain events occur. The users are then alerted by a To-Do that displays up in the user's To-Do menu. The To-Dos for each user are grouped into predefined categories.

When you double-click a To-Do, the relevant workspace opens. If, for example, there is a To-Do for submitting a time sheet, then the Time and Expense workspace opens.

Menu Search Capability

The Search Capability feature allows you to enter terms into a search field and retrieve information for a particular workspace.

This feature lets you navigate the workspace menu easily and search for a specific workspace (in English or its localized equivalent, depending on your language settings). As you type it provides you with a list of suggestions when it cannot find the exact match. You can also carry out a wildcard search when you are unsure about the term you are looking for.

Workflow

Maconomy switches to the tree view whenever you activate a search. This type of view allows you to view multiple search results from different folders. When you clear the **Search** field or close it, Maconomy switches back to the shelf view. Customize the **Search** field if you want it to be visible at all times, or if you prefer to see it only when you press a keyboard shortcut. By default, Maconomy keeps this field hidden.

Procedures

View the Search Field

By default, Maconomy keeps the **Search** field hidden.

To view the **Search** field:

1. Press CTRL+ALT+F (on Windows) or CMD+ALT+F (on Mac).
2. Press the same keyboard combination to hide the **Search** field, or press ESC.

View the Search Field Permanently

To view the **Search** field permanently:

1. Click **Edit » Preferences » Search**.
2. Select the **Always show menu search field** check box.
3. Click **OK**.

Search for a Workspace

To search for a workspace:

1. In the **Search** field, enter a search term. It can be the specific workspace name or the localized equivalent.

   > **Note:** Maconomy does not allow you to search for pane names.

2. In the list of search results that appears, double-click the workspace you want to use to open it.
3. To erase the contents of the **Search** field and return to the shelf view of the menu, click **Erase** (the icon found in the rightmost part of the field) or press BACKSPACE.

Perform a Wildcard Search

To perform a wildcard search:

1. In the **Search** field, enter an * followed by a search term. It can be in English or its localized equivalent.

   > **Note:** Maconomy does not allow you to search for pane names.

2. In the list of search results that appears, double-click the workspace you want to use to open it.
3. To erase the contents of the **Search** field and return to the shelf view of the menu, click **Erase** (the icon found in the rightmost part of the field) or press BACKSPACE.

Search Favorites

The Search Favorites feature enables you to take any filter restriction and custom sorting that you frequently use and save it as a ”favorite” for searching purposes. These Search Favorites then function the same way as the predefined searches in the Workspace Client to quickly filter information.

Your Search Favorites metadata are saved in your local machine.

Workflow

Add, remove, reorder, and rename Search Favorites using the heart-shaped icon found in the top right corner of the current workspace. You can also use the arrow beside this icon.

Saved Search Favorites are seen as radio buttons in the top portion of the workspace, together with any predefined searches for that workspace. Select the Favorite that you want to use to filter the information.

If the number of Search Favorites makes it impossible for Maconomy to display them as distinct radio buttons, Maconomy will simply make use of the compacted filter options drop-down list. If you want to use a Search Favorite and you cannot find it in the row of visible radio buttons, select the **Others** option and choose the Favorite from the drop-down list beside this option.

This feature is enabled by default.

Procedures

Add a Search Favorite

To add a Search Favorite:

1. Enter a search filter restriction in any workspace column.
2. Click **Search Favorites** (or the arrow beside it) **» Add Search Favorite**.
3. In the **Name** field, enter a name for this search filter restriction.

   > **Note:** If you use the name of an existing option, saving is disabled.

4. Click **Save**.

Remove a Search Favorite

To remove a Search Favorite:

1. Click **Search Favorites (or the arrow beside it) » Manage Search Favorites**. A table displays.
2. In the table, select the row of the Search Favorite to remove.
3. Click **Remove » OK**.

Remove All Search Favorites

To remove all Search Favorites:

1. In a workspace, click **Search Favorites (or the arrow beside it) » Manage Search Favorites**.
2. In the window that appears, click **Remove All » OK**.
3. Click **OK** to return to the workspace.

Remove All Search Favorites for All Workspaces

To remove all Search Favorites for all workspaces:

1. Click **Edit » Preferences » Metadata**.
2. Click **Clear search favorites » OK**.
3. Click **OK** to return to the workspace.

Reorder Search Favorites

To change the order in which your Search Favorites are listed:

1. In a workspace, Click **Search Favorites (or the arrow beside it) » Manage Search Favorites**.
2. In the table that appears, select the row of the Search Favorite to move.
3. Click **Up** or **Down** to move the Search Favorite to the desired position.
4. Click **OK** to save changes and return to the workspace.

Rename a Search Favorite

To rename a Search Favorite:

1. Click **Search Favorites (or the arrow beside it) » Manage Search Favorites**.
2. In the table that appears, click the **Name** field of the Search Favorite to rename.
3. Enter a new name.

   > **Note:** If you attempt to use an existing name, saving is disabled.

4. Click **OK** to save changes and return to the workspace.

Use a Search Favorite

To use a Search Favorite:

1. In a workspace, select a Search Favorite to filter the information.

Use a Search Favorite from the Compacted Filter Options Drop-down List

To use a Search Favorite from the compacted filter options drop-down list:

1. In a workspace, select the **Others** filter option.
2. In the drop-down list beside this option, select the Search Favorite to use.

Disable Search Favorites

To disable Search Favorites:

1. Click **Edit » Preferences » Search**.
2. Clear the **Enable search favorites** check box.
3. Click **OK**.
4. Close all open workspaces.
5. Reopen the workspaces you want to use.

Using the Keyboard

You can use the keyboard instead of the mouse (or a similar tracking device) to control the Maconomy client. You can navigate the workspaces, work with the panels, and control the top filters, all by using the keyboard exclusively.

There is a separate topic that describes how to work with tables. As part of that topic, the specific keyboards shortcuts for working in a table are also described.

Note: Press F1 to open the Help Menu.

Shortcuts

You can use keystroke combinations to navigate workspaces. The table below shows the shortcuts you can use in the workspaces.

Workspace Shortcuts

Shortcut	Function
CTRL+ARROW_UP	When not in keyboard navigation mode, this shortcut will initiate the mode. In keyboard navigation mode, it moves focus form the current tab to the tab in the parent panel, or to a section tab.
CTRL+ARROW_LEFT	When in keyboard navigation mode, this shortcut will move focus to the panel to the left of the current panel.
CTRL+ARROW_DOWN	When in keyboard navigation mode, moves focus to the panel below the current panel.
ARROW_LEFT , ARROW_RIGHT	When in keyboard navigation mode, moves between sibling tabs (tabs on the same level of the workspace hierarchy) and section tabs (left and right, respectively.)
ENTER	When in keyboard navigation mode, ENTER ends the mode. If a tab is selected, the panel below the tab will have focus afterwards; if a section tab is selected, the active tab in the workspace below will have focus afterwards.
ESC	Press this key to cancel workspace navigation.
CTRL+F6	This shortcut opens the window which lists all the parts (workspaces and menus) that are currently open in Maconomy.
ALT+M	Use this shortcut to toggle the workspace area between the maximized and the normal modes.
CTRL+SHIFT+W	Use this shortcut to close all workspaces.
CTRL+W	Use this shortcut to close the current workspace.

Shortcut	Function
CTRL+ALT+F	Use this shortcut to open the **Search** field.
CTRL+ALT+P	Use this shortcut to open the Properties dialog box for the current workspace.

Panel Shortcuts

You can use the keyboard to minimize, maximize, and restore panels. The table below shows the shortcuts you can use:

Shortcut	Function
CTRL+PAGEUP, CTRL+PAGEDOWN	CTRL+PAGEUP toggles the state of the panel to the right of the current panel between minimized and normal. CTRL+PAGEDOWN does the same for the panel below the current panel.
CTRL+SHIFT+PAGEUP, CTRL+SHIFT+PAGEDOWN	CTRL+SHIFT+PAGEUP maximizes the current panel. CTRL+SHIFT+PAGEDOWN normalizes the current panel if it is maximized; if it is already in the normal state, it minimizes.

Use the following shortcuts for panel control navigation.

Shortcut	Function
F9	Press this key to activate panel control navigation.
ARROW_RIGHT	Press this key to navigate to the next control.
ARROW_LEFT	Press this key to navigate to the previous control.
ENTER, SPACE	Press either of these keys to end panel control navigation.
F8	Press this key to toggle search rows in a filter.
CTRL+ARROW_RIGHT	Use this shortcut to navigate to the next filter page.
CTRL+ARROW_LEFT	Use this shortcut to navigate to the previous filter page.

You can also use keyboard shortcuts to perform panel actions.

Shortcut	Panel Action
ALT+SHIFT+ARROW_UP	Move up
CTRL+P	Print
CTRL+N	Initialize
ALT+SHIFT+ARROW_RIGHT	Indent
CTRL+D	Delete
F5	Refresh/Read
ALT+SHIFT+ARROW_LEFT	Outdent
CTRL+SHIFT+P	Print this
ALT+SHIFT+ARROW_DOWN	Move down
CTRL+M	Add row

Filter Shortcuts

You can use the keyboard to work with and control the top filter (filter list) of a workspace. The table below shows the shortcuts you can use:

Shortcut	Function
CTRL+F	Use this keystroke combination to toggle the top filter of a workspace between the normal and the collapsed mode. When you switch to the normal mode, the filter gets focus. When you switch to the collapsed mode, focus returns to the workspace below.
CTRL+SHIFT+F	Use this keystroke combination to toggle focus between the workspace and a collapsed top filter without expanding the filter. You can use the shortcuts listed below to navigate in the collapsed filter, and move back to the workspace with another CTRL+SHIFT+F.
CTRL+ARROW_UP	When not in keyboard navigation mode, this shortcut will initiate the mode. In keyboard navigation mode, it moves focus from the current tab to the tab in the parent panel, or to a section tab.
CTRL+ARROW_LEFT	When in keyboard navigation mode, this shortcut will move focus to the panel to the left of the current panel.
CTRL+ARROW_RIGHT	When in keyboard navigation mode, moves focus to the panel to the right of the current panel.

Shortcut	Function
CTRL+ARROW_DOWN	When in keyboard navigation mode, moves focus to the panel below the current panel.
ARROW_LEFT , ARROW_RIGHT	When in keyboard navigation mode, moves between sibling tabs (tabs on the same level of the workspace hierarchy) and section tabs (left and right, respectively.)
ENTER	When in keyboard navigation mode, ENTER ends the mode. If a tab is selected, the panel below the tab will have focus afterwards; if a section tab is selected, the active tab in the workspace below will have focus afterwards.

Filter List Shortcuts

This topic describes how to use the Keyboard to work with a filter list (such as an expanded top filter).

The table lists the keyboard shortcuts that you can use:

Shortcut	Function
F8	This key toggles focus between the sub-tab (the list of records) and the filter row.
F9	This key toggles focus between working in the table part of a filter list and in the panel control row (the row that contains buttons for predefined filters).
ARROW_LEFT, ARROW_RIGHT	Use these arrow keys to move from one control to another in the panel control row.
CTRL+ARROW_LEFT, CTRL+ARROW_RIGHT	When a filter list has more than one page, use these shortcuts to move back and forth between pages.
ENTER	Press ENTER to select the currently highlighted control when the cursor is in the panel control row.

Working with Tables

A lot of data in Maconomy is presented in tables. Accordingly, there are many features that make working with tables easier. You can do almost anything you want to do with a table with either the mouse by clicking and dragging, or with the keyboard through a number of keyboard shortcuts.

The topics presented here describe the general features for working with tables in the Maconomy client, as well as the keyboard shortcuts that you can use when working with a table.

Editing and copying in tables

"One click editing" means that an editable table switches to editing mode as soon as you click in it or navigate to it.

To copy the contents of a read-only (non-editable) cell, press the F2 key to switch the cell to "selection mode."

To copy parts of a table (multiple cells), you make a rectangular selection that contains the table cells that you want to copy. You can make the selection in two ways:

- Click and drag with the mouse.
- Press SHIFT+CTRL on your keyboard.

After you select the cells, you can use CTRL+C to copy them, or you can right-click with the mouse and click **Copy** on the context menu.

Customizing a Table

You can customize a table to meet your needs in a number of ways.

The customization options appear in a context menu when you right-click in the header of a table. The menu contains two options:

- **Customize columns** — This option opens a new window.
- **Remove column** — This option removes the column that is currently selected.

Customize Columns

You can open the Customize columns window by right-clicking in the header of a table and selecting Customize columns from the context menu.

There are two boxes with lists of fields in this window:

- **Available columns** — Contains all fields that it is possible to show as columns in the table, but that are not shown at the moment.
- **Show columns in this order** — Is a list of fields currently shown as columns. You can order the columns by selecting one or more fields here and clicking the up or down arrow buttons to move the selected fields up and down. Up and down corresponds to left/right in the table: the field at the top will be the column at the left end of the table, and so forth.

You can move fields from one list to the other by selecting them and then clicking the Add or the Remove button.

Finally, you can click the **Revert to defaults** link that resets everything to the defaults. Any changes are only applied when you close the window by clicking **OK**.

Shortcuts in Tables

The keyboard can be used to move focus around in table cells, as well as for entering data in cells.

A table cell can be in two fundamentally different modes, and the keyboard shortcuts that you use are different in these two modes. The two modes are:

- Edit mode
- Non-edit mode

Edit mode means that you can enter data in a cell, while non-edit mode means that you can move around between cells.

When you “enter” a cell — either by navigating to the cell by using a keyboard shortcut, or by clicking in the cell with the mouse — the cell is in edit mode. To switch out of edit mode, press F2. If a cell is read-only, pressing F2 while the cell is highlighted switches it to selection mode. This means that you can copy the content of the cell, but you cannot edit it.

When No Cell is in Edit Mode

Shortcut	Function
TAB	Move focus from one cell to the next to the right.
SHIFT+TAB	Move focus from one cell to the next to the left.
ARROW_UP, ARROW_DOWN	Move focus from one row to the row above or below.
CTRL+SHIFT+<ARROW>	Create a rectangular multiple cell selection for copying (expanding from the starting cell).

When a Cell is in Edit Mode

Shortcut	Function
ARROW_LEFT, ARROW_RIGHT	Move cursor in the cell content.
SHIFT+ ARROW_LEFT, SHIFT+ ARROW_RIGHT	Select cell content left/right.
CTRL+ARROW_LEFT, CTRL+ ARROW_RIGHT	Move cursor left/right to the next space character.
SHIFT+CTRL+ARROW_LEFT, SHIFT+CTRL+ARROW_RIGHT	Select cell content left/right to next space character.
ARROW_UP, ARROW_DOWN	Move cursor one line up or down.
SHIFT+ARROW_UP, SHIFT+ARROW_DOWN	Expand selection to line above or below.

Editing

Use the following keyboard shortcuts to edit records and other editable fields in a table.

Shortcut	Function
CTRL+V, SHIFT+INSERT	Paste
CTRL+R	Revert changes done in a panel.
ENTER	Select record
CTRL+X	Cut
CTRL+C, CTRL+INSERT	Copy

Shortcut	Function
CTRL+A	Select all
CTRL+G	Search
CTRL+Z	Undo
CTRL+Y	Redo

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