

## Maconomy iAccess

July 2018

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This edition published July 2018.

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## iAccess Overview

Maconomy iAccess is designed for streamlined access to daily and weekly time and expense activities, absence management, purchase orders, employee information, approvals, and reports.

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
- Approving/rejecting records, transactions, and absence/allowance requests
- 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 and allowance 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.

- **Record and Transaction Approval** - Managers/designated approvers can access and review records/transactions submitted for approval. They can then approve or reject these approval items.
- **Absence and Allowance Approval** - Managers/designated approvers can access and review employee absence and allowance requests. They can then approve or reject these requests.
- **Viewing Reports** - Access BPM reports from within iAccess.
- **Notifications** - Use basic notification coverage for time sheets, expense/mileage sheets, absence management, purchase orders, transaction approval, and absence/allowance 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**
- **Approval Center**
- **Absence Approval**
- **Allowance 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 **Other 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 Sheets, Daily Time Sheets, and Absence workspaces only.
<b>Save</b>	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the <b>Save</b> action button is disabled until additional changes are made.
<b>Revert</b>	Click this action button to undo changes made to the current record, or to any of its lines.
<b>Create</b>	Click this action button to create a time sheet.
<b>Submit</b>	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.   This is available in the Weekly Time Sheets, Daily Time Sheets, Expenses, Mileage, and Purchase Orders workspaces only.
<b>Edit</b>	Click this action button to edit the current record.


Button	Description
	 This is available in the Favorites, Absence, and Employee Self Service workspaces only.
<b>Approve</b>	Click this action button to approve an absence or allowance request.
<b>Reject</b>	Click this action button to reject an absence or allowance request.
<b>Other Actions</b>	<p>Each workspace includes an <b>Other Actions</b> drop-down list. Available actions vary slightly from one workspace to another.</p> <p>In the Weekly and Daily Time Sheets workspaces, the drop-down list includes the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Edit</b></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>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>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> </ul>

Button	Description
	<ul style="list-style-type: none"> <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> <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>Reopen</b></li> </ul>
<b>Approve all</b>	<p>Click this action to approve all the lines pending approval that are listed in the tab.</p> <hr/>  <a href="#">This is available in the Approval Center workspace only.</a>
	<p>The <b>Row Tools</b> icon 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> </ul>

Button	Description
	<ul style="list-style-type: none"> <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> <p><b>Registrations Tab</b></p> <ul style="list-style-type: none"> <li>▪ <b>Insert Mileage Sheet Line</b></li> <li>▪ <b>Delete Mileage Sheet Line</b></li> <li>▪ <b>Create favorite</b></li> <li>▪ <b>Attach Document to Line</b></li> <li>▪ <b>View Document</b></li> </ul> <p><b>Documents Tab</b></p> <ul style="list-style-type: none"> <li>▪ <b>Update Document</b></li> <li>▪ <b>Delete Document</b></li> <li>▪ <b>View Document</b></li> </ul> <p>For Favorite lines, choose from the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Insert Favorite</b></li> <li>▪ <b>Delete Favorite</b></li> </ul> <p>For absence and allowance request lines, choose from the following actions:</p> <ul style="list-style-type: none"> <li>▪ <b>Submit Request</b></li> <li>▪ <b>Reopen Request</b></li> <li>▪ <b>Delete Request</b></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>▪ <b>Insert Purchase Order Line</b></li> <li>▪ <b>Delete Purchase Order Line</b></li> </ul> <p><b>Documents Tab</b></p> <ul style="list-style-type: none"> <li>▪ <b>Update Document</b></li> <li>▪ <b>Delete Document</b></li> <li>▪ <b>View Document</b></li> </ul> <p>For employee self-service and employee information lines, choose from the following actions:</p> <p><b>Emergency Contacts Tab</b></p>

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

Button	Description
	Click <b>Collapse / Expand</b> to toggle the expand / hide detail feature in weekly/daily time sheets.
<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>+ New 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/>  <p>This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.</p> <hr/>
<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/>  <p>This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.</p> <hr/>
<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/>  <p>This action is only available if you are running Maconomy 2.4 LA1 (or later) in the backend.</p> <hr/>

Button	Description
+ Add Work Eligibility	<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.
+ Add Employee Skill	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 **Favorites** 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/ Option	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/Option	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/Option	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/Option	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/Option	Description
Day	<p>This field displays the day for the time sheet.</p> <p>To select a day in 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/Option	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>

Field/Option	Description
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.
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/Option	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. Go to **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. Go to **Weekly Time Sheets**.
2. Select the weekly time sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**. The Copy Time Sheet wizard displays.
4. 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.
5. 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. Go to **Daily Time Sheets**.
2. Select the daily time sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**. The Copy Time Sheet wizard displays.
4. Specify the date of the daily time sheet from which you want to copy lines.
5. 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. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Select the time sheet you would like to edit, and double-click the line. The line displays as editable text.
3. Edit the hours field as needed.
4. 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. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Open the time sheet panel and select a time sheet.
3. 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.
4. 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:

1. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. 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. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Select a time sheet.
3. From the **Other Actions** drop-down list, select **Print**.  
The time sheet prints at your default printer.

## 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. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Open a time sheet, review the time sheet for accuracy, and make changes if necessary.  
iAccess automatically saves your changes.
3. Click **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/Option	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/Option	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/Option	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/Option	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>Click on the file name to download the document.</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/Option	Description
Remark	Enter any additional remarks in this field.
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. Go 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. Go to the Expenses workspace.
2. Select the expense sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.  
The Copy From Expense Sheet wizard displays.
4. Select the expense sheet from which you want to copy lines.
5. 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. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an existing expense report to edit.



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

3. From the **Other Actions** drop-down list, select **Edit**.  
The Edit Expense Sheet page displays.
4. Edit the fields as needed.
5. Click **Save**.
6. To add additional lines to the expense sheet, click **+ Add Expense Sheet Line**.
7. Fill out the line fields as needed.
8. Click **Save**.
9. If the **Just. Req.** field is selected for the line, fill out the fields in the Justification pane as well.
10. 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. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. From the **Other 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.
4. 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].

5. 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. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. In the Registrations tab, select the line you want to update.
4. To attach a receipt from your local drive:
  - a) Click **Row Tools » 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.



If you want to enter additional remarks for a specific receipt, you can fill out the **Remark** field for that receipt in the Receipts tab. Click **Save**, or press ENTER to save the information.

5. To attach a receipt listed in 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. Go to the **Expenses workspace » Receipts tab**.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. From the **Other Actions** drop-down list, select **Attach Receipts**.
4. In the dialog that opens, click **Choose Files** to open your file explorer.
5. Select the files you want to upload.
6. Click **Open**, or press ENTER.

7. Click **Ok**.  
The files are uploaded and listed in the Receipts tab.



If you want to enter additional remarks for a specific receipt, you can fill out the **Remark** field for that receipt in the Receipts tab. Click **Save**, or press ENTER to save the information.

## 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. Go to the Expenses workspace.
2. In either the Registrations or Receipts tab, select a line.
3. Click **Row Tools » View Receipt**.  
The file is downloaded to your computer/device.



In the Receipts tab, clicking the filename displayed in the **Document** field also downloads the file to your local storage.

## Delete an Expense Sheet

Use these steps to delete an expense sheet.

### To delete an expense sheet:

1. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an existing expense report to delete.



You can only delete reports that are not yet submitted.

3. From the **Other Actions** drop-down list, select **Delete Expense Sheet**.  
A confirmation window appears.
4. 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. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. From the **Other Actions** drop-down list, select **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. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an existing expense sheet.



You can only submit open expense sheets.

3. Click **Submit**.

## Mileage Fields

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


### Card Part Fields

Field/Option	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/Option	Description
Entry Date	Enter a date for this mileage expense.
Favorite	<p>In this field, you can select a favorite.</p>  <p>Choosing a favorite may change other details specified for the mileage 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 mileage 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 mileage expense.</p> <p>Filling out one field will auto-populate the other.</p>
Quantity	Specify the number of units of the current activity for which a mileage expense is incurred.
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.
Vehicle	In this field, select a vehicle from the drop-down list.
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.
Document	<p>Use this field to attach a document to the current mileage sheet line.</p> <p>You can attach a document from your local storage, or select one from those already uploaded to the Documents tab of this workspace.</p>

## 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/Option	Description
Document Name	<p>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.</p> <p>Click on the file name to download the document.</p> <p>If you attach a document straight from your local storage, iAccess automatically uploads this document to the Documents tab as well.</p>
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.
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.
Remark	Enter any additional remarks in this field.
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. Go to the Mileage workspace.
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. Go to the Mileage workspace.
2. Select the mileage sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.  
The Copy From Mileage Sheet wizard displays.
4. Select the mileage sheet from which you want to copy lines.
5. 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. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select an existing mileage sheet to edit.



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

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

## Duplicate a Mileage Sheet

Use these steps to duplicate an existing mileage sheet.

### To duplicate a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select a mileage sheet.

3. From the **Other 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. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. In the Registrations tab, select the line you want to update.
4. To attach a document from your local drive:
  - a) Click **Row Tools » 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.



If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

5. To attach a document listed in 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. Go to the **Mileage workspace » Documents tab**.
2. Use the search filter and/or the **Search** field to select a mileage sheet.

3. From the **Other Actions** drop-down list, select **Attach Documents**.
4. In the dialog that opens, click **Choose Files** to open your file explorer.
5. Select the files you want to upload.
6. Click **Open**, or press ENTER.
7. Click **Ok**.

The files are uploaded and listed in the Documents tab.



If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

## 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. Go to the Mileage workspace.
  2. In either the Registrations or Documents tab, select a line.
  3. Click **Row Tools » View Document** on the line.
- The file is downloaded to your computer/device.



In the Documents tab, clicking the filename displayed in the **Document** field also downloads the file to your local storage.

## Delete a Mileage Sheet

Use these steps to delete a mileage sheet.

To delete a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select an existing mileage sheet to delete.



You can only delete reports that are not yet submitted.

3. From the **Other Actions** drop-down list, select **Delete Mileage Sheet**.  
A confirmation window appears.
4. 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. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. From the **Other Actions** drop-down list, select **Print**.  
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. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select an existing mileage sheet.



You can only submit open mileage sheets.

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3. Click **Submit**.

## 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/Option	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. Go to the Favorites workspace.



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 click **Row Tools » Revert** 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. Go to one of the following workspaces:
  - Weekly Time Sheets
  - Daily Time Sheets
  - Expenses
  - Mileage
2. On the line you want to make a Favorite, click **Row Tools » Create Favorite**. 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. Go to one of the following workspaces:
  - Weekly Time Sheets
  - Daily Time Sheets
  - Expenses
  - Mileage
2. From within the Time, Expense, or Mileage Sheet, click ▼ in the **Job**, **Job Name**, or **Task** field. A list of Favorites displays.
3. 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. Go to the Favorites workspace.
2. Select an existing Favorite to delete.

3. Click **Row Tools » Delete** on the line.  
A confirmation window appears.
4. 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 to help make the decision.
  - Approvers use the Absence Approval workspace for this step.
  - A notification is sent to the employee.

## 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/Option	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/Option	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, or enter the date manually.
1/2 Day	<b>When registering absence in days:</b>  Select this check box if the first day of the absence request period is a half-day.

Field/Option	Description
	<p><b>When registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend):</b></p> <p>If the number of hours you enter for the first day is equivalent to a half-day, iAccess selects this check box automatically.</p>
Hours, First Day	<p>This field is available only if you are running Maconomy 2.4 GA or later in the backend, and the vacation period setup requires registration in hours.</p> <p>In this field, specify the number of hours of absence on the first day.</p>
Last Day of Absence	<p>In this field, specify the last day of the absence request period. Click the calendar icon in the field to select a date, or enter the date manually.</p>
1/2 Day	<p><b>When registering absence in days:</b></p> <p>Select this check box if the last day of the absence request period is a half-day.</p> <p><b>When registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend):</b></p> <p>If the number of hours you enter for the last day is equivalent to a half-day, iAccess selects this check box automatically.</p>
Hours, Last Day	<p>This field is available only if you are running Maconomy 2.4 GA or later in the backend, and the vacation period setup requires registration in hours.</p> <p>In this field, specify the number of hours of absence on the last day.</p>
Duration	<p><b>When registering absence in days:</b></p> <p>This field displays the total number of days spanned by the absence request period (from the first day to the last day, including non-working days). It also displays the time unit used.</p> <p><b>When registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend):</b></p> <p>This field displays the total number of working hours spanned by the absence request period (from the first day to the last day), thus making the value the same as that of the <b>Working Time</b> field. It also displays the time unit used.</p> <p>iAccess fills out this field automatically after you save the absence request.</p>
Working Time	<p>This field displays the total number of working days (or hours) spanned by the absence request period. It also displays the time unit used.</p> <p>iAccess fills out this field automatically after you save the absence request.</p> <p>If the absence was registered in hours, this field will have the same value as the <b>Duration</b> field.</p>
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>

Field/Option	Description
	<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 is 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/Option	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>


Field/Option	Description
	<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>
Time Registered	<p>Enter the number of days (or hours) you want to add to your allowance.</p> <p>During allowance approval, the approver can change the value you entered for this field.</p>
Time Unit	<p>Select the time unit you want to use. You can only select hours as the time unit if you are running Maconomy 2.4 GA or later in the backend.</p> <p>During allowance approval, the approver can change the number you entered for the <b>Time Registered</b> field, but cannot change the time unit you specified.</p>
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 time for the selected vacation period for each relevant absence type.

Field/Option	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> <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>

Field/Option	Description
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 much time 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. Go to **Absence workspace » Absence Requests tab.**



2. Click **+ New Absence Request**.
3. If you are registering absence in days:
  - a) In the **First Day of Absence** field, specify the first date of the absence period.
  - b) If the date you specified is a half-day, select the **½ Day** check box.
  - c) In the **Last Day of Absence** field, specify the last day of the absence period.
  - d) If the date you specified is a half-day, select the **½ Day** check box.
4. If you are registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend):
  - a) In the **First Day of Absence** field, specify the first date of the absence period.
  - b) In the **Hours** field, specify the number of hours of absence on the first day.

 If the number of hours you enter is equivalent to a half-day, iAccess selects the **½ Day** field automatically.
  - c) In the **Last Day of Absence** field, specify the last date of the absence period.
  - d) In the **Hours** field, specify the number of hours of absence on the last day.

 If the number of hours you enter is equivalent to a half-day, iAccess selects the **½ Day** field automatically.
5. In the **Absence Type** field, select an absence type from the drop-down list. This is a required field.
6. Enter additional remarks if needed.
7. Click **Save**.

iAccess automatically fills out the **Duration** and **Working Time** fields, and 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. Go 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. Go to **Absence workspace » Absence Requests tab**.
2. On the line you want to edit, click **Row Tools » Reopen Request**.
3. Edit the fields as needed, per instructions in Create an Absence Request.
4. 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. Go to **Absence workspace » Absence Requests tab**.
2. On the line you want to submit, click **Row Tools » 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. Go to **Absence workspace » Absence Requests tab**.
2. On the line you want to delete, click **Row Tools » 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. Go 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 time 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 **Time Unit** field, select the time unit you want to use.  
You can only specify hours as the time unit if you are running Maconomy 2.4 GA (or later) in the backend.
6. In the **Time Registered** field, enter the number of days (or hours) you want to add to your allowance.
7. In the **Reason** field, enter the reason for your request or provide relevant comments.
8. 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. Go 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. Go to **Absence workspace » Allowance Requests tab**.
2. On the line you want to edit, click **Row Tools » Reopen Request**.
3. Edit the fields as needed, per instructions in Create an Allowance Request.
4. 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. Go to **Absence workspace » Allowance Requests tab**.
2. On the line you want to submit, click **Row Tools » 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 request is approved, iAccess adds the requested number of days (or hours) to your pool of available days (or hours) for the chosen absence type. You can then use those days (or hours) 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. Go to **Absence workspace » Allowance Requests tab**
2. On the line you want to delete, click **Row Tools » 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/Option	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>
Purchase Order No.	This field displays the PO number.

### Details Island

Field/Option	Description
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> <p>If you do not specify a value, iAccess automatically selects the employee name of the user creating the PO.</p>
Submitted by	This field shows the name of the employee who submitted the current PO.

Field/Option	Description
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 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.

#### Vendor Island

Field/Option	Description
Vendor	<p>This field displays the name, number, and address 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	<p>This field shows the name of the vendor's designated person-in-charge.</p> <p>You can enter a value for this field or update it when the PO is in Edit mode.</p>
E-mail	This field displays the vendor's email address.

#### Price Island

Field/Option	Description
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 %	This field shows the invoice discount percentage.

Field/Option	Description
	<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	<p>This field displays the total amount in taxes.</p>
Invoice Amount	<p>This field displays the total invoice amount including tax and discounts.</p>

## Specifications Tab

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

### Tab Fields

Field/Option	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	<p>For lines with a job number, enter or select a task from the drop-down list.</p> <p>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.</p>

Field/Option	Description
Employee	Enter or select from the drop-down list the number and name 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 Details	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/Option	Description
Document	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.  Click on the file name to download the document.
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.



Field/Option	Description
Remark	Enter any additional remarks in this field.


## 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. Go to the Purchase Orders workspace.
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**.

### 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. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select the purchase order you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.  
The Copy From Purchase Order wizard displays.
4. Specify the PO from which you want to copy lines.
5. Click **Copy From Purchase Order**.  
iAccess adds the copied lines to the Specifications tab of the current PO and automatically saves your changes.

## Edit a Purchase Order

Use these steps to edit a purchase order.

### To edit a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Edit**.
4. Edit the fields as needed.
5. 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. Go to the Purchase Orders workspace.
  2. Use the search filter and/or the **Search** field to select a PO.
  3. From the **Other Actions** drop-down list, select **Attach Documents**.
  4. Click **Choose Files**.
  5. In the file explorer window that opens, select the file.
  6. Click **Open**, or press ENTER.
  7. Click **Ok**.
- iAccess automatically saves your changes, and lists the new attachment in the Documents tab of this workspace.



If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

## View a Document

You can view any document listed in the Documents tab.

### To view a document:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a purchase order.
3. In the Documents tab, select a line.
4. Click **Row Tools » View Document** on the line.  
The file is downloaded to your computer/device.



Clicking the filename displayed in the **Document** field also downloads the file to your local storage.

## Submit a Purchase Order

Use these steps to submit a purchase order.

### To submit a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. Click **Submit**.

## Close a Purchase Order

Use these steps to close a purchase order.

### To close a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Close**.

## Reopen a Purchase Order

Use these steps to reopen a purchase order.

### To reopen a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Reopen**.

## Print a Purchase Order

Use these steps to print a purchase order.

### To print a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Print**.  
The purchase order prints at your default printer.

## 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/Option	Description
Employee Name	This field displays your employee name.
Employee No.	This field displays your employee number.

### Employment Island

Field/Option	Description
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.

### Related Employees Island

Field/Option	Description
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.
Absence Approver	This field displays the name and number of the employee responsible for approving your absences.

### Address Island

Field/Option	Description
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.

Field/Option	Description
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.

## 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/Option	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.

Field/Option	Description
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/Option	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/Option	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>

Field/Option	Description
Qualification Suffix	Enter the qualification suffix.
Education Institution	<p>Choose the institution where you received your qualification from the drop-down list.</p> <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/Option	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/Option	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. Go 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/Option	Description
Employee Name	This field displays the employee's name.
Employee No.	This field displays the employee's number.

### Employment Island

Field/Option	Description
Date Employed	This field displays the date the employee started working for the company.
Termination Date	This field displays the date when the employee was terminated.
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.

Field/Option	Description
	Click <b>Edit</b> to update this information.

#### Related Employees Island

Field/Option	Description
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.
Absence Approver	This field displays the name and number of the employee responsible for approving absences for the employee.

#### Address Island

Field/Option	Description
Address	These fields display the employee's address. 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 Information Island

Field/Option	Description
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.

Field/Option	Description
	Click <b>Edit</b> to update this information.

### Talent Management Island

Field/Option	Description
User ID	This field displays the employee's Talent Management User ID.

## 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/Option	Description
Dependent	When you add an emergency contact for the employee, select this check box if the person is the employee's dependent.
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/Option	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 the employee's 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 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/Option	Description
Country	Choose the country where the employee 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.

Field/Option	Description
Education Institution	<p>Choose the institution where the employee received the qualification from the drop-down list.</p> <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 the employee received the qualification.
Qualification Level	<p>Choose the 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 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.
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 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/Option	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.
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/Option	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 the employee's 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 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/Option	Description
Document	This field displays the document name.

Field/Option	Description
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.
Remark	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. Go to the Employee Information workspace.
2. Use the search filter and/or the **Search** field to select an employee.
3. From the **Other 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 **Other 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. Go to the **Employee Information workspace » Documents tab**.

2. Use the search filter and/or the **Search** field to select an employee.
3. From the **Other Actions** drop-down list, select **Attach Documents**.  
The Attach Documents dialog displays.
4. Click **Choose Files** to open the file explorer.
5. Select a file, then click **Open** or press ENTER.
6. Click **Ok**.  
iAccess automatically saves your changes, and lists the new attachment in the Documents tab.



If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

## View Another Employee's Documents

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

### To view documents:

1. Go to the Employee Information workspace.
2. Use the search filter and/or the **Search** field to select an employee.
3. In the Documents tab, select a line.
4. Click **Row Tools » View Document** on the line.  
The file is downloaded to your computer/device.



Clicking the filename displayed in the **Document** field also downloads the file to your local storage.

## Approvals Overview

Use the Approvals workspaces to quickly view and approve/reject transactions, absence requests, and allowance requests.

### Approval Center Concepts

The Approval Center workspace allows you to approve or reject approval items from within iAccess.

Approval items are those for which approval hierarchies are set up in the Workspace Client. Specifically, you can approve/reject the following:

- Time sheets
- Time sheet lines
- Expense and mileage sheets
- Expense and mileage sheet lines
- Purchase orders
- Purchase order lines
- Vendor invoices
- Vendor invoice allocation lines
- Job invoice drafts
- Jobs
- Employees
- Customers/company customers

This workspace supports approvals for project managers and other employee types responsible for approvals (for example, resource managers), and is available in the menu if the user logged in has the requisite access rights (as defined by access groups).

### Notifications

Notifications for approving approval items inform the relevant managers/designated approvers 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 Time Sheet** - Appears for the user designated as approver of a weekly time sheet submitted for approval. If the substitute approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet by Type** - Appears for all users assigned the employee type designated as approver of a weekly time sheet submitted for approval. If another approver/substitute approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Time Sheet (Substitute)** - Appears for the user designated as substitute approver of a weekly time sheet submitted for approval. If the approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a weekly time sheet submitted for approval. If another approver/substitute approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line** - Appears for the user designated as approver of a weekly time sheet line submitted for approval. If the substitute approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line by Type** - Appears for all users assigned the employee type designated as approver of a weekly time sheet line submitted for approval. If another approver/substitute approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line (Substitute)** - Appears for the user designated as substitute approver of a weekly time sheet line submitted for approval. If the approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a weekly time sheet line submitted for approval. If another approver/substitute approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet** - Appears for the user designated as approver of an expense sheet submitted for approval. If the substitute approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet by Type** - Appears for all users assigned the employee type designated as approver of an expense sheet submitted for approval. If another approver/substitute approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet (Substitute)** - Appears for the user designated as substitute approver of an expense sheet submitted for approval. If the approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an expense sheet submitted for approval. If another approver/substitute approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet** - Appears for the user designated as approver of a mileage sheet submitted for approval. If the substitute approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Mileage Sheet by Type** - Appears for all users assigned the employee type designated as approver of a mileage sheet submitted for approval. If another approver/substitute approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet (Substitute)** - Appears for the user designated as substitute approver of a mileage sheet submitted for approval. If the approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a mileage sheet submitted for approval. If another approver/substitute approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line** - Appears for the user designated as approver of an expense sheet line submitted for approval. If the substitute approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line by Type** - Appears for all users assigned the employee type designated as approver of an expense sheet line submitted for approval. If another approver/substitute approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line (Substitute)** - Appears for the user designated as substitute approver of an expense sheet line submitted for approval. If the approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an expense sheet line submitted for approval. If another approver/substitute approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line** - Appears for the user designated as approver of a mileage sheet line submitted for approval. If the substitute approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line by Type** - Appears for all users assigned the employee type designated as approver of a mileage sheet line submitted for approval. If another approver/substitute approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line (Substitute)** - Appears for the user designated as substitute approver of a mileage sheet line submitted for approval. If the approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a mileage sheet line submitted for approval. If another approver/substitute approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Purchase Order** - Appears for the user designated as approver of a purchase order submitted for approval. If a substitute approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order By Type** - Appears for all users assigned the employee type designated as approver of a purchase order submitted for approval. If another approver/ substitute approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order (Substitute)** - Appears for the user designated as substitute approver of a purchase order submitted for approval. If the approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a purchase order submitted for approval. If another approver/substitute approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line** - Appears for the user designated as approver of a purchase order line submitted for approval. If the substitute approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line by Type** - Appears for all users assigned the employee type designated as approver of a purchase order line submitted for approval. If another approver/substitute approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line (Substitute)** - Appears for the user designated as substitute approver of a purchase order line submitted for approval. If the approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a purchase order line submitted for approval. If another approver/substitute approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Vendor Invoice** - Appears for the user designated as approver of a vendor invoice submitted for approval. If a substitute approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Vendor Invoice by Type** - Appears for all users assigned the employee type designated as approver of a vendor invoice submitted for approval. If another approver/ substitute approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Vendor Invoice (Substitute)** - Appears for the user designated as substitute approver of a vendor invoice submitted for approval. If the approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.



- **Approve Vendor Invoice by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a vendor invoice submitted for approval. If another approver/substitute approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line** - Appears for the user designated as approver of an invoice allocation line submitted for approval. If the substitute approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line by Type** - Appears for all users assigned the employee type designated as approver of an invoice allocation line submitted for approval. If another approver/substitute approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line (Substitute)** - Appears for the user designated as substitute approver of an invoice allocation line submitted for approval. If the approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an invoice allocation line submitted for approval. If another approver/substitute approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts** - Appears for the user designated as approver of a job invoice draft submitted for approval. If the substitute approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts by Type** - Appears for all users assigned the employee type designated as approver of a job invoice draft submitted for approval. If another approver/substitute approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts (Substitute)** - Appears for the user designated as substitute approver of a job invoice draft submitted for approval. If the approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a job invoice draft submitted for approval. If another approver/substitute approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job** - Appears for the user designated as approver of a job submitted for approval. If a substitute approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job by Type** - Appears for all users assigned the employee type designated as approver of a job submitted for approval. If another approver/substitute approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.



- **Approve Job (Substitute)** - Appears for the user designated as substitute approver of a job submitted for approval. If the approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a job submitted for approval. If another approver/ substitute approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee** - Appears for the user designated as approver of an employee submitted for approval. If a substitute approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee by Type** - Appears for all users assigned the employee type designated as approver of an employee submitted for approval. If another approver/ substitute approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee (Substitute)** - Appears for the user designated as substitute approver of an employee submitted for approval. If the approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an employee submitted for approval. If another approver/substitute approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer** - Appears for the user designated as approver of a company customer submitted for approval. If a substitute approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer by Type** - Appears for all users assigned the employee type designated as approver of a company customer submitted for approval. If another approver/substitute approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer (Substitute)** - Appears for the user designated as substitute approver of a company customer submitted for approval. If the approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a company customer submitted for approval. If another approver/substitute approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Customer** - Appears for the user designated as approver of a customer submitted for approval. If a substitute approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Customer by Type** - Appears for all users assigned the employee type designated as approver of a customer submitted for approval. If another approver/


substitute approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Customer (Substitute)** - Appears for the user designated as substitute approver of a customer submitted for approval. If the approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Customer by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a customer submitted for approval. If another approver/substitute approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.

## Approval Center Fields

This topic describes the fields and definitions on the Approval Center workspace. Regular employees without the requisite permissions do not have access to this workspace or any of its tabs.

### Card Part Fields

Field/Option	Description
Job	Specify a job name or number to view only the approval items associated with that job.   The drop-down lists include all the jobs to which you have access, not just those for which you have pending approvals.
Show Substitute Lines	Toggle on/off to show/hide the approval items for which you are a substitute approver.
Show Super Approver Lines	Toggle on/off to show/hide the approval items for which you are a super approver.
Show Rejected Lines	Toggle on/off to show/hide rejected approval items.

## Time Sheets Tab

This topic describes the fields and definitions on the Time Sheets tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee who filed the weekly time sheet.

Field/Option	Description
Week	This field displays the week number.
Unit	This field displays the time unit used for filing time (hours or days).
Internal	This field displays the total time registered on internal jobs for the week.
External	This field displays the total time registered on external jobs for the week.
Invoiceable	This field displays the total invoiceable time registered for the week.
Non-Invoiceable	This field displays the total non-invoiceable time registered for the week.
Fixed	This field displays the employee's total of fixed expected working hours (or days) for the week.
Balance	This field displays the balance between fixed expected working hours (or days) and the total hours (or days) registered for the week.
Total	This field displays the sum of invoiceable and non-invoiceable time.
Status	This field displays the time sheet's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Time Sheet Lines Tab

This topic describes the fields and definitions on the Time Sheet Lines tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee who filed the weekly time sheet line.
Week	This field displays the week number within which the time sheet line falls.
Job No.	This field displays the number of the job associated with the time sheet line.

Field/Option	Description
Job Name	This field displays the name of the job associated with the time sheet line.
Task	This field displays the title or name of the task for which the employee registered time.
Description	This field displays entry information about the work for which the employee registered time.
Total	This field displays the total hours (or days) worked for the week for the job and task specified on the line.
Invoiceable	If the time registered on the line is invoiceable, this field is selected.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Expense Sheets Tab

This topic describes the fields and definitions on the Expense Sheets tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee who incurred the expenses.
Expense Sheet	This field displays the expense sheet number.
Type	This field displays the type of expense. Possible values are: <ul style="list-style-type: none"> <li>Normal</li> <li>Mileage</li> </ul>
From Date	This field displays the start date of the expense sheet.
To Date	This field displays the end date of the expense sheet.
Description	This field displays a brief description of the expenses incurred.

Field/Option	Description
Total Amount	This field displays the currency and total amount of the expenses.
Status	This field displays the expense sheet's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Expense Sheet Lines Tab

This topic describes the fields and definitions on the Expense Sheet Lines tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee who incurred the expense specified on the line.
Description	This field displays the entry text provided on the expense sheet line.
Type	This field displays the type of expense. Possible values are: <ul style="list-style-type: none"> <li>Normal</li> <li>Mileage</li> </ul>
Job No.	This field displays the number of the job for which the expense was incurred.
Job Name	This field displays the name of the job for which the expense was incurred.
Task	This field displays the description of the task for which the expense was incurred.
Quantity	This field displays the number of units of the activity for which the expense was incurred.
Total Amount	This field displays the currency and total amount of the expense.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.

Field/Option	Description
Reject	Click this action to reject the line.
View Receipt	If a receipt is attached to the expense sheet line, click the link in this field to download the file.

## Purchase Orders Tab

This topic describes the fields and definitions on the Purchase Order Lines tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Requisitioner	This field displays the name of the employee who requested the item or service specified on the purchase order.
Purchase Order	This field displays the number of the purchase order.
Vendor	This field displays the name of the vendor who will supply the item/service requested.
Amount	This field displays the currency and total cost of the item/service requested.
Status	This field displays the purchase order's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Purchase Order Lines Tab

This topic describes the fields and definitions on the Purchase Order Lines tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.

Field/Option	Description
Requisitioner	This field displays the name of the employee who requested the item or service specified on the purchase order line.
Purchase Order	This field displays the purchase order number.
Job No.	This field displays the number of the job for which the purchase order line was registered.
Job Name	This field displays the name of the job for which the purchase order line was registered.
Task	This field displays the name of the task for which the purchase order line was registered.
Vendor	This field displays the name of the vendor who will provide the item/activity requested.
Line Remarks	This field displays any reasons provided to justify the purchase order.
Quantity	This field displays the number of units of the item/activity requested.
Price	This field displays the currency and total cost of the item/activity requested.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Vendor Invoices Tab

This topic describes the fields and definitions on the Vendor Invoices tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Vendor	This field displays the name of the vendor who provided the item/activity.
Invoice No.	This field displays the invoice number.

Field/Option	Description
Description	This field displays the brief description entered during registration.
Amount Incl. Tax	This field displays the currency and price (including tax/any discounts) of the allocated item/activity.
Due Date	This field displays the date on which payment is due for the vendor invoice.
Purch. Order No.	If the vendor invoice relates to a purchase order placed with the vendor, this field displays the number of that purchase order.
Status	This field displays the vendor invoice's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
View Invoice	If a copy of the invoice document is attached to the vendor invoice, click the link in this field to download the file to your computer/device.

## Invoice Allocation Lines Tab

This topic describes the fields and definitions on the Invoice Allocation Lines tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Vendor	This field displays the name of the vendor who provided the item/activity.
Invoice No.	This field displays the invoice number.
Job No.	This field displays the number of the job to which the cost is allocated.
Job Name	This field displays the name of the job to which the cost is allocated.
Task	If the cost is allocated to a specific task listed under the job, this field displays the name of that task.
Entry Description	This field displays the brief description entered during registration.
Quantity	This field displays the allocated number of units of the item/activity.



Field/Option	Description
Amount Excl. Tax	This field displays the currency and price (less tax/any discounts) of the allocated item/activity.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
View Invoice	If a copy of the invoice document is attached to the vendor invoice, click the link in this field to download the file to your computer/device.

## Draft Invoices Tab

This topic describes the fields and definitions on the Draft Invoices tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Job No.	This field displays the number of the job performed.
Job Name	This field displays the name of the job performed.
Payment Customer	This field displays the name of the payment customer who is the receiver of the final invoice. This may not be the same as the delivery customer (the customer on the job).
Blanket Draft	This field is selected if the draft invoice is a blanket draft.
Invoice Type	This field displays the type of invoice. Possible values are: <ul style="list-style-type: none"> <li>▪ T&amp;M</li> <li>▪ On Account</li> <li>▪ T&amp;M and On Account</li> <li>▪ Pre-Invoice</li> </ul>
Billing Price	This field displays the currency and total price of the invoice, excluding tax.
Write Up/Down	This field displays the currency and total amount written up/down on the job entries for invoicing, excluding tax.

Field/Option	Description
Status	This field displays the line's current approval status.
View Draft	Click this icon to download the PDF of the draft invoice to your computer/device.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Jobs Tab

This topic describes the fields and definitions on the Jobs tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Job No.	This field displays the number of the job.
Job Name	This field displays the name of the job.
Job State	This field displays the job's current state. The list of possible values is customized by the company.  This field is only relevant if: <ul style="list-style-type: none"> <li>Approval hierarchies are set up to use multiple stage approvals.</li> <li>The company uses the Job State functionality.</li> </ul>
Customer	This field displays the name of the customer for whom the company performed the job.
Project Manager	This field displays the name of the project manager for the job.
Status	This field displays the job's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Employees Tab

This topic describes the fields and definitions on the Employees tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee for approval.
Position	This field displays the employee's position.
Supervisor	This field displays the name of the employee's supervisor.
Absence Approver	This field displays the name of the designated absence approver for the employee.
Company	This field displays the name of the company to which the employee is assigned.  This is relevant for multi-company organizations.
Status	This field displays the employee's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Customers Tab

This topic describes the fields and definitions on the Customers tab of the Approval Center workspace.

### Tab Fields

Field/Option	Description
View Details	Click this icon to view more information about the approval item specified on the line.  The wizard that displays also lets you approve/reject the approval item.
Company Specific	For company customers, this field is selected.

Field/Option	Description
Customer No.	This field displays the customer number.
Customer	This field displays the name of the customer for approval.
Acct. Manager	This field displays the name of the account manager assigned to the customer.
Currency	This field displays the currency used by the customer.
Settling Company	This field displays the number of the company to be used as settling company for the customer.
Customer State	<p>This field displays the customer's current state. The list of possible values is customized by the company.</p> <p>This field is only relevant if:</p> <ul style="list-style-type: none"> <li>Approval hierarchies are set up to use multiple stage approvals.</li> <li>The company uses the Customer State functionality.</li> </ul>
Status	This field displays the customer's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.

## Approval Center Procedures

This section describes the steps you need to follow to work with approval items in the Approval Center workspace.

Use the Approval Center workspace to do the following:

### Approve or Reject an Item

Use these steps to approve or reject an approval item.

**To approve or reject an approval item:**

- Go to one of the various tabs in the Approval Center workspace.
- If you need to view more information about the approval item you are reviewing, click the **View Details** icon on the line for that approval item.
- To approve the item:
  - Click the **Approve** icon on the line.
  - In the confirmation window that displays, click **Approve Line**.  
iAccess automatically saves your changes, and refreshes the page.

4. To reject the item:

- a) Click the **Reject** icon on the line.  
The Reject Line wizard displays.
- b) Enter a reason for the rejection. This is a required field.
- c) Click **Reject**.  
iAccess automatically saves your changes, and refreshes the page.

## Approve All Items

You also have the option to approve all the items in a tab.

### To approve all items:

1. Go to one of the various tabs in the Approval Center workspace .
2. Click the **Approve All** action.
3. In the confirmation window that displays, click **Approve All**.  
iAccess automatically saves your changes, and refreshes the page.

## View a Receipt

You can view receipts attached to approval items in the Expense Sheet Lines tab.

### To view a receipt attached to a line:

1. Go to the **Approval Center workspace » Expense Sheet Lines tab**.
2. Click the link in the **View Receipt** field of the line.  
The file is downloaded to your computer/device.

## View a Vendor Invoice

You can view invoices attached to approval items.

### To view an invoice attached to a line:

1. Go to **Approval Center workspace » Vendor Invoices tab**, or to **Approval Center workspace » Invoice Allocation Lines tab**.
2. Click the link in the **View Invoice** field of the line.  
The file is downloaded to your computer/device.

# 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.

Field/Option	Description
Employee Name	This field displays the name of the employee who filed the absence request.
Absence Request Summary	This field contains the absence type and the date range of the absence request.

## Status Part Fields

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

### Absences Part Fields

Field/Option	Description
Absence Type	This field shows the reason for the absence request, such as vacation or illness.
Duration	<p><b>When absence was registered in days:</b></p> <p>This field displays the total number of days spanned by the absence request period (from the first day to the last day, including non-working days). It also displays the time unit used.</p> <p><b>When absence was registered in hours (only available if you are running Maconomy 2.4 GA or later in the backend):</b></p> <p>This field displays the total number of working hours spanned by the absence request period (from the first day to the last day), thus making the value the same as that of the <b>Working Time</b> field. It also displays the time unit used.</p>
Working Time	<p>This field displays the total number of working days (or hours) spanned by the absence request period. It also displays the time unit used.</p> <p>If the absence was registered in hours, this field will have the same value as the <b>Duration</b> field.</p>
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.
First Day of Absence	This field shows the first day in the range of dates covered by 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.
Hours, First Day	<p>This field is available only when the absence request for approval was registered in hours.</p> <p>This field displays the number of hours of absence on the first day.</p>
Last Day of Absence	This field shows the last day of the absence period in the current absence request.
Last Day is Half Day	This field indicates whether the last day of the absence request period is a half day.
Hours, Last Day	<p>This field is available only when the absence request for approval was registered in hours.</p> <p>This field displays the number of hours of absence on the last day.</p>

## 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. Go to the Absence Approval workspace.
2. Use the search filter and/or the **Search** field to select an absence request for approval. You can also select an absence request from the list of notifications in the top right corner.
3. To approve the request:
  - a) Click **Approve**.
4. To reject the request:
  - a) 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.

Field/Option	Description
Employee Name	This field displays the name of the employee who filed the allowance request.
Allowance Request Summary	This field contains the absence type, the quantity, and time unit of the allowance request.

### Status Part Fields

Field/Option	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.



Field/Option	Description
Rejection Reason	This field shows the reason provided by the approver for the most recent rejection.

### Allowance Request Part Fields

Field/Option	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.
Time Registered	This field displays the number of days (or hours) the employee specified in the allowance request. It also displays the time unit used.  During allowance approval, the approver can change the number the employee entered for the <b>Time Registered</b> field, but not the time unit specified.
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. Go to the Allowance Approval workspace.
2. Use the search filter and/or the **Search** field to select an allowance request for approval. You can also select an allowance request from the list of notifications in the top right corner.
3. To approve the request:
  - a) 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) If needed, edit the **Quantity** field. You can edit the number, but not the time unit specified.
  - d) Click **Approve**.
4. To reject the request:

- a) 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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