

Time & Expense

The Time & Expenses workspace contains four sections: Time, Expenses, Mileage, and Favorites.

- 1 Time**
For registering time spent in either a weekly or daily tab
- 2 Expenses**
For registering expenses and outlays.
- 3 Mileage**
For registering mileage.
- 4 Favorites**
For setting up favorites, which are shortcuts for project numbers, tasks.

Time Section

- 1 Week**
where time can be entered on a daily basis but submitted on a weekly basis
- 2 Day**
where time is entered and submitted on a daily basis
- 3 My Plan**
for users with Maconomy integrated within People Planner, which is not included in this guide

Connection between Day and Week panels

- A System parameter determines whether users can use the daily time sheet.
- Time entered in the Day tab can be viewed in the Weekly time sheet and vice versa.
- The guide includes a section for both Week and Day, but the time sheets are similar. The only differences are that the overview displays either a week or a day and similarly, Registration is either for a Week or a Day. The expansion at the bottom does not include the Daily Description tab, as it can be entered in Registration.

Weekly Time Sheet

The screenshot shows the 'Time & Expenses' application interface. The top navigation bar includes 'TIME', 'EXPENSES', 'MILEAGE', 'FAVORITES', and 'REPORTS'. The main area is divided into three sections:

- Week Tab (1):** Features a calendar for August 2021. The selected week (Aug 2-8) is highlighted. A table shows time entries for each day, with columns for 'Mon' through 'Sun' and a 'Week' total. A pie chart indicates 43 hours of Invoicable time and 0 hours of Non-Invoicable time.
- Registrations Table (2):** A table with columns for 'Keep', 'Favorite', 'Customer Name', 'Project Name', 'Task Description', and time entries for each day. It lists entries for 'Bank of America' and 'Boeing'.
- Descriptions Panel (3):** An expansion panel for a selected entry, showing 'Hours' for each day (e.g., 8:00 on Mon and Fri) and a 'Description' field.

1 The top part or the card pane of the **Week** tab features a calendar in which a week can be selected for entering time. The Time Information is an overview is playing entered and missing time.

2 The **Registrations** table pane is where weekly time is entered along with a project and task.

3 At the bottom is an expansion with the Descriptions and Details panel. It provides additional information and explanations for a selected entry in the Registration table. This panel also has Expense and Mileage tabs displaying entries linked to the time entry.

Color Coding

The screenshot shows the 'Time & Expenses' application interface for May 2013. The selected week (May 20-26) is highlighted in the calendar. The interface displays the following information:

- Employee Information:** Sean Williams (1132), Week No. 21.
- Time Information Table:**

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Week
Total	7:00	10:...	10:...	8:00	8:00	0:00	0:00	43:...
Fixed	8:00	8:00	8:00	8:00	8:00	0:00	0:00	40:...
Balance	-1:...	2:00	2:00	0:00	0:00	0:00	0:00	3:00
Invoicable	7:00	10:...	10:...	8:00	0:00	0:00	0:00	35:...
Invoicable %	10...	10...	10...	10...	0,00	0,00	0,00	81,...
- Legend:** Due (Red), Submitted (Green), Approved (Blue), Rejected (Yellow).
- Pie Chart:** Shows 35:00 Invoicable (blue) and 8:00 Non-Invoicable (green) time.

- By default the Time Sheet opens to the current week displayed with a highlight around the week in the calendar.
- If you are late in submitting your time or want to submit for the following week, you can click in the calendar on any of the days of the week. At any time, you can also review your previously entered time by moving the calendar back and forth on the arrows.
- The **Employee** Name and Number of the user logged in are displayed together with the selected week number.

Actions

Time sheets have four actions:

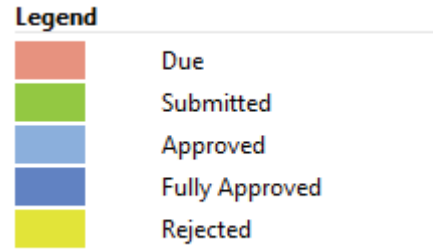
- Submit
- Reopen

Submit Reopen Copy Time Sheet Print Time Sheet

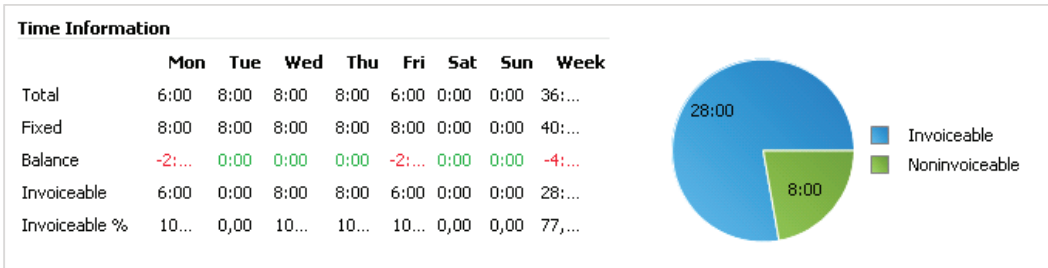
Color Coding

The Time Sheet has color coding for a status overview:

- Red:** The week is Due and is Not Submitted.
- Green:** The week has been Submitted and is awaiting Approval.
- Blue:** The week has been Approved.
- Dark Blue:** The week has been Fully Approved
- Yellow:** The time has been Rejected.
- No color: The week is in the future and not due for submission yet.



Time Information



Time Information has a daily overview of hours and a weekly summary.

Total hours is the total amount of entered time.

- **Fixed** hours are derived from a local and personal calendar. The Local calendar will contain public holidays to avoid entering time on these days. The **Personal** calendar will show the amount of hours you have to work each day.
- Balance is the difference between total and fixed and are displayed in **Red** when there are missing time and **Green** if equal or more.
- Invoiceable hours entered are displayed both with a total and as percentage of the total amount of hours.
- Invoiceable hours compared to the non-invoiceable hours displayed in the colored graph makes it easy to get an overview of the employees usability.

Registration Week

REGISTRATIONS												Create favorite		Expense		Mileage	
▲ Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot...	Invoiceab...	Details		
1	<input type="checkbox"/>	Bank of America ...	Exxon - General consulting	Analysis	Analysis	7:00	2:00		8:00				17:00	✓	OK		
2	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing	Outsourcing			10:00					10:00	✓	OK		
3	<input type="checkbox"/>	Bank of Amer...	Bank of America - Manag...	Solution testing	Solution testing		8:00			8:00			16:00	✓	OK		

The Registration table is ready to use – always displaying an empty line – where you can enter the necessary information for the specific day:

- Project
- Task
- Description (optional)
- Hours



Note: It is possible to leave the Project and Task unpopulated and to save an entry with only Hours and an optional Description. The missing information needs to be entered before the week can be submitted.

Actions Registration



- The **Create favorite** action will update the Favorites section with a new favorite for a selected project and task.
- The **Expense** action will add an expense to an already created expense sheet or open a wizard to create a new expense sheet.
- The **Mileage** action will add a mileage entry to an already created mileage sheet or open a wizard to create a new mileage sheet.

Daily Timesheet

The screenshot shows the 'Time & Expenses' application interface. It is divided into three main sections:

- Top Section (Callout 1):** Features a calendar for August 2021, a legend for status (Due, Submitted, Approved, Fully Approved), and a 'Time Information' table. The table shows: Total (7:15), Fixed (8:00), Balance (-0:45), Invoiceable (6:00), and Invoiceable % (82.76). A pie chart shows 6 hours Invoiced and 1.25 hours Non-Invoiced.
- Middle Section (Callout 2):** The 'REGISTRATIONS' table with columns: Keep, Favorite, Customer Name, Project Name, Task Description, Daily Description, Hours, Invoiceab..., and Details. It contains two entries for Sean Williams on 09/08/2021.
- Bottom Section (Callout 3):** The 'DETAILS' pane showing customer hierarchy (Bank of America Corp.), project manager (Sean Williams), activity (External Time, Billable), and dimensions (Executing Department: Management Consulting).

The top part of the card pane of the **Day** tab features a calendar in which a Day can be selected for entering time. The Time Information is an overview displaying entered and missing time.

The middle part, or the **Registrations** table pane, is for entering daily time and descriptions for the projects on which you have worked.

The lower part, or the expansion with the table pane **Details**, is where you can add or see additional information and explanations of a selected entry in the Registration part. This part also has **Expense** and **Mileage** tabs displaying entries linked to the time entry.

Day Overview

The screenshot shows the 'Day Overview' view for August 16, 2021. It includes a calendar, a legend for status (Due, Submitted, Approved, Fully Approved, Rejected), and a 'Time Information' table. The table shows: Total (0:00), Fixed (8:00), Balance (-8:00), Invoiceable (0:00), and Invoiceable % (0.00).

- By default, the Time Sheet opens to the current **Day**. A selected day is outlined in black in the calendar.
- If you are late in submitting your time or want to submit it for the following days, you can click in the calendar on any day of the week. At any time, you also can review previously entered time by moving the calendar timeline using the arrows.

Maconomy Time & Expense Series: Deltek Maconomy Quick Reference Guide



- The **Employee** Name and Number of the user logged in are displayed together with the selected date.
- Follow your Time Sheet status for the selected day in **Time Information**. You can view total hours entered, as along with as a graphic displaying the ratio of invoiceable: noninvoiceable hours.
- The **Fixed Hours** are derived from both a local and personal calendar. The **Local** calendar will contain public holidays to prevent time from being entered on these days. The **Personal** calendar will show the amount of hours you have to work each day.

Registration Day

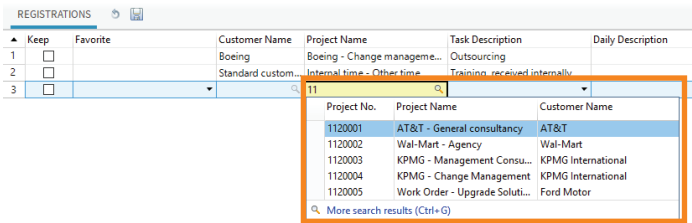
REGISTRATIONS									
Keep	Favorite	Customer Name	Project Name	Task Description	Daily Description	Hours	Invoiceab...	Details	
1	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing		6:00	✓	OK	
2	<input type="checkbox"/>	Standard cust...	Internal time - Other time	Training, received internally		1:15		OK	

The **Registration** table is ready to use – always displaying an empty line where you can enter the necessary information, including: Project, Task, an optional Description, and the Hours for the specific day.



Note: If you do not yet know the project, it is possible to leave the field unfilled and save an entry with just hours and a description (optional). Once you receive the project and or task you can finish the time sheet.

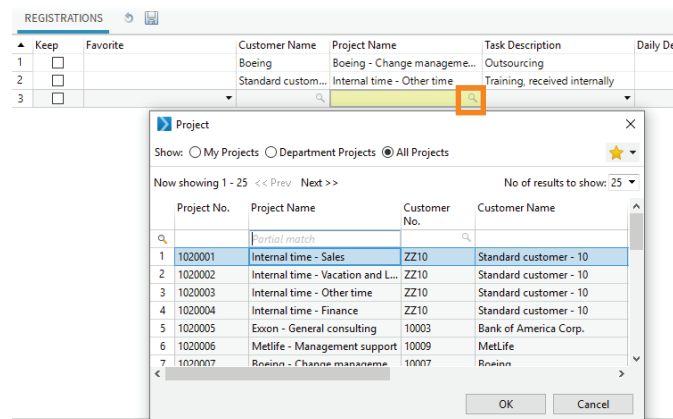
Search Clients & Projects



There are two ways to enter the project:

1. **Search as you type** - Start entering part of the project name or number. A drop-down list containing the most recently used projects will be populated.

- The Project Name field is a combined field including both the project name, project number, and the customer name.



2. Click on the **Magnifying Glass** and use this search functionality to select a project from any of the available filter lists displayed in the pop-up window.

Tasks

- When you have found your project, you must complete the Task field.
- If you know the task number, you can enter it. Otherwise, open the drop-down list of tasks and make a selection.
- Notice that only Time tasks that are relevant to the project and included in the project Task List can be chosen.

REGISTRATIONS																								
▲ Keep	Favorite	Customer Name	Project Name	Task Description	Daily Description																			
1	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing																				
2	<input type="checkbox"/>	Standard custom...	Internal time - Other time	Training, received internally																				
3	<input type="checkbox"/>	Boeing	Boeing - Change manage...		<table border="1"> <thead> <tr> <th>Task Name</th> <th>Description</th> </tr> </thead> <tbody> <tr><td>100</td><td>Analysis</td></tr> <tr><td>110</td><td>Strategic work</td></tr> <tr><td>120</td><td>Project Management</td></tr> <tr><td>130</td><td>Method development</td></tr> <tr><td>140</td><td>Outsourcing</td></tr> <tr><td>150</td><td>Customer Meetings</td></tr> <tr><td>160</td><td>Consulting services in general</td></tr> <tr><td>170</td><td>Subcontractor</td></tr> </tbody> </table>		Task Name	Description	100	Analysis	110	Strategic work	120	Project Management	130	Method development	140	Outsourcing	150	Customer Meetings	160	Consulting services in general	170	Subcontractor
Task Name	Description																							
100	Analysis																							
110	Strategic work																							
120	Project Management																							
130	Method development																							
140	Outsourcing																							
150	Customer Meetings																							
160	Consulting services in general																							
170	Subcontractor																							

Hours and Descriptions

REGISTRATIONS															
▲ Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot...	Invoiceab...	Details
1	<input type="checkbox"/>	Bank of America ...	Exxon - General consulting	Analysis	Analysis	7:00	2:00		8:00				17:00	✓	OK
2	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing	Outsourcing			2:00					2:00	✓	OK
3	<input type="checkbox"/>	Bank of Amer...	Bank of America - Manag...		External Time, Billable		8:00			8:00			16:00	✓	Task?
4	<input type="checkbox"/>							6:00					6:00		Project?

- When you have chosen the task, enter the amount of hours you have spent on the project and press Enter.
- Standard Task Description and the Customer Name are populated with this action.
- A manual text can be entered in Description.

More entries can be made for the Day or the Week; however, before they are submitted, all entries must have a project and task displayed with OK in Details.

Keep

REGISTRATIONS															
▲ Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot...	Invoiceab...	Details
1	<input type="checkbox"/>	Bank of America ...	Exxon - General consulting	Analysis	Analysis	7:00	2:00		8:00				17:00	✓	OK
2	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing	Outsourcing			2:00					2:00	✓	OK
3	<input type="checkbox"/>	Bank of America ...	Bank of America - Managem...	System analysis	System analysis		8:00			8:00			16:00	✓	OK
4	<input checked="" type="checkbox"/>	Bank of Amer...	Bank of America - Manag...	Solution design	Solution design			6:00					6:00	✓	OK

REGISTRATIONS			
▲ Keep	Favorite	Customer Name	Project Name
1	<input type="checkbox"/>	Boeing	Boeing - Change managem...
2	<input checked="" type="checkbox"/>	Standard custom...	Internal time - Other time
3	<input checked="" type="checkbox"/>	Boeing	Boeing - Change manage...

Often you will be working on the same project for a period of time. To avoid searching for the project when making new entries, you can check the Keep field for the particular project, and reuse it again.

When using the Keep option, the project and task will be populated automatically within new Time Sheets in the following weeks until you deselect Keep. However, you still will need to populate hours and a description, if needed.

Favorites

When a time entry has been entered with a project number and task, it can be saved as a Favorite utilizing the **Create Favorite** action.

When a **Favorite** has been created, Project Number and Task can be entered by selecting the Favorite from the **Favorite** column.

Keep	Favorite	Customer Name	Project Name	Task Description	D
<input type="checkbox"/>		Bank of America ...	Exxon - General consulting	Analysis	A
<input type="checkbox"/>		Boeing	Boeing - Change managem...	Outsourcing	C
<input checked="" type="checkbox"/>		Bank of America ...	Bank of America - Managem...	System analysis	S
<input checked="" type="checkbox"/>		Bank of Amer...	Bank of America - Manag...	Solution design	S

Keep	Favorite	Customer Name	Project Name	Task
<input type="checkbox"/>		Bank of America ...	Exxon - General consulting	
<input type="checkbox"/>		Boeing	Boeing - Change managem...	
<input checked="" type="checkbox"/>		Bank of America ...	Bank of America - Managem...	
<input checked="" type="checkbox"/>	Bank of America - Manager	Bank of Amer...	Bank of America - Manag...	

Favorite Name	Project No.	Task
Bank of America - Management project, Solution ...	1020008	115

[More search results \(Ctrl+G\)](#)

Note: Learn more about **Favorites** in the specific section later in this guide.

Time Sheet Expansion

- The expansion at the bottom of the Week tab will display four tabs when expanded. The first tab displayed is **Description**, used for Daily Description, and is not included in the Day time sheet.
- The remaining three tabs **Details**, **Expenses**, and **Mileage** are available on both tabs and the information displayed refers to the highlighted information in Registrations.

Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue
<input type="checkbox"/>		Bank of America ...	Exxon - General consulting	Analysis	Analysis	7:00	2:00
<input type="checkbox"/>		Boeing	Boeing - Change managem...	Outsourcing	Outsourcing		
<input checked="" type="checkbox"/>		Bank of Amer...	Bank of America - Manag...	System analysis	System analysis		8:00

DESCRIPTIONS | **DETAILS** | **EXPENSES** | **MILEAGE**

Customer	Bank of America Corp. (10003)	Customer Hierarchy	Level 1 Bank of America Corp. (10003)
Customer Level	Level 1	Level 2	-
Project Manager	Sean Williams (1132)	Level 3	-
Activity	External Time, Billable (100)	Level 4	-
Employee Category	Name Number	Level 5	-
Billing Price Total, Base	3,040.00		

Dimensions

Executing Department	Management Consulting	1000
Project Type	System Implementations	130
Spec. 5	Description	-
Spec. 6	Description	-
Local Spec. 2	Description	10

Estimate to Completion

Hours	0.00
Days	0.00
<input type="checkbox"/> Completed	

Project Manager Approval

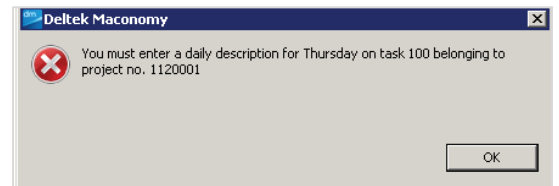
Status	-
Date	-

Daily Descriptions

Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue	Wed	Thu	Fri
<input type="checkbox"/>		Bank of Amer...	Exxon - General consulting	Analysis	Analysis	7:00	2:00		8:00	
<input type="checkbox"/>		Boeing	Boeing - Change managem...	Outsourcing	Outsourcing			2:00		

DESCRIPTIONS | **DETAILS** | **EXPENSES** | **MILEAGE**

Hours		Description	
Mon	7:00	Analysis and research	
Tue	2:00		
Wed			
Thu	8:00		



In the Descriptions tab you can enter a **Daily Description** of your task for each day of the selected week in the calendar. Compared to the Description field in the Time Sheet line, which covers all days in the week per project/task combination, this is a detailed description per day.

When a line in the **Registrations** pane has been selected, the hours are displayed in the Description tab per day and the additional description can be entered. Press **Enter** when you are done.

Note: Be aware that it is possible for the Project Manager to make Daily Descriptions mandatory, as this is needed as additional invoice information on some projects. If so you will receive a notification when attempting to submit the time sheet without the description entered.

Details

- From the **Details** tab you can find standard project information such as **Customer** and **Project Manager**.
- The displayed information will follow the line selected in Registration.

DESCRIPTIONS	DETAILS	EXPENSES	MILEAGE
Customer Bank of America Corp. (10003) Customer Level Level 1 Project Manager Sean Williams (1132) Activity External Time, Billable (100) Employee Category <input type="text" value="Name"/> <input type="text" value="Number"/> Billing Price Total, Base 3,230.00		Customer Hierarchy Level 1 Bank of America Corp. (10003) Level 2 - Level 3 - Level 4 - Level 5 - Estimate to Completion Hours <input type="text" value="0.00"/> Days <input type="text" value="0.00"/> <input type="checkbox"/> Completed Project Manager Approval Status - Date -	
Dimensions Executing Department Management Consulting <input type="text" value="1000"/> Project Type General Consulting <input type="text" value="150"/> Spec. 5 <input type="text" value="Description"/> Spec. 6 <input type="text" value="Description"/> Local Spec. 2 <input type="text" value="Description"/>			

Expenses

REGISTRATIONS															
Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total	Invoiceab...	Details
1	<input type="checkbox"/>	Bank of Amer...	Exxon - General consulting	Analysis	Analysis	7:00	2:00		8:00				17:00	✓	OK
3	<input type="checkbox"/>	Bank of America ...	Bank of America - Managem...	System analysis	System analysis		8:00			8:00			16:00	✓	OK
2	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing	Outsourcing			2:00					2:00	✓	OK

Expense Sheet No.	Entry Date	Task Description	Description	Expense Justification	Reference	Qua...	Unit Price, Currency	Amount, Currency	Currency	Exchange Rate	Tax Code
1	10700014	02/08/2...	Hotel	Client meeting	requested by client	1.00	125.00 USD	125.00 USD	USD	1.00	US 0%

- When a time entry has been entered with a project number and a task, it is possible to create a new **Expense Sheet** or add an entry in an already opened Expense Sheet using the **Action Expense**.
- Once created, the expense line can be viewed in the Expenses tab within the expansion.

Note: Learn more about **Expense Sheet** in the specific section later in this guide.

Mileage

REGISTRATIONS														
Keep	Favorite	Customer Name	Project Name	Task Description	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total	
1	<input type="checkbox"/>	Bank of Amer...	Exxon - General consulting	Analysis	Analysis	7:00	2:00		8:00				17:00	
3	<input type="checkbox"/>	Bank of America ...	Bank of America - Managem...	System analysis	System analysis		8:00			8:00			16:00	
2	<input type="checkbox"/>	Boeing	Boeing - Change managem...	Outsourcing	Outsourcing			2:00					2:00	

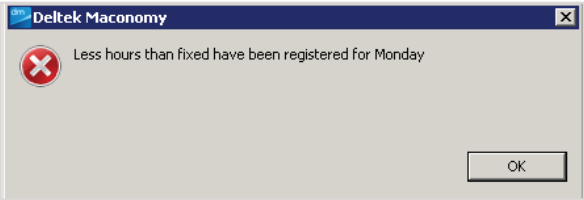
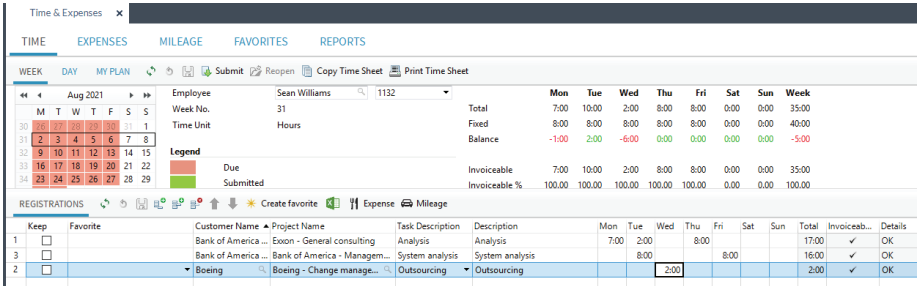
Mileage Sheet No.	Entry Date	Description	Quantity	Unit Price, Currency	Amount, Currency	From	To	Vehicle	
1	10700035	02/08/2...	Customer Meeting	135.00	0.44 USD	59.40 USD	Home	Clients Office	Own Car

When a time entry has been entered with a project and task, it is possible to create a new **Mileage Sheet** or add an entry in an already opened Mileage Sheet using the **Mileage** action.

Note: Learn more about the **Mileage Sheet** and how to calculate the quantity using Google map in the specific section later in this guide.

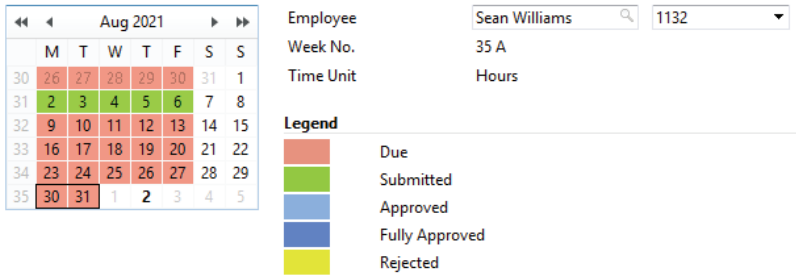
Once created, the expense line can be viewed in the Expense tab in the expansion.

Submit



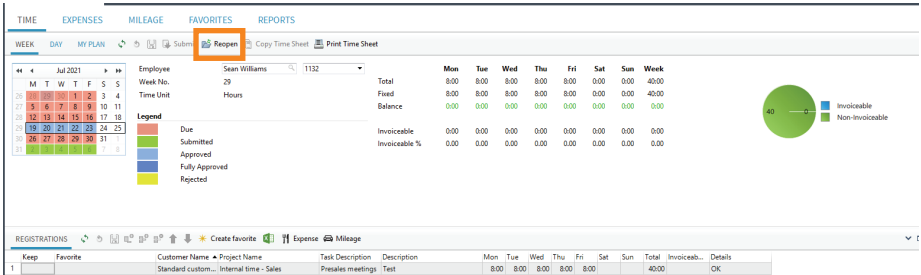
- When all the entries for the day or week have been entered, it is time to submit your time sheet. Click **Submit**.
- All entries will be validated and the time sheet will not be submitted if you have omitted either a project or a task. The submission can also be prevented if the project is **Blocked** or **Closed** for time entries or if you have to populate mandatory **Daily Descriptions**.
- Submitted time sheets can be approved by the Project Manager, Supervisor, or both when approval is required.
- When a time sheet is submitted, the amount of hours can be checked against a daily amount of Fixed Hours displayed in Time Information. Employees can be required to enter the minimum amount, making it easier to measure missing time.
- An error message will be issued when the entered amount of hours is less than the required Fixed hours.

Split Weeks



Note: If a week is split over two months you might have to submit the same week twice, as in Week A and Week B. This is called Split Week and will support a quick month-end closing, as you must submit all days covering the last week of the month on the first day of the new month regardless of the weekday.

Reopen

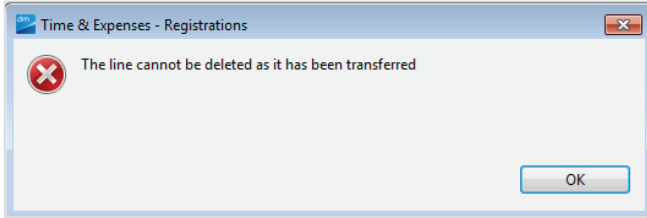


It is possible to submit a time sheet and then realize that you want to change a description or add extra hours. This is possible as long as the time sheet has not been approved by your Line Manager yet, i.e. it is still grey.

Either overwrite the hours entered or add a new entry; this will reopen the week. Or, click the action **Reopen**.

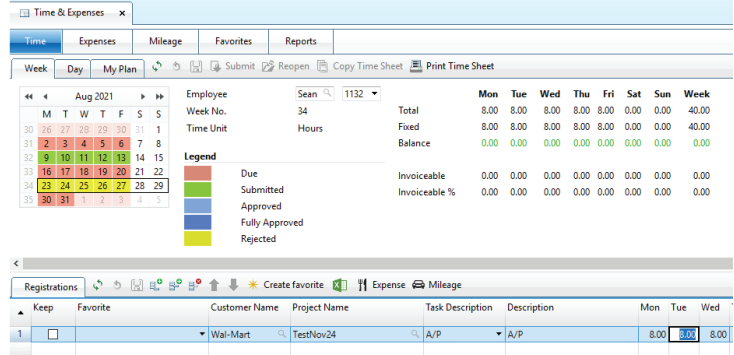
When you have made the necessary adjustments **Submit** the time sheet again.

Delete TimeSheet Lines



It is NOT possible to delete time sheet lines if they have been submitted. The amount of hours can be reversed by entering a negative line and new entries can be entered on a new line within the week.

Rejected Entries



In the event that entries have been rejected by either the project manager, the employee will receive a To-Do **Rejected Time Sheet Lines**.

In the calendar, the date of the entries are highlighted in the **Rejected** color – yellow.

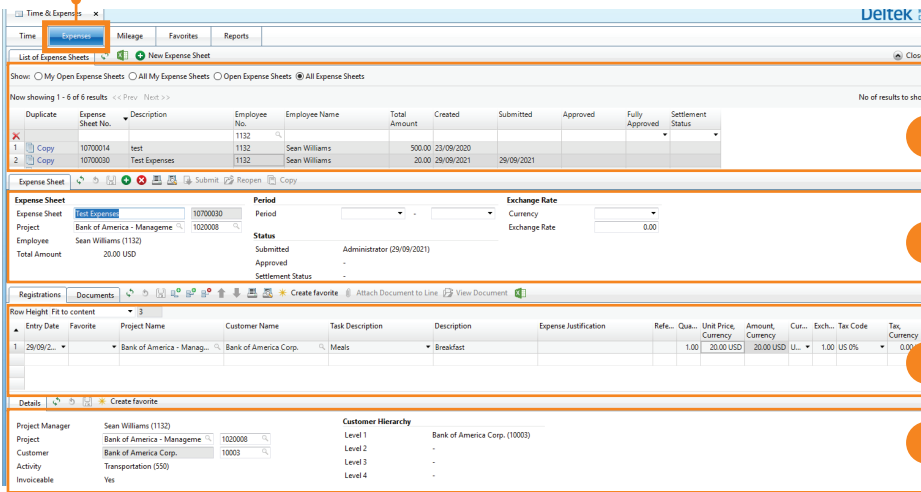
Expense Sheet Registration

This is a step-by-step guide on how to register and submit expense sheets.

Entering expenses directly on a project is timesaving and ensures a timely invoicing to customers. Expense sheets can be automatically selected for payment, which ensures a fast reimbursement. It is possible to follow the expense sheet for approval and payment, as it can be opened and reviewed at any time.

All Employees

Within the **Time & Expenses** tab is an Expenses section.



The section is split into four panes.

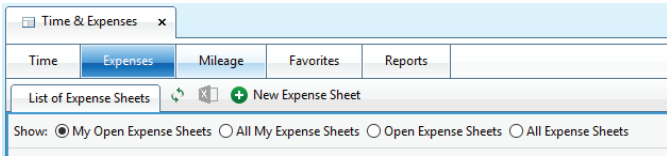
1 A filter list

2 The Expense Sheet header

3 Expense Sheet Registration per project and task

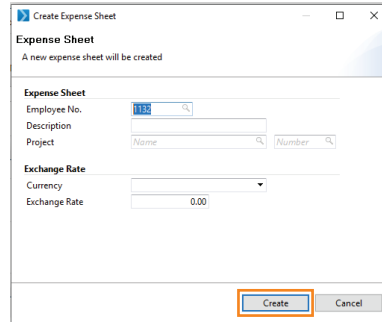
4 Registration Details

New Expense Sheet



- To start creating a new Expense sheet, select the **+ New Expense Sheet**.
- The action is available when the filter list is open.

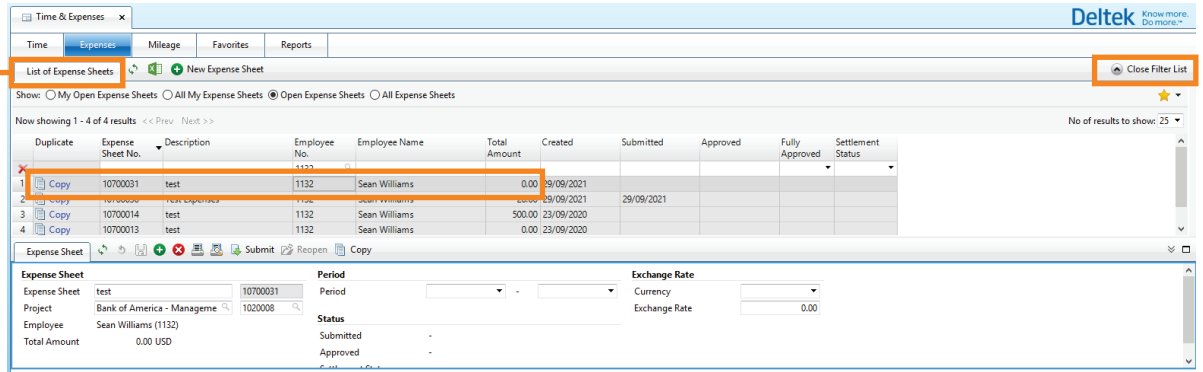
The Creation Wizard



- Selecting **New Expense Sheet** will open a Create Expense Sheet wizard in which you can add the header information to be used as the default for the expense registrations.
- The text entered in **Description** field will help to identify the expense sheet.
- When a **Project no.** is entered in the wizard, it will default to each entry later.
- If the items have been expensed abroad in a foreign currency, the **Currency** and **Exchange Rate** can be entered to convert the expenses to the local currency (base).
- All entries can be entered after the expense sheet is created. To create the Expense Sheet, click **Create**.

List of Expense Sheets

When a **New Expenses Sheet** has been created it will be added to the Filter List in the **List of Expense Sheets** tab.



You can close the filter list **Close Filter List** in the upper-right corner and start entering your expenses. You can also double-click on one of the expense sheets in the filter list.

Actions

- Expense sheets have three actions:
- Submit
 - Reopen
 - Copy

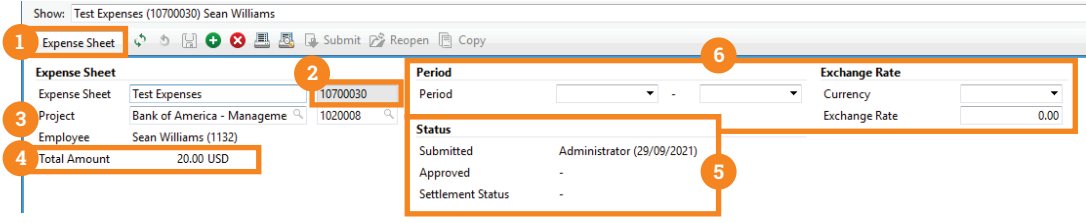


Expense Sheet Header

1 In the **Expense Sheet** header you will find the same fields as in the wizard – Expense Sheet name and currency. If you have not already entered the information, you can do it here; however, it is not necessary.

2 The **Expense Sheet** area in the overview includes a unique reference number (transaction number) for the expense sheet added at creation.

3 The name and number for the **Project** are included, along with the **Employee**.



4 The **Total Amount** in base (company) currency is included.

6 **Status** is updated with date and employee name when the expense sheet is:

- Submitted
- Approved
- Paid

5 A **Period** date range can be entered.

In **Exchange Rate**, a default currency and exchange rate can be entered.

When no **Exchange Rate** is entered for a foreign currency entry, the rate from the standard Exchange Rate table will be used.

Expense Registrations

Entry Date	Favorite	Project Name	Customer Name	Task Description	Description	Expense Justification	Ref...	Qua...	Unit Price, Currency	Amount, Currency	Cur...	Exch...
29/09/2021		Bank of America - Managem...	Bank of America Corp.	Meals	Breakfast			1.00	20.00 USD	20.00 USD	USD	1.00
29/09/2021		Bank of America - Managem...	Bank of America Corp.	Travel airfare, taxi etc.	Travel airfare, taxi etc.			1.00	30.00 USD	30.00 USD	USD	1.00
29/09/2...		Bank of America - Manag...	Bank of America Corp.	Hotel	Hotel			1.00	45.00 USD	45.00 USD	U...	1.00

In the first tab in the table pane you will find **Registrations**. The table is ready to use – always displaying an empty line – where you can enter the necessary expense information:

- **Project Name**
- **Task**
- **Description** (optional)
- **Quantity**
- **Unit Price**

In most cases it is best to enter **Quantity** as 1 for the total amount on the item.

In the **Documents** tab, documents attached to the expense sheet are listed.

Actions Registrations



The Registration section has three actions:

- **Create Favorite**
- **Attach Document**
- **View Document**

Search Client & Projects

The search functionality in the expense sheet works in the same way as in the time sheet. There are two ways to enter the project:

- **Search as you type** - Start entering part of the project name or number. A drop-down list containing the most recently used projects will be populated.
- Click on the **Magnifier Glass** and use this search functionality to select a project from any of the available filter lists displayed in the pop-up window.

Row	Entry Date	Favorite	Project Name	Customer Name	Task Description
1	29/09/2021		Bank of America - Managem...	Bank of America Corp.	Meals
2	29/09/2021		Bank of America - Managem...	Bank of America Corp.	Travel airfare, taxi etc.
3	29/09/2021		Bank of America - Managem...	Bank of America Corp.	Hotel
4	29/09/2...		11	Bank of America Corp.	Hotel

Project No.	Project Name	Customer Name
1120001	AT&T - General consultancy	AT&T
1120002	Wal-Mart - Agency	Wal-Mart
1120003	KPMG - Management Consu...	KPMG International
1120004	KPMG - Change Management	KPMG International
1120005	Work Order - Upgrade Soluti...	Ford Motor

Currency

When a **Currency** and **Exchange Rate** have been entered in the wizard or in the **Exchange Rate** in the Expense Sheet tab, it will default to the lines in Registrations. It is possible to change them per item. The Expense Sheet can include items with multiple currencies.

All items will be converted to the local currency with the exchange rate entered or with a default system rate. The amount to be reimbursed can be found in Total Amount in the Expense Sheet tab portion above.

Qua...	Amount, Currency	Cur...	Exch...	Tax Code	Tax, Currency
1.00	20.00 USD	U...	1.00	US 0%	0.00 USD
1.00	30.00 USD	USD	1.00	US 0%	0.00 USD
1.00	45.00 USD	USD	1.00	US 0%	0.00 USD



Note: Be aware that the amount reimbursed might be different, if the Finance department has changed the currency before posting.

Tax

- Columns with **Tax Codes** in both base and currency can be added to the expense sheet, making it possible for the employee to select a Tax Code and have the tax amount calculated when applicable.
- Tax codes can be entered at any time before the expense sheet is approved, which makes it possible to have the Finance department enter or change the code before the approval.

Tax Code	Tax, Currency	Exp
0 US 0%	0.00 USD	
0 US 0%	0.00 USD	
0	Name	Tax Rate
	BE BS21	21.00

Customize Columns & Details

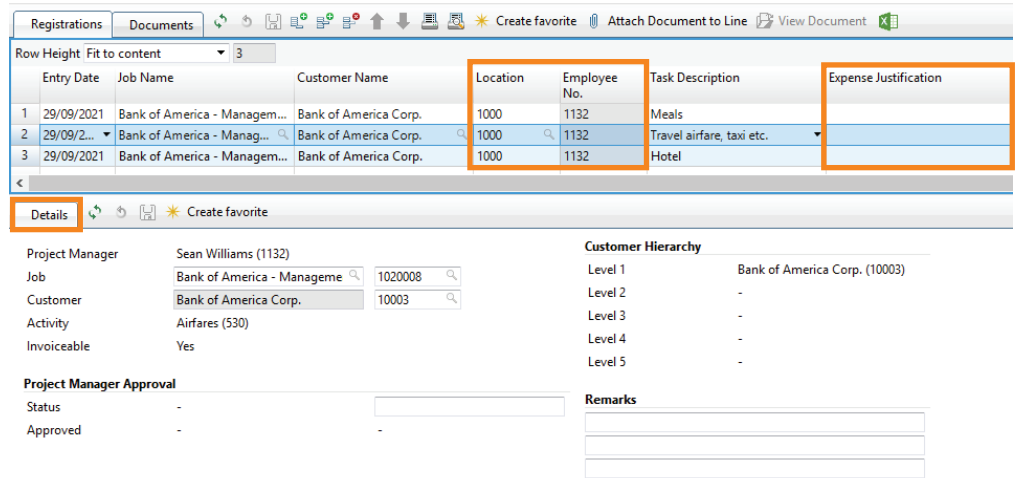
The Expense Sheet Registration table can be customized to only display necessary information. Columns can be made mandatory to make sure information is entered.

Columns that can be added or removed are:

- Dimensions (such as Location)
- Employee No.
- Expense Justification

The bottom portion of the wizard contains an assistant with **Details**, such as project and customer name and number.

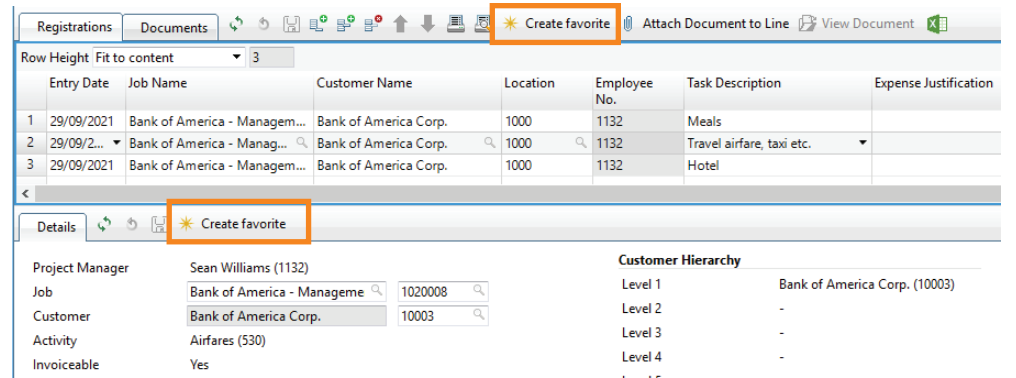
The area can also include **Remarks** fields, where you insert a message to the Finance Managers.



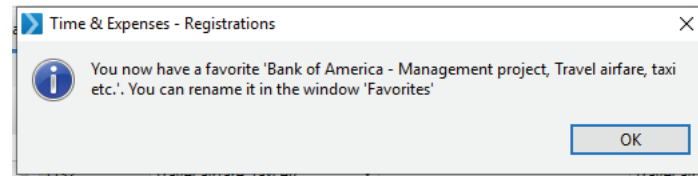
Create Favorite

You have the option to create project entries as **Favorites**, making the registration faster if you are using the same project regularly.

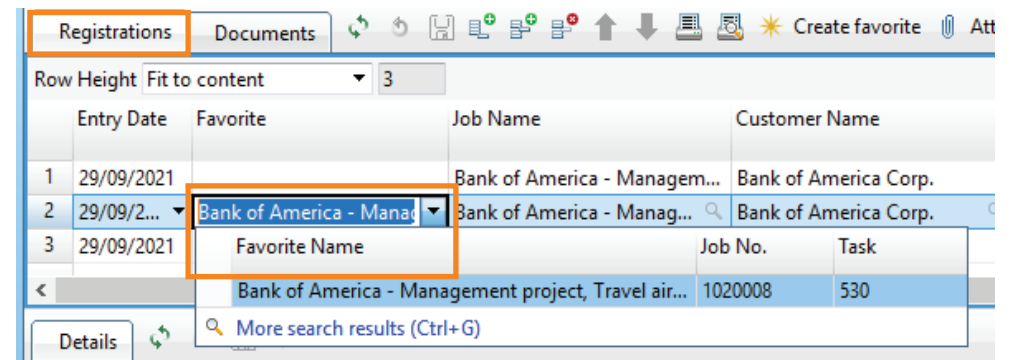
When the entry has been made, highlight the particular entry and press one of the two available **Create Favorite** buttons.



A confirmation of the created favorites.



Similar to time entries, created **Favorites** can be selected from the Favorite column and the Project number and Task will be populated automatically.



Note: Learn more about Favorites in the **Favorite** section.

Documents

Entry Date	Favorite	Job Name	Customer Name	Location	Employee No.	Task Description
1	29/09/2021	Bank of America - Managem...	Bank of America Corp.	1000	1132	Meals
2	29/09/2...	Bank of America - Manag...	Bank of America Corp.	1000	1132	Travel airfare, taxi etc.

- Scanned copies of the expense receipts can be attached to the expense sheet.
- Save the scanned copies on your computer and select them individually from the File Open dialog that opens when you select the **Attach Document to Line** action. Remember to attach the correct copy to the item selected.
- Selecting **View Document** will display the copy.

Docume...	Document Type	Document Size (Bytes)	Locked	Locked By	Latest Revision is Closed	Revision No.	Revision Text	Changed on	Changed by
1	How to r...	Microsoft Word	166006		<input type="checkbox"/>	1		07/10/2021	Administrator

- From the **Documents** tab, you can see what type of documents has been attached.
- Documents can be Word, Excel, PDF, TXT, and image files.

Create from Time Sheet

Keep	Favo...	Customer Name	Job No.	Job Name	Task Description	Description	Mon	Tue	Wed
1	<input type="checkbox"/>	Bank of Amer...	1020008	Bank of America - Manag...	System analysis	System analysis	8.00	6.00	8.00
2	<input type="checkbox"/>	Bank of America ...	1020008	Bank of America - Managem...	Requirement spe...	Requirement specification		2.00	

Make sure you have selected the correct entry. Then press **Expenses** and one of two things will occur.

Note: Expenses often go hand-in-hand with Time spent with a client. To save time you can use an entry in the time sheet with hours registered to create an associated expense entry.

1 If you already have an open/unsubmitted Expense Sheet, the entry will be inserted.

2 If you do NOT have an open Expense Sheet a wizard will open to help you create one.

Associated Expenses

- An **Associated Expenses** wizard is used with the time sheet, which is similar to the New Expense Sheet wizard explained earlier.
- Select **Expense** to create the Expense Sheet.

Registration Associated Expenses

Entry Date	Favorite	Job Name	Customer Name	Location	Employee No.	Task Description	Expense Justification	Description	Qua...	Amount, Currency	Cur...
1	20/09/2...	Bank of America - Manag...	Bank of America Corp.		1132	Travel airfare, taxi etc.			1.00	0.00 USD	U...
2	21/09/2021	Bank of America - Managem...	Bank of America Corp.		1132				1.00	0.00 USD	USD
3	22/09/2021	Bank of America - Managem...	Bank of America Corp.		1132				1.00	0.00 USD	USD

- The project selected in the time sheet is now inserted in either an existing or a new Expense Sheet. When there are time entries made for more than one day in the week, a line will be added for each day.
- Remaining fields for Task, Quantity, and Amount must be filled out in the same way as explained earlier.

Time Sheet Line

Details		Time Sheet Line		Hours		Estimate to Completion	
Customer	Bank of America Corp. (10003)	Hours		Hours	Description	Hours	0.00
Customer Level	Level 1	Mon	8:00	-		Days	0.00
Project Manager	Sean Williams (1132)	Tue	6:00	-		Completed	No
Job	Bank of America - Managemen...	Wed	8:00	-		Project Manager Approval	
Task	System analysis (100)	Thu	8:00	-		Status	-
Activity	External Time, Billable (100)	Fri	8:00	-		Date	-
Invoiceable	Yes	Sat		-			
Overtime Spec.	-	Sun		-			

- When an Expenses entry is created from the time sheet, a Time Sheet Line tab will be available and display the details of the time entry.

Expenses in Time Sheet

Expense Sheet No.	Entry Date	Favorite	Task Description	Description	Expense Justification	Ref...	Qua...	Unit Price, Currency	Amount, Currency	Cur...	Exch...	Tax Code	Tax, Currency
10700032	20/09/2...		Travel airfare, taxi etc.	Travel airfare, taxi etc.			1.00	0.00 USD	0.00 USD	U...	1.00	US 0%	0.00 USD
10700032	21/09/2021						1.00	0.00 USD	0.00 USD	USD	1.00		0.00 USD

- When Expenses are created from the Time Sheet entry, the created line or lines can be viewed in the **Expenses** sub tab in the time sheet.
- Remaining fields Task, Quantity, and Amount must be completed in the same way as explained earlier.



Note: Additional Information entered in the Expense tab in Time will update Registration in Expenses and vice versa.

Copy Expense Sheet



- Previously created expense sheets can be **Copied** and save time when there are similar entries.
- Select the action **Copy** when a new expense sheet has been created. This will open a Copy Expense Sheet wizard.
- Enter or use the search functionality to find the Expense Sheet number.
- Select **Copy Expense Sheet**.
- All lines from the old expense sheet will be inserted without **Quantity** and **Unit Price** populated.

Copy Expense Sheet

Enter the number of the expense sheet to copy from

Expense Sheet Number

Submit Expense Sheet



- **Submit** is part of the approval process for the expense sheet and must be completed by either the employee or the supervisor.
- When the expense sheet is submitted, a To-Do can be created for either a Manager or the Finance Department.



Note: When Project Manager approval is requested, a To-Do will be created when the employee submits the expense sheet.

Print Expense Sheet

- Employees can **Print** and **Sign** the Expense Sheet. The layout can be customized.
- The printed and signed expense sheet, together with the original receipts will be handed over to the Finance Department for reimbursement.
- A manager's approval and employee confirmation of expenses can be made before the Expense Sheet is delivered to the Finance department.

Expense Sheet

NAME: Sean Williams
 EMPLOYEE NO.: 1132
 DATE: 12/10/2021
 EXPENSE SHEET NO.: 10700032

Mileage Rate

Date	Project No.	Project Name	Task Name	Description	Currency	Currency	Exch. Rate	Base
20/09/2021	1020008	Bank of America - Manageme	530	Travel airfare, taxi etc.	USD	0.00	1.00	0.00
21/09/2021	1020008	Bank of America - Manageme			USD	0.00	1.00	0.00
22/09/2021	1020008	Bank of America - Manageme			USD	0.00	1.00	0.00
23/09/2021	1020008	Bank of America - Manageme			USD	0.00	1.00	0.00
24/09/2021	1020008	Bank of America - Manageme			USD	0.00	1.00	0.00
TOTAL					USD			0.00

I hereby certify that the above statement of expenses is correct.

Signed: Dated:

ALL ORIGINAL RECEIPTS TO BE NUMBERED AND ATTACHED

Approval - Manager

Name: Signature: Date:

Overview Expense Sheets

List of Expense Sheets + New Expense Sheet

Show: My Open Expense Sheets All My Expense Sheets Open Expense Sheets All Expense Sheets

Now showing 1 - 13 of 13 results << Prev Next >>

Duplicate	Expense Sheet No.	Description	Employee No.	Employee Name	Total Amount	Created	Submitted	Approved	Fully Approved	S
	10700013	test	1132	Sean Williams	0.00	23/09/2020				S
	10700014	test	1132	Sean Williams	500.00	23/09/2020				S
	10700019	Test	1007	Gert Freeman	0.00	25/11/2020				S
	10700025	test	1049	Fay Miller	0.00	15/04/2021				S

- Expense Sheets are added to the **Filter List** once created and can be opened and reviewed at any time.
- Employees can search for and follow the approval process to track when the Expense Sheet has been **Submitted, Approved, and Payments** have been made.

Mileage Registration

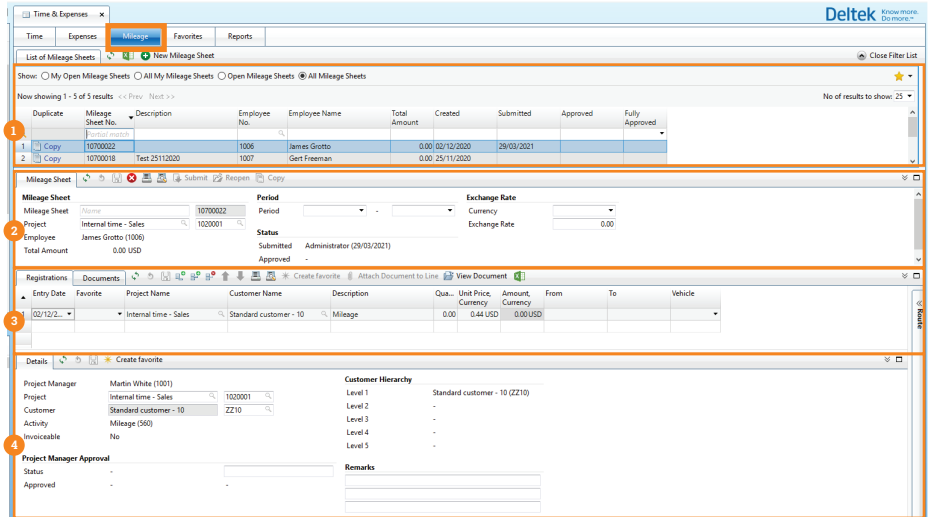
This guide will take you through the steps of registering and submitting mileage.

Within the **Time & Expenses** tab is a **Mileage** section

The Mileage section is similar to Expenses, but can have a different Registration layout and a separate print version of the expense sheet in the Mileage Sheet.

The section is split into four panes.

- 1 A filter list
- 2 The Mileage Sheet header
- 3 Mileage Sheet Registrations per project and task
- 4 Registration Details



New Mileage Sheet

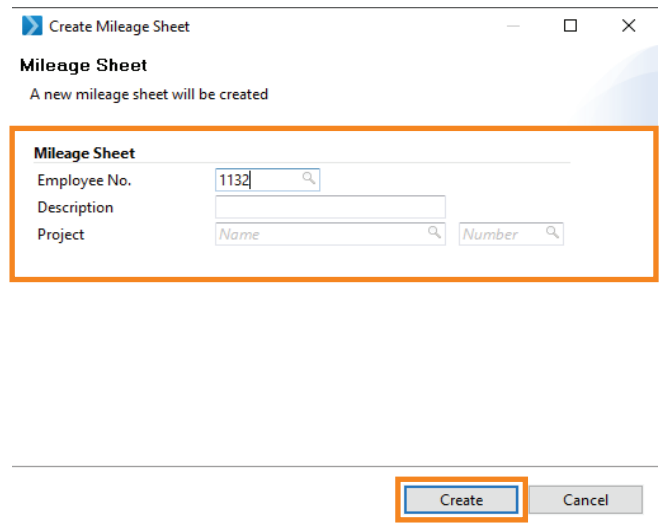
- To start creating a new Mileage sheet select **+ New Mileage Sheet**.
- The action is available when the filter list is open.



The Creation Wizard

Selecting **New Mileage Sheet** will open a **Create Mileage Sheet** wizard where you can add a Description for the Mileage sheet and add a Project name and number.

- The text entered in **Description** will help identify the Mileage Sheet.
- When a **Project Number** is entered in the wizard, it will default to each entry later.
- All entries can be entered later. Click **Create** to first create the Mileage Sheet.



List of Mileage Sheets

When a New Mileage Sheet has been created it will be added to the Filter List in the List of Mileage Sheets tab.

You can close the filter list in the upper-right corner and begin entering your expenses. You can also double-click on one of the Mileage Sheets in the filter list.

Mileage Sheet Header

1 In the Mileage Sheet header you will find the same fields as in the wizard – Name for the Mileage Sheet and Project. If you have not already entered the information you have the option to enter it here.

The **Mileage Sheet** tab includes a unique reference number (transaction number) for the mileage sheet added at creation.

The Project name and number and the Employee are included.

The total amount in Base (Company) Currency is included.

2 A **Period** date range can be entered.

In **Exchange Rate** a default **Currency** and **Exchange Rate** can be entered.

When no **Exchange Rate** is entered for a foreign currency entry, the rate from the standard Exchange Rate table will be used.

3 Status is updated with date and employee name when the expense sheet is:

- Submitted
- Approved
- Paid

Mileage Registrations

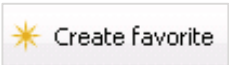
In the sub tab you will find the Registrations table ready to use – always displaying an empty line – where you can enter the necessary expense information:



Note: The unit price for mileage/kilometres can be derived automatically when the Task is selected.

Actions Registrations

The Registration section have two Actions



- Create Favorite
- Show Directions

Google Maps

Entry Date	Project Name	Customer Name	Description	Quantity	Unit Price, Currency	Amount, Currency	From	To	Vehicle
07/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	50.00	0.44 USD	22.00 USD	office	site	Own Car
08/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	30.00	0.44 USD	13.20 USD	home	customer	Own Car
09/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	25.00	0.44 USD	11.00 USD	customer	site	Own Car

The Mileage panel in the Time & Expense workspace is integrated with Google Maps, for directions.

The assistant **Route** is a link to Google Maps.

Route

- The Route Assistant has two links which will open a map with directions to the Customer address from the Employees home address and from the Company Address.

Note: The Address fields for company, employees, and customers must be entered correctly so they can be located on Google Maps.

Entry Date	Project Name	Customer Name
07/10/2021	Bank of America - Managem...	Bank of America Corp.
08/10/2021	Bank of America - Managem...	Bank of America Corp.
09/10/2021	Bank of America - Managem...	Bank of America Corp.

Route

Customer Address
Bank of America Corp.
7500 Centurion Parkway, 28255 Charlotte, NC

[Show Directions from Company](#)

[Show Directions from Employee](#)

Search Clients & Projects

The search functionality in the Mileage Sheet works in the same way as in the time sheet.

There are two ways to enter the project

- Search as you type** - Start entering part of the project name or number. A drop-down list containing the most recently used projects will be populated.
- Click on the **Magnifying Glass** and use this search functionality to select a project from any of the available filter lists displayed in the pop-up window.

Entry Date	Project Name	Customer Name	Description	Qua
07/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	
08/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	
09/10/2021	e	Bank of America Corp.	Mileage	

Project No.	Project Name	Customer Name
1020005	Exxon - General consulting	Bank of America Corp.
1020012	Exxon - Consulting Days	Bank of America Corp.
1020107	DHl testing	Exxon Mobil
1020109	MarcumInvoiceEditingTest	Exxon Mobil
1020113	ETC test	Wal-Mart

More search results (Ctrl+G)

Details

- In the bottom of the wizard you will have an assistant with **Details** including **Project** and **Customer** name and number.
- The area can also include a **Remarks** field to insert a message to the Finance Manager.

Descriptions	Details	Expenses	Mileage
Customer	Procter & Gamble (10008)		
Customer Level	Level 1		
Project Manager	Sean Williams (1132)		
Activity	External Time, Billable (100)		
Employee Category	Senior Project Manager		30
Billing Price Total, Base	6,080.00		

Create Favorite

The screenshot shows the 'Registrations' window with a table of entries. The 'Create favorite' button in the top toolbar is highlighted with a blue box and a circled '1'. Below the table, the 'Details' section shows fields for Project Manager, Project, Customer, and Activity.

Entry Date	Project Name	Customer Name	Description	Qu
07/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	
08/10/2021	Bank of America - Managem...	Bank of America Corp.	Mileage	
09/10/2...	Bank of America - Managem...	Bank of America Corp.	Mileage	

- You have the option to create project entries as **Favorites**, making the registration faster if you are using the same project regularly.
- When the entry has been made, highlight the particular entry and press one of the two **Create Favorite** buttons available.

The dialog box contains the following text: "You now have a favorite 'Bank of America - Management project, Mileage'. You can rename it in the window 'Favorites'". An 'OK' button is at the bottom right.

- A confirmation is issued when a Favorite is created.

The screenshot shows the 'Registrations' window with a dropdown menu open for the 'Favorite' column. The menu lists 'Bank of America - Management project, Travel air...' and 'Bank of America - Management project, Mileage'.

Entry Date	Project Name	Favorite	Customer Name	Description	Quantity	Unit Price, Currency
07/10/2021	Bank of America - Managem...		Bank of America Corp.	Mileage	50.00	0.44 USD
08/10/2021	Bank of America - Managem...		Bank of America Corp.	Mileage	30.00	0.44 USD
09/10/2...	Bank of America - Managem...	Bank of America - Management project, Mileage	Bank of America Corp.	Mileage	25.00	0.44 USD

- Similar to time entries created, Favorites can be selected from the Favorite column and the Project number and Task will be populated automatically.

Note: Learn more about favorites in the Favorite section.

Create from Time Sheet

- Make sure you have selected the correct entry. Then press **Mileage** and one of two things can occur.

Note: Mileage will often go hand-in-hand with time spent with a client. To save time, you can use an entry in the time sheet with hours registered to create an associated Mileage entry.

The screenshot shows the 'Registrations' window with the 'Mileage' button in the top toolbar highlighted with a blue box. Below it, the 'Expenses' window is open, showing a table of Mileage Sheet entries.

Mileage Sheet No.	Entry Date	Favorite	Description	Qua...	Unit Price, Currency	Amount, Currency	From	To	Vehicle
10700034	27/09/2...			0.00	0.00 USD	0.00 USD			
10700034	28/09/2021			0.00	0.00 USD	0.00 USD			
10700034	29/09/2021			0.00	0.00 USD	0.00 USD			
10700034	30/09/2021			0.00	0.00 USD	0.00 USD			

- If you already have an open/unsubmitted Mileage Sheet, the entry will be inserted.
- If you do NOT have an open Mileage Sheet, a creation wizard will open.

Mileage in Time Sheet

- Expenses created from the time sheet can be viewed and updated in the Mileage sub tab in the expansion at the bottom of the time sheet section.
- The Mileage tab and Registrations tab are both updated simultaneously when an entry is made to one area.

The image shows two screenshots from a software interface. The top screenshot shows the 'Registrations' tab with columns: Keep, Favo..., Customer Name, Project No., Project Name, Task Description, and Description. A row is visible with Customer Name 'Procter & Gamble', Project No. '1020150', Project Name 'Test', Task Description 'Consulting', and Description 'Consulting'. The bottom screenshot shows the 'Mileage' tab with columns: Mileage Sheet No., Entry Date, Description, Qua..., Unit Price, Currency, and Amount, Currency. It contains four rows of data for Mileage Sheet No. 10700034 with entry dates from 27/09/2021 to 30/09/2021, all with a quantity of 0.00 and amount of 0.00 USD.

Copy Mileage Sheet

- Previously created mileage sheets can be **Copied**, saving you time if you will be entering similar entries.
- Select the **Copy** action when a new Expense Sheet has been created. This will open a **Copy Expense Sheet** wizard.
- Enter or use the search functionality to find the Expense Sheet number.
- Select **Copy Mileage Sheet**.
- All lines from the old mileage sheet will be inserted without **Quantity** filled out.

The image shows a toolbar with a 'Copy' button highlighted in orange. Below it is a dialog box titled 'Copy Mileage Sheet' with the instruction 'Enter the number of the mileage sheet to copy from'. A search field contains '10700033' and a dropdown menu shows a search result for '10700033 Mileage Oct'. At the bottom right of the dialog, a 'Copy' button is highlighted in orange.

Submit

The image shows a toolbar with a 'Submit' button highlighted in orange.

- Submit** is part of the approval process for the Mileage Sheet and must be done either by the employee or the supervisor.
- When the Mileage Sheet is submitted, a To-Do can be created for the Finance Department Manager.

Note: When project manager approval is requested, a To-Do will be created when the employee Submits the Mileage Sheet.

Print Mileage Sheet

- Employees can **Print** and **Sign** the Mileage Sheet. The layout can be customized.
- The printed and signed Mileage Sheet can be handed over to the Finance department for reimbursement.



Note: The procedure depends on the approval process and can be created in many different ways.

Mileage Sheet									
DATE: 13/10/2021					PAGE: 1				
MILEAGE SHEET NO.	10700033				SUBMITTED	No			
DESCRIPTION	Mileage Oct				APPROVED	No			
EMPLOYEE NO.	1132				REMARKS				
NAME	Sean Williams								
DATE	TEXT	ACTIVITY	REFERENCE	CURR	QTY.	UNIT PRICE	TAX	AMOUNT	
PROJECT	VEHICLE	FROM	VIA	EXCH RATE					
07/10/2021	Mileage	560		USD	50.00	0.44	0.00	22.00	
1020008	Bank of America - M	560	office	1.00					
08/10/2021	Mileage	560		USD	30.00	0.44	0.00	13.20	
1020008	Bank of America - M	560	home	1.00					
09/10/2021	Mileage	560		USD	25.00	0.44	0.00	11.00	
1020008	Bank of America - M	560	customer	1.00					
TOTAL				USD			0.00	46.20	

Overview Mileage Sheet

List of Mileage Sheets New Mileage Sheet

Show: My Open Mileage Sheets All My Mileage Sheets Open Mileage Sheets All Mileage Sheets

Now showing 1 - 7 of 7 results << Prev Next >>

Mileage Sheet No.	Description	Total Amount	Submitted	Approved	Employee Name	Created	Employee No.	Fully Approved
1	10700034	mileage September	0.00		Sean Williams	13/10/2021	1132	
2	10700033	Mileage Oct	46.20		Sean Williams	13/10/2021	1132	

- Mileage Sheets are added to the Filter List once created and can be opened and reviewed at any time.
- Employees can search for and follow the approval process to track when the mileage sheet has been Submitted and Approved.
- For Tax purposes, Mileage can also be reimbursed together with the payroll.

Favorites

This guide is a step-by-step guide on how to create Favorites that can be used in the Time, Expenses, and Mileage Sheets.

Guide for Project Managers

Overview Mileage Sheet

Favorite Name	Project No.	Project Name	Task	Task Description	Can be used for Time Regi...	Can be used for Expense R...	Can be used for Mileage R...
1 Test	1020011	Matrix Marketing budget 2012	Actnp	Action planning	✓		
2 Bank of America - Management project, Travel airfa	1020008	Bank of America - Manag...	530	Travel airfare, taxi etc.		✓	✓
3 Bank of America - Management project, Mileage	1020008	Bank of America - Managem...	560	Mileage		✓	✓



Note: As the tasks are used to specify the kind of work performed, it might be necessary to create more than one favorite per project with different tasks.

All **Favorites** created from the **Time**, **Expenses**, and **Mileage** entries can be viewed in the List of Favorites in the **Favorites** tab.

- A favorite is a combination of the **Project** and **Task**. The favorite will by default receive a name combining the two.
- The default **Favorite Name** can be renamed to something more user friendly.

Actions

Copy from Other Employee Create from Time Sheets Show All Favorites Update Lines

Copy from Other Employee Create from Time Sheets Update Lines

New Favorites

Favorites can be created manually in Favorites by entering a **Project, Task**, and possibly, a new **Favorite Name**.

List of Favorites								
	Favorite Name	Project No.	Project Name	Task	Task Description	Can be used for Time R...	Can be used for Expens...	Can be used for Mileage...
1	Metlife - Management support, Mileage	1020006	Metlife - Management support	Mlg	Mileage		✓	✓
2	Exxon - General consulting, Hotel	1020005	Exxon - General consulting	540	Hotel		✓	✓
3	Boeing - Change management analysi...	1020007	Boeing - Change management analysis	140	Outsourcing	✓		
4	Bank of America - Main contract, Proj...	1020008-01	Bank of America - Main contract	150	Project planning	✓		
5		1020102	General Consulting					

Based on the selected **Task**, the respective columns where the Task will be used will be selected – Time, Expense & Mileage.

List of Favorites								
	Favorite Name	Project No.	Project Name	Task	Task Description	Can be used for Time Registration	Can be used for Expense Registration	Can be used for Mileage Registration
1	Metlife - Management support, Mileage	1020006	Metlife - Management support	Mlg	Mileage		✓	✓
2	Exxon - General consulting, Hotel	1020005	Exxon - General consulting	540	Hotel		✓	✓
3	Boeing - Change management analysi...	1020007	Boeing - Change management analysis	140	Outsourcing	✓		
4	Bank of America - Main contract, Proj...	1020008-01	Bank of America - Main contract	150	Project planning	✓		

Favorites can be created for a specific period. A date range can be entered in the columns Valid From and Valid To.

List of Favorites										
	Favorite Name	Project No.	Project Name	Task	Task Description	Can be used for Time Re...	Can be used for Expens...	Can be used for Mileage R...	Valid From	Valid To
1	Metlife - Management support, Mileage	1020006	Metlife - Management support	Mlg	Mileage		✓	✓	01/01/2013	10/07/2013
2	Exxon - General consulting, Hotel	1020005	Exxon - General consulting	540	Hotel		✓	✓		

Create Favorite Actions

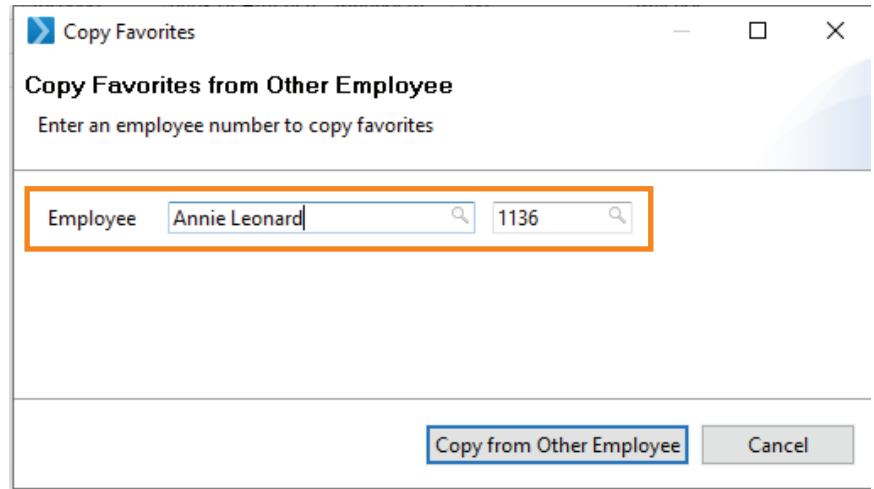
- Use the **Create favorite** action in Time, Expenses, and Mileage for automatic creation based on the entered project and task.

Keep	Favo...	Customer Name	Project No.	Project Name	Task Description
1		Procter & Gamble	1020150	Test	Consulting

- The favorite is created immediately and can be altered in the card pane **Favorites**.
- Open the Favorite tab to rename the created favorite.

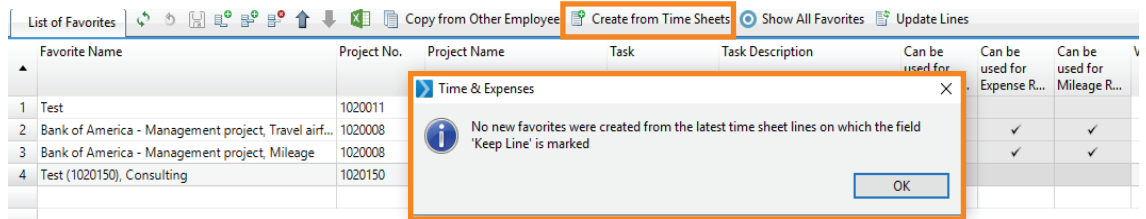
Copy Favorites Wizard

- A useful action is **Copy from Other Employee** which allows created favorites to be copied from one employee to another.
- This functionality can be used to copy all internal project/task for new employees. Like Vacation, meetings etc. or when a team of employees are working on the same projects.



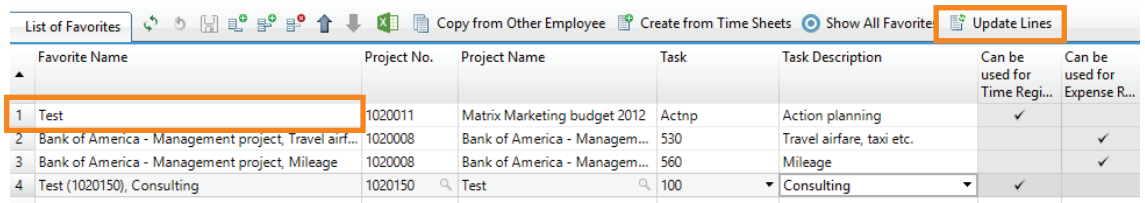
Create from Time Sheets Action

- Clicking the **Create from Time Sheets** action will copy projects that have been saved and have a time entry.
- A message will be issued indicating if favorites have or have not been created.



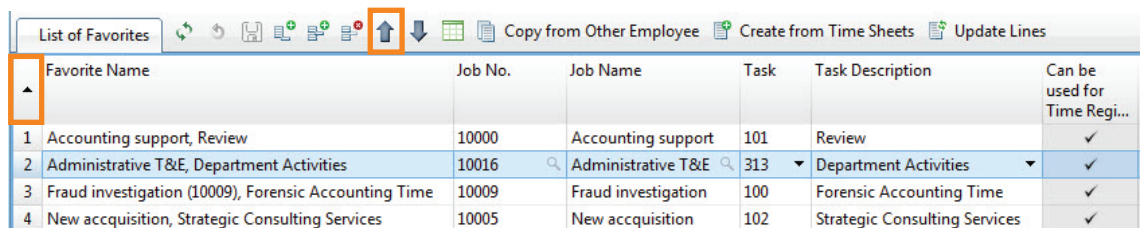
Update Lines

Unsubmitted lines in Time, Expense, or Mileage entered with favorites can be updated with the action **Update Lines**, e.g., a new name or task.



Organize Favorites

Favorites can be organized using the arrows to move entries up or down, or each field can be sorted in ascending or descending order.



Limitations to Using Favorites

Favorites can be blocked. They can also be limited by date ranges.

When a favorite is blocked, it does not display in the table part of the window or in the time registration windows. When a job is closed or blocked for registration, the favorites that were distributed for the job are also blocked and are no longer visible. If a job is later reopened or unblocked, Maconomy unblocks the favorites that were distributed for the job.

To resolve name clashes, Maconomy automatically renames a favorite that is unblocked whenever an employee already has a favorite with the same name.

A favorite can include a date range that specifies when the favorite can be used. If the date of the intended registration is outside the date range of a favorite, the favorite does not display in the time registration windows.

