




Deltek

Deltek Ajera

Project Information Management (PIM)
User Guide

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Overview

Welcome to the Deltek Ajera Project Management Information (PIM) User Guide. This guide provides technical guidance setting up the integration between Ajera and PIM as well as details regarding the information synced between Ajera and PIM.

About the Integration

The integration of Ajera and PIM offers the key features of document management from PIM directly in Ajera with new widgets. You can integrate Ajera projects, clients, employees, vendors, and contacts with PIM. Easily view, add, and modify documents associated with these items from a new PIM Documents tab on Ajera dashboards.

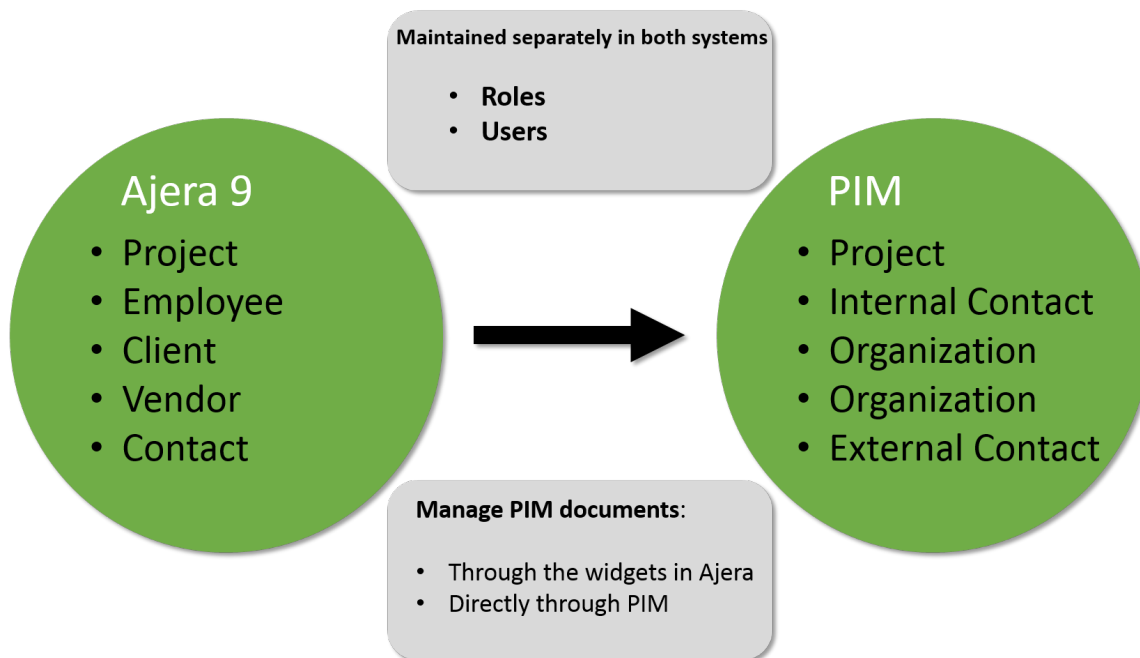
Your projects, clients, employee, vendors, and contacts continue to be maintained in Ajera and are updated immediately to PIM upon saving.

PIM is available for you to use directly from Ajera, through widgets on the dashboard, eliminating the need to click between two different programs.


Users and security need to be set up separately in PIM and Ajera

After the integration is set up,

- New projects, clients, contacts, vendors, and employees you enter in Ajera will automatically be created in PIM.
- Changes you make to projects, clients, contacts, vendors, and employees in Ajera will be synced to PIM.
- You will work with your PIM consultant to install PIM and import your Ajera data in PIM.
- Your historical information is available in PIM (after a backup is sent to data services).
- You can view and add documents to PIM through widgets in Ajera or by logging directly into PIM.



Setting the Integration up in Ajera

1. From  > **Setup** menu, click **Company** > **Preferences** > **Integration** tab.
2. Click the **PIM** tab.
3. Enter the **PIM URL**.
4. Enter the **PIM Shared Secret**.
5. Click **Test** to test the connection to the server.



You cannot enable PIM or select any of the Integrate options until you test the connection.

6. Check the **Enable PIM** box.
7. In the **Integrate** field, check any of the following boxes to sync the data to PIM:
 - Projects
 - Clients
 - Contacts
 - Employees
 - Vendors
8. Click **Save**.
PIM widgets and tabs are imported.
9. Navigate to the following widgets and set up security.
 - On the Home page:
 - PIM Information Zone
 - PIM Personal Zone
 - On the Project page:
 - PIM Project Documents
 - On the Client page:
 - PIM Client Documents
 - On the Employee page:
 - PIM Employee Documents
 - On the Vendor page:
 - PIM Vendor Documents
 - On the Contacts page:
 - PIM Contact Documents

Manually Add PIM Widgets to Tabs in Ajera




There are two PIM widgets available on the Home page:

- PIM Info Zone
- PIM Personal Zone

The PIM widgets are available on the following pages:

- Client
- Contact
- Employee
- Home
- Vendor

To add a PIM widget manually

1. Click  >  to open Design mode and click the tab you want the widgets on.
2. In the Tab Properties area, click  **Add Widget**.
3. Under **Other**, click **PIM Info Zone** or **PIM Personal Zone**.

The widget is added to the current tab.

Information Synced from Ajera to PIM

Project

Ajera database table: AxProject

PIM database: Project



Project information is sent to PIM at the project level only. Phases do not sync to PIM.

Ajera database field	Ajera field	PIM table	PIM field	Notes
prjKey	prjKey		Project ID	Project only – no phases go to PIM
prjDescription	Project Description	Project	Name	
prjNotes	Project Notes		Description	
prjID	Project ID		Project Code	Automatically generated if not entered in Ajera
VecDescription	Client			Information from the first invoice group associated with the project in Ajera
VecAddress1	Client Address 1			Information from the first invoice group associated with the project in Ajera
VecAddress2	Client Address 2			Information from the first invoice group associated with the project in Ajera

Information Synced from Ajera to PIM

Ajera database field	Ajera field	PIM table	PIM field	Notes
vecCity	City			Information from the first invoice group associated with the project in Ajera
vecState	State			Information from the first invoice group associated with the project in Ajera
vecZip	Zip			Information from the first invoice group associated with the project in Ajera

Client

Ajera database table: AxVec

PIM database table: Organization

Ajera database field	Ajera field	PIM field	Notes
vecKey	vecKey	Organization ID	Organization ID in PIM is prepended with "cl". For example if the veckey in Ajera is 101 then the organization ID in PIM is "cl-101"
vecDescription	Client Name	Name	
vecAddress1...3 vecCity, vecState	Address 1...3, City, State	Address	
vecZip	Zip	Post Code	

Ajera database field	Ajera field	PIM field	Notes
vecPhone1 or vecPhone2	Phone	Phone Number	If the phone number is not in first phone number, will look to second phone number
vecFax	Fax	Fax Number	
vecWebsite	Website	Web Address	
vecEmail	Email	Email	

Vendor

Ajera database table: AxVec

PIM database table: Organization

Ajera database field	Ajera field	PIM field	Notes
vecKey	vecKey	Organization ID	Organization ID in PIM is prepended with "ve". For example if the veckey in Ajera is 102 then the organization ID in PIM is "ve-102"
vecDescription	Vendor Name	Name	
vecAddress1...3 vecCity, vecState	Address 1...3, City, State	Address	
vecZip	Zip	Post Code	
vecPhone	Phone	Phone Number	If the phone number is not in first phone number, will look to second phone number
vecFax	Fax	Fax Number	
vecWebsite	Website	Web Address	
vecEmail	Email	Email	

Employee

Ajera database table: AxVec

PIM database table: Contact

Ajera database field	Ajera field	PIM field	Notes
vecKey	vecKey	Contact ID	Contact ID in PIM is prepended with "em". For example if the vecKey in Ajera is 103 then the contact ID in PIM is "em-103"
		Organization ID	Internal
vecFirstName	First Name	Forename	
vecLastName	Last Name	Surname	
n/a	n/a	Title	Prefills with "-". Mr/Mrs used in merge templates
vecMiddleName	Middle Name	Middle Names	
vecTitle	Title	Job Title	
vecEmail	Email	Email	Used for single sign on
vecPhone2	Phone 2	Mobile	
vecPhone1	Phone 1	Direct Dial	
n/a	n/a	Created Date	
		Document Initials	Uses first and last initials from name

Contact

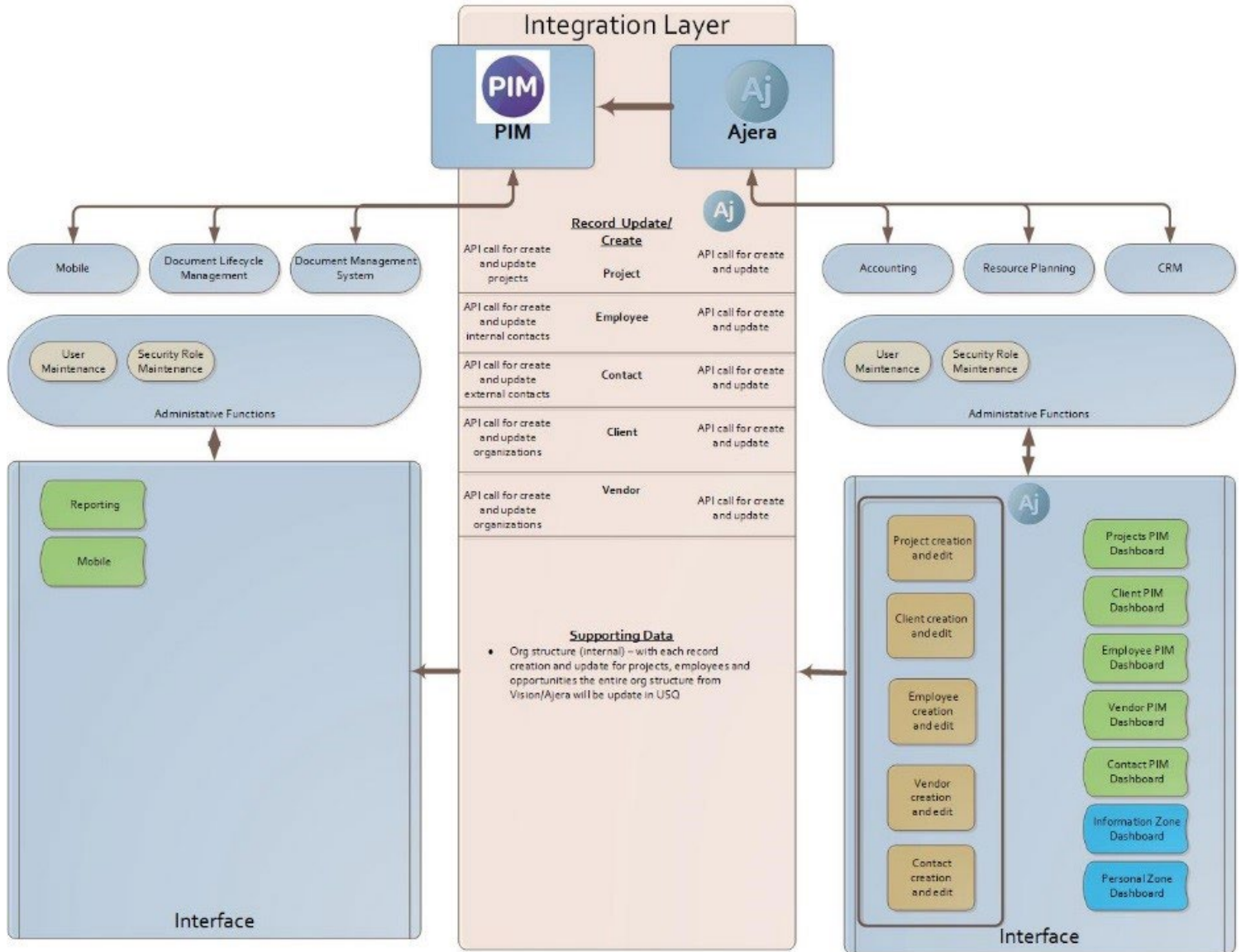
Ajera database table: AxContact

PIM database table: Contact

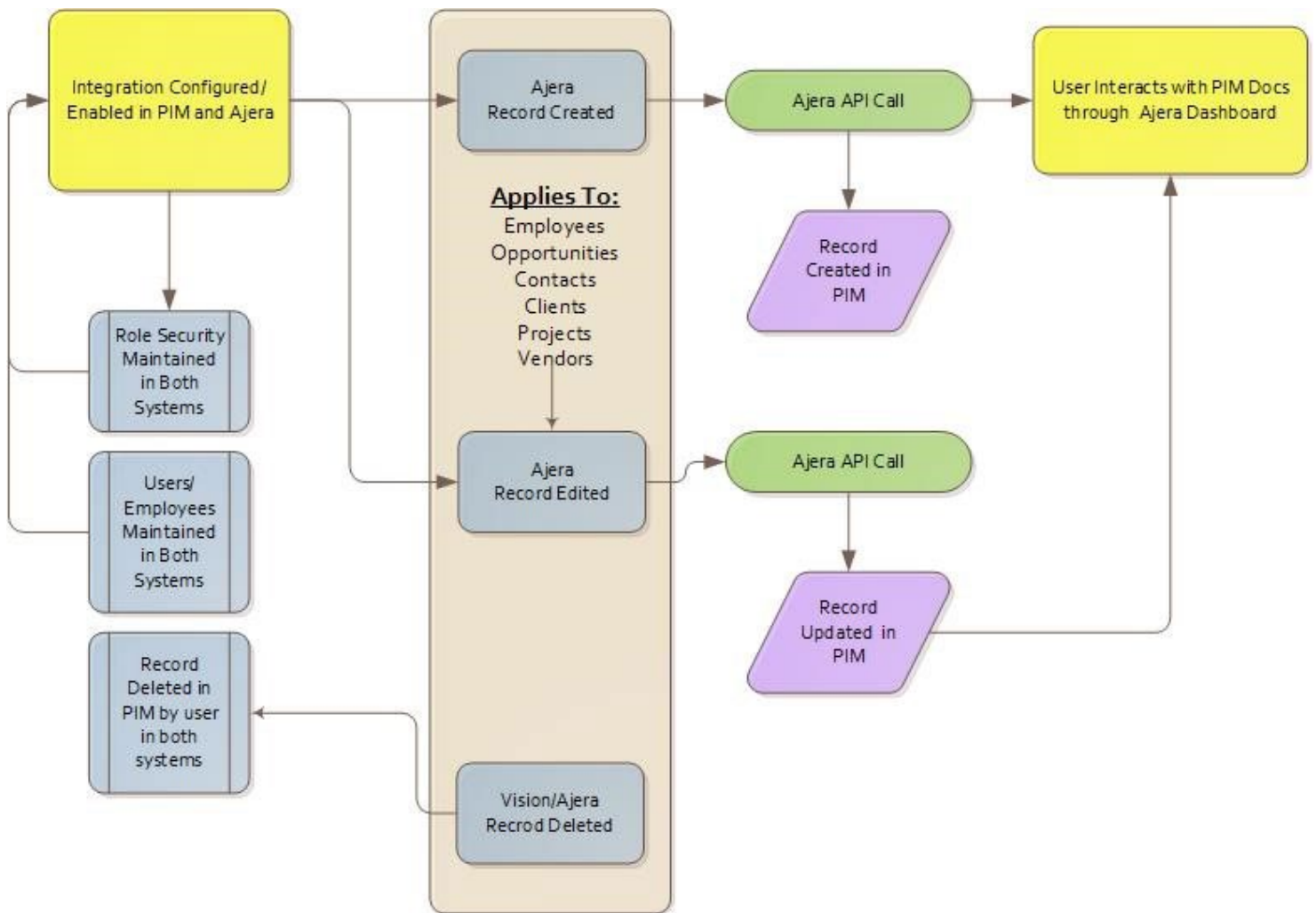
Ajera database field	Ajera field	PIM field	Notes
cntKey	cntKey	Contact ID	Contact ID in PIM is prepended with "co". For example if the cntKey in Ajera is 104 then the contact ID in PIM is "co-104"
		Organization ID	Search for the first client or vendor that the contact is attached to in Ajera, use the vecKey plus cl or ve depending on if it is a vendor or client. This can be changed in PIM.
cntFirstName	First Name	Forename	
cntLastName	Last Name	Surname	
n/a	n/a	Title	Prefills with "-". Mr/Mrs used in merge templates
cntMiddleName	Middle Name	Middle Names	
cntTitle	Title	Job Title	
cntEmail	Email	Email	
cntPhone2	Phone 2	Mobile	
cntPhone1	Phone 1	Direct Dial	
n/a	n/a	Created Date	
		Document Initials	Uses first and last initials from name

Appendix A: Technical breakdown of PIM Integration

Review the infographics below for a more detailed breakdown of the PIM integration.



Appendix A: Technical breakdown of PIM Integration





About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com