




Deltek

Deltek Ajera 10

SaaS Administrator Guide

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About Ajera SaaS

Some sort of an about statement

Types of Environments

A number of different types of application environments are available with Deltek's cloud products. An environment is the collection of software and infrastructure components necessary to operate a product. This includes shared security services, monitoring, web and application servers, database servers, operating systems, compute, storage, memory, and network. Each environment can have one or more customer-specific database instances associated with it, which may require an additional subscription fee. Each of these environments has a specific purpose and is available with specific offerings.

Production Environments

All Deltek cloud services provide a production environment that is held to the highest operational standards. These environment instances are highly secure and managed under strict control. Only authorized Deltek Cloud Operations employees are allowed access to the infrastructure and application layers of the solution. Customer access is provisioned only through the application front-end or through very specific and tightly controlled methods, such as an application-specific API layer. These environments serve as the focal point for disaster recovery replication and backup have only one production instance, unless they have more than one company or entity, running under separate subscriptions.

Non-Production Sandbox Database

You receive one additional production configuration database replica, which is housed in the production environment and treated as a production database only for backup and retention purpose. Use the production database replica for reporting and configuration testing.

Production database replicas offer different availability and service levels than production environments.

Your Sandbox Database expires every 6 months. You can request a Sandbox Database Refresh from the Ajera Cloud Solutions Page in the Deltek Support Center to refresh and enable the Sandbox again. Once refreshed it is valid for another 6 months.


Sample Database

You receive a sample Ajera database for a fictional company called Accutera Architects that you can use to learn how to use Ajera. Use this database to experiment with Ajera in the Ajera Cloud using sample information.

To access Ajera Cloud sample data



Sample data does not include the ability to upload attachments.

1. Verify that each Ajera employee in your firm is active and set up with a valid email address ( > **Setup > Employees**). Each employee must have an email address to log into the sample database on the Ajera Cloud.
2. To access the sample data, log in with our actual email, preceded by the word *sample/*
 - **Email:** sample\<your email address>
 - **Password:** <your password>
 - Ajera prompts you to select an employee or role already set up in the sample database.

Disaster Recovery

Deltek provides a disaster recovery environment with all offerings. Unless otherwise specified, the disaster recovery site is more than 250 miles away (DR250) from the production hosting facility.

On an annual basis, Deltek coordinates and executes a disaster recovery test of each cloud offering, usually on a weekend between May and September. You will receive advance notice of the testing and may be asked to validate the disaster recovery site once it has been brought online.

After a successful test, the service is rolled back to the production environment.

Backup & Retention Policy

Objects	Backup Frequency	Retention Period
Data	Daily	7 days
Data	Weekly (every Saturday)	30 days
Transaction logs	Every 15 minutes	

The backup and retention policy is subject to ongoing review and change.

Service Requests

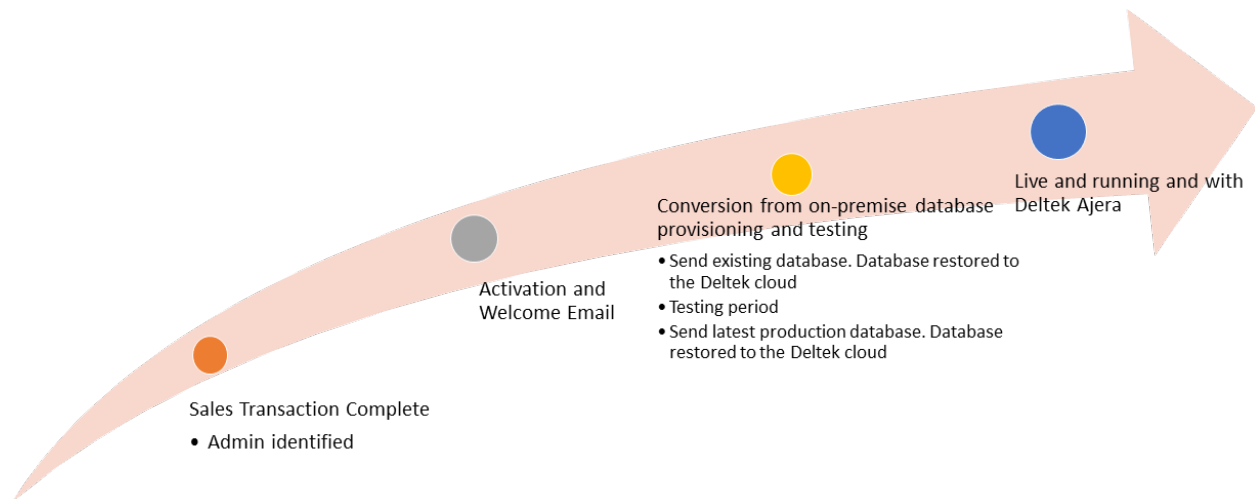
As the Ajera SaaS administrator for your company, you can request additional services from Deltek as part of your annual subscription fee through Customer Care and the Ajera Cloud Solutions page on the Deltek Support Center. Service requests can only be submitted by a designated Ajera administrator. If Deltek receives a service request from someone other than a designated Ajera administrator, the request will be rejected.

You can submit requests for the following services:

Service	Description
Administrator Password Reset	If you lose or forget the password for your Ajera SaaS Administrator account, you (the Ajera SaaS administrator) can request a password reset with Customer Care. When you submit a password reset request, you must include the user ID of the account that needs the password reset. These are typically completed within two business hours.
Sandbox Database Refresh	You can request to refresh a database from the Ajera Cloud Solutions page on the Deltek Support Center. For example, you can refresh your sandbox database from a copy of your production database. A sandbox is a separate database within the Ajera production environment that can be used for testing new configurations, exploring functionality, and for training purposes. If you do not have a sandbox, you can request to have one created for your Ajera instance. When you request a sandbox, Deltek Cloud Operations creates a copy of the existing production database, properly renames the copy, and adds the copy to the instance of Ajera as a separate item available in the Database field on the login screen. Your Sandbox Database remains valid for 6 months at which time you can request a new one from support. However, a SaaS Administrator can request that their sandbox be refreshed. This process replaces data in their existing sandbox with their latest production data. After you submit a sandbox creation or refresh request, Deltek Cloud Operations will send the sandbox information via email message within 3 business days.
Production Database Restore	If you need to restore your database to a previous point in time, you can request a production database restore from the Ajera Cloud Solutions page. If you have multiple Ajera databases be sure to specify the database you want restored. Ajera customer databases are backed up every 24 hours. You are allowed four (4) backup restores annually for each Ajera database. Backup restores are typically completed as soon as possible.
Production Database Backup Download	You can request a backup copy of your Ajera database, which will be sent to you via secure FTP. When you request a backup, be sure to specify the point in time that the backup should reflect. If you have multiple Ajera databases, be sure to specify the database backup you require. You are allowed four (4) backup copies annually for each Ajera database. Database backup requests are typically completed within three business days. If you need a secure FTP site to receive your back up, you must complete a Data Consent Case.

Activation and Onboarding

During the sales transaction, you will identify an administrator and implementer. This may be Deltek consulting or a Deltek partner. Once that is complete, you will get an activation and welcome email which will include reference information and next steps. The next steps will vary depending upon whether you are converting your on premise Ajera database to the cloud, or joining Deltek as a new customer. If there is a conversion or migration as part of your process, you will be sending your database to Deltek to have it restored in the Ajera cloud. You will be able to test out the cloud before going live with the latest copy of your production database. If you are new to Deltek, it's a quicker process and you'll get your new database right away.



Uploading Data for Conversion during Implementation

If you have purchased a data conversion as part of the implementation to Ajera, the Data Services team will need permission to create and populate your new Ajera database. Before beginning the conversion process, Deltek requires that clients send an email to the Data Specialist assigned to their conversion that expresses your company's willingness to allow the Data Specialist access to your data. Once the Data Specialist has this email they can provide directions on how to upload data and begin the conversion process. It should be noted that all client data will be removed from Deltek's servers within 90 days upon receipt.

Identifying Ajera SaaS Administrators

All Ajera cloud customer accounts are required to have at least one active/valid Ajera SaaS Administrator at all times. Three additional Administrators can also be identified, allowing for a maximum of four Administrators per company. When more than one Administrator is identified for an account, they are treated equally. Each Administrator has the same authority to administer your company's Ajera Cloud solution, and each receives the same communications from Deltek.

Deltek recommends that each company have at least two Administrators to ensure that communications are always received, and someone is always available to carry out service requests.

You can manage the Administrators on your account through the Support Center site.

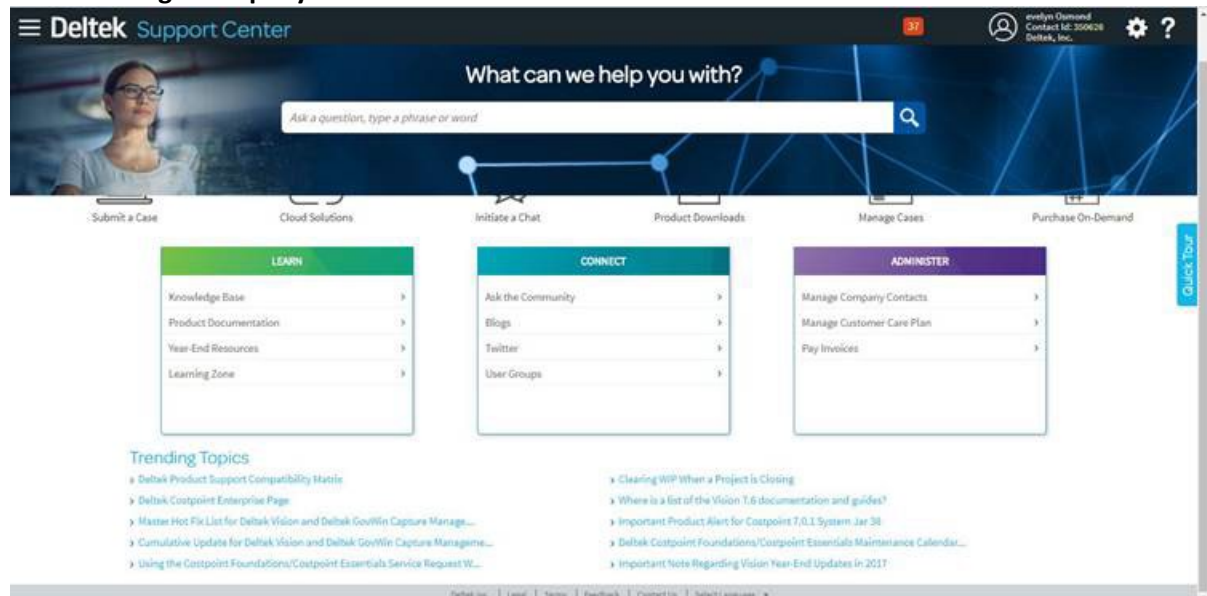
To manage Administrators

1. Go to <http://support.deltek.com>.
2. Log in to the Support Center site using the credentials provided to you when your initial Ajera order process was completed.

If you do not have a username and password for the Support Center site, contact your firm's Ajera Administrator.

If you forget your username or password, you can click the **Need Help?** button on the Support Center login screen.

3. Select **Manage Company Contacts** in the Administer section.



4. Click on the name of any user who should have Ajera SaaS Administrator rights. This opens a window where you can update information about the user.
5. Click **Yes** in the SaaS Administrator field.
6. Click **Update Contact**.

Identifying Ajera SaaS Administrators

Deltek Support Center

Ask a question, type a phrase or word

Manage Company Contacts

Add Contact SaaS Administrators Allowed: 3 SaaS Administrators Available: 2296 Authorized Support Contacts Allowed: 15 Authorized Support Contacts Available: 2561

Export All to Excel

Contact ID	Name	Primary Support Contact	Online Support Contact	Authorized Support Contact	SaaS Administrator	Support Contact Manager	Download Correction Files	View All Cases
432843	A', Larsen, Claus	No	Yes	Yes	Yes	No	Yes	No
785678	Abacan, Ray Carlos	No	Yes	Yes	Yes	No	Yes	Yes
511887	Abarguez, Agnes Luisa	No	Yes	Yes	Yes	No	Yes	No
465008	Abarru, Aquila	No	Yes	Yes	Yes	No	Yes	No
414497	Abayan, Bernadette	No	Yes	Yes	Yes	No	Yes	Yes
784615	Abcede, Dwight	No	Yes	Yes	Yes	No	Yes	Yes
135942	Aberra, Yasin	No	Yes	Yes	No	No	Yes	Yes
775016	Aberra, Hazel Bernadette	No	Yes	Yes	Yes	No	Yes	Yes
727196	Aberra, Jonathani	No	Yes	Yes	Yes	Yes	Yes	Yes
738566	Aberra, Alfred	No	Yes	Yes	Yes	No	Yes	Yes
534690	Abubakar, Samina	No	Yes	Yes	Yes	No	Yes	Yes
739330	Abundo, Orlene Marie	No	Yes	Yes	Yes	No	Yes	Yes
465394	Abuya, Marielle	No	Yes	Yes	Yes	No	Yes	Yes
423450	Account ID, Test	No	Yes	No	No	No	No	No
456402	Aceto, Katie	No	Yes	Yes	Yes	No	Yes	Yes
465602	Adams, Victoria	No	Yes	No	No	No	No	No
403029	Adams, Kristina	No	Yes	Yes	Yes	No	Yes	Yes

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Deltek Support Center

Ask a question, type a phrase or word

Manage Support Contact

* Denotes a required field.

Update Support Contact

Email Address * williamyandell@deltek.co

Username * williamyandell@deltek.co

First Name * William

Last Name * Yandell

Office Phone *

Alternate Phone

Job Title * WI Sales

SaaS Administrator * Yes No -- Maximum number of SaaS Administrators has been reached.

Primary Support Contact * Yes No

Online Support Contact * Yes No

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Staying Informed

Cloud Solutions Support Site

On the Customer Care Connect site, Deltek provides the Deltek Cloud Solution area for its cloud-based products. This area includes guides, videos, and other resources to help you learn about Ajera.

Deltek Support Center

Type in a phrase and search the Knowledge Center

Deltek Cloud Solutions - Ajera

Administrative Guides

- > Deltek Ajera SaaS Administrator Guide
- > Deltek Ajera 8 Getting Started

Releases Notes

- > Deltek Ajera 9.2 Release Notes

Learning Resources

- > Deltek University: Ajera Online Training
- > Video: Deltek Ajera Administrator Webinar

Learn about Ajera

- > Video: Guided Tour of Ajera 8

Customer Care Guides and Resources

- > Deltek Customer Support Guide
- > Deltek Enterprise Search Tips and Tutorials

Customer Data Handling Policy

In order to provide the Services requested, Deltek may transfer to, store, or process Customer Data at its U.S. data center in Ashburn, Virginia, USA. We are a data processor (or sub-processor) acting on your behalf, and you appoint us to perform activities with Customer Data in order to provide Services to you. Deltek agrees and covenants that it shall keep and maintain your Customer Data in strict confidence, using such degree of care as is reasonably appropriate to avoid unauthorized access, use, or disclosure. Deltek employs reasonable security and protection mechanisms on its network that can differ from that of Deltek's Cloud or your network. You hereby consent to this transfer and you shall obtain any necessary consent from end users, data subjects, or others whose Personal Information or other data you will be hosting using the Services. We will use Customer Data only to provide you Services. This use may include troubleshooting to prevent, find, and fix problems with the operation of Services. It may also include improving features for finding and protecting against threats to users. We will not use Customer Data or derive information from it for any advertising or other commercial purposes without your consent.

For purposes of transferring Personal Information subject to Article 26(2) of Directive 95/46/EC and/or Article 46(2) of the General Data Protection Regulation to processors established in third countries, Deltek and Customer agree that such transfer will be in accordance with the [Data Processing Addendum](#).

The following definitions apply:

REPORT A SERVICE DISRUPTION

If you need to report an service disruption please complete the following:

Time of Disruption

Instance URL

Description/Business Impact

Upload Screenshot

Browse...

Submit

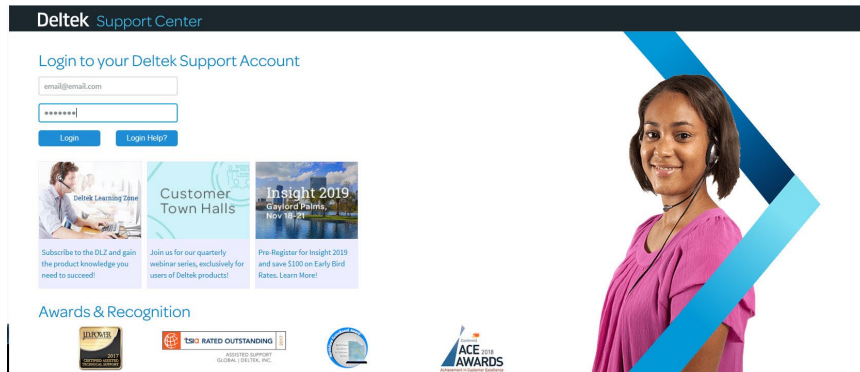
To go to this page, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Log in to the Deltek Customer Care Connect site using the credentials provided to you when your initial Ajera order process was completed.

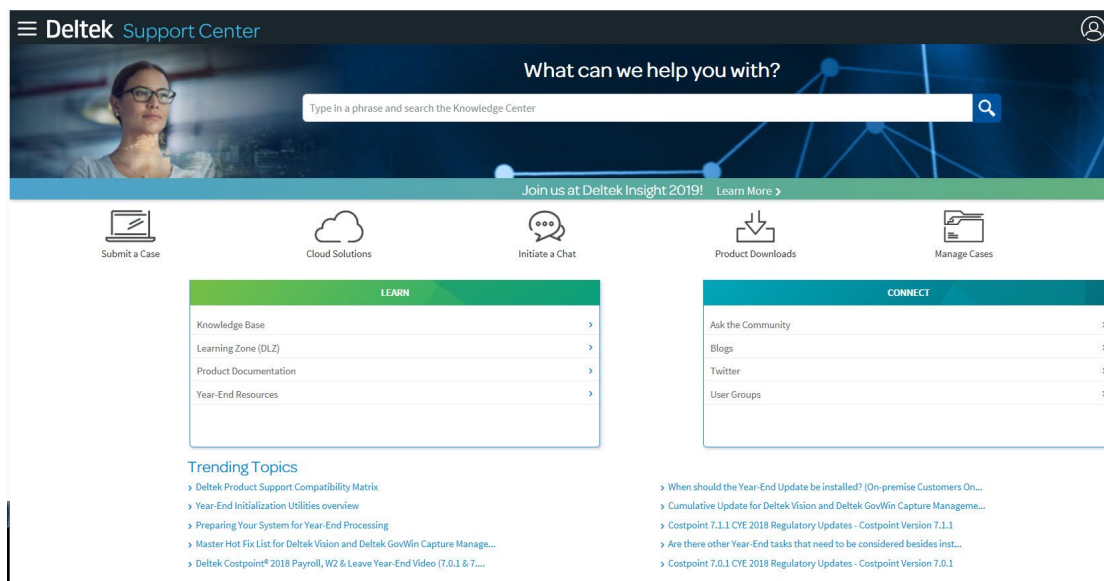


If you do not have a username and password for the Customer Care Connect site, contact your firm's Ajera Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the Customer Care Connect login screen for help.



- On the Home page, under Support Resources, find the Deltek Cloud Solutions area. Click **Ajera**.



If You Need Assistance

If you need assistance using your Ajera solution, Deltek makes a wealth of information and expertise readily available to you through our Customer Care organization.

Support cases can be initiated by designated individuals within your organization according to the standard support model. In addition, these individuals can leverage the Deltek Customer Care offerings described in the following sections.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training



Find out more about these and other services from the [Customer Care Connect site](#).

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase Ajera.

The following are some of the many options you have at the Customer Care Connect site:

- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes



If you need assistance using the Customer Care Connect site, the online help available on the Customer Care Connect site provides answers for most questions

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to <http://support.deltek.com>.
 2. Enter your Customer Care Connect **Username** and **Password** that were sent to you in your original Welcome emails.
 3. Click **Log In**.
-



If you do not have a username and password for the Customer Care Connect site, contact your firm's Ajera Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the Customer Care Connect login screen for help.

Hardware and software requirements

Click to [view the hardware and software requirements](#).

Single Sign-On with Microsoft Entra ID Active Directory (formally Azure)


Microsoft Entra ID AD's single sign-on feature lets Ajera users log on to Ajera using their Windows usernames and passwords instead of using separate Ajera usernames and passwords. To set up single sign-on, an Ajera administrator must complete the following configuration steps, described in the [Microsoft Entra ID Active Directory Integration for Single Sign-On](#) guide.

Configure Alert Settings

Before you begin

- [Set up Designer security](#) with full design access
- [Assign access](#) to the alerts tabs

Turn on alerts

1. From the  > **Setup** menu, click **Company** > **Preferences**.
2. Click the **Alert Email Settings** tab.
3. Check **Alerts Active** to turn alerts on.

Configure Alert settings



Not all options are applicable for all email services. SMTP server and port are required fields. Work with your IT team to set up the email service for your company.

1. To configure alerts, enter the following information:

Available fields	Description
Sender's name	The name of the person the email should look like it is coming from
Sender's address	The email address of the person the emails will be coming from
SMTP server	The address of your SMTP server
Port	The port number set up on the email server
Authentication	If the server requires authentication, check the box and enter the username and password
SSL	Check if your server uses SSL for security

2. After entering the information, click **Test** to ensure the information is correct.



If Alerts aren't sending because the Ajera Service is not running, you can restart the Ajera Service. From the server where Ajera is installed, go to the Windows Start menu, and click **All Programs > Ajera > Ajera Server Administration > Tasks > Ajera Service > Reregister**.

Set up CRM Integration

Not available in ajeraCore or ajeraCore + add-ons

[Visit the Learning Center to set up the CRM integration.](#)

ODBC and Hybrid Data Pipeline (HDP) Setup and Configuration

If your company has purchased the Ajera ODBC (Read Only) access to your SaaS data, use the setup and configuration guide to set up users and install the tools to utilize the ODBC access to your Ajera cloud data. Ajera ODBC (Read Only) offers a secure, read-only connection to your Ajera database using ODBC, providing the ability to connect Microsoft Excel or Microsoft Access directly to your database.

[Visit the Setup and Configuration](#) Guide to find out more on installing and configuring HDP and ODBC.



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