



Deltek

Deltek Ajera 9

Installation Guide

July 15, 2023

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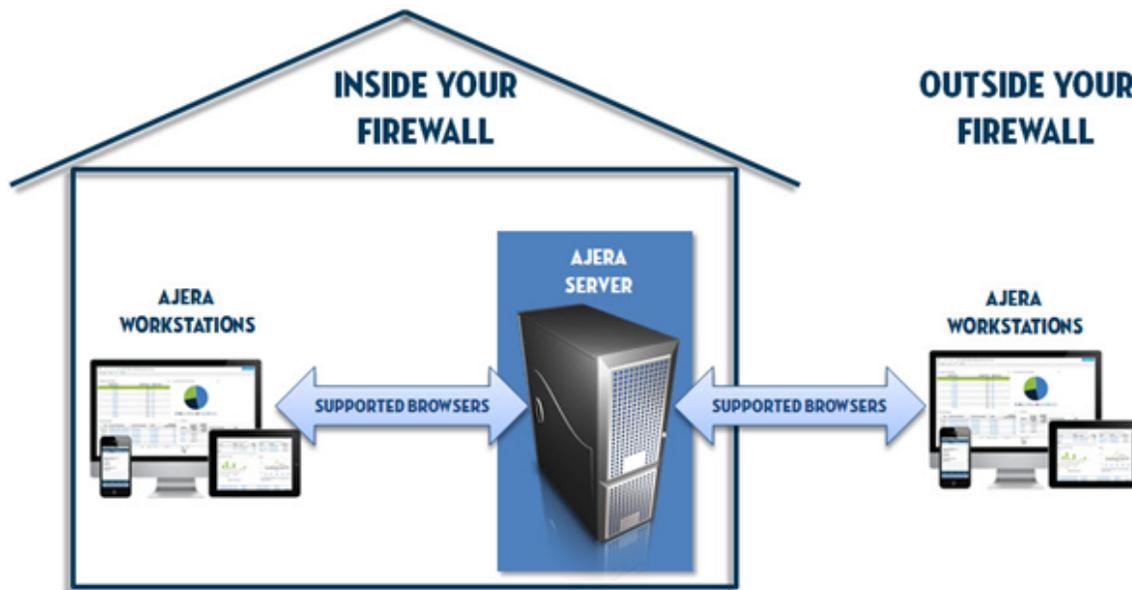
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Install Ajera

About Ajera web access

Every firm is different with different security and firewall requirements, as well as web access configurations. The image below illustrates a typical Ajera web access configuration.

Work with your IT team to determine what web access configuration works for your firm and to ensure that you have the appropriate hardware and software. Refer to the [Ajera Hardware/Software Requirements](#) for details.



Step 1: Prepare for the installation

Before you start the Ajera installation, work through the following checklist to make sure you are prepared:

- Confirm that each workstation is set up with the appropriate hardware and software identified in the [Ajera Hardware/Software Requirements](#).



Without the correct hardware and software (such as supported web browsers or Microsoft Windows), you cannot access Ajera's full functionality.

- Confirm that Microsoft .NET Framework 4.6 is installed on the Ajera server. Refer to the [Microsoft .NET Framework 4.6 website](#) for installation information.

If you use Firefox as your browser you must manually install the Microsoft .NET Framework Assistant add-on for Firefox.

1. Download and install Firefox 20 or later on your Ajera workstations.
2. Download and install the Microsoft .NET Framework Assistant add-on for Firefox.
3. Open Firefox and click Ctrl+Shift+A to open the add-on screen.

4. Click the **Extension** tab and select Microsoft .NET Framework Assistant.
 5. Click the **Enable** button to enable the update.
 6. Click **Restart Now** to restart Firefox.
- Determine what version of Microsoft SQL Server your firm requires. The Ajera installation automatically installs Microsoft SQL Server 2019 Express as its database on your server. Your database size and the number of Ajera users may require that you upgrade to a full version of Microsoft SQL Server 2019. Refer to the [Microsoft SQL Server website](#) for installation information.
 - If your firm determines that one of the following scenarios applies, contact [Ajera Support](#) for instructions on how to install SQL manually:
 - Your firm requires a version of Microsoft SQL Server other than SQL Server 2019 Express.
 - You need to install SQL Server 2019 Express to a different directory than the default location.
 - Before beginning the installation, disable your anti-virus software.
 - When your firm purchased Ajera, your billing contact received a Welcome to Ajera email, containing your firm's Ajera Registration Code and company name. Locate that email, as you will need that information for the installation.
 - Identify your Ajera Administrator. Your Ajera Administrator is responsible for the health of your project and financial information in Ajera. After you install Ajera, your Administrator sets up Ajera to align with your accounting and project management workflow. Refer to the [Ajera Getting Started Guide](#) for setup information.

Step 2: Install Ajera on your server

Note :	For security purposes, it is recommended that you install the Ajera application and the database on separate servers.
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Ajera stores your project and financial information in a Structured Query Language (SQL) database. Ajera automatically pulls data from the SQL database tables to create client invoices, generate reports, and perform other tasks for you. After installing Ajera on your server, your employees access Ajera on the server by using supported browsers.

The Ajera installation automatically installs Microsoft SQL Server 2019 Express as its database on your server. Your database size and the number of Ajera users may require that you upgrade to a full version of Microsoft SQL Server 2019.



Downloading the Ajera program files as well as communication back to the server occurs over TCP/IP port 80 (or 443 for Secure Sockets Layer [SSL]), allowing for easy passage through corporate and personal firewalls. Ajera can coexist with an installation of SharePoint that is deployed with Windows Small Business Server. Ajera cannot coexist on a server where SharePoint virtualizes URL processing, bypassing Internet Information Services (IIS) authentication mechanisms.

If your firm determines that you need to install a full version of Microsoft SQL Server or if you install SQL on a drive other than the C: drive on your Ajera server, you must specify an instance name of **Axium** during the SQL installation. Refer to the [Microsoft SQL Server website](#) for installation information.



During the Ajera installation, the system looks for the SQL instance named **Axium**.
If the Ajera installation does not find that name, Ajera installs Microsoft SQL Server 2019 Express.

Before you begin

- Disable any anti-virus software before installing Ajera.
- Locate your *Welcome to Ajera* email; it contains your Ajera Registration Code and company name. Your Ajera Registration Code identifies your firm, your version of Ajera, and your firm's employee limit.
- Verify that your hardware and software environment is in place and meets what is identified in the [Ajera Hardware/Software Requirements](#).



Without the correct hardware and software (such as supported web browsers or Microsoft Windows), you cannot access Ajera's full functionality.

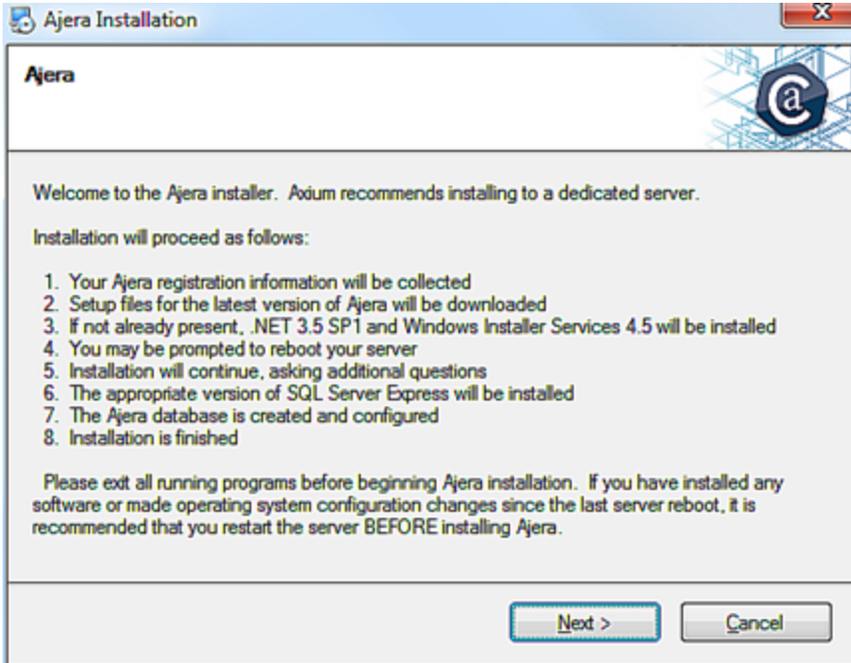
To install Ajera on your server

1. On your server, click <http://update.axium.com/ajerainstall.exe>.
 - If you installed a full version of Microsoft SQL Server before this Ajera installation, the system may prompt you to allow access, depending on your User Account Control settings in the Control Panel. Click **Yes**.
 - If Ajera is already installed, the system prompts whether you want to overwrite your existing data.



If you choose to continue, the system overwrites your existing databases and you will lose your existing Ajera data. To preserve your existing data and update Ajera to the latest release, click **Cancel** and complete the steps described in the [Update Ajera](#) section of this guide.

- If you did *not* install SQL for Ajera, the system may prompt you to allow access to your computer, depending on your User Account Control settings in the Control Panel. Click **Allow**.
2. To start the Ajera installation, click **Next** on the screen below.



3. Enter your company name spelled exactly as it appears in the *Welcome to Ajera* email, along with your Registration Code and click **Next**.
4. Specify the local server location where you want to install the Ajera program files and backup folder (C:\Ajera, by default). Click **Install**.



The drive letter must be local to the server, not on network-attached storage or a mapped drive letter. Do not enter the location of the database.

5. Specify the program file and backup folder installation directory, and click **Install**.

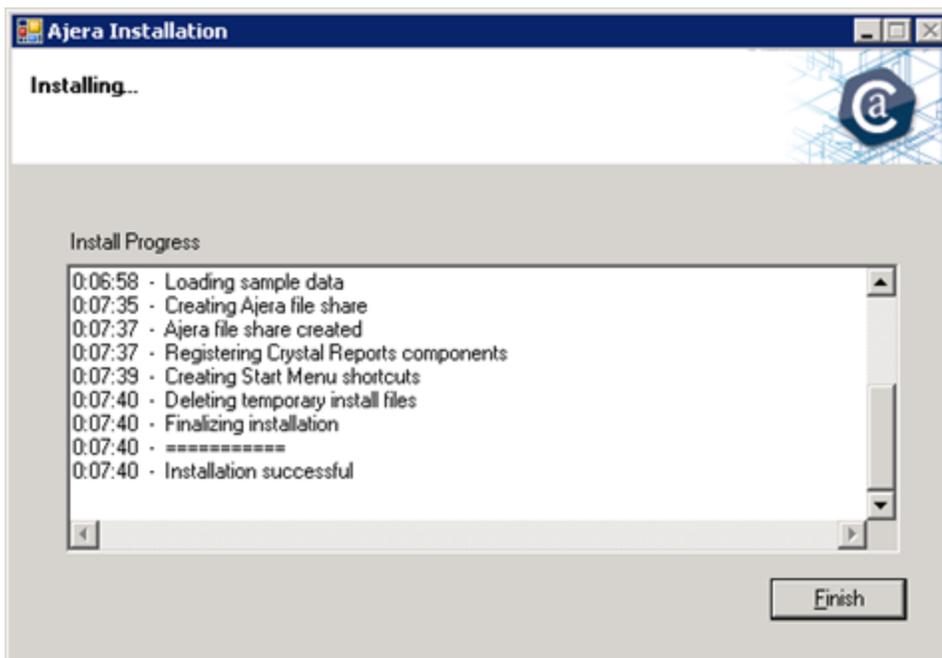


This is not the location of the database; it is the location for the program files and backups. The drive letter must be local to the server, not on network-attached storage or a mapped drive letter.

The installation creates and shares a folder within this location for you. By default, it is C:\Ajera\Program, and the Program folder is shared as Ajera with the appropriate permissions.

6. Click **Reboot Now**.
7. Depending on your User Account Control settings in the Control Panel, the system may prompt you to allow access to your computer. Click **Allow**.
8. Read the ***Axium Software License and Services Agreement*** and do one of the following:
 - If you need a printable version of the agreement, scroll to the bottom of the window and click the **Click Here** link before clicking **I Accept**.
 - Click **I Accept** to accept the license agreement.
9. Type a master Ajera password (also used for your SQL SA account).
10. Re-enter the password to confirm it and then click **Next**. Save the password in a secure location for future reference. You need it to restore databases or to access the ODBC database.

11. Select one of the following firm types:
 - **Architectural** or **Engineering** - Ajera creates predefined settings specific to each firm type.
 - **Neither** - enter your own unique chart of accounts.
12. Click **Next**.
13. The *First Employee* is your firm's Ajera Administrator. The Ajera Administrator has full rights to the system, including access to all data, options, tasks, reports, and employee login email/IDs and passwords. Enter the First Employee's name, Login Email (which appears in Ajera as the user name), and password.
14. Click **Install**.
15. Messages indicate the current state of the installation. When you see the message that confirms that the installation is successful, click **Finish**.



Congratulations! Ajera is now installed on your server.

Step 3: Set up Ajera Web Access

Web access options

Work with your IT team to determine how to set up web access for your firm. You can set up your web clients (also known as workstations and smart devices) to access Ajera from:

- **Inside your firm's physical office, using an internal network behind your firewall**
Your company firewall provides the security necessary to protect your Ajera data. No SSL is required.
- **Any public Internet connection, including public Wi-Fi hot spots**



If using external Internet access or the Active Directory integration, Deltek strongly recommends securing access with SSL technology. Access to the Internet outside of your firewall may require additional router or firewall configuration. If you have a website, you may already have an SSL certificate.

For more information on how to set up an SSL certificate, contact your company network administrator.

For public Internet use and for *Ajera Mobile Timesheets*, you must use a static public IP address. You also need additional network configuration to set up external web access to your server or a virtual private network (VPN) or other technology, such as a public domain name system (DNS), to connect to your server from over the Internet.

You can create a public DNS through your Internet service provider. If you do, you must configure a port forward on your firewall or gateway device.



Due to the variations in firewalls and network access, **Deltek cannot provide support or troubleshoot** any problems you might experience while setting up external web access.

- **Ajera Cloud, enterprise hosting for Ajera**

Ajera Cloud provides disaster protection, multiple firewalls, and intrusion detection, as well as encrypted access, continuous monitoring, and daily backups stored in a secure, off-site facility.

Using the Ajera Cloud eliminates the time-consuming process of selecting the right hardware and deployment strategy. Ajera Cloud provides 24/7 access, data security, daily database backups, and continuous maintenance of Ajera. Refer to the Ajera Cloud appendix for more information.

Ajera Requires ClickOnce

Ajera requires ClickOnce technology from Microsoft, which allows you to run Windows applications over the web without requiring administrative rights or workstation configuration changes. You do not need to be a local administrator to run Ajera using ClickOnce. The Ajera program does not access privileged resources. Non-administrators receive the same one-time security prompt as administrators.

If you access Ajera directly from the web without using a VPN, Deltek strongly recommends running SSL. ClickOnce does not support self-signed certificates. Purchase an SSL certificate issued by a trusted root CA.

Running a ClickOnce application for the first time downloads and runs the application from an isolated folder on the workstation. Subsequent runs do not require that the application be downloaded again unless you move Ajera to a new server or update Ajera to a new version. Ajera program files are approximately 35 MB.



ClickOnce does not support non-standard ports. You must use either port 80 or 443.

The following scenario describes what happens when an employee logs into Ajera over the web.

1. Using a supported web browser, an employee logs into Ajera: `http://<server name>/Ajera` or `https://<server name>/Ajera`.
The Ajera login page displays, via anonymous authentication.
2. When the employee clicks the **Login** button, Ajera verifies the user name and password against the database using protections against common attacks, such as SQL injection and buffer overrun.

- If Ajera cannot validate the credentials, an error message appears on the login page.
 - If Ajera accepts the login credentials, the system creates a forms authentication token on the server with an expiration of 30 days.
3. Communication between the Ajera web application and server uses secure HTML5.
 4. Using the token passed on the Ajera ClickOnce URL, a forms authentication cookie is manually set in all HTTP requests.
 5. All communication from the Ajera program back to the server for data entry tasks is done via .NET remoting, with custom client and server sinks.

Server calls are in the form of a binary HTTP POST. The address for all server calls is `http://servername/Ajera/Secure/SAService.rem`, where `.rem` is a default ISAPI extension that points to ASP.NET, used for remoting purposes.

This cookie allows the request to access the `/Ajera/Secure` path to process the .NET remoting call. Note that the cookie is not set in Microsoft Internet Explorer (IE) and is not stored anywhere on the client workstation.

Setting up Ajera web access

Ajera is a web-based program, meaning that your employees log into your Ajera server using supported web browsers. You do not install Ajera on individual workstations. Verify that the browsers on each workstation match what is listed in the [Ajera Hardware/Software Requirements](#).



Without the correct hardware and software (such as supported web browsers or Microsoft Windows), you cannot access Ajera's full functionality.

Setting up the Ajera server for web access installs IIS and required modules if they are not already present. It also creates an Ajera ASP.NET application and application pool on the Ajera server. Ajera requires IIS 7 or greater.

Before you begin

- [Determine your firm's web access options.](#)
- [Understand Ajera's ClickOnce requirement.](#)
- If you use Firefox as your browser you must manually install the Microsoft .NET Framework Assistant add-on for Firefox. [Step 1: Prepare for the installation](#) contains steps to install the Firefox Assistant.

To set up Ajera web access

1. From the server where Ajera is installed, go to the Windows **Start** menu, and click **All Programs > Ajera > Ajera Server Administration**.
2. The system may prompt you to allow access to your computer, depending on your User Account Control settings in the Control Panel. Click **Allow**.
3. From the **Tasks** menu, click **Setup Ajera Internet Access**.
4. The system prompts you to install IIS and operating system components. Click **OK**. This may take several minutes to complete.
5. Click **OK** to create a web application.
6. The system displays the following Ajera and Ajera Mobile Timesheets URLs. Your employees can access these URLs from their workstations using supported web browsers.

Ajera: `http://<servername>/Ajera`
Ajera Mobile Timesheets: `http:// <servername>/Ajera/M`



If problems occur with web access, delete the following folder from the client workstation. You may need to display *hidden* folders before you can find the right folder.

Windows 10

C:\Users\%username%\AppData\Local\Apps\2.0\

Set up Ajera Administrators

When you [installed Ajera](#), you set up the first employee in the Ajera database by entering their name, login email, and password for your first employee. That first employee, also known as the *Ajera Administrator*, is responsible for the health of your firm's financial and project information in Ajera.

To designate that first employee as your Ajera Administrator, you must now log in to Ajera using their login information and complete their setup. Once complete, the Ajera Administrator can then set up the rest of your employees.

Your Ajera Administrator should understand your firm's current workflow, as well as what financial and project information each employee can access. They use this knowledge to set up Ajera's preferences and permissions for your firm and for your employees.

To set up Ajera Administrators

1. Navigate to the Ajera URL you created in the [Set up Ajera web access](#) section.
2. In the upper left-hand corner of the **Ajera Login** window, select the database from the drop-down box.
3. Log into Ajera using the **Login email** and **password** of the first employee to complete their setup as the Ajera Administrator.
4. Click **Login**.
5. From the  > **Setup** menu, click **Employees**. The Employee List screen appears with only the first employee listed.
6. Click **Edit**.
7. On the **General** tab, enter or verify the following information:
 - Employee name
 - Employee type = Administration
 - Login information = employee email (required by Ajera Cloud), Login ID, password
 - Role = Administrator



Record this setup information and store in a safe location, as the Ajera Administrator will need it to manage this Ajera database.

8. On the **Pay Information** tab, select a pay period and enter a pay period salary amount for the administrator.
9. Click **Save** and then click **Close**.

The administrator can now set up your Ajera company information as described in the [Ajera Getting Started Guide](#).



Store this information in a safe location, as the administrator will need to manage this Ajera database.

Access Ajera from workstations

1. Confirm that each workstation is set up with the appropriate hardware and software identified in the [Ajera Hardware/Software Requirements](#).
2. Using a supported browser, enable cookies.



Without the correct hardware and software (such as supported web browsers or Microsoft Windows), you cannot access Ajera's full functionality.

3. Using a supported browser, enable Javascript.
4. When using Internet Explorer 10.0 or greater, turn off **Compatibility View**.
5. Using a supported browser, verify the Ajera login URLs:

Ajera: `http://<server name>/Ajera`

Ajera Mobile Timesheets: `http://<server name>/Ajera/M`



If your domain name is different from your server name, use this URL instead:
`http://<domain name>/Ajera/M`

6. Once confirmed, email the Ajera URLs to your employees.
7. Employees can then log into Ajera using their login credentials.



Ajera Cloud clients: To log into Ajera using the Ajera Cloud, employees must be set up in Ajera with email addresses, which is used as their login ID.

Access and reload sample data

Installing Ajera creates 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 sample data

1. Go to the Ajera login web page and enter **sample\pdh** in the Username field.
2. Enter **pdh** as the password. The password is case-sensitive.
3. To log into your company's data, log out of Ajera and log back in, typing your user name and password.

To access Ajera Cloud sample data

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\ - **Password:** <your password>
3. Ajera prompts you to select an employee or role already set up in the sample database.



Sample data does not include the ability to upload attachments.

To reload sample data

The Ajera Administrator can reset the sample database at any time to return to its original content.

From the  > **Setup** menu, click **Utility > Reload Sample Data**.

If you are logged into the sample data, Ajera restores the sample data and returns you to the login web page. Otherwise, Ajera restores the sample data and returns you to your normal processing.

Multi-tier Setup

Use these installation instructions if you are installing Ajera and SQL on different machines.

Technical Recommendation	Having a dedicated gigabit connection between the two machines is recommended as all communication between SQL and Ajera will be done through this connection.
---------------------------------	--

Machine 1

What you should know before you begin:

- Backup and Restore will not work within Ajera with this setup.
- Ajera sample data is not supported with this setup.
- During an upgrade of Ajera, sample data will not be maintained or updated with this setup.

Installation and setup

1. Install Ajera
Ajera will automatically install a copy of SQL and install the database in this instance.
2. Backup the databases from the Machine 1 SQL instance and restore them onto Server 2 SQL instance.
3. Run **Ajera Server Administration**.
4. Click **Task > Change SQL Logon**.
5. Change the **SQL Server Machine Name** to the hostname or to the IP address of Machine 2.
6. If you installed SQL on Machine 2 with the default instance, leave the **SQL Server Instance** blank. If not, enter the **SQL Server Instance**.
7. In the **Username** field, enter **sa**.
8. In the Password field, enter the password used when setting up SQL on Machine 2.
9. Click OK.

Machine 2

What you should know before you begin

- Backup and Restore will not work through Ajera Server Administration unless the SQL databases on Machine 2 are setup as recommended in Step 3 below.

Installation and setup

1. Install SQL.

Note :	<ul style="list-style-type: none">• Use mixed mode and setup the instance with an sa password.• Install SQL using the default instance. Installing SQL with a different name will cause SQL to use dynamic ports and forwarding those ports can be more difficult.
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2. Setup Windows Firewall. View the steps here: <https://docs.microsoft.com/en-us/sql/sql-server/install/configure-the-windows-firewall-to-allow-sql-server-access>
3. On Machine 2, create the following folders:
 - C:\Ajera
 - C:\Ajera\Backups
 - C:\Ajera\Programs
 - C:\Ajera\Programs*.bak files
4. To backup, in **Ajera Server Administration** click **Tasks > Backup Database** and back up to C:\Ajera\Backups\Ajera.bak.
5. To restore, in **Ajera Server Administration** click **Tasks > Restore Database** and restore from C:\Ajera\Backups\Ajera.bak.

Updating Ajera using the multi-tier setup

You may receive an error message related to sample data during the update process. The update will complete for the Ajera database however sample data is not supported. You can click OK on this message to close the window.

Update Ajera



Ajera Cloud clients: You do not need to complete this task; Deltek completes it for you.

Before you begin



Whether or not you have the appropriate Ajera 8 environment, the Ajera 7 update will continue unaffected and complete successfully.

- Before beginning the update, disable your anti-virus software.



Do not install an Ajera update while employees are connected over the web. If you install the update when an employee is entering data, work entered since the last save will be lost.

To update Ajera

1. Direct all users, including those using **Ajera Mobile Timesheets**, to exit Ajera.



If anyone is logged in during the update, all changes since the last save are discarded.

2. If the [Release Notes](#) describe changes to Inquiry, [export your custom inquiries](#).
3. From the Ajera server, go to the Windows **Start** menu, and select **All Programs > Ajera > Ajera Server Administration**.
4. On the **Tasks** menu, select **Update Ajera**.
The Ajera installation displays status messages as it proceeds. Do not close any of these windows until the update is complete. If you have multiple Ajera databases, the update process updates all databases automatically.



If using Windows Server 2008 with the **User Account Control** enabled, you must answer any security messages within two minutes. Otherwise, the update aborts, and you must restart the process again.

5. When the update is complete, click **Finish**.



Ajera automatically creates a backup of your data in **Ajera > Backups > PreviousVersion.bak**.

6. After the update is complete, [import your custom inquiries](#) if you had exported them earlier.

To update to SQL 2019

1. From the server where Ajera is installed, go to the Windows Start menu, and click All Programs > Ajera > Ajera Server Administration.
2. From the Tasks menu, select Update to SQL 2019.

Uninstall Ajera



Ajera Cloud clients: You do not need to complete this task; Deltek completes it for you.

- **Uninstall Ajera on a server:**
If you want to move Ajera to another server or perform a clean installation, you must completely uninstall Ajera from your current server.
- **Uninstall Ajera on a workstation:**
Ajera does not physically exist on individual workstations. Employees access Ajera on your server using a supported web browser and Ajera URL on your server, so there is nothing to uninstall on individual workstations.

Before you begin

- **Ajera 9 does not support Crystal Reports.**
Before uninstalling any Ajera release prior to Ajera 9, copy the custom reports subfolder from the Ajera/Program folder to a secure location.

To uninstall Ajera from your server

1. [Make a current backup of your data.](#) From the Ajera folder, copy the Backups folder to a secure location.
If you use multiple databases, you must log into each database separately.
2. Using the Internet Information Services (IIS) Manager, remove the:
 - Default **Ajera** virtual application from the web sites list
 - AjeraAppPool from the Application Pools
3. Optionally, remove the Axiom instance from Microsoft SQL Server:
 - On your Ajera server, uninstall Microsoft SQL Server instance in use by Ajera.
 - Delete the C:\Program Files\Microsoft SQL Server\MSSQLxx.AXIUM folder.
4. Delete the Ajera folder (typically C:\Ajera).
5. Remove Ajera and Ajera Server Administration shortcuts.
6. Empty your recycle bin.
7. Copy your backups or Custom Reports subfolders back to their appropriate locations (for example, after installing Ajera or moving it to another server).

Manage multiple databases

Step 1: Create multiple databases



Ajera Cloud clients: You do not complete this task. Contact Ajera Support to request additional databases.

If you have multiple companies that do not share employees, projects, or financial information, you can set up a unique Ajera database on your server for each company. Each database contains only that company information and functions as a completely separate version of Ajera.

Before you begin

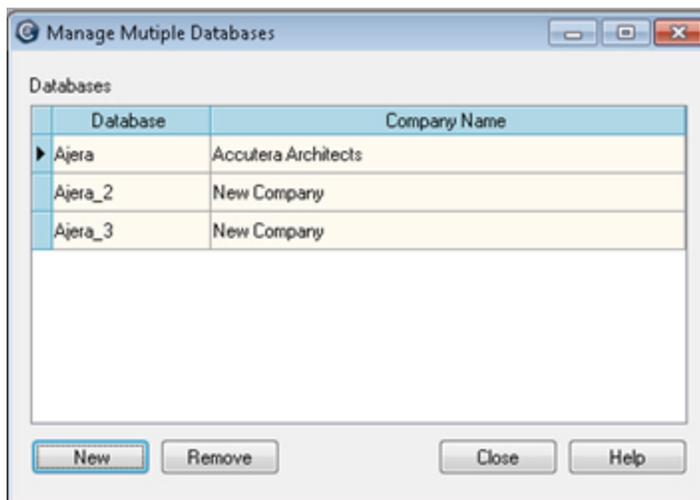
- Verify that you are set up with the Administrator role in your original Ajera database.

To create multiple databases

1. Log into your original Ajera database, using your administrator user name and password.
2. From the  > **Setup** > **Utility** menu, click **Multiple Databases**.



This option only appears on the **Utility** menu if you are set up with the Administrator role in your original Ajera database.



3. Click **Yes** to confirm that you want to add a database.
4. Click **New**.

Your original database is named **Ajera**. Each time you create a new database, Ajera appends a sequential number to the word **Ajera** (such as *Ajera_2*, *Ajera_3*) for each database name and uses the words *New Company* as the default company name. You can change the company name after you set up an administrator for the new database. Refer to [Step 3 - Rename each database](#) for details.

When you create an additional database, Ajera creates it with the same firm type selected for the original Ajera database (Architectural, Engineering, or Neither).

5. Click **Close**.

Step 2: Set up database administrators



Ajera Cloud clients: You do not complete this task. Contact Ajera Support to request additional databases.

After setting up multiple databases, you must set up the first employee as the administrator for each database. Choose an employee who can maintain each database, has full rights to the system, and has access to all options, tasks, reports, and employee user IDs and passwords.

Before you begin

- [Verify that multiple databases have been created.](#)
- Verify that you are set up with the Administrator role in your original Ajera database.

To set up database administrators

1. On the **Ajera Login** window, select your new database from the drop-down menu in the top left-hand corner of the screen.
2. In the **username** field, type *Master*.
3. In the **password** field, enter the master password for the original Ajera database.
4. Click **Login**. You are now logged into your new database.
5. From the  > **Setup** menu, click **Employees**. Complete the steps described in the [Set up Ajera Administrators](#) section.

Step 3: Rename databases



Ajera Cloud clients: You do not complete this task. Contact Ajera Support to request additional databases.

Before you begin

- Verify that you are set up with the Administrator role in your original Ajera database.

To rename databases

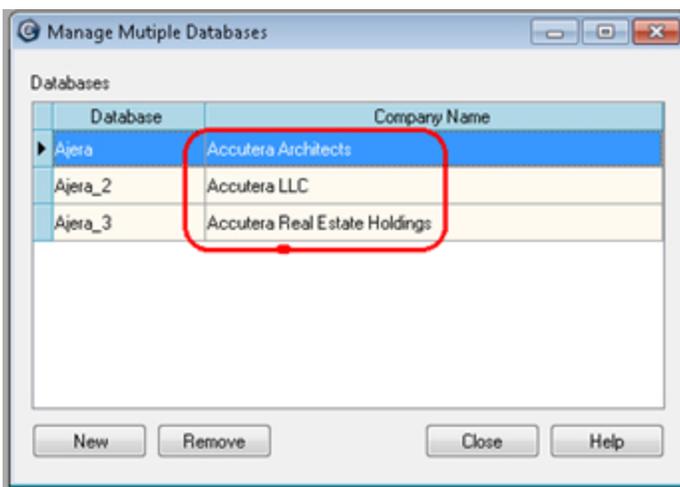
1. On the **Ajera Login** window, select the database you want to rename.
2. Enter the administrator login credentials for this database and click **Login**.
3. From the  > **Setup** > **Company** menu, click **Preferences**.

4. On the **General** tab, the words *New Company* appear in the **Company name** field. Replace those words with your actual company name.
5. Enter a beginning balance date and click **Save**.
6. Repeat the above steps to rename each database.
7. To see all of your renamed databases, log into the original Ajera database.
8. From the  > **Setup** > **Utility** menu, click **Multiple Databases**.



This option only appears on the **Utility** menu if you are set up with the Administrator role in your original Ajera database.

All Ajera databases appear with their corresponding company names, as illustrated below:



9. Share the company database name with employees so that they can log into the right database.

Move Ajera databases to a new server



Ajera Cloud clients: You do not complete this task. Contact Ajera Support for additional information.

There are many reasons to move your Ajera databases to a new server. For example, when you purchase a new server, reorganize your network structure, or move SQL to a different drive on the same server. Moving Ajera is a simple process of creating, copying, and restoring database backups.

Before you begin

- Regardless of which version of Ajera you use, the steps to move Ajera to a new server are exactly the same. The installation routine verifies your current version and installs that version to the new server.
- Verify that you are set up with the Administrator role in your original Ajera database.

To move Ajera to a new server

1. Log into the Ajera database you want to move.
2. [Back up each database](#) to the \Ajera\Backups folder on your Ajera server.
When you create a backup file, name the file so that it indicates which company you are backing up (for example, *MainCompany.BAK*, *2_Company2.BAK*, and *3_Company3.BAK*).
When you back up your data, the **Database Backup** window lists only the data for the Ajera database you are currently logged into.
3. Using Windows Explorer, copy your **\Ajera\Backups** folder to a secure location where you can access it from both the current and new servers.
4. [Install Ajera](#) onto the new server.
5. After completing the installation, copy your Backups subfolder back to their appropriate locations.
6. Log into the new Ajera database using the administrator login ID and password.
7. Recreate your current database structure on your new server. Refer to [Step 1 - Create a new database](#) for more information.



Write down the number is assigned to each new database in the **Database** column.

8. [Restore the database backups](#) you copied to the new server.
9. Repeat the above steps to restore each additional databases.

Enabling Upload Attachments

About Upload Attachments and FileStream

Upload Attachments allows you to upload and store attachments for expense reports, vendor invoices, and in-house expenses.

Ajera Upload Attachments uses Microsoft SQL Server FileStream technology to store and retrieve documents in a SQL Server database. Deltek has chosen to configure FileStream functionality and to store these documents in a separate database rather than in your Ajera database.

Your separate Ajera and FileStream databases must be backed up on the same schedule so that they will be in sync if a restore is needed. If using the Backup and Restore option provided in Ajera this will automatically happen.

Video: [Upload Attachments](#) (4:31)

FileStream Best Practices

The following article provides detailed information on FileStream best practices:

[http://msdn.microsoft.com/en-us/library/dd206979\(v=sql.105\).aspx](http://msdn.microsoft.com/en-us/library/dd206979(v=sql.105).aspx)

Some examples of FileStream best practices noted in the MSDN article are:

- Disable short file names on FileStream computer systems because they take significantly longer to create. To disable short file names, use the Windows fsutil utility.
- Regularly defragment FileStream computer systems.
- Use 64-KB NTFS clusters. Compressed volumes must be set to 4-KB NTFS clusters.
- Disable indexing on FileStream volumes and use the Windows fsutil utility to set disablelastaccess.
- Disable anti-virus scanning of FileStream volumes, if possible. If anti-virus scanning is necessary, avoid setting policies that will automatically delete offending files.
- Ensure that your nightly backup routine (and any other backup processes) back up the FileStream database at the same time as your Ajera transaction database. Metadata for uploaded files is stored in the Ajera database, while the actual uploaded file data is stored in the FileStream database. If you restore one or both databases and the database backups are out of sync, data issues may occur.

On-premise users, view [Setting up Upload Attachments when Ajera and SQL are on the same server](#).

Ajera Cloud users, view [Enabling Upload Attachments for Cloud Users](#).

View the [Ajera 9 Installation Guide](#) for more information.

Setting up Upload Attachments when Ajera and SQL are on the same server

In order to Upload Attachments in Ajera, you need to enable FileStream.

If Ajera and SQL are installed on the same server, you can turn on FileStream from Ajera Server Administration.

If Ajera and SQL are installed on different servers, you will need to follow the directions [here](#).

To turn on Upload Attachments using SQL FileStream when Ajera and SQL are on the same server

1. From the Ajera server, go to the Windows **Start** menu and select **All Programs > Ajera > Ajera Server Administration**.
2. From the Tasks menu, select **Setup Upload Attachments**.
You will get the message "FileStream databases have been created."
This creates a new FileStream database for each Ajera database you use. The naming convention for files uploaded will be AjeraFiles followed by the name of the database.
3. Click **OK**.
4. To verify FileStream is enabled, from  > **Setup** menu, select **Company > Preferences > General** tab and verify that the check box in the lower right is checked. This check will have to be done for each Ajera database.

Setting up Upload Attachments when Ajera and SQL are on different servers

In order to Upload Attachments in Ajera, you need to enable FileStream. If Ajera and SQL Server are installed on different servers, use the following steps to configure upload attachments with SQL Server FileStream.

Enabling FileStream during the SQL Server installation

1. Open the Database Engine Configuration.
2. Click the FILESTREAM tab and ensure that the following options are selected:
 - Enable FILESTREAM for Transact-SQL access
 - Enable FILESTREAM for file I/O streaming access
 - Allow remote clients to have streaming access to FILESTREAM data

By default, the Windows share name created for FILESTREAM access will be the SQL Server instance name (default SQL instances are named MSSQLSERVER). Deltek recommends that you use the default selections.

3. Continue on to [configuring settings in SQL Server Properties](#).

Enabling FileStream after installing SQL Server

1. On the database server, open the SQL Server Configuration Manager.
2. Right-click your SQL Server service, and click Properties on the shortcut menu.
3. Click the FILESTREAM tab, ensure that all three options are selected, and click OK.

By default, the Windows share name created for FILESTREAM access will be the SQL Server instance name (default SQL instances are named MSSQLSERVER). Deltek recommends that you use the default selections.

4. Continue on to [configuring settings in SQL Server Properties](#).

Configure settings in SQL Server Properties

1. Open SQL Server Management Studio.
2. Right-click the server, and click **Properties**.
3. Select the **Advanced** page.

4. Check to ensure that the Running Values are displaying that the FileStream Access level is set to Full access enabled.
5. Click **OK**, and restart the SQL Server service.
6. Continue on to [manually creating FileStream databases](#).

Manually create FileStream databases

Before you create the FileStream database, you must determine where the FileStream data will be stored. By default, the FileStream data is stored in a folder and sub-folders in your SQL Server Data folder. Depending on your SQL Server installation and disk configuration, it may be better to store this data on a separate physical disk, partition, RAID array, etc.

1. Open the SQL Server Management Studio (SSMS).
2. Right click Databases and click Restore Database.
3. In the Restore Database window select Device, select Add and browse for the file AjeraFiles.bak, typically this is store in the Program folder where Ajera is installed.
4. If the Ajera database ends in a *_1/ _2/ _n* then you will need to change the **Destination Database** name to a name appropriate for the Ajera database you intend on using upload attachments for.
The name of the FileStream database must be your Ajera database name with FILES added after Ajera. The naming schema we've agreed upon is this; for Ajera the FileStream database is AjeraFiles, for Ajera_1, Ajera_2, Ajera_n the naming schema is AjeraFiles_1, AjeraFiles_2, AjeraFiles_n, etc.
5. If you want more control over which drive/folder the data in this database is store click the **Files** page from left.
6. Change the **Restore As** field for each field (items a, b are typical database entries, c is where the logical files will be stored in the windows filesystem).
 - FileStore: where the data records are stored.
 - FileStoreLog: where the data log records are stored.
 - Filestream: where the actual files themselves will live.
7. Enter a name for the database.
8. Restore the AjeraFiles.bak file into the new database(s) you created.
9. To verify FileStream is enabled, from  > **Setup** menu, select **Company > Preferences > General** tab and verify that the check box in the lower right is checked. This check will have to be done for each Ajera database.

Setting the upload file size limit

When you turn on Upload Attachments, Ajera sets the default upload size to 50MB. The maximum file size that can be uploaded as an attachment in Expense Reports, In-House Expenses, and Vendor Invoices is 120MB.

Select a file size limit that seems reasonable to your organization. Be aware that the larger the file size limit the more hard disk space that will be required to store the data.



Ajera Cloud only: The upload file size is set to 120MB by default and cannot be changed.

To set up the upload file size limit

1. From the Ajera server, go to the Windows **Start** menu and select **All Programs > Ajera > Ajera Server Administration**.
2. From the Tasks menu, select **Change Upload Size Limit**.
3. Enter a size limit between 50 and 120.
4. Click **OK**.

Back up Ajera

Back up a database



Ajera Cloud clients: You do not complete this task. Deltek backs up your databases daily. Contact Ajera Support for backup assistance.

To secure your data, create a formal backup schedule, document the schedule, and incorporate it into your workflow. How often you create a backup depends on your firm's situation.



If using the upload attachment feature, Ajera automatically backs up your Ajera database and Filestream attachments together. If manually backing up your files be sure that you back Ajera and the corresponding FileStream data together.

- Back up your Ajera server daily, at month-end, at year-end, and before installing updates.
- Retain at least two weeks of backups on the \Ajera\Backups folder on your Ajera server.
- Archive your \Ajera\Backups folder to an external location regularly.

Before you begin

- Verify that you are set up in Ajera with an Administrator role in your original Ajera database. Only employees with that role can back up an Ajera database.

To back up a database

1. Log into Ajera, using your administrator user name and password.
2. From the  > **Setup** > **Utility** menu, click **Database Backups**.



This option only appears on the **Utility** menu if you are set up with the Administrator role in your original Ajera database.

3. Click **New Backup** and type a description for the backup, such as January backup. Do not use the following characters: \ / : * ? " < > | or exceed 100 characters.
4. Click **Create**. Ajera saves a copy of your data to the \Ajera\Backups folder on your Ajera server.



If using the upload attachment (FileStream) feature, Ajera backs up the FileStream data at the same time.

5. If you have multiple databases, you must log into and back up each database separately. When you back up data, the **Database Backup** window lists only the data for the database you are logged into.

Restore a database backup



Ajera Cloud clients: You do not complete this task. Contact Ajera Support for backup assistance.

Before you begin

- Verify that you are set up in Ajera with an Administrator role in your original Ajera database. Only employees with that role can restore an Ajera database.

To restore a database backup



When restoring database backups, Ajera **OVERWRITES** all changes entered since your last backup. Ajera Support cannot restore overwritten data.

1. To avoid losing changes, [back up your current data](#).
 2. Verify that all employees have exited Ajera.
 3. On your Ajera server, open your Ajera folder and double-click the **AjeraServerAdministration.exe** file to open the **Ajera Server Administration** tool.
 4. From the **Tasks** menu, click **Restore Database**.
-



If using the upload attachment (FileStream) feature, Ajera automatically backs up your FileStream data. When restoring data, if the .bak file being restored does not contain the matching FileStream data, you will be warned. It is important that you backup and restore the FileStream data at the same time as the Ajera data.

5. On your Ajera server, navigate to and select the backup file that you want to restore. Click **Restore**.
-



After Ajera restores the database, Ajera prompts you to log in. Keep previous administrator passwords in a secure location so that you can use them to log into the restored databases.

6. Click **Yes** to confirm that you want to restore the database. Ajera notifies you when it has successfully restored and updated your database.
If a FileStream database was backed up, this also restores the backed up FileStream database.
 7. To restore multiple databases, repeat the above steps for each database separately.
-

Delete a database backup



Ajera Cloud clients: You do not complete this task. Contact Ajera Support for backup assistance.

Before you begin

- Verify that you are set up in Ajera with an Administrator role in your original Ajera database. Only employees with that role can delete an Ajera database.

To delete a database backup

1. Log into Ajera, using your administrator user name and password.
2. From the  > **Setup** > **Utility** menu, click **Database Backups**.



This option only appears on the **Utility** menu if you are set up with the Administrator role in your original Ajera database.

3. Select the database backup you want to delete.



If using the upload attachment (FileStream) feature, this also deletes the FileStream data.

4. Click **Delete**.
5. Click **Yes** to confirm that you want to delete the database.
6. If you have multiple databases, you must log into each database separately to delete it.

Ajera Cloud

Ajera Cloud: Migrate from Ajera server

Step 1: Prepare your current Ajera information

1. Purchase Ajera Cloud and complete the license agreement.
2. On your existing server, update Ajera to the current release. Refer to the [Updating Ajera](#) section for step-by-step instructions.
3. Verify that each Ajera employee is active and has a valid email address. Each employee must have an email address to log into the Ajera Cloud.
4. Ensure that your custom reports were created using Microsoft SQL Server Reporting Services 2005 (.rdl files).



Ajera does not support Crystal Reports (.rpt files).

-
5. [Back up all current databases](#) to a secure location.



If using the upload attachment (FileStream) feature, this will also back up the FileStream database.

Step 2: Send your databases to Deltek

Send each Ajera database to Deltek so that they can be uploaded into the Ajera Cloud. Deltek uses a secure Internet connection to receive your data.



When you are ready to send your databases to Deltek, be sure to restrict any further use of your Ajera databases by your employees. Any updates you make after you send your databases will be unavailable in the Ajera Cloud.

-
1. The Ajera IT team will contact you and walk you through the steps you'll need to send your data to Deltek.
 2. The Ajera IT team will notify you when your data is accessible in the Ajera Cloud.

Step 3: Log into Ajera on the Ajera Cloud

1. Using a supported browser, access the link to your Ajera database and enter your email and password.
2. Share the Ajera Cloud database URL with your employees so they can continue to work in Ajera as usual.



With Ajera Cloud, your databases are automatically backed up daily.

Ajera Cloud: Set up a new Ajera database

To set up a new Ajera database

1. Purchase Ajera Cloud and complete the license agreement.
2. The Ajera IT team creates your new Ajera database in the Ajera Cloud.
3. When the database is accessible, Deltek sends you an *Welcome to Ajera Registration* email, containing your Registration Code, web link to your Ajera database, and your Ajera Administrator's login information (with a temporary email and master password).
4. Go to the Ajera Cloud login page: <https://login.ajera.com/>
5. Enter the temporary email and password identified in your *Welcome to Ajera Registration* email.
6. Click **Login**. You are now logged into your Ajera database.
7. Complete your [Ajera Administrator setup](#).



With Ajera Cloud, your databases are automatically backed up daily.

If using the upload attachment (FileStream) feature, this will also back up the FileStream database.

The administrator can now set up your Ajera company information as described in the [Ajera Getting Started Guide](#).

Access and reload sample data

Installing Ajera creates 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 sample data

1. Go to the Ajera login web page and enter **sample\pdh** in the Username field.
2. Enter **pdh** as the password. The password is case-sensitive.
3. To log into your company's data, log out of Ajera and log back in, typing your user name and password.

To access Ajera Cloud sample data

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\ - **Password:** <your password>
3. Ajera prompts you to select an employee or role already set up in the sample database.



Sample data does not include the ability to upload attachments.

To reload sample data

The Ajera Administrator can reset the sample database at any time to return to its original content.

From the  > **Setup** menu, click **Utility** > **Reload Sample Data**.

If you are logged into the sample data, Ajera restores the sample data and returns you to the login web page. Otherwise, Ajera restores the sample data and returns you to your normal processing.



About Deltek

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