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Deltek iAccess 2.3.1 for Ajera CRM

Frequently Asked Questions

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General

What is iAccess for Ajera CRM?

iAccess for Ajera CRM is a powerful tool that is accessible from almost any browser and tablet device. Because iAccess is browser-agnostic, you can access it using either a PC or a Mac.

iAccess enables professional services firms to manage effectively all of the information, activities, and resources related to pursuing opportunities. You can also use iAccess to gather and maintain a repository of information on clients, subconsultants, vendors, government agencies, contacts, and competitors.

Does iAccess replace Ajera CRM?

No. Ajera CRM gives you more advanced capability for configuration, capture activities, and contract management. iAccess can be a good first step to full capture management. All iAccess data is visible and editable within Ajera CRM. Project Managers simply have flexibility in choosing where they would like to create and maintain their opportunities, companies, and contacts.

Must Ajera CRM data and iAccess data be synchronized periodically?

iAccess is simply another interface for managing your Ajera CRM information, and updates that you make in either iAccess or in Ajera CRM are immediately available in the other.

Is there a cost for iAccess?

iAccess is delivered as part of core Ajera CRM functionality, so all Ajera CRM clients current on maintenance and on Deltek Ajera CRM 7.6 (CU 1) will have access to the most recent version of iAccess.

Does iAccess support Active Directory authentication?

Yes. iAccess honors Windows authentication.

Does Ajera CRM role security apply to iAccess?

Yes. Security is seamless between the two applications, and the access rights that are configured within Ajera CRM Security Configuration are applied to iAccess.

Ajera CRM Security Configuration includes an **Access to iAccess** setting that enables the system administrator to configure a role's access rights to iAccess.

Can I use iAccess on my mobile devices?

iAccess is web-based and is not browser-specific. If your firm has configured iAccess and if you have access to a browser and an internet connection, you can use iAccess on practically any computer (PC or Mac) or tablet. Supported browsers are Internet Explorer 10 or higher and the most recent versions of Safari, Chrome, and Firefox. We test iAccess on both Android tablets and iPads.

Is there a web address for iAccess that I can use to access it from outside of Ajera CRM?

When your system administrator installs iAccess on your server, he or she creates an iAccess URL specifically for your firm. You can then use that URL like any other web address on your various devices.

Can VPN users use iAccess “anywhere, anytime”?

If you use a tablet, you must download a VPN app. Once you do, you can connect to your VPN on the tablet and then use iAccess.

Are custom fields created in Ajera CRM also available in iAccess?

Your system administrator can add user-defined (custom) fields and grids to iAccess. He or she can specify the iAccess tabs on which the user-defined components display and the order in which they display. The system administrator can also create user-defined tabs for iAccess. In addition, a user-defined field added to iAccess can be added as a column on reports in iAccess. Once you add it to a report, you can filter the report based on the values in that field.

Can we customize the standard screens in iAccess?

iAccess does honor Ajera CRM configuration and security. If you change a label for a field or hide a field, those changes are reflected in iAccess also.

For iAccess, your system administrator can make user-defined fields available and specify the tab on which they appear and the order in which they display. (On standard tabs, those custom fields are always displayed after the last standard field.) Your administrator can also add custom grids and tabs to iAccess. iAccess has no functionality equivalent to the Screen Designer in Ajera CRM. He or she adds custom fields, grids, and tabs using the User Defined Components form in Ajera CRM Configuration.

Does iAccess support Ajera CRM workflows?

Yes. Changes in iAccess trigger user initiated workflows.

Business Development

Who should use iAccess for business development activities and who should use Ajera CRM?

iAccess is a great option if you simply need to manage opportunities and nurture relationships with companies and contacts. If your job involves more advanced computer-based CRM tasks, such as managing marketing campaigns, tracking leads, or maintaining configuration settings, you will still need to use Ajera CRM.

How is revenue calculated for the Pipeline chart on the Dashboard?

To determine each opportunity's contribution to pipeline revenue, iAccess spreads the revenue amount for each opportunity evenly across the period from that opportunity's start date to its end date to determine per-day revenue. It then uses the opportunity start and end dates to determine the number of days each opportunity will contribute revenue during the Pipeline chart time frame, and multiplies that number of days by the per-day revenue amounts to determine that opportunity's contribution to the revenue shown in the chart.

Example: The number of days between the start and end dates for Opportunity 100 is 300, and the estimated revenue for the opportunity is 3,000,000. Based on that information, iAccess calculates a per-day revenue amount of 10,000 (3,000,000 total revenue / 300 days). You select **Next 6 Months** as the time frame for the Pipeline chart. iAccess uses the start and end dates for Opportunity 100 to determine that the opportunity would contribute revenue for 120 of the days in that six month time frame. As a result, Opportunity 100's pipeline revenue contribution for that time frame is 1,200,000 (120 days x 10,000 revenue per day).

An opportunity's contribution to weighted revenue for the Pipeline chart is calculated in exactly the same way, once the weighted revenue is calculated (Estimated revenue x Probability).

Note: Because a start and end date and an estimated revenue amount are required for the calculation of pipeline revenue amounts, the chart excludes opportunities that do not have all three of those values.

How do I filter records in Reporting when I receive a message that there are too many records?

For performance reasons, Reporting in iAccess requires that you have fewer than 1,000 records selected in order to display a report. To reduce the number of records selected, you can select the Mine or Active standard searches, select a saved custom search, or create and apply a new custom search.

How are touchpoints in iAccess different from activities in Ajera CRM?

Touchpoints are simple activities that require a minimal number of data entry fields so you can quickly and easily maintain a record of communications with companies and contacts about an opportunity. If integration with Kona Business is implemented, you can also create a follow-up Kona task related to a touchpoint and assign it to an employee.

Touchpoints appear in Ajera CRM as activity records. Other types of activities that you create in Ajera CRM appear in the Touchpoints grids in iAccess, but you cannot create other types of activities in iAccess.

What are “companies” in iAccess?

Companies include both clients and vendors from Ajera CRM because companies that you work with may not just be a client or a vendor. They may be both or neither. You can also track any other type of company, such as competitors or government agencies, in the Companies area of iAccess.

When you create a new company in iAccess, it is added to the Clients Info Center in Ajera CRM. You can mark a company as both a client and vendor, which in turn enables you to associate that company with an opportunity in any capacity.

If you have a client and vendor linked in Ajera CRM, that company appears only once in iAccess using the client record.

You can edit both client and vendor records that appear in iAccess, if your access rights permit that.

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