



Ajera 7 Installation Guide

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connecting people, projects + profits

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Install Ajera

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.

The Ajera installation automatically installs Microsoft SQL Server 2014 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 2012 or 2014.

Notes:	<p>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.</p> <p>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.</p>
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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.

Caution:	<p>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 2014 Express.</p>
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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.

To install Ajera

1. From the Windows Run window, enter <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.

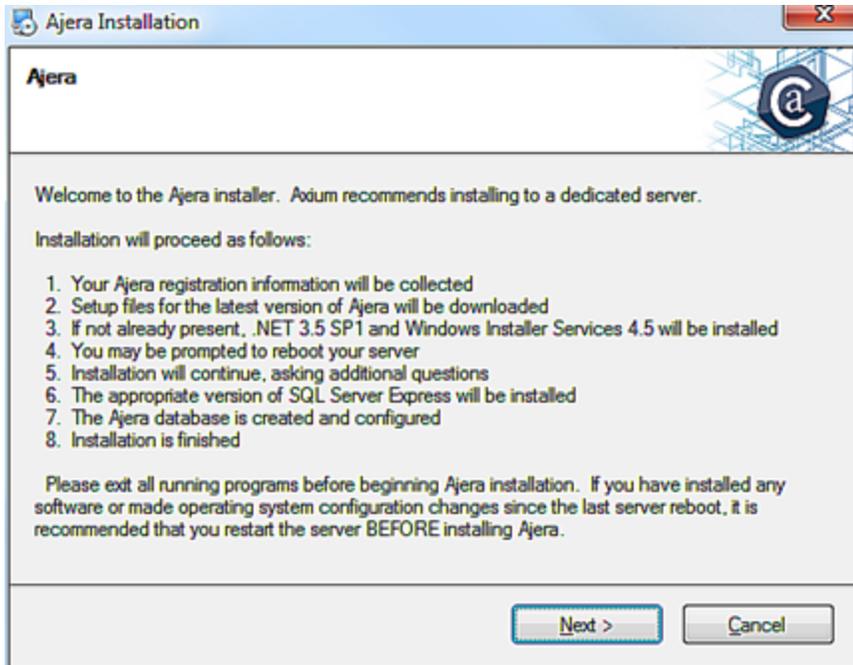
Caution:	<p>If you choose to continue, the system overwrites your existing databases and you will lose your existing Ajera data. To preserve your existing data and update Ajera to the latest release, click Cancel and complete the steps described in the Update Ajera section of this guide.</p>
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- If you did *not* install SQL for Ajera, the system may prompt you to allow access to your

Install Ajera

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.

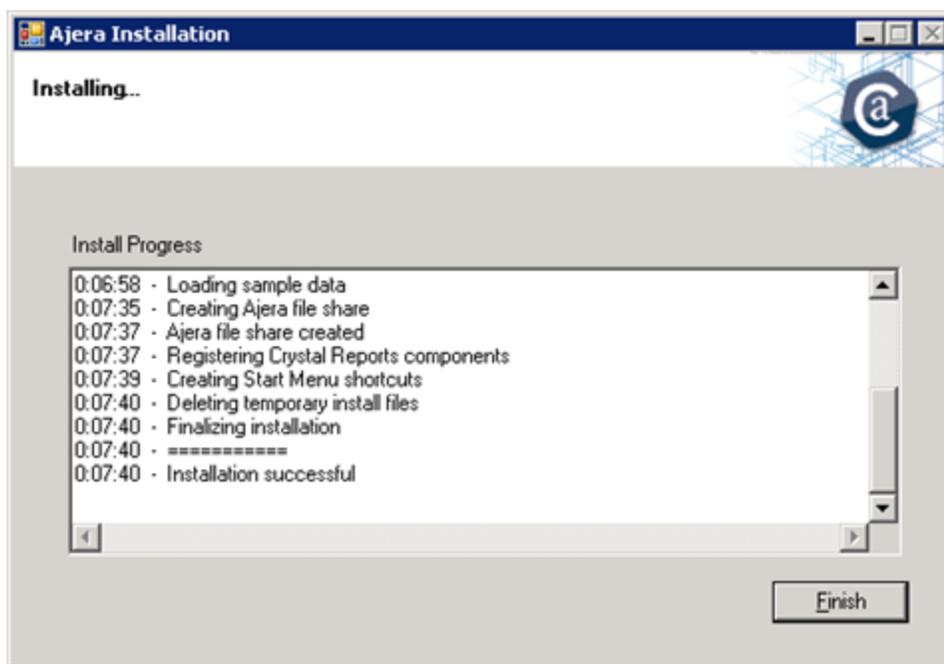


3. Enter your company name spelled exactly as it appears in the *Welcome to Ajera* email, along with your Registration Code and click **Next**.
4. Specify the program file and backup folder installation directory, and click **Install**.

Notes:	<p>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.</p> <p>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.</p>
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5. Click **Reboot Now**.
6. Depending on your User Account Control settings in the Control Panel, the system may prompt you to allow access to your computer. Click **Allow**.
7. 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.
8. Type a master Ajera password (also used for your SQL SA account). A valid password consists of only letters or numbers; do not use special characters, such as \ / : * ? < > |.
9. 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.

10. 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.
11. Click **Next**.
12. 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.
13. Click **Install**.
14. 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.

Set up Ajera web access

Before you begin

- Read the [Overview of web access for Ajera](#)

To set up external web access (Internet)

For Internet use and Mobile Timesheets, you need a static public IP address. You also need additional network configuration to set up external web access to your server or a 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. Because of the variations in firewalls and network access, Axium

Install Ajera

cannot provide support or troubleshoot any problems you might experience while setting up external web access.

To set up internal web access (intranet)

1. From the server where Ajera is installed, go to the Windows **Start** menu, and select **All Programs > Ajera > Ajera Server Administration**.
2. Click **Setup Ajera Internet Access**.
3. Depending on your User Account Control settings in the Control Panel, you may be prompted for access. Click **Allow**.
4. Click **OK** to install OS components.

Note:	If you are running Windows Server 2003, a message appears asking you to insert the Windows installation CD. If you are running Windows Server 2003, this message refers to IIS 6.0 instead of IIS 7.0.
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5. Click **OK** to create an application.
6. Write down the URLs displayed in the window. The format is:
 - For web access: `http://<your server name>/Ajera`.
 - For Ajera Mobile Timesheets: `http://<your server name>/Ajera/M`.
7. Click **OK**.
8. In Internet Explorer, verify the web access login using `http://<your server name>/Ajera`.
9. Review [Access Ajera from workstations](#), which describes how to log in and work in Ajera over the web.
10. Email employees the web access login URL and the help topic URL.

Access Ajera from workstations

Before you begin:

- Disable your anti-virus software during the installation.

Set up workstations in a client-server environment, if needed:

- Verify that Microsoft .NET Framework 4 is installed on the server and on each workstation that requires access to Ajera. The installation requires this version.
- On each workstation, click **Start > Run** and enter `\\server name\Ajera\Setup.exe` (where server name is the name of the workstation where you installed Ajera)
- Follow the on-screen instructions.
- Set up web access for Ajera.

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. Click **Start > All Programs > Ajera > Ajera**
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 Axiom Cloud), Login ID, password
 - Role = Administrator

Note:	Record this setup information and store in a safe location, as the Ajera Administrator will need it to manage this Ajera database.
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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](#).

Note:	Store this information in a safe location, as the administrator will need to manage this Ajera database.
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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 Axiom 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 Axiom Cloud sample data

1. Verify that each Ajera employee in your firm is active and set up with a valid email address (**Setup > Employees > General** tab). Each employee must have an email address to log into the sample database on the Axiom 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.

To reload sample data

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

From the **File** menu, click **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.

Deploy Ajera Mobile Timesheets

Note: Ajera 7.5 introduced **Ajera Mobile Timesheets**. If you have already [set up external web access](#) for Ajera with Internet Information Services (IIS) 6, you must set up external web access again to use Ajera Mobile Timesheets.

If you use IIS 7, no setup is required; you can begin deploying Ajera Mobile Timesheets.

Before you begin

- [Set up web access](#)

To deploy Ajera Mobile Timesheets

1. In an Axiom-supported browser, enable cookies.
2. If you are using Internet Explorer 9.0 or greater:
 - From the **Tools** menu on the menu bar, select **Compatibility View** settings. (If the menu bar is hidden, press the Alt key.)
 - Ensure that the websites list does not contain *axium.com* and that the **Display intranet** sites in **Compatibility View** check box is cleared.
3. In the browser, verify the login using the Ajera Mobile Timesheet URL: `http://<your server name>/Ajera/M`

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

4. If the login fails, go to the **Start** menu; select **All Programs** (if needed) > **Ajera** > **Ajera Server Administration**; and from the **Tasks** menu, click **Setup Ajera Internet Access**. Try the URL again.
5. Email employees the web access login URL. If employees cannot access Ajera Mobile Timesheets, ensure that their devices and browsers meet the requirements, including:
 - Cookies are enabled.
 - If using Internet Explorer 9.0 or greater, turn off Compatibility View.
 - Turn off Private Browsing.

Update Ajera

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

Before you begin

- **Ajera 7 clients**

When you update to 7.81 or later, you can take advantage of the Ajera 8 Sandbox, which gives you the ability to test drive Ajera 8, using a copy of your own database and a dashboard template. The Ajera 7.81 update installs the Ajera 8 Sandbox alongside your Ajera 7 database. The Sandbox does not impact your live version of Ajera 7. Refer to [Move to Ajera 8](#) for details on how to use the Ajera 8 Sandbox.

Note:	Whether or not you have the appropriate Ajera 8 environment, the Ajera 7 update will continue unaffected and complete successfully.
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- Verify that Microsoft .NET Framework 4 is installed.
- Before beginning the update, disable your anti-virus software.

Caution:	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.
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To update Ajera

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

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

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

Note:	Ajera automatically creates a backup of your data in Ajera > Backups > PreviousVersion.bak .
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6. After the update is complete, [import your custom inquiries](#) if you had exported them earlier.

To update to SQL 2014

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 2014.

Uninstall Ajera

Axium Cloud clients: You do not need to complete this task; Axium 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.

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. If you use Crystal Reports (.rpt), copy the Custom Reports subfolder from the Ajera/Program folder to a secure location.
3. If you have Ajera configured for web access:
 - a. From the Windows **Start** menu, select **Control Panel**, double-click **Administrative Tools**, and double-click **Internet Information Services (IIS) Manager**.
 - b. Expand Sites, expand **Default Web Site**, right-click **Ajera**, and select **Remove**.
 - c. Select **Application Pools**, right-click **AjeraAppPool** and select **Remove**.
4. From the Windows Start menu:
 - a. Select **Control Panel**, double-click **Add/Remove Programs (XP/2003)** or **Programs and Features (2008)**, and select **Microsoft SQL Server 2014 or 2012**.
 - b. Follow the onscreen instructions.
5. Optionally, remove the Axium 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.
6. Delete the Ajera folder (typically C:\Ajera).
7. Remove Ajera and Ajera Server Administration shortcuts.
8. Empty your recycle bin.
9. Copy your backups or Custom Reports subfolders back to their appropriate locations (for example, after installing Ajera or moving it to another server).

Move to Ajera 8

If you currently use Ajera 7, you can take advantage of the Ajera 8 Sandbox, which gives you the ability to test drive Ajera 8 using a copy of your own database and a dashboard template. The Ajera 7.81.00 update installs the Ajera 8 Sandbox alongside your Ajera 7 database. The Sandbox does not impact your live version of Ajera 7. In the Ajera 8 Sandbox, you can build dashboards that support your firm's information needs.

When you decide to move to Ajera 8, choose to use the original dashboard template, the Sandbox dashboards you created, or no dashboards. Use the road map below to prepare for Ajera 8.

Learn about Ajera 8

- [Watch a guided tour of Ajera 8](#) (5:20 min)
- [Watch the training video](#) – Using the Sandbox (1 hour)
- [Watch the training video](#) – Building basic dashboards (1 hour)
- [Learn about Ajera 8 dashboards](#)

Prepare for Ajera 8

- [Find answers about Ajera 8 \(FAQs\)](#)
- [Identify Ajera hardware/software requirements](#)
- [Contact Axium Support with questions](#)

Move to Ajera 8

- [Prepare for the Ajera 8 Sandbox](#)
- [Run the update to install the Sandbox](#)
- [Test drive Ajera 8 in the Sandbox](#)
- [Move to Ajera 8](#)

Congratulations! Welcome to Ajera 8

Step 1: Prepare for the Ajera 8 Sandbox

When you update to Ajera 7.81, the system runs a check against your system to confirm that you have the right environment in which to install and run Ajera 8. Here are the steps that the update completes:

- Updates Ajera 7 to the current version - Whether or not you have the appropriate Ajera 8 environment, the Ajera 7 update will continue unaffected and complete successfully.
- Installs a fully, functional version of Ajera 8 into the Ajera\Sandbox folder
- Copies your primary Ajera 7 database into the Ajera 8 Sandbox - Only your primary Ajera database will be copied into the Sandbox.
- Converts existing Ajera 7 security groups into Ajera 8 security roles in the Sandbox - Initially, only Ajera Administrators will have visibility to the Sandbox dashboard template. Other employees can log into the Sandbox but will be unable to see the dashboard until you grant dashboard access to their roles.
- Adds the **Help > Axium Sandbox** option to your Ajera 7 Help menu

Verify your current environment

To ensure a successful installation of the Ajera 8 Sandbox, work through the following checklist **BEFORE** you attempt to run the 7.81 update.

Note:	You can install the Sandbox with active Crystal Reports (.rpt file extension), but you CANNOT move to Ajera 8 with active Crystal Reports files. Contact Axium Support with questions.
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- Confirm that your server and workstations meet the Ajera 8 requirements, identified in the [Ajera Hardware/Software Requirements](#).
- **Server operating systems**
Ajera 8 must be installed on a server, not on a workstation acting as a server. While Ajera 8 runs with Microsoft Windows Server 2003 and 2008, these operating systems are rapidly becoming older technology. Before updating to Ajera 8, consider updating your server to Microsoft Windows Server 2008 R2 or 2012. These recommended operating systems provide a healthier environment for your firm's financial information.

- **Web access and supported browsers**

Ajera 8 requires web access, using one of the following browsers:

- Internet Explorer 10 or later (disable Compatibility View Settings)
- Firefox 20 or later with the Microsoft .NET Framework Assistant add-on for Firefox on any Ajera workstations

Note:	Full Ajera functionality is not supported in other browsers.
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- **Workstation operating systems**

- On workstations, Ajera 8 works with Microsoft Windows 7, 8, XP, and Vista.
- Note: When Microsoft ends support for older versions of Windows (such as XP or Vista), Axium will also end Ajera support of those versions.

- **Mac compatibility**

- Ajera dashboards are compatible with Mac OS X 10.5 or later.
- Full Ajera functionality requires software that can run Microsoft Windows on a Mac.

- **Crystal Reports**

In Ajera 8, custom reports or custom client invoices must be created with Microsoft SQL Server Reporting Services 2005 (.rdl file extension), giving you the ability to run the reports on the web and back them up as part of the Ajera database.

Note:	You can install the Sandbox with active Crystal Reports (.rpt file extension), but you CANNOT move to Ajera 8 with active Crystal Reports files. Contact Axium Support with questions.
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Step 2: Run the update to install the Sandbox

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

Note:	If anyone is logged in during the update, all changes since the last save are discarded.
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2. Depending on your User Account Control settings in the Control Panel, the system may prompt you to allow access to your computer. Click **Allow**.
3. On your Ajera server, go to the Windows **Start** menu.
4. Select **All Programs > Ajera > Ajera Server Administration**.
5. On the **Tasks** menu, select **Update Ajera**.

Note:	Whether or not you have the appropriate Ajera 8 environment, the Ajera 7.81 update continues unaffected and complete successfully.
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6. Read the **Axium Software License and Services Agreement**. Click the **I Accept** button to accept the license agreement.
7. When prompted, click **Yes** to confirm that you want to update the latest version of your database.
8. Messages appear, indicating the progress of the installation. The system will indicate whether the Sandbox was installed successfully.

When you see the *Update successful* message, click **Finish**.

Note:	If the update encounters issues with your current environment, you may see a message indicating that the Sandbox installation failed. Confirm that you meet the Ajera Hardware/Software Requirements for Ajera 8 and retry the update. If no issues are found, the system installs the Sandbox.
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9. The update makes Ajera 7, Ajera Mobile Timesheets, and the Ajera 8 Sandbox web accessible and displays their corresponding URLs.

Note the URLs displayed, as you will need them later to access Ajera. Click **OK**.

Ajera 7:	<code>http://<server name>/Ajera</code>
Ajera Mobile Timesheets:	<code>http://<server name>/Ajera/M</code>
Ajera 8 Sandbox:	<code>http://<servername>/AxiumSandbox</code>

Congratulations! The Ajera 8 Sandbox is now installed on your server.

Step 3: Test drive Ajera 8 in the Sandbox

The Ajera 8 Sandbox comes with an out-of-the-box dashboard template that you can tweak to fit the information needs of your firm and your employees. When you move to Ajera 8, the system can transfer Sandbox or template dashboards automatically into your live version of Ajera 8. That's the beauty of the Sandbox – it gives you the freedom to create your dashboards in an isolated environment and the ability to move your Ajera 8 dashboards with a flip of the switch.

Before you begin

- [Learn about dashboards](#)
- [Learn how to design a dashboard](#)
- Determine who will be responsible for designing and test driving your Ajera 8 dashboards. Initially, only Ajera Administrators will have visibility to the Sandbox dashboard template. Other employees can log into the Sandbox but will be unable to see the dashboard until you grant dashboard access to their roles.

Caution: When [setting up security](#), use caution when checking the **Design dashboard content** check box. Employees with this security can view employee cost, even if the View employee cost check box is cleared.

To log into the Ajera 8 Sandbox

1. Using a supported browser, enable cookies and Javascript. If using Internet Explorer 10.0 or greater, turn off **Compatibility View**.
2. Log into Ajera 7.
3. From the Ajera 7 **Help** menu, choose the **Axium Sandbox** option.
 - If the Sandbox installed successfully, the Ajera 8 Sandbox opens.
 - If the system could not install the Sandbox due to environmental issues, the [Ajera 8 Hardware/Software Requirements](#) appear to help you verify your environment. Work with your IT team to ensure that these requirements are met. Once you have resolved any issues, [rerun the 7.81 update](#) to install the Ajera 8 Sandbox.
4. Experiment with and design dashboards based on your firm's workflow and information needs. Refer to the [Learning Center for information about dashboards](#) or [watch the training videos on building basic dashboards](#).
5. Ajera users with the Administrator security role can design dashboards. You can grant design security to any role by adjusting the settings for that role.

Caution: When [setting up security](#), use caution when checking the **Design dashboard content** check box. Employees with this security can view employee cost, even if the **View employee cost** check box is cleared.

Ajera 8 comes with an out-of-the-box dashboard template that the designer can tweak to fit the information needs of your firm and your employees. Only the designer with the appropriate security role can make those changes.

If your firm requires specialized dashboards, contact your [Axium consultant](#) for their dashboard building expertise.

Refresh Sandbox data

1. From the server where Ajera is installed, go to the Windows **Start** menu, and select **All Programs > Ajera > Ajera Server Administration**.
2. Click **Tasks > Refresh Sandbox Data**
3. Choose one of the following options:
 - Restore standard tabs
 - Retain current tabs
 - Remove all tabs
4. Click **OK**

Step 4: Move to Ajera 8

After you've test driven the Ajera 8 Sandbox, decide when you're ready to move from Ajera 7 to Ajera 8. The update process makes it easy to bring the Sandbox dashboards you created into Ajera 8.

Before you Begin

When you decide to move to Ajera 8, choose to use the Sandbox dashboards you created, the original dashboard template, or no dashboards. The process automatically creates a backup of the Ajera 7 database and updates your latest Ajera 7 database to Ajera 8.

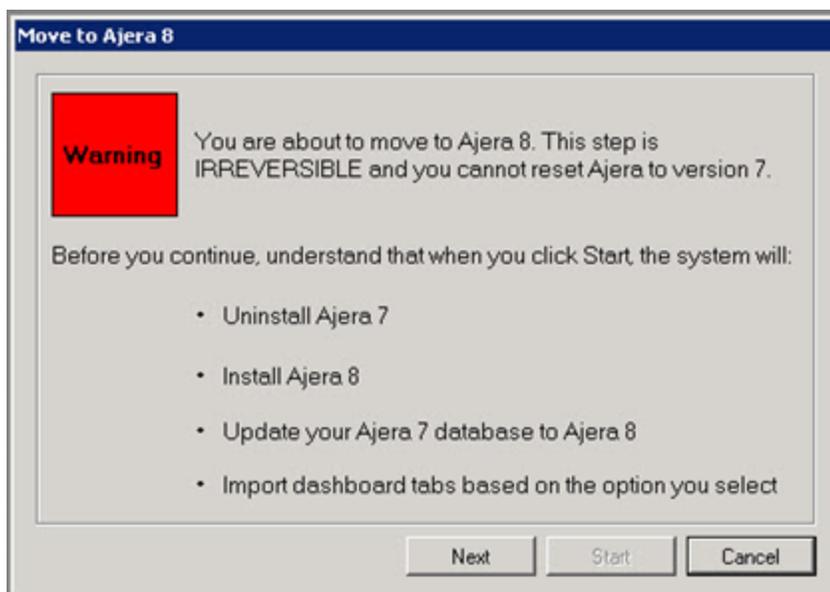
In the Ajera 8 Sandbox, export the Sandbox dashboards you want to use in the live Ajera 8.

To move to Ajera 8

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 **Move to Ajera 8**. The following screen appears:

Warning: Before you proceed, understand that you cannot restore the Sandbox or reset to Ajera 7. The next step deletes your Sandbox and updates your Ajera 7 database to Ajera 8.

Note : This option will not be available to you if you are running Microsoft Server 2003. Please review the [Hardware/Software requirements](#) to figure out which version you need in order to update to Ajera 8.



3. Before clicking **Next**, confirm with your Ajera Administrator that you can continue with this process.
4. On the next screen, choose one of the following dashboard tab options:
 - **Import all standard tabs** – this option imports the dashboard tabs that Axium provided as part of the original Sandbox installation.

Move to Ajera 8

- **Import all tabs from your Sandbox** – This option imports all tabs that currently exist in your Sandbox, including tabs you have created.
 - **Do not import any tabs** – This option does not import any tabs into Ajera 8. Your employees will see only the Home tab on the Ajera 8 dashboard.
5. Click **Start**. The system prompts you to verify that your Ajera Administrator has confirmed they are ready to move to Ajera 8.
When you click **Yes**, the system:
 - Exports the dashboard tabs you selected in the step above.
 - Updates your current Ajera 7 database to Ajera 8.
 - Imports dashboard tabs and their corresponding roles into your live version of Ajera 8. You can then associate employees and settings with those roles in your live Ajera 8 database.
 - Overwrites the files in your C:\Ajera folder with the files from the Sandbox subfolder.
 - Deletes the Sandbox subfolder.
 6. Messages confirm that you have successfully updated to Ajera 8. Share the Ajera 8 URL with your employees so that they can log into Ajera 8.
 7. You can import tabs into Ajera 8 at any time. If you have more than one database, import the dashboard tabs manually into each database. Refer to [how to import dashboard tabs](#).

Manage multiple databases

Step 1: Create multiple databases

Axium Cloud clients: You do not complete this task. Contact Axium 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.

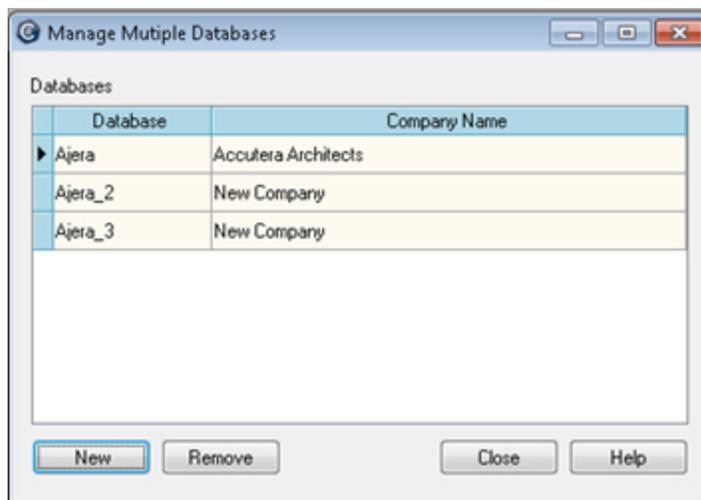
Before you begin

- 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 **File** menu, click **Manage Multiple Databases**.

Note: This option only appears on the **File** 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

Axiom Cloud clients: You do not complete this task. Contact Axiom 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

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

Before you begin

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

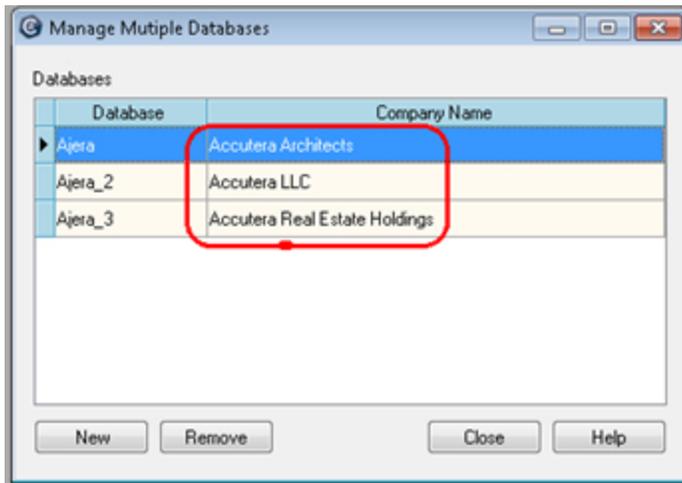
To rename databases

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 **Company** menu, select **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 **File** menu, click **Manage Multiple Databases**.

Note: This option only appears on the **File** 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

Axiom Cloud clients: You do not complete this task. Contact Axiom 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.

Manage multiple databases

3. If you use custom Crystal Reports (.rpt), copy the Custom Reports subfolder from the Ajera/Program folder to a secure location.
4. Using Windows Explorer, copy your **Ajera\Backups** folder to a secure location where you can access it from both the current and new servers.
5. [Install Ajera](#) onto the new server.
6. After completing the installation, copy your Backups or Custom Reports subfolder back to their appropriate locations.
7. Log into the new Ajera database using the administrator login ID and password.
8. Recreate your current database structure on your new server. Refer to [Step 1 - Create a new database](#) for more information.

Note:	Write down the number is assigned to each new database in the Database column.
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9. [Restore the database backups](#) you copied to the new server.
10. Repeat the above steps to restore each additional databases.

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