



Ajera 8 Installation Guide



connecting people, projects + profits

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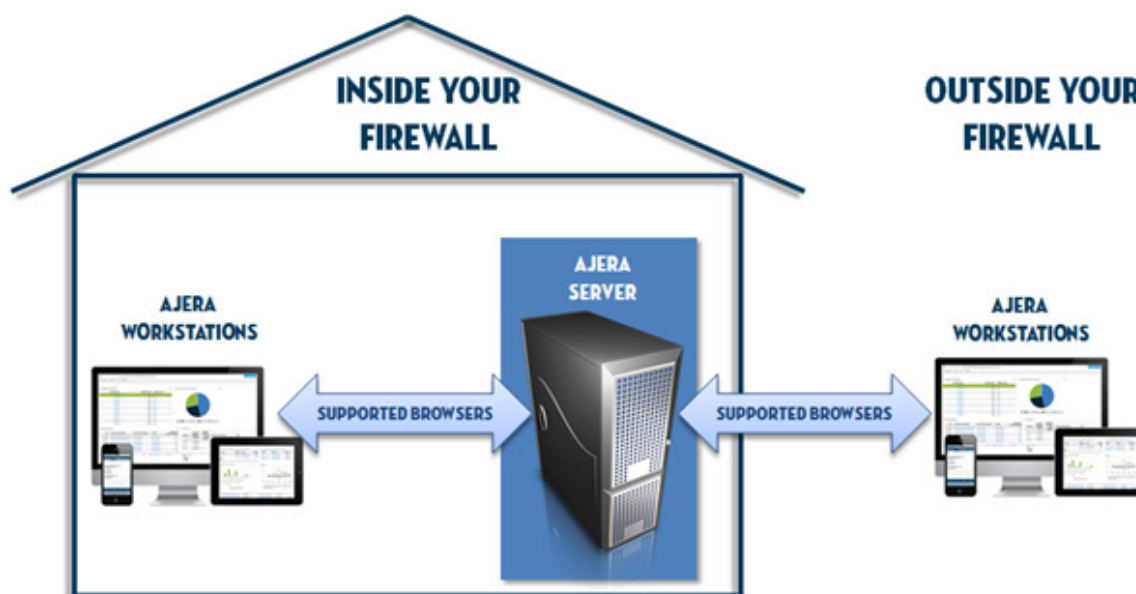
Copyright includes accompanying software and windows generated by the software.

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](#).

Caution: 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 4.5.2 is installed on the Ajera server. Refer to the [Microsoft .NET Framework 4.5.2 website](#) for installation information.
- While Ajera 8 supports Microsoft Windows XP and Vista, these operating systems are old technologies. Before updating to Ajera 8, consider updating your workstation to newer operating systems to provide a healthier environment for your firm's financial information. When Microsoft ends support for XP and Vista, Axium will also end Ajera support for XP and Vista.

Microsoft Windows XP and Vista do not support Internet Explorer version 10. If your firm chooses to use Microsoft Windows XP or Vista for Ajera, you must use Firefox as your browser and manually install the Microsoft .NET Framework Assistant add-on for Firefox.

Install Ajera

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 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. Refer to the [Microsoft SQL Server website](#) for installation information.
 - If your firm determines that one of the following scenarios applies, contact [Axium Support](#) for instructions on how to install SQL manually:
 - Your firm requires a version of Microsoft SQL Server other than SQL Server 2014 Express.
 - You need to install SQL Server 2014 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, Implementation Guide](#) for setup information.

Install Ajera on your server

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 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:	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.
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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: 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.

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](#).

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

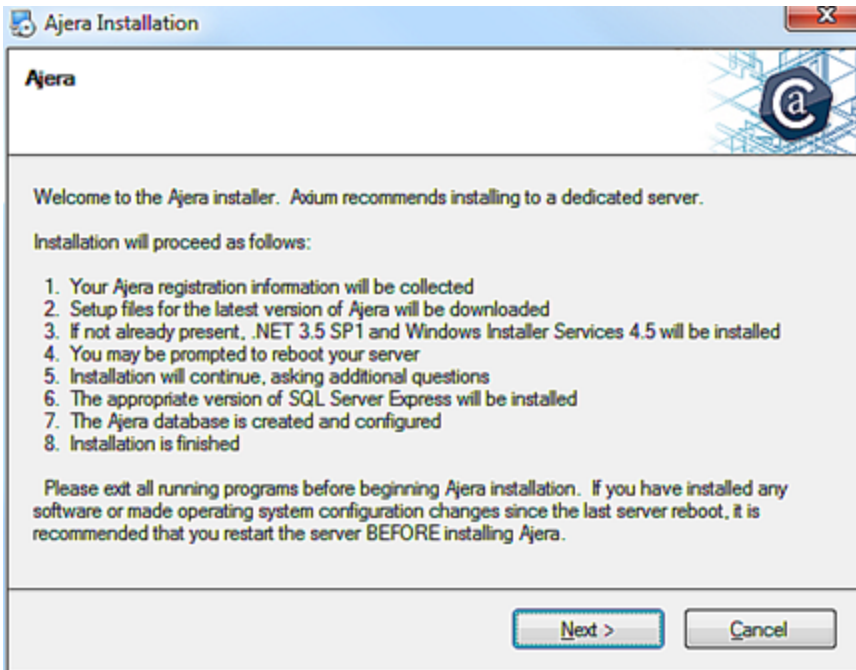
To install Ajera on your server

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.

Caution: 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.

Install Ajera



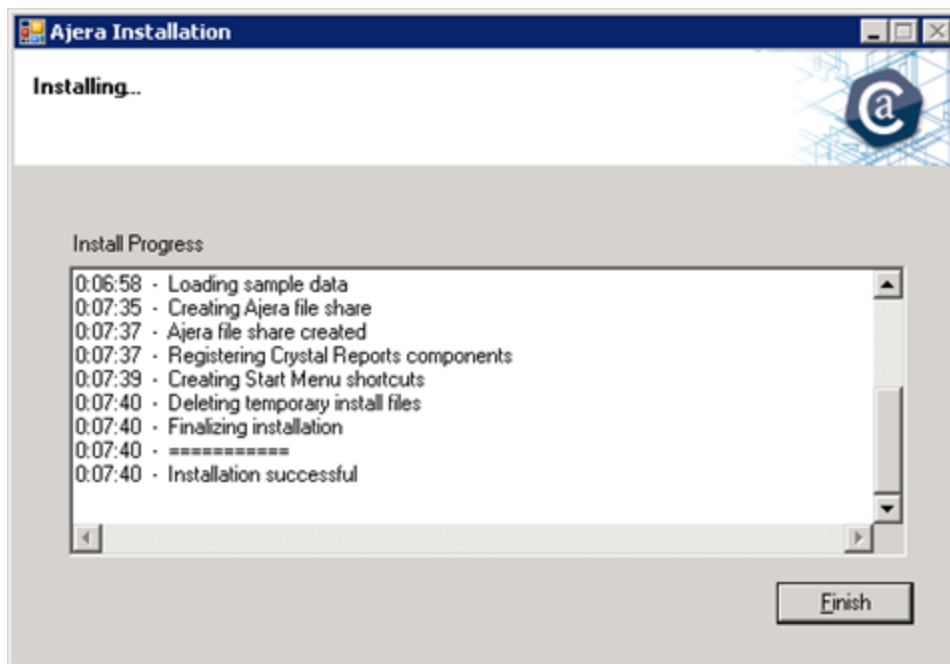
3. Enter your company name spelled exactly as it appears in the *Welcome to Ajera* email, along with your Registration Code and click **Next**.
4. Specify the local server location where you want to install the Ajera program files and backup folder (C:\Ajera, by default). Click **Install**.

Notes:	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.
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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 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**

Note: If using external Internet access or the Active Directory integration, Axium 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.

Note:	Due to the variations in firewalls and network access, Axium cannot provide support or troubleshoot any problems you might experience while setting up external web access.
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- **Axium Cloud, enterprise hosting for Ajera**

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

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

Step 3: 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](#).

Caution: 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 your firm chooses to use Microsoft Windows XP for Ajera, you must use Firefox 20 or later as your browser on your Ajera workstations and manually install the Microsoft .NET Framework Assistant add-on for Firefox. Microsoft Windows XP does not support Internet Explorer version 10. [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`

Note:	If problems occur with web access, delete the following folder from the client workstation. You may need to display <i>hidden</i> folders before you can find the right folder.	
	Windows XP	C:\Documents and Settings\%username%\Local Settings\Apps\2.0\
	Windows Vista or 7	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 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 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.

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

Note:	If your domain name is different from your server name, use this URL instead: <code>http://<domain name>/Ajera/M</code>
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6. Once confirmed, email the Ajera URLs to your employees.
7. Employees can then log into Ajera using their login credentials.

Axium Cloud clients: To log into Ajera using the Axium 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 Axium 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 Axium 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

Install Ajera

on the Axium 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  > **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.

Update Ajera

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

Before you begin

- 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.

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.

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

Axiom Cloud clients: You do not need to complete this task; Axiom 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 8 does not support Crystal Reports.**
Before uninstalling any Ajera release prior to Ajera 8, 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


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.

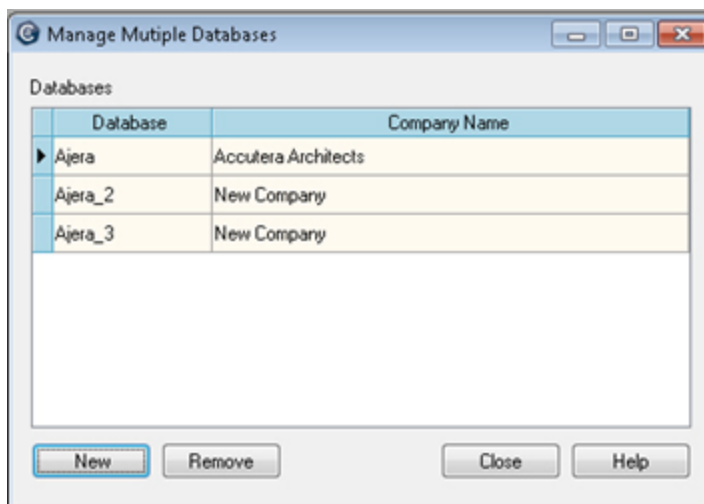
Before you begin

- 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  > **Setup** > **Utility** menu, click **Multiple Databases**.

Note: 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.

Manage multiple databases

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


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


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

Before you begin

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

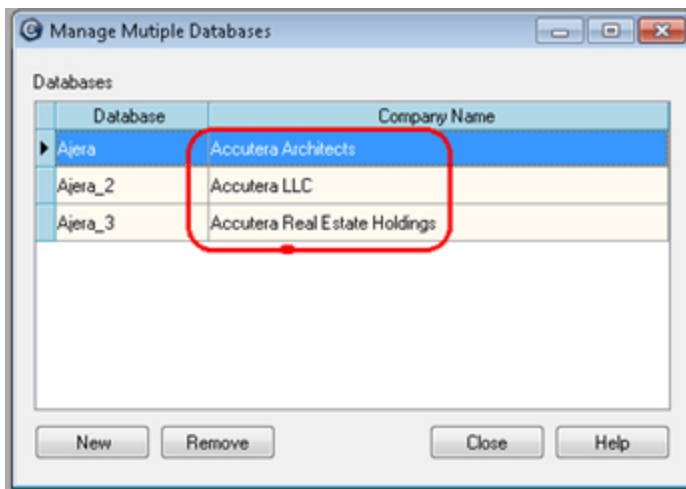
To rename databases

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**.

Note: 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

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*).

Manage multiple databases

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.

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

Back up Ajera

Back up a database

Axiom Cloud clients: You do not complete this task. Axiom backs up your databases daily. Contact Axiom 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.

- 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**.

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

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

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

1. To avoid losing changes, [back up your current data](#).
2. Verify that all employees have exited Ajera.
4. On your Ajera server, open your Ajera folder and double-click the **AjeraServerAdministration.exe** file to open the **Ajera Server Administration** tool.
5. From the **Tasks** menu, click **Restore Database**.
6. On your Ajera server, navigate to and select the backup file that you want to restore. Click **Restore**.
7. Click **Yes** to confirm that you want to restore the database. Ajera notifies you when it has successfully restored and updated your database.
8. To restore multiple databases, repeat the above steps for each database separately.


Delete a database backup

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

Note: 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.
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.

Axiom Cloud

Axiom Cloud: Migrate from Ajera server

Step 1: Prepare your current Ajera information

1. Purchase Axiom 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 Axiom Cloud.
4. Ensure that your custom reports were created using Microsoft SQL Server Reporting Services 2005 (.rdl files).

Note:	Ajera does not support Crystal Reports (.rpt files).
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5. [Back up all current databases](#) to a secure location.

Step 2: Send your databases to Axiom

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

Caution:	When you are ready to send your databases to Axiom, 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 Axiom Cloud.
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1. The Axiom IT team will contact you and walk you through the steps you'll need to send your data to Axiom.
2. The Axiom IT team will notify you when your data is accessible in the Axiom Cloud.

Step 3: Log into Ajera on the Axiom Cloud

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

Note:	With Axiom Cloud, your databases are automatically backed up daily.
-------	---

Axiom Cloud: Set up a new Ajera database

1. Purchase Axiom Cloud and complete the license agreement.
2. The Axiom IT team creates your new Ajera database in the Axiom Cloud.

3. When the database is accessible, Axium 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 Axium 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](#).

Note:	With Axium Cloud, your databases are automatically backed up daily.
-------	---

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 Axium 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 Axium 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 Axium 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  > **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.

Ajera-to-Newforma Integration

Axiom Cloud clients: The Ajera-to-Newforma Integration tool cannot be used with the Axiom Cloud.

Axiom partnered with Newforma (a leading provider of Project Information Management [PIM] software) to create an Integration tool that pushes Ajera project, contact, client, employee, and company information to Newforma automatically.

Axiom's Data Services will work with you to set up your Ajera-to-Newforma Integration. If you have any questions, contact Axiom's Data Services (dataservices@axium.com).

Prepare for your integration

- Before using the Ajera-to-Newforma Integration, verify your Ajera configuration with the requirements noted in the [Ajera Hardware/Software Requirements](#).
- Contact Newforma to verify the Newforma server configuration requirements. Configure Newforma's server per Newforma's documentation.
- Set up Newforma server to allow HTTP / HTTPS traffic to and from the server, bypassing firewalls.
- Install Microsoft Excel on the Newforma Project Center (NPC) Server and on the machine on which you run the Ajera-to-Newforma Integration tool.
- Set up the account where you run the Ajera-to-Newforma Integration with write access to the NPC Server's file system and connection rights to the Ajera database.

Relationship between Ajera and Newforma information

The Integration pushes information for projects, contacts, clients, employees, and companies from Ajera to Newforma but not from Newforma back to Ajera.

In order to correctly push information, the Integration creates a relationship between (or maps) corresponding information in both products. Refer to the table below to understand what information is mapped between Ajera and Newforma. Even though the terminology varies slightly, the information is the same in both products.

This Ajera information...	Maps to this Newforma information
project	project
phase	phase calendar item
contact	contact (external)
employee	contact (internal)
client	company

To ensure that the Integration tool creates the correct relationship, verify that you use the following information consistently and that this information exists in both products:

- Project name and status
- Contact and employee email addresses
- Company name

Caution: If the information between Ajera and Newforma does not match correctly, the integration may **OVERWRITE** existing Newforma data. For example, if multiple contacts use the same email address or if multiple projects use the same project numbers, the push may overwrite Newforma information inadvertently.

The Ajera-to-Newforma Integration pushes the following Ajera information to Newforma whenever that information is added or changed.

Projects	Contacts	Employees	Companies
address	address	address	address
client	company	department	client contacts
principal in charge	email	email	email
project	fax	fax	fax
billing contact in Ajera;	job title	job title	location
main contact in Newforma	name	name	name
description	notes	notes	notes
manager name	phone	phone	phone
number	status	status	URL
type			
project team			
billing contact			
client contacts			
marketing contact			
principal in charge			
project contacts			
project manager			
phase			
name			
start and end date			
status			

Newforma: Push information manually

Axiom Cloud clients: The Ajera-to-Newforma Integration tool cannot be used with the Axiom Cloud.

Before you begin

Contact Axiom's Data Services (dataservices@axium.com) to verify the Ajera-to-Newforma Integration default settings.


If the default was set to *Push selected items manually*, the Ajera Administrator or each Project Manager must manually push new or updated information to Newforma.

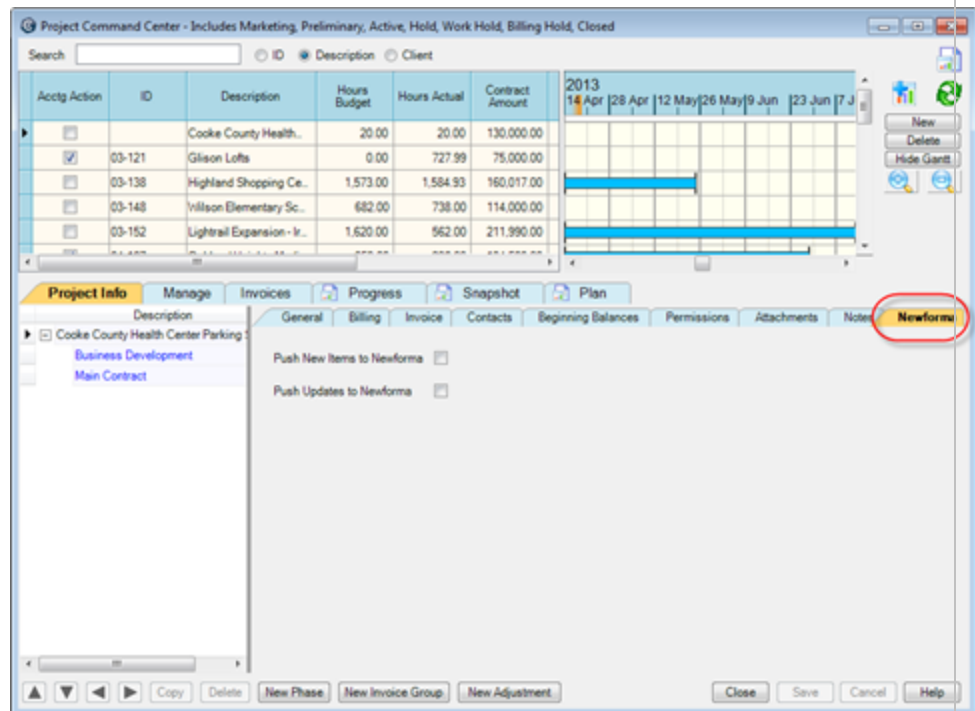
Note: Deletions are not updates. The Integration will not push deleted Ajera information to Newforma. In this case, your Newforma information may contain information not in Ajera.

To push this Ajera information...


Complete these steps...

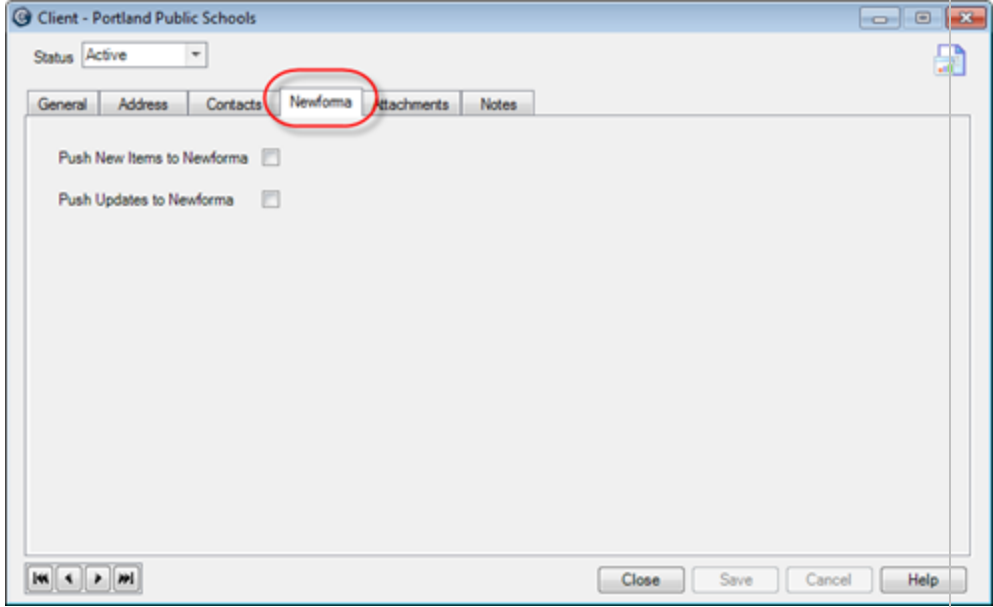

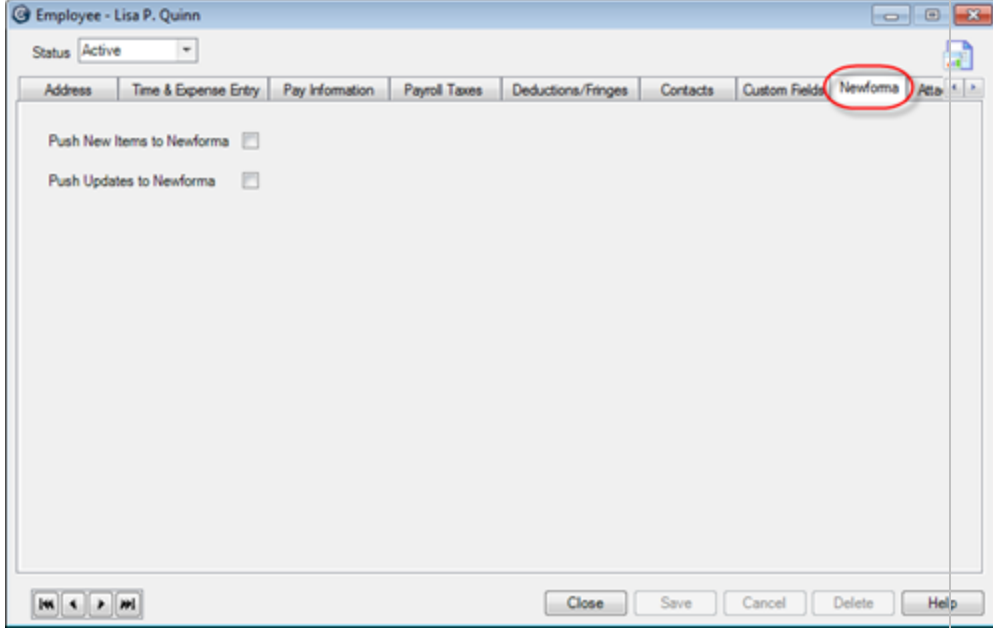

project and phase

1. On the  > **Manage** menu, click **Project Command Center**.
2. Select the project you want to push information for by highlighting the project in the top half of the screen.
3. Click the **Newforma** tab and check or clear the options according to your needs and click **Close**.

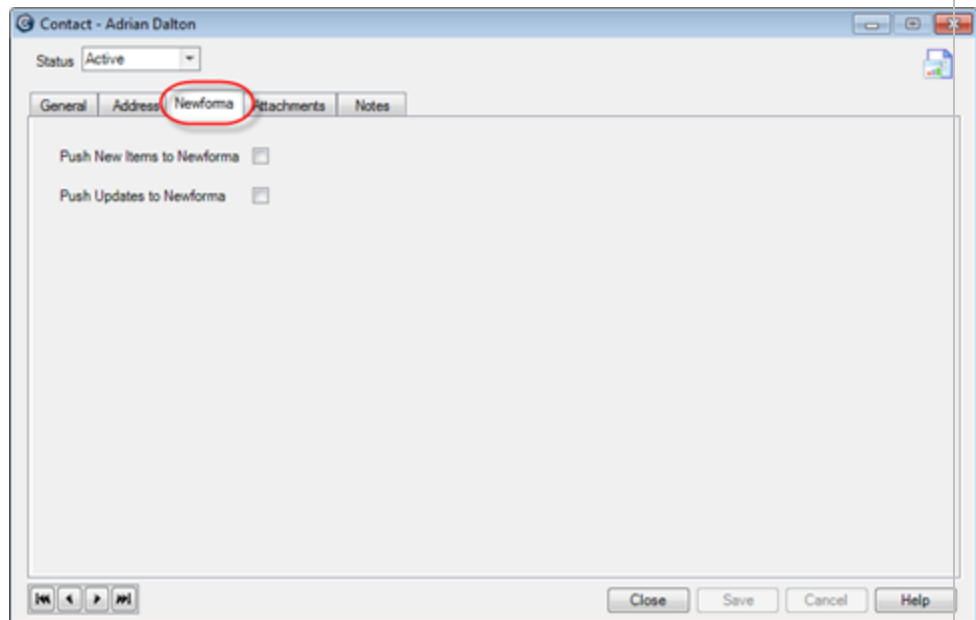


client

1. On the  > **Setup** menu, click **Clients**.
2. On the Client List, select the client you want to push information for manually and click **Edit**.
3. Click the **Newforma** tab and check or clear the options according to your needs and click **Close**.

	
<p>employee</p>	<ol style="list-style-type: none"> 1. On the  > Setup menu, click Employees. 2. On the Employee List, select the employee you want to push information for manually and click Edit. 3. Click the Newforma tab and check or clear the options according to your needs and click Close. 
<p>contact</p>	<ol style="list-style-type: none"> 1. On the  > Setup menu, click Contacts. 2. On the Contact List, select the contact you want to push information for manually and click Edit.

3. Click the **Newforma** tab and check or uncheck the options according to your needs and click **Close**.



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