

2017


AJERA **USERS** ASSOCIATION

*NATIONAL*

*CONFERENCE*

MAY 10-12, 2017 SCOTTSDALE, AZ

EMBASSY SUITES  
SCOTTSDALE, AZ



SCOTTSDALE, AZ  
EMBASSY SUITES

# WELCOME TO THE 2017 AJERA **USERS** ASSOCIATION NATIONAL CONFERENCE

## PRESIDENT'S WELCOME LETTER

The Ajera Users Association Board of Directors and Committees invite you to join us at The 2017 AUA National Users Conference in Scottsdale, Arizona. This year's conference should be our biggest conference yet.

Lectures, in-depth workshops, hands-on lab classes and one to one assistance all make this conference an unmatched learning and networking experience. Expert users, Certified Consultants, and Deltek staff lead these educational sessions. Your Education committee has been working very hard to bring you new classes and materials. As the software develops so does our conference.

We will once again have the opportunity (upon request) to schedule a One-on-One lab to discuss in further detail a specific challenge or question. It is like having a personal consultant at your fingertips.

AUA is an independent, volunteer based, not-for-profit association created for the sole purpose of providing support to users by users. Please consider becoming more involved with the association, run for a board seat, join the education committee, or join the Conference committee. That is how I started, I joined the Education committee, ran for a Director Position, then Vice President and now President. Being a member of this community has not only taught me so much, it has given me the opportunity to shape the professional development of Ajera users. Help direct AUA to make Ajera better than it is today.

So what are you waiting for? **Log on to [AUAonline.net](http://AUAonline.net), select your classes and meet us in Scottsdale.**

*Deirdre Larkin*  
AUA President

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# INFORMATION

## REGISTRATION

**CONFERENCE DATES** May 10-12, 2017

Register Online: [www.AUAonline.net](http://www.AUAonline.net)

Ajera Users Association  
P.O. Box 562  
Westerville, OH 43086

**RESERVE HOTEL BY**  
**April 18, 2017**

[www.AUAonline.net](http://www.AUAonline.net)

## HOTEL

**HOTEL BLOCK CLOSES** April 18, 2017

Embassy Suites – Scottsdale  
5001 N. Scottsdale Rd.  
Scottsdale, AZ 85250

\$149 single / double / night  
(Rates / avail. may change after 04.18.2017)

Visit Online for Booking: [www.AUAonline.net](http://www.AUAonline.net)

## REGISTRATION FEES

	MEMBERS	NON-MEMBERS
1 Day Fee	\$ 760.00	\$ 1,110.00
2 Day Fee	\$ 1,075.00	\$ 1,425.00
3 Day Fee	\$ 1,290.00	\$ 1,640.00

Non-members may join AUA at this time by including your first year dues (\$325 per company) with your conference registration while taking advantage of the discounted rate.

## CANCELLATION POLICY

**CANCELLATION DEADLINE** April 26, 2017

Cancellations must be received in writing two weeks prior to the National Conference to receive a monetary refund. After that time, full credit will be given toward any future AUA event for a period of 1 year. For more information regarding administrative policies such as complaints and refunds, please contact our offices at [auaadm@aol.com](mailto:auaadm@aol.com)

## 24 CPE CREDITS AVAILABLE

**24 CPE CREDITS AVAILABLE FOR SESSIONS.**

Ajera Users Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)





TIMES	BASIC	INTERMEDIATE	ADVANCED	PROJECT
	Classes focused on base program functionality. You utilize Ajera only during the day to do the minimum processes or less than 18 months of experience.	You have mastered Ajera basics in the following areas: accounting/project management, Inquiry, dashboards & widgets, setup procedures, reporting options and views pertaining to each session. You are comfortable with performing each of the session's Ajera tasks.	You have been using Ajera for at least 2 years and want to discuss the sessions' advanced techniques. You are looking to enhance Ajera's abilities to provide the information you need. You modify dashboards / widgets, and want to move your capabilities to the next level.	Your Ajera use is more focused on project costs, managing budgets, and balancing resources.
TUESDAY, MAY 9, 2017				
PRE-CONFERENCE ACTIVITIES				
5:00 PM 7:00 PM	Registration Networking @ Hotel Manger's Reception Area			
WEDNESDAY, MAY 10, 2017				
7:00 AM 8:00 AM	Registration			
8:00 AM 8:45 AM	Welcome Session - "Making the Most of This Conference"			
9:00 AM 10:40 AM	A1 New Users Workshop Project Setup & Rate Tables DESCRIPTION: pg. 5	B1 Intermediate Widgets DESCRIPTION: pg. 8	C1 New Features in Ajera DESCRIPTION: pg. 9	D1 What's Up with Project Profitability DESCRIPTION: pg. 13
10:50 AM 12:30 PM	A2 New Users Workshop Workflow & Billing DESCRIPTION: pg. 6	B2 Intermediate Widgets (continued) DESCRIPTION: pg. 8	C2 Ajera Tips, Tricks, and Mini Topics DESCRIPTION: pg. 11	D2 Resource Budgeting & Schedule Manager DESCRIPTION: pg. 14
12:30 PM 1:30 PM	Lunch Break - AUA General Meeting			
1:30 PM 3:10 PM	A3 New Users Workshop Reporting DESCRIPTION: pg. 6	B3 Tips & Tricks to Building a Dashboard DESCRIPTION: pg. 9	C3 Advanced SQL Formula Madness DESCRIPTION: pg. 11	D3 Resource Budgeting & Schedule Manager (cont.) DESCRIPTION: pg. 14
3:20 PM 5:00 PM	A4 New Users Workshop HR Setup DESCRIPTION: pg. 6	B4 Month-End Closing DESCRIPTION: pg. 9	C4 Advanced SQL Formula Madness (cont.) DESCRIPTION: pg. 11	D4 Project Manager & Principal Dashboards DESCRIPTION: pg. 14
5:00 PM 6:00 PM	Computer Lab Open / Meet with an Expert (by appointment)			
6:30 PM 8:00 PM	Welcome Reception / Cocktails & Hors d'Oeuvres			

TIMES	BASIC	INTERMEDIATE	ADVANCED	PROJECT
	THURSDAY, MAY 11, 2017			
8:30 AM 10:10 AM	A5 Formula Basics DESCRIPTION: pg. 7	B5 Customizing Your Financials DESCRIPTION: pg. 9	C5 Advanced Inquiry & Widgets 1 DESCRIPTION: pg. 12	D5 Streamlining Billing Workflow: The Next Level DESCRIPTION: pg. 14
10:20 AM 12:00 PM	A6 Beginning Widgets DESCRIPTION: pg. 7	B6 Customizing Your Financials (continued) DESCRIPTION: pg. 9	C6 Advanced Inquiry & Widgets 1 (continued) DESCRIPTION: pg. 12	D6 Streamlining Billing Workflow (continued) DESCRIPTION: pg. 14
12:00 PM 1:30 PM	Lunch – Q & A with AUA's Panel of Experts			
1:30 PM 3:10 PM	A7 Beginning Widgets (continued) DESCRIPTION: pg. 7	B7 New Features in Ajera DESCRIPTION: pg. 9	C7 Client Invoice Designer DESCRIPTION: pg. 12	D7 Maximizing Business Development DESCRIPTION: pg. 15
3:20 PM 5:00 PM	A8 Introduction to Inquiry DESCRIPTION: pg. 7	B8 Month-end Closing DESCRIPTION: pg. 9	C8 Client Invoice Designer (continued) DESCRIPTION: pg. 12	D8 Maximizing Business Development (continued) DESCRIPTION: pg. 15
5:00 PM 6:00 PM	Computer Lab Open / Meet with an Expert (by appointment)			
	FRIDAY, MAY 12, 2017			
8:00 AM 8:45 AM	Closing Session – “Ajera Roadmap: The Future of Ajera”			
9:00 AM 10:40 AM	A9 Digging Deeper into Inquiry DESCRIPTION: pg. 8	B9 Payroll Matters DESCRIPTION: pg. 10	C9 Consultant Management DESCRIPTION: pg. 13	D9 Project Managers Workshop DESCRIPTION: pg. 15
10:50 AM 12:30 PM	A10 Intermediate Widgets DESCRIPTION: pg. 8	B10 Payroll Matters (continued) DESCRIPTION: pg. 10	C10 The Colors of Ajera DESCRIPTION: pg. 13	D10 Project Managers Workshop (continued) DESCRIPTION: pg. 15
12:30 PM 1:30 PM	Lunch – Industry Speaker			
1:30 PM 3:10 PM	A11 Intermediate Widgets (continued) DESCRIPTION: pg. 8	B11 Managing Prospects with Ajera CRM DESCRIPTION: pg. 10	C11 Advanced Inquiry & Widgets 2 DESCRIPTION: pg. 12	D11 Project Managers Workshop (continued) DESCRIPTION: pg. 15
3:20 PM 5:00 PM	A12 Setting Up Ajera for AASHTO / FAR Compliance DESCRIPTION: pg. 8	B12 Excel: Adv. Concepts to Smooth Your Workload DESCRIPTION: pg. 10	C12 Advanced Inquiry & Widgets 2 (continued) DESCRIPTION: pg. 12	D12 Project Managers Workshop (continued) DESCRIPTION: pg. 15

# 2017 CONFERENCE SESSION *DESCRIPTIONS*

## BASIC (A COURSES)

Classes focused on base program functionality. You utilize Ajera only during the day to do the minimum processes or less than 18 months of experience.

### **A1** NEW USERS WORKSHOP PROJECT SETUP & RATE TABLES

#### **INTENDED AUDIENCE**

Accounting, Project Managers

#### **# OF SESSION BLOCKS**

Single

#### **PREREQUISITES**

None

#### **LEARNING OBJECTIVES**

1. The attendee will understand and manipulate Project Command Center to work for you and provide the project information you require for your company.
2. Understand the structure, function and effect of rate tables.
3. Understand and be able to utilize Project Budgets, the Manage tab, and use of Dates on the Manage Tab.
4. Understand, create and utilize Custom fields (Additional information on Custom Fields is included in Inquiry and HR Setup.)

#### **SESSION DESCRIPTION**

This Level 1 session will introduce you to how information entered in Project Setup and Rate Tables affects your Ajera system. Project budgets and schedules, special reports, and Custom Fields will all be discussed. Here's where you'll expand your knowledge of the basics. We'll give you the ins and outs and tips and tricks, to make Ajera work for you. We'll show you how to get help when you need it. You'll have plenty of hands-on time and can ask those questions you've been saving up. The session includes hands-on computer usage and Q&A.

## **A2** NEW USERS WORKSHOP WORKFLOW & BILLING

### **INTENDED AUDIENCE**

Accounting, Principals

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None

### **LEARNING OBJECTIVES**

1. Understand and see the results of decisions and selections made in the Project Command Center that effect billing processing and client invoicing.
2. Understand the effect of invoice choices on formatting and invoice structure.
3. The attendee will be able to make better selections and utilize the Client Invoicing function to provide the client with invoices and information to pay invoices.
4. Understand the financial statement effects of invoicing.

### **SESSION DESCRIPTION**

This class will move you from Project setup to beginning invoice processing and basic invoice setup. We will also cover standard invoice template setup, paperless invoicing, AR reporting, statements and will bridge into the Beginning Reporting Session. The session includes hands-on computer usage and Q&A.

## **A3** NEW USERS WORKSHOP REPORTING

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None

### **LEARNING OBJECTIVES**

1. The attendee will be able to customize Ajera standard Reporting saving it as a view of the report.
2. The attendee will be able to utilize and begin to customize Inquiries.
3. The attendee will be able to setup roles to allow proper access to the reporting system.
4. The attendee will export data from the reports for manipulation in Excel (or other programs.)

### **SESSION DESCRIPTION**

This Level 1 session will introduce you to how information entered in Ajera can be accessed with an inquiry, reports, downloads and how you filter that data further. After completing this class, you will be able to recognize the difference between conditions and basic links, and how to set basic conditions on an inquiry or a link. You will be able to process reports and export data for additional information. The session includes hands-on computer usage and Q&A.

## **A4** NEW USERS WORKSHOP HR SETUP

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None

### **LEARNING OBJECTIVES**

1. Learn to use Ajera for Human Resources

### **SESSION DESCRIPTION**

Everyone has to begin somewhere, and this is where you start to know how Ajera can be customized for information useful for your Human Resources department. We'll give you tips and tricks, using inquiry, custom field and dashboards to make this information easily available at the click of a button. There will be hands-on activities as well as Q & A time.

## **A5** FORMULA BASICS

### **INTENDED AUDIENCE**

Accounting

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

Prior experience with Excel formulas will be helpful.

### **LEARNING OBJECTIVES**

1. Ajera uses formulas in 3 different formula building tools (Inquiry, Widgets, and Invoicing modules.)
2. The attendee will be able to construct simple formulas to add additional information to your design.
3. The attendee will utilize formulas in the various modules.
4. The attendee will take with them additional tools in the form of inquiries, widget, invoice formulas, and formatting. Attendee will gain the knowledge of tools and websites that will provide additional support.

### **SESSION DESCRIPTION**

Let's discuss the basics of formulas that you need and can use for your implementation of Ajera. Ajera provides access to fields that you can use, but Inquiry, Invoice designer, and Widgets provide a different interface for the use of formulas. We will discuss how to know what fields are available, how to get to the field that you need and teach a basic SQL Query tool that will enable you to obtain the information you need to improve your reporting and information gathering. We will discuss advanced basics for inquiry, invoice designer, and dashboards and widgets. This session includes hands-on computer activities. We will actively work on examples of the discussed issues and have an active Q&A session. Email discussion points to gmayer@forsgren.com.

## **A6 A7** BEGINNING WIDGETS

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

None

### **LEARNING OBJECTIVES**

1. Which widgets come premade in Ajera and how to utilize those widgets.
2. How to modify an existing widget with additional columns and filters.
3. How to create a basic widget from scratch

### **SESSION DESCRIPTION**

This Level-1 session will introduce you to Widgets and how they can provide live information to the decision makers of your firm. Widgets are the building blocks of the Ajera 8 dashboards. They allow you to access and present information in a clean and user friendly interface. After completing this class, you will know which widgets are included with Ajera, how to modify an existing widget and how to create one from scratch.

## **A8** INTRODUCTION TO INQUIRY

### **INTENDED AUDIENCE**

Accounting

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None

### **LEARNING OBJECTIVES**

1. The attendee will have an understanding of the basics of Ajera's Inquiry module and how to use it to accommodate some of a firm's most common information needs.
2. The attendee will be able to work with and modify Ajera's standard inquiries to create simple custom inquiries.

### **SESSION DESCRIPTION**

Inquiries allow you to target specific data in Ajera's database so that you can easily access only the information you need. In this class, you will learn how to distinguish between the various standard inquiries, modify columns, group your data, filter the data shown on the inquiry, export your designs, and utilize basic formulas in Inquiry.



## **A9** DIGGING DEEPER INTO INQUIRY

### **INTENDED AUDIENCE**

Accounting

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

A8 Introduction to Inquiry (this or prior years)

### **LEARNING OBJECTIVES**

1. The attendee will have expanded basic Inquiry knowledge with intermediate-level formulas, conditions, and links.
2. The attendee will be able to create more advanced inquiries to dig deeper into a firm's information.
3. The attendee will be able to organize and share inquiries with others in a firm.

### **SESSION DESCRIPTION**

Ajera's Inquiry module has the ability to link data together and apply conditions to provide detail-level information with the click of the mouse. In this session, we will demonstrate how to utilize this capability to rollout Inquiries to various staff levels in your firm. After completing this class, you will be able to create moderate-level formulas, recognize the difference between conditions and links, and understand how to set conditions on an inquiry or a link.

## **A10 A11 B1 B2** INTERMEDIATE WIDGETS

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double (offered twice)

### **PREREQUISITES**

A6 Beginning Widgets, and a basic knowledge of widgets and dashboards. A beginning knowledge of SQL will be helpful (but is not required).

### **LEARNING OBJECTIVES**

1. Create new tabs
2. Create a table widget
3. Create a chart widget
4. Modify page layout
5. Create and use conditional formatting
6. Learn how to use basic and intermediate formulas to create and modify
7. Assign widgets to users and groups.

### **SESSION DESCRIPTION**

This intermediate-level session will build upon the lessons introduced in Beginning Widgets or move you to a higher level of usage if you already feel you know the basics. We will show you how to find data in numerous ways, the importance of key fields and how to find them, develop widget formulas and use some simple common SQL formulas, conditional formatting to give "visual enhancement" to your widgets, using security to limit access, use of filters, grouping, sorting and using date ranges. After completing this class, you will be able to create tabs, add new widgets within the tabs, resize widgets, create useful widget charts, use simple SQL formulas, and secure a tab and the widgets contained in it to specific users and groups.

## **A12** SETTING UP AJERA FOR AASHTO / FAR COMPLIANCE

### **INTENDED AUDIENCE**

Accounting, Principals

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None

### **LEARNING OBJECTIVES**

1. Set up and manage Ajera for AASHTO and FAR compliance for State DOT and Federal contracting.

### **SESSION DESCRIPTION**

The purpose of this course is to educate Ajera users on how transactions are mapped (get assigned General Ledger account numbers) to the General Ledger (GL), provide a working knowledge of the Federal Acquisition Regulation (FAR) in regards to classifying and accounting for costs, and how to setup an Ajera system to be FAR compliant. Time permitting, users will further learn how to calculate and report their FAR compliant overhead rate.

## INTERMEDIATE (B COURSES)

You have mastered Ajera basics in the following areas – Accounting/Project Management functionality, Inquiry functions, Dashboards & Widget functionality, Setup procedures, Reporting options and views setup pertaining to each session. You should be comfortable with performing each of the session's Ajera tasks.

### **B3** TIPS & TRICKS TO BUILDING A DASHBOARD

#### INTENDED AUDIENCE

Everyone

#### # OF SESSION BLOCKS

Single

#### PREREQUISITES

Dashboard basics.

#### LEARNING OBJECTIVES

1. Provide additional knowledge on the use and setup of Widgets and Dashboards.
2. How to share relevant information through the use of Dashboards and Widgets.

#### SESSION DESCRIPTION

Ajera's dashboards offer unlimited capabilities for accessing your data. With so many options, the challenge is in deciding what you want your team to see. In this session, we will discuss techniques to help your firm succeed with dashboards and alerts.

### **B4 B8** MONTH-END CLOSING IN AJERA

#### INTENDED AUDIENCE

Accounting

#### # OF SESSION BLOCKS

Single (offered twice)

#### PREREQUISITES

Completion and mastery of the basic (A) Ajera classes.

#### LEARNING OBJECTIVES

1. Provide a framework for the month end closing process.
2. Provide a reconciliation methodology for the accounts and subledgers.
3. Provide a starting point for dealing with account and subledger discrepancies.

#### SESSION DESCRIPTION

This class will cover how to create a month-end close in Ajera. We will discuss the process of separating accounting periods and how to change entries without changing all prior-period Financial Statements. Reconciliation processes and account verification strategies will be presented. The use of Ajera reports and inquires will be discussed as they relate to month-end processing.

### **B5 B6** CUSTOMIZING YOUR FINANCIALS

#### INTENDED AUDIENCE

Accounting

#### # OF SESSION BLOCKS

Double

#### PREREQUISITES

Basic accounting knowledge

#### LEARNING OBJECTIVES

1. Learn how to use Financial Statement Designer to customize your financials.

#### SESSION DESCRIPTION

In this two-part training course, you will see first-hand how to build a financial statement, adding columns and rows, accumulators, and budgets. During the class, we will be creating several templates that you will be able to export and apply to your own firm. You will also learn how to organize a monthly report into groups to quickly produce many different sets of financial statements at the push of a few buttons.

### **B7 C1** NEW FEATURES IN AJERA

#### INTENDED AUDIENCE

Everyone

#### # OF SESSION BLOCKS

Single (offered twice)

#### PREREQUISITES

None

#### LEARNING OBJECTIVES

1. Provide insight into new features in Ajera.

#### SESSION DESCRIPTION

This class will cover and provide insight into new features in Ajera.

**INTENDED AUDIENCE**

Accounting

**# OF SESSION BLOCKS**

Double

**PREREQUISITES**

Basic payroll

**LEARNING OBJECTIVES**

1. The user will be able to evaluate in-sourced vs out-sourced payroll functions.
2. Understand Payroll setup and how your setup affects reporting and payroll.

**SESSION DESCRIPTION**

All aspects of payroll will be open for discussion. We will start with in-sourcing vs. out-sourcing. We will discuss setup, i.e. pays, deductions, fringes, taxes, WC, tax reporting and payments and the concept that all pays for employees flow through payroll, which will simplify your life. We will also discuss those items that should not flow through payroll. We will discuss planning and reporting, Excel versus Ajera concepts, direct deposits and in and out pays. Send in your questions early and we will incorporate them in the course materials and discussions.

**B11** **MANAGING PROSPECTS  
WITH AJERA CRM****INTENDED AUDIENCE**

Everyone

**# OF SESSION BLOCKS**

Single

**PREREQUISITES**

None

**LEARNING OBJECTIVES**

1. Provide an overview of Client Relationship Management
2. Provide an overview of relationship with Ajera database
3. Provide an overview of potential revenue and marketing activity

**SESSION DESCRIPTION**

This presentation will provide an overview of Client Relationship Management and Collaboration products, new to Ajera. Integrating these products with your Ajera setup can greatly expand your team's ability to manage customers and deliver projects. See how the integration works and find the solutions that work for your firm.

**B12** **EXCEL: ADVANCED CONCEPTS TO  
SMOOTH YOUR WORKFLOW****INTENDED AUDIENCE**

Accounting

**# OF SESSION BLOCKS**

Single

**PREREQUISITES**

Inquiry Level 1 and 2 and Advanced Widgets will be helpful. An intermediate understanding of Excel formulas could also be helpful.

**LEARNING OBJECTIVES**

1. Users will learn how to utilize Pivot tables and Excel 3D Concepts in their Financial and project invoicing and reporting.
2. How to create and manipulate templates to make more dynamic spreadsheets.
3. Attendees will utilize Ajera inquiry and widgets to extract information from the SQL Databases of Ajera.

**SESSION DESCRIPTION**

This course will be an advanced exploration of Pivot tables and Excel 3D capabilities. The class will demonstrate several data extraction methods from Ajera. The class will focus more on what to do with the data after it is in Excel and creation of Project information reports and demonstrate an efficient method of summarizing like financial and project information. The class will include discussion of real life situations, hands on application and the utilization of Excel to create the Ad Hoc reporting that you require. The discussion will continue with how your choices in the setup screens affect the data that is passed to the invoice formats. In the second part of the class we will open the custom invoice designer and discuss the basics. Exercises will cover making common changes to invoice formats, and the pro and cons of custom invoice formats.

## ADVANCED (C COURSES)

You have been using Ajera for at least 2 years, actively utilizing the discussed functions, and are seeking to discuss the session's advanced techniques. You are looking to enhance Ajera's capabilities to provide the information your company needs. You modify dashboards and widgets and desire to move your widgets, reporting and accounting capabilities to the next level.

### **C2** AJERA TIPS, TRICKS, AND MINI TOPICS

#### INTENDED AUDIENCE

Accounting

#### # OF SESSION BLOCKS

Single

#### PREREQUISITES

Exposure to and use of Ajera for at least one year.

#### LEARNING OBJECTIVES

1. Learn new and efficient (or alternative) methods to implement Ajera solutions.

#### SESSION DESCRIPTION

Call it a Post Conversion follow-up class on "steroids". During your conversion process, so much material and new concepts were introduced there is a high degree of probability you did not absorb it all or completely. This class is designed for users of Ajera for one year or longer. We will move through best practices, tips, tricks, and other workflow improvements at a brisk pace. The goal is to expose current users to as many workflow improvements as possible in the 100-minute session. Questions and lively discussions are encouraged.

### **C3** ADVANCED SQL **C4** FORMULA MADNESS

#### INTENDED AUDIENCE

Accounting

#### # OF SESSION BLOCKS

Double

#### PREREQUISITES

Inquiry Level 1, Dashboards, Widgets, and prior experience with formulas in Ajera and advanced formulas in Excel.

#### LEARNING OBJECTIVES

1. Ajera uses 3 different formula building tools in the Inquiry, Widgets, and Invoicing modules.
2. The attendee will be able to construct SQL formulas to add additional information to your design and control the flow of information in Ajera Reporting Tools.
3. The attendee will create and utilize advanced formulas in the various modules.
4. The attendee will take additional tools with them in the form of inquiries and invoice formulas and formatting and the knowledge of tools and websites that will provide additional support.

#### SESSION DESCRIPTION

Let's discuss formulas that you need and can use. Ajera provides access to fields that you can use, but Inquiry, Invoice designer, and Widgets provide a different interface for each application. We will discuss how to get to the field that you need and teach some SQL Query tools that will enable you to obtain the information you need for your reporting purpose. We will discuss advanced formulas for Inquiry, Invoice designer, dashboards, and widgets. The SQL functionality is similar in these applications. The session includes hands-on computer usage. Please, send in some of your formula issues, so we can plan to discuss them during the session. We will actively work on the issues as examples and have an active Q&A session. Email discussion points to [gmayer@forsgren.com](mailto:gmayer@forsgren.com).

## **C5 C6** ADVANCED INQUIRY & WIDGETS 1

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

Beginning and Intermediate Widgets, and at least 3 months of experience using the Widget and Inquiry Designer. SQL commands exposure could be helpful.

### **LEARNING OBJECTIVES**

1. Learn about best practices in relation to Widgets and Inquiries.
2. Learn the strengths and weaknesses of Widgets and Inquiries.
3. Gain an Understanding of Widget and Inquiry Bases
4. Learn how to tap into unpublished fields and formulas using SQL commands.

### **SESSION DESCRIPTION**

This will be a fast paced course covering a lot of material. It is not recommended that you take this if you are taking beginning and intermediate during the current conference unless you are familiar with other querying/ Business Intelligence tools. The courseware assumes the user can perform basic widget functions without instruction.

## **C7 C8** CLIENT INVOICE DESIGNER

### **INTENDED AUDIENCE**

Accounting

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

None. Exposure to and use of the standard invoice configuration Utility is helpful.

### **LEARNING OBJECTIVES**

1. Users will learn how the settings in the invoice configuration screens communicate with the stored procedures that generate data used by the invoice formats.
2. Users will learn the benefits and draw backs of using custom invoice formats.
3. Users will learn the basics of the client invoice designer.

### **SESSION DESCRIPTION**

This course will venture beyond of the basics of making custom selections in the Invoice Format setup screens. The first half of the class will focus on the how Ajera "communicates" with invoice formats. Next we will discuss how choices in the setup screens affect the data passed to the invoice formats. In the second part of the class we will look at the basics of the custom invoice designer. Exercises will cover making common changes to invoice formats, and the evaluation of custom invoice formats.

## **C9** CONSULTANT MANAGEMENT

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None.

### **LEARNING OBJECTIVES**

1. Provide an overview of consultant resources
2. Provide an overview of using commitments with Vendor Invoices
3. Provide an overview of Pay when Paid Reporting

### **SESSION DESCRIPTION**

This presentation will provide an overview of sub consultant resource budgeting for managing consultant commitments. This can allow you to track who has invoiced your firm, the committed budget, when you have invoiced your client and most importantly, when you can pay the consultant. There are opportunities to give these tools to your project managers as well. In addition, understanding the Pay When Paid report and using both tools together will give your firm insights into the sub consultants and your firm's committed value.



## **C10** THE COLORS OF AJERA

### **INTENDED AUDIENCE**

Accounting

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None.

### **LEARNING OBJECTIVES**

1. Discuss the Work Breakdown Structure (WBS) that Ajera Supports
2. Hierarchy & Rollup
3. Viewing the Project - Internally vs Externally
4. Gotcha's

### **SESSION DESCRIPTION**

In the Command Center various colors of the work breakdown structure can be seen. They change from project to project. Sub-phasing can exist. Sometimes sub-phasing produces an invoice one way and another time my invoice looks different. If your understanding of this dynamic is less than solid or you feel there might be a better way, then attend this class.

## **C11 C12** ADVANCED INQUIRY & WIDGETS 2

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

Advanced Widgets 1 and at least three months of experience using the Widget and inquiry Designer. Prior exposure to SQL commands is helpful but not necessary. This session assumes the user knows how to perform basic widget design without instruction.

### **LEARNING OBJECTIVES**

1. Advance the students' knowledge of SQL formulas and SQL commands to tap into non-standard functionality and information within the Ajera database.
2. Learn how to create a formula library and create central repositories within Ajera that can be used in multiple Widgets and Inquires.

### **SESSION DESCRIPTION**

This will be a fast paced course covering a lot of material. It is not recommended that you take this if you are taking beginning and intermediate during the current conference unless you are familiar with other querying/ Business Intelligence tools. The courseware assumes the user can perform basic widget functions without instruction. The main focus of the class will be harvesting data directly from the Ajera database using SQL commands. Beyond the box is the goal and focus. This class is 100% SQL.

## **ACCOUNTING AND PROJECT MANAGERS (D COURSES)**

Your Ajera use is more focused on project costs, managing budgets, and balancing resources.

## **D1** WHAT'S UP WITH PROJECT PROFITABILITY?

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

None.

### **LEARNING OBJECTIVES**

1. Understand project profitability as defined by standard Ajera reports and functionality.
2. Gain an understanding of the challenges in defining project profitability.
3. Educate Ajera users about alternative methods of measuring the financial success of a project due to the challenges surrounding project profitability.

### **SESSION DESCRIPTION**

The goal of this session is to educate Ajera users about the subject of project profitability. After attending this session, users will understand that project profitability as defined by standard Ajera reports and functionality is not without challenges and pit falls. As a result, alternative processes and project profitability metrics will be discussed. It is the intent of the instructor to educate Ajera users on the subject so they can best determine which method(s) best fits their firm's business practices and culture. This should enable users to break free of traditional methods in the event traditional methods prove to be ineffective.

## **D2 D3** RESOURCE BUDGETING & SCHEDULE MANAGER

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

Strong interest in Project Manager interaction with the management of hours (and dollars where warranted).

### **LEARNING OBJECTIVES**

1. Discuss project creation within Ajera and where their role comes into play during the project lifecycle.
2. The practical use of Project Templates and their benefits.
3. Review Ajera workflow for initial project creation. This will conclude with a discussion on phases and forms they take.
4. Budgeting of projects and utilize resource management within Ajera for allocating all hours (fees) to those projects.
5. Answer the age-old question, what is the perfect level of micro-management?
6. Have the ability to schedule out the tasks/resources/phases/projects on your roster to completion.
7. PM driven project and employee hour (and/or) dollar management within Ajera's Schedule Manager.
8. Displaying Employee and Project scheduled hours and potentially dollars via Ajera's Dashboard reporting.

### **SESSION DESCRIPTION**

This two-part session will provide insight into Ajera's capabilities for tracking employee man power and how it affects your individual project performance.

## **D4 D5** PROJECT MANAGER & PRINCIPAL DASHBOARDS

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Single

### **PREREQUISITES**

Basic understanding of Ajera and Dashboards / Widgets.

### **LEARNING OBJECTIVES**

1. Best practices for dashboard setup and rollout.
2. Real time reporting – what makes it work?
3. Review of widget and dashboard terminology, function, and security.
4. Demonstration of "go-to" dashboards by role.
5. Easy modifications of "out of the box" dashboards to add value.

### **SESSION DESCRIPTION**

This session will provide insight to the best practices use of dashboards and widgets. Real Time Reporting in a fast-paced A/E environment is an invaluable tool to aid your Project Management team and to drive your profits to new highs. After completing this session users will be able to leverage their real-time widget reporting to maximize efficiency and profitability.

## **D5 D6** STREAMLINING BILLING WORKFLOW THE NEXT LEVEL

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

A basic knowledge of Ajera and Inquiry is helpful, but not required.

### **LEARNING OBJECTIVES**

1. Best practices for dashboard setup and rollout.
2. Real time reporting – what makes it work?
3. Review of widget and dashboard terminology, function, and security.
4. Demonstration of "go-to" dashboards by role.
5. Modifications of "out of the box" dashboards to add value.

### **SESSION DESCRIPTION**

In this hands-on session we will explore the traditional and paperless methods of billing workflow. You will learn how to utilize multiple features in Ajera to facilitate the information flow to\from Principals or Project Managers to Accounting and back to create accurate and timely invoices.

## **D7 D8** MAXIMIZING BUSINESS DEVELOPMENT

### **INTENDED AUDIENCE**

Everyone

### **# OF SESSION BLOCKS**

Double

### **PREREQUISITES**

A basic knowledge of a standard marketing processes and Ajera project set up.

### **LEARNING OBJECTIVES**

1. Set up Business Development.
2. Set up a BD project.
3. Update and track a BD project to manage your BD efforts.
4. Use reports and inquires to analyze your BD efforts.

### **SESSION DESCRIPTION**

This two-part session will provide insight to the complete solution for tracking, managing and integrating business development efforts within your firm. It will also help you put what you learn back into action when you return to the office. Items covered include: 1) Tracking opportunities through the various business development stages, 2) Forecast future project workloads, 3) Analyze marketing investment and performance, 4) Manage the Business Development process throughout the firm with Tasks, and 5) Displaying key Business Development information using Ajera's Dashboard reporting.

## **D9 - D12** PROJECT MANAGERS' WORKSHOP

### **INTENDED AUDIENCE**

Project Managers, Principals

### **# OF SESSION BLOCKS**

All Day

### **PREREQUISITES**

A working knowledge of Ajera.

### **LEARNING OBJECTIVES**

1. Become an Active PM throughout the Project Lifecycle.
2. Customize the Project Command Center.
3. Set up project templates (Top-down & Bottom-up).
4. Set up projects using templates.
5. Assign both internal and external resources.
6. Manage these resources.
7. Set up and use Schedule Manager
8. Review projects for billing.
9. Create invoices.
10. Create Widgets (in-class examples throughout the workshop).
11. Review Ajera Complete standard reports.

### **SESSION DESCRIPTION**

This class is intended for, but not limited to, project managers and is led by an accounting professional and a Deltek Project Management Consulting Manager. Accounting professionals may find this workshop helpful to develop their own training program for their project managers. A working knowledge of Ajera would be extremely helpful as this class is very hands-on. Class participants will learn how to create and utilize widgets using Ajera 8 that provide valuable information and links specific to project managers. We will learn to customize Ajera views so that project managers are only viewing the information they need to better manage projects. Participants will then learn best practices on how to set up projects, create project budgets, and allocate resources. We will use Schedule Manager to schedule employee hours for a project we create in class. This will enable us to compare the scheduled hours with the budgeted hours and analyze employee workload. Finally, the participants will learn how to utilize various reports available in Ajera and how to build a custom Inquiry report or two. After completing this course, attendees will be better equipped to use the many tools available in Ajera to effectively manage projects and will be able to train others.

Stay tuned at the conference for a fresh new AUA look as we continue to build the bridge between software and user in the future.



IS BECOMING...



**STAY TUNED!**

A new association look will be unveiled at the conference...

