Deltek PIM (Cloud) Integration Data Sheet

19 June 2023

Summary

This document covers the key details of the integration between Deltek PIM and Flo10, including the standard data mapping from Deltek PIM to Flo10. As Standard, data flow is one directional, data can be pulled into Flo10 from Deltek PIM but cannot be pushed into Deltek PIM.

Please note this only applies to systems hosted on the Deltek cloud as a direct connection to the database is not available.

Integration

User Accounts and Roles

User accounts in Flo10 will be synchronised with Deltek. All new user accounts must first exist or be created in Deltek. We expect users to sign-on using Microsoft Authentication (OAuth).

Please note that Flo10 will not inherit any user roles (such as admin rights) from Deltek. Rights specific to Flo10 are allocated in the Flo10 admin pages.

Accounts will only be maintained for current Deltek users. User accounts that are no longer current in Deltek will automatically be deactivated as Flo10 users.

Data Synchronization

Flo10 will retrieve data via the Deltek PIM API. There will usually be a delay of up to 30 minutes for any new or amended data to be reflected in Flo10.

Default Data Mapping

We will bring the following data across from your Deltek database for display in Flo10 by default. If you need to change which fields are displayed, please speak to your Flo10 project manager or implementation engineer.

These fields will be read only in Flo10 and can only be updated in Deltek.

We can augment this information with additional Flo10 specific fields on request. Please speak to your Flo10 project manager to discuss your requirements.

Staff

Data

We will pull the following Staff details from Deltek into Flo10 for current staff only (see below):

Deltek (Contact)	Mapped in Flo10
Forename	Forename (Name)
Surname	Surname (Name)
Job_Title	Job Title
Email	Email
Direct Dial	Direct Dial
Extension	Extension
Mobile	Mobile

Current staff are defined as those users in Deltek with an active license.

Staff photographs will need to be uploaded directly into Flo10 against each staff record.

Filters

The following data will also be used as filters in the Staff Directory by default:

- Department
- Branch
- Job Category

Projects

Data

Deltek Projects will automatically be created within Flo10. We will pull the following Project details from Deltek into Flo10:

Deltek (Project)	Mapped in Flo10
Project_Code	Job Number
Name	Name
Description	Description
Region_ID	Region
Project_Category_ID	Category
Project_Status_ID	Status
Approx_Value	Contract Value
Fee_Value	Fee Value
Created_Date	Created Date
Start_Date	Start Date
Planned_Completion_Date	Planned Completion
Completion_Date	Completion Date
End_of_Defects_Date	End of defects date

The following data will also be used as filters in the Project Gallery by default:

- Status
- Category
- Classification (this will require configuration by Flo10)

Flo10 can configure the creation of Tracker tasks based on Classification or Project Stage information from Deltek. Please speak to your Flo10 project manager or implementation engineer.