

Deltek PIM (On Premise) Integration Data Sheet

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Summary

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

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

Integration

User Accounts and Roles

User accounts should be maintained within Deltek. Flo10 can use the user accounts from Deltek and by default all Deltek users will have access to all public areas within Flo10.

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 User accounts that are no longer current in Deltek will automatically be deactivated as Flo10 users.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 directly from Deltek PIM databases. Some data is immediately available such as Projects, other data may need to be processed by a background task and therefore will be some latency.

Accessibility

Flo10 can be embedded into Deltek. Deltek users can access Flo10 from the top-level menu on the Deltek home page.

If Flo10 Tracker is enabled, Flo10 Tracker can be accessed as a tab on the Deltek project pages.

If Flo10 Map is enabled, project postcodes are automatically used to locate the project on the Flo10 Map.

Links to Flo10 pages, such as reports, can also be added to the Deltek Activity Zone.

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 from Deltek will automatically be synchronised with their account in Flo10.

If you use OpenAsset to manage your staff photographs, please speak to your Flo10 project manager about linking them in Flo10.

It is also possible to upload staff photographs directly into Flo10 against each staff record. Please note that it is not possible to combine uploading staff photos into Flo10 with the above methods, and staff photos uploaded into Flo10 will not appear in Deltek.

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.