

Deltek PIM - DLZ Starter Guide



Asset Name	Description	Role
PIM Absence Administration - Starter Guide	<p>In this starter guide, you will set up and maintain the administrative functions of employee absence such as setting up entitlement for new starters and managing employee entitlement for the year ahead.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, configure working week schemes, approval route, notification group, 2016, 2017, 19, reporting, accounting, highlevel report, union square, workspace, leave, holiday, pto, next year, following year, carry over, lieu, starter guide, clickguide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Absence - Starter Guide	<p>In this starter guide, you will learn how to view and book absence in either hours or days. This course also offers optional content on how to approve absence.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, 2016, 2017, 19, union square, workspace, daily entitlement, leave, holiday, pto, contact record, approve, approvals, dashpart, request, matrix, approval route, video, accrual, rates, starter guide, clickguide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Outlook Add In - Starter Guide	<p>In this starter guide, you can make the most out of the Outlook Add-In with your integrated system. Learn how to use the Outlook Add-In to save emails that you send and receive, into the Document Management System as well as setting up your mobile phone to publish emails.</p> <p>[Keywords and Related Searches - elearning, online learning, training, union square, email management, integration, ajera, vision, vantagepoint, publish, starter guide, clickguide, functional training, basic]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Document Management - Starter Guide	<p>In this starter guide, you will learn how to use the powerful search features in the Document Management System to find documents and emails, and how to use the Working Files Dashpart to save and edit documents.</p> <p>[Keywords and Related Searches - clickguide, starter guide, functional training, basic, elearning, online learning, training, union square, workspace, dms, information zone, document store, publish, bulk check in, check out, clone, replace, download, recycle, version, document pools, find, filter, view, categories, preview, bulk edit properties, upload large files, 2gb, edit multiple documents, template, 19]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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PIM Fundamentals - Starter Guide	<p>In this starter guide, you will learn about the various zones in PIM, as well as learn about dashparts on the Personal Zone and how to use them. You will learn how to add new contacts and organisations from the Activity Zone, and how to find, view, and edit those record types.</p> <p>[Keywords and Related Searches - elearning, online learning, training, union square, workspace, fundamentals, information zone, dashboard, contact, quick find, advanced search, edit, 2017, 19, starter guide, clickguide, functional training, basic]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Time and Expense - Starter Guide	<p>In this starter guide, you will learn how to enter time and claim expenses via the Timesheets Dashpart.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, project, enquiry, overtime, workstages, resource plan, mobile timesheets, ios, android, 2017, 19, starter guide, clickguide, functional training, basic]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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PIM Time and Expense Administration - Starter Guide	<p>In this starter guide for administrators, you will learn how to enter time and claim expenses via the Timesheets Dashpart.</p> <p>[Keywords and Related Searches - union square, usq, 2017, workspace, admin, project accounting, finance, period, week, starter guide, clickguide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Document Lifecycle Manager - Starter Guide	<p>In this starter guide, you will learn how to create and manage place holders, add renditions into the Document Lifecycle Manager, and issue them via email, download, electronic media, or hardcopy.</p> <p>[Keywords and Related Searches - elearning, online learning, training, union square, dlm, workspace, place holders, renditions, revisions, drawings, registers, reports, architect, architectural assistant, design and build, revit, register, sync, synchronise, model file, drawings, autocad, network share, jargon buster, video, document control, issuing, drawing, placeholder, 2017, 19, clickguide, starter guide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Project Accounting - Starter Guide	<p>In this starter guide, you will learn the project accounting tools available, forecasting, invoicing, ledger connector, project set up and purchasing.</p> <p>[Keywords and Related Searches - elearning, online learning, training, union square, utilise pa landing page, adjust cost transactions, reporting of data, manage rate, 2015, 2017, v19, 2019, sales payments, set up, approval, sales document, purchase invoice, configure, invoice line, cost effect band, clickguide, functional training, basic, starter guide]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Contract Management - Starter Guide	<p>In this starter guide you will learn about Contract Management as a system for managing many types of contractual communications, such as RFIs, instructions, change orders, variations or valuations, etc.</p> <p>[Keywords and Related Searches - elearning, online learning, training, union square, workspace, request for information, instructions, video, cm, approval, rasterex, 2017, 19, starter guide, clickguide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Sub Contractor Tendering - Starter Guide	<p>In this starter guide, you will learn how to create work packages, issue the tender, and update PIM with the responses within the Sub Contractor Tendering (SCT) module.</p> <p>[Keywords and Related Searches - 2017, self paced, elearning, online learning, training, union square, workspace, bid, starter guide, functional training, basic, clickguide]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Marketing Campaigns - Starter Guide	<p>In this starter guide, you will find HTML template tips when using them in the Document Management System to be used within campaigns.</p> <p>[Keywords and Related Searches - union square, usq, workspace, crm, sending a campaign, clickguide, functional training, basic, starter guide]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
PIM Milestones - Starter Guide	This starter guide covers how to update, track and complete key milestone dates on records such as projects. [Keywords and Related Searches - union square, 2016, 2017, workspace, completing milestones, entity events, notes, dates, re-occur, applicable, complete, band, dashpart, planned completion dates, starter guide, basic, functional training, starter guide]	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Milestones Administration - Starter Guide	This starter guide covers how to set up new milestones, link them to classifications and apply security permissions. This guide is only applicable to those with Administrator rights. [Keywords and Related Searches - union square, 2016, 2017, workspace, milestones setup, entity events, admin zone, setup, security, user roles, view, edit, classifications, adding a new milestone, starter guide, functional training, basic, clickguide]	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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PIM Performance Rating View and Enter Ratings - Starter Guide	<p>This starter guide covers how to find and view ratings being held for organisations within your PIM System. It also helps you understand the information to make the most of your data.</p> <p>[Keywords and Related Searches - union square, workspace, ratings, how to view organisation ratings, organisation ratings, performance ratings, how to view performance ratings, rating scheme, classification, workspace, completing milestones, entity events, notes, dates, re-occur, applicable, complete, band, dashpart, planned completion dates, starter guide, functional training, basic, clickguide]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Business Intelligence Set Up - Starter Guide	<p>In this starter guide, you will learn how to create reports using the Business Intelligence tool.</p> <p>[Keywords and Related Searches - elearning, online learning, training, create a bi report, dashboard, union square, workspace, video, admin, administration, business intelligence, set up, reporting, accounting, highlevel report, overview, 2017, 19, starter guide, clickguide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Custom Forms - Starter Guide	<p>This starter guide tackles customisable elements that you can use to create your base master template for the Custom Form Builder.</p> <p>[Keywords and Related Searches - union square, usq, 18.1, workpsace, deploy, deployment, generate, starter guide, functional training, basic, clickguide]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Mobile Working - Starter Guide	<p>In this starter guide, you will learn how to use the Mobile Working App and the main features within the main PIM System.</p> <p>[Keywords and Related Searches - mobile, mobile app, union square, usq, 19, 2019, reporting, defect, snagging, punch lists, on site, site manager, photo, starter guide, functional training, basic, clickguide]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Security Course - Starter Guide	<p>This starter guide is for those tasked with managing user licences and security permissions in PIM. You will learn how to assign licences to new users, apply security permissions to zones, dashparts, bands and document pools, create new document pools and set pool requirements.</p> <p>[Keywords and Related Searches - elearning, online learning, training, union square, workspace, admin, trusted, partner, user roles, entity records, dms, security provider, contact role, employee, video, deltek learning lab, dll, sandpit, clickguide, starter guide, functional training, basic]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Training Planning - Portal	<p>Use this portal if you are the user who has ownership of PIM Training within your organisation. This portal contains supporting materials and templates to help you plan, communicate and support your colleagues during their training.</p> <p>[Keywords and Related Searches - Training, Training Management, Help, Learning, e-learning, supporting materials, online learning, PIM, union square, USQ]</p>	HR Specialist,Super User,System Administrator,Business/Office Manager
PIM Powered by Union Square 2015 Portal	<p>This portal provides a searchable list of videos and webinar recordings for the 2016 release of Union Square. This also includes access to the self-paced Security Course.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, union square, workspace, usq, fundamentals, enquiry records, project, document management, dms, email, absence, outlook add-in, dlm, document lifecycle manager, finance, project accounting, pa, 2016, 2015]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Mobile Working Custom Form Builder (v19.2) - Portal	<p>This course will allow you to learn about using Mobile Custom Form Builder from both the Mobile App and PIM. You will learn about managing custom forms, editing settings and the reporting available within the Global Custom Form Reporting features.</p> <p>[Keywords and Related Searches - union square, usq, 19, 2019, 19.2, Mobile, app, report, reporting, defect data, customise, managing defect, snagging, punch list, dashpart]</p>	Super User,Project Manager,Estimator,Quantity Surveyor,Site Manager
PIM Email Management Quick Start Series: Document Management (v2017.7 onwards) - Clickguide	<p>Find out how you can make the most out of the PIM Document Management System with your Integrated ERP system. Learn how to use the powerful search features in the DMS to find published emails quickly and easily.</p> <p>[Keywords and Related Searches - union square, 2017, integration, ajera, vision, vantagepoint, view, email]</p>	System Administrator,End User
PIM Email Management Quick Start Series: Fundamentals (v2017.7 onwards) - Clickguide	<p>New to PIM? Learn how to navigate your integrated system and the various zones within PIM, as well as learn how to use dashparts and customise your personal zone and find records housed within your system.</p> <p>[Keywords and Related Searches - 2017, union square, integration, ajera, vision, vantagepoint, getting started, new user]</p>	System Administrator,End User

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<p>PIM Document Management Series: Effective Document Searching (v2016/17) - Virtual Live Class</p>	<p>In this 1-hour course, you will see a more in-depth demonstration of document searching, as well as best practices and troubleshooting tips. This course is useful for advanced users or those who wish to improve their document searching skills.</p> <p>[Keywords and Related Topics: 2016, 2017, union square, workspace, dms, document management system, information zone, find documents, search, filter, document pools, instructor led class, training, utilising suggestions, create text searches, vlc]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM DLM Revit & AutoCAD Integrations (v2017) - Self-Paced Learning</p>	<p>In this 30-minute course, you will learn how to manage Revit sheets in conjunction with the Document Lifecycle Manager, synchronise content between Revit and DLM, and create renditions for the sheets. You will learn how to link AutoCAD files to placeholders and ensure that the DLM records match the title block information. Prerequisites: Document Lifecycle Manager (v2017).</p> <p>[Keywords and Related searches - self paced, elearning, online learning, training, union square, dlm integrator, integration status, parameters and sets, results, details, revise sheets, assign rendition, video, 2017, 19]</p>	<p>Super User,Project Manager,Document Controller,Quality Manager,Quantity Surveyor,Site Manager,Project Architect/Engineer/Technician</p>
<p>PIM Document Management: Version Control in the DMS - Virtual Live Class</p>	<p>Learn how to manage Documents and their versions effectively within the Document Management System. During this course we will look at the various different features which make use of the powerful version control functionality.</p>	

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PIM Fundamentals: Getting Started (v2016 onwards) - Virtual Live Class	Join us on this interactive class to gain a better understanding of Document Security. Learn how to create new Document Pools, define appropriate requirements on Pools which control the types of records they appear in, and set up security permissions. Duration: 1 hour.	
PIM Security Series: Document Pool Security (v2017 onwards) - Virtual Live Class	<p>In this 1-hour course, you will gain a better understanding of Document Security, as well as learn how to create a new Document Pool, define appropriate requirements on Pools which control types of records it appears in, and setup security permissions. This course is part of the PIM Security Series.</p> <p>[Keywords and Related Topics: 2017, 19.0, union square, workspace, admin zone, dms, document security, categories, pool requirements, requirements, security provider, entity, contact role, employee, instructor led class, training, test document pool, manage document pool requirements]</p>	Super User, System Administrator
PIM Security Series: User Licence Management and Security (v2017 - v19.0) - Virtual Live Class	<p>In this 1-hour course, you will gain a better understanding of PIM administrative setup such as User License Management, setting up security permissions for the Personal Zone, Dashparts, Activity Zone Menu items, and records such as Contacts, Organisations and Projects. This course is part of the PIM Security Series.</p> <p>[Keywords and Related Searches - 2017, 19.0, union square, workspace, admin zone, licence, trusted, partner, mobile, user role, bands, entity records, instructor led class, training, assign a license, remove license, manage user role memberships, utilize available reporting, test security]</p>	Super User, System Administrator

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PIM Fundamentals Common Dashparts - Infographic	<p>This covers information about Dashparts, how they work, and how they will help you search and organize information.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, 2017, union square, usq, workspace, refresh, expand, working files, internal phone list, phonebook, phone book, favourite, hard copy scanner, intray, in-tray, in tray, fundamentals, dashpart, personal zone, desktop, quick entity search]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Document Management Series: How to Search for Documents in the DMS (v2017) - Infographic	<p>This covers the most effective route to finding published documents quickly and easily in the Document Management System. This is part of the PIM Document Management Series. Prerequisite: PIM Fundamentals (v2016) or (v2017).</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, 2016, 2017, union square, usq, workspace, dms, working files, information zone, how to find documents in the dms, search documents, filter by text searching]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Defect Management SSRS Reporting - Infographic	<p>This covers the Defect Management Project Band and the changes which have been made in PIM v19.1. The content in this guide relates to those users who have SQL Server Reporting Services (SSRS) installed and configured for use.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, 2017, union square, usq, workspace, v19.1, v19.1, 2019, sql, snagging, punch lists, snag management, mobile working, search and filter, select results, generate reports]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Fundamentals Supersede & Reinstate a Contact - Infographic	<p>This covers how to supersede (archive) a contact record when that person has left the organisation. If they return then you can reinstate them at any time.</p> <p>[Keywords and Related Topics: 2016, 2017, pim, union square, workspace, fundamentals, contact, organisation, left on, add external contact wizard]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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<p>PIM Document Management Series: How to Search for Emails in the DMS (v2017) - Infographic</p>	<p>This covers the most effective route to finding published Emails quickly and using the Document Management System. Duration: Self-Paced. This is part of the PIM Document Management Series. Prerequisites: PIM Fundamentals (v2016) or (v2017).</p> <p>[Keywords and Related Topics: 2016, 2017, print out, cheat sheet, quick reference, union square, workspace, dms, document management system, working files, how to find emails, information zone, search emails]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Project Accounting How to Correct an Invoice - Infographic</p>	<p>This covers how you can correct invoices and raise credit notes. This is part of the PIM Project Accounting Series. Prerequisite: PIM Back End Finance Processes - Self-Paced Learning.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq, workspace, pa, project accounting, finance, invoicing, troubleshooting, credit notes]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Project Accounting How to Resolve Missing Time when Invoicing - Infographic	<p>This covers how to troubleshoot if you are missing submitted time when invoicing. This is part of the PIM Project Accounting Series. Prerequisite: PIM Back End Finance Processes - Self Paced Learning.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq, workspace, pa, project accounting, time, draft invoice, materials, rejected time on invoices, workstage charge methods, unapproved time, adjusting transactions]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Document Management Jargon Buster Infographic	<p>This covers the terms used in the Document Management System (DMS).</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq, workspace, jargon buster, 2015, 2016, 2017, information zone, check in, bulk check in, check out, clone, document pools, categories, attributes, parent pool, child pool, meta data]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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<p>PIM Performance Rating Series: How to View Ratings (v2016 & 2017) - Infographic</p>	<p>This covers how to find and view ratings being held for organisations within your PIM System. This guide helps you understand the information to make the most of your data. This is part of the PIM Performance Rating Series.</p> <p>[Keywords and Related Topics: 2016, 2017, print out, cheat sheet, quick reference, union square, workspace, ratings, how to view organisation ratings, organisation ratings, performance ratings, how to view performance ratings, rating scheme, classification]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Project Accounting How to use the Invoice, Costs and Profits Chart (v19.1) - Infographic</p>	<p>This covers how to use the Invoice, Costs and Profits Chart which has been changed in the v19.1 release of PIM. Learn about the different filters and the changes made in downloading your data.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq, v19.1, 2019, 19, 19.1, project accounting, pa, how to use the invoice costs and profits chart, high charts, charting, reporting, pa reporting, using chart filters, enabling or disabling filters, downloading the data]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Project Accounting How to use the Fee from Resource feature (v19.1) - Infographic	<p>This covers how to use the Invoice, Costs and Profits Chart which has been changed in the v19.1 release of PIM. Learn about the different filters and the changes made in downloading your data.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq, 19, 19.1, 2019, project accounting, pa, fee from resource, fast fill controls, how to use fast fill, how to use resource planning, resourcing, workstage level]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Fundamentals Jargon Buster - Infographic	<p>This covers the terms used in the Fundamentals features of PIM.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, jargon buster, 2015, 2016, 2017, workspace, band, entity, band set, branch, fundamentals, learning zone, contact, organisation, project, dashpart, personal zone, zones, desktop]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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<p>PIM Performance Rating Series: How to Enter Ratings (v2016 & 2017) - Infographic</p>	<p>This covers how to enter a rating to find out how well an organisation is doing in general or in relation to a project, helping you make informed decisions. This is part of the PIM Performance Rating Series.</p> <p>[Keywords and Related Topics: v2017, 2016, print out, cheat sheet, quick reference, union square, workspace, enter a rating, ratings, performance ratings, performance, how to add a performance rating, how to add performance ratings]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Populating & Completing Milestones (v2016 & 2017) - Infographic</p>	<p>This covers how to update, track and complete key milestone dates on records such as projects. Prerequisite: PIM Fundamentals (v2016) or (v2017).</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, 2016, 2017, workspace, completing milestones, entity events, notes, dates, re-occur, applicable, complete, band, dashpart, planned completion dates]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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PIM Fundamentals Activity Zone Searches Tips - Infographic	This covers the search framework within PIM and provides tips on how to effectively design your search to get the best results. [Keywords and Related Topics: print out, cheat sheet, quick reference, union square, workspace, searching, how to search, find, search framework, advanced search, searches, using saved searches]	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Security Series: Creating a Test User (v19.1) - Infographic	This covers how to set up a test user within PIM and assign a license. This is part of the PIM Security Series. [Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq, 19, 19.1, 2019, how to create a test user, assign a license, test user license, free license, setting up pim security, user and license management, create contact record]	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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Asset Name	Description	Role
<p>PIM Milestones Administration (v2016 & 2017) - Infographic</p>	<p>This covers how to set up new milestones, link them to classifications and apply security permissions. This guide is only applicable to those with Administrator rights. Prerequisites: PIM Fundamentals (v2016) or (v2017) and PIM Populate and Complete Milestones (v2016) or (v2017).</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, 2016, 2017, workspace, milestones setup, entity events, admin zone, setup, security, user roles, view, edit, classifications, adding a new milestone]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Admin How to Merge and Delete Organisation Records - Infographic</p>	<p>This covers how to merge organisation records within PIM in order to remove duplicated or mistakenly created records. It is recommended you go through PIM Fundamentals for more details about organisation records.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, workspace, organisation records, how to delete an organization, how to merge duplicate organisations]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Security Series: Creating a PIM User (v19.1) - Infographic</p>	<p>This covers how to set up a new internal user within PIM and assign them a trusted license. This is part of the PIM Security Series.</p> <p>[Keywords and Related Topics: print out, cheat sheet, quick reference, union square, usq,19, 19.1, 2019, how to create a pim user, internal user, assign a license, trusted license, partner license, setting up pim security, user and license management, creating a contact record]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Mobile Working: Mobile App Minimum Device Requirements (v2017) - Infographic</p>	<p>Use this guide for iOS and Android mobile app minimum device requirements to view PIM training.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, version, release, ios, android, app, requirement, iphone, tablet, version, upgrade, personal zone, activity zone, training, support, case, customer care]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Admin How to Merge and Delete Contact Records - Infographic</p>	<p>This covers how to merge Contact records within PIM in order to remove duplicated or mistakenly created records. It is recommended you go through PIM Fundamentals for more details about Contact records.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, workspace, how to delete a contact]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Set up and Publish Mobile Emails (v2016 & 2017) - Infographic</p>	<p>This covers how to set up the Mobile Publish feature on your phone so you can publish incoming emails on the go. This is a useful tool if you are out of the office often with limited access to your computer.</p> <p>[Keywords and Related Searches - 2016, v2017, print out, cheat sheet, quick reference, union square, workspace, outlook add in, email folder, set up, device]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Campaigns HTML Templates Tips (v2017) - Infographic</p>	<p>This covers where to find HTML Merge fields for use in your HTML Template and how to save your HTML Template into the Document Management System to be used within Campaigns. Prerequisites: PIM Marketing Campaigns (v2016 and 2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, workspace, usq, crm, tip]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Search PIM Emails in Outlook (v2016 & 2017) - Infographic</p>	<p>This is to guide you through the most effective route to finding published emails quickly and easily when in Outlook. Prerequisite: PIM Fundamentals (v2016) or (v2017).</p> <p>[Keywords and Related Searches - 2016, print out, cheat sheet, quick reference, union square, usq, workspace, outlook add in, mobile, search, find, filter, dms, document management system, view, send, recipient]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Time and Expense Admin Series: Timesheet Period Admin (v2017) - Infographic</p>	<p>If you are a Timesheet Administrator for your PIM System, you can use this guide to learn how to Split Timesheet Periods and add new Timesheet Periods to correspond with a financial month. Prerequisite: PIM Time and Expense (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, admin, project accounting, finance, period, week]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Sync Outlook with Contacts - Infographic</p>	<p>This will show you how to synchronise PIM contacts you are associated with to your Outlook Contacts. This can be helpful when you are out of the office and need contact information on your phone.</p> <p>[Keywords and Related Searches -print out, cheat sheet, quick reference, union square, usq, 2017, workspace, outlook add in, mobile, device]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Time and Expense Admin Series: Timesheet User Set Up (v2017) - Infographic</p>	<p>If you are a Timesheet Administrator for your PIM System, you can use this guide to help you set up the Timesheet Options for new users before they log into PIM allowing them to submit their Timesheets. Prerequisite: PIM Time and Expense (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, admin, new user, starter, first login, contact, project accounting, finance, grade, approval route, delegate]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Turning on the Developer Tab in MS Word (v2016 & 2017) - Infographic</p>	<p>This guides you on how to turn on the Developer tab in MS Word in preparation for creating new DocX Templates. Prerequisites: PIM Fundamentals (v2016) or (v2017) and PIM Document Management (v2016) or (v2017).</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2016, 2017, workspace, template]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Time and Expense Admin Series: Timesheet Admin (v2017) - Infographic</p>	<p>If you are a Timesheet Administrator for your PIM System, you can use this guide to help you view information relating to a user's timesheet or reopen a user's timesheet if they have submitted it but now need to make changes. Prerequisite: PIM Time and Expense (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, 2017, workspace, admin, project accounting, pa, finance, expense, approval history, re-open, unlock]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Adding the Repeat Tag to a DocX Template (v2016 & 2017) - Infographic</p>	<p>Use this guide to show you how to add a repeat tag to your template. Repeat tags enable the template to merge multiple sets of data into the template, i.e. you want to send the same standard letter to multiple contacts. It is recommended that repeat tags are added to all templates where you may need to 'repeat' the template for multiple contacts in one go. Prerequisites: PIM Fundamentals (v2016) or (v2017) and PIM Document Management (v2016) or (v2017).</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, 2016, 2017, workspace, template, docx, repeat tag, merge field, mail merge]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Time and Expense Admin Series: Transaction Utility and Re-rate Lines (v2017) - Infographic</p>	<p>If you are a Timesheet Administrator for your PIM System, you can use this guide to see how to move and re-rate transactions from one compatible project/enquiry workstage or variation, to another. Prerequisite: PIM Time and Expense (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, admin, project accounting, pa, finance, re-rate, move transaction, workstage, variation, grade]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM DLM Configuration Settings (v2017) - Infographic</p>	<p>This guide includes settings defined with the Document Lifecycle Manager configuration area and used to control settings for your DLM Issues. These settings will only be available to those who are administrators of your PIM System. Prerequisite: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, admin, configure]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Document Lifecycle Manager Series: Create a Register (v2017) - Infographic</p>	<p>Learn how to view and create your own registers based on set membership, originating organisations or linked entities. Prerequisite: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, dlm, report, create a register, custom]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM DLM Management Settings (v2017) - Infographic</p>	<p>You can use the Document Lifecycle Manager management settings to add additional options such as drop-down items to configure your DLM system. These settings will only be available to those who are administrators of your PIM system. Prerequisites: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, admin, scale, size, status, suitabilities, approval, enabled entity classes, rendition types, markup preferences]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Document Lifecycle Manager Series: Use DLM Activity Zone Searches (v2017) - Infographic</p>	<p>Learn how to use the Drawing Search and the Issue search to help find Document Lifecycle Manager information across multiple projects. Prerequisites: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - 2017, print out, cheat sheet, quick reference, union square, usq, workspace, dlm, report, activity zone]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM DCS Configuration & Management Settings (v2017) - Infographic</p>	<p>The settings defined with the DCS Configuration area are used to control settings for your Document Lifecycle Manager Issues. These settings will only be available to those who are administrators of your PIM system. Prerequisites: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, dlm, admin, configure, setting]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Document Lifecycle Manager Series: View Full Register Report (v2017) - Infographic</p>	<p>Learn how to access the Full Register Report to view all placeholders and their associated renditions which have been uploaded to a project. Prerequisites: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, dlm]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>Identify your PIM Version to access the correct training - Infographic</p>	<p>Not sure which version of PIM you are using? Use this guide to help you identify your PIM version. This will tell you which course versions you should be accessing in the Deltek Learning Zone.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, release, number, upgrade, personal zone, dlz, activity zone, training]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Document Lifecycle Manager Placeholder Creation Methods (v2017/18) - Infographic</p>	<p>Use this guide to learn about the different methods of creating placeholders in advanced of receiving drawings, and the scenarios in which they can be used. Prerequisite: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 2017, 2018, dlm, placeholder, drawing management, import]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Mobile Working - How to Extract Location Data from IFC Files (v2017) - Infographic</p>	<p>This guide will show you how to extract project location data from IFC (Industry Foundation Classes) files. Prerequisite: PIM Fundamentals (v2017)</p> <p>[Keywords and Related Searches - 2017, print out, cheat sheet, quick reference, union square, usq, workspace, mobile working, ifc file, location group, storey, space]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Custom Forms: What Happens when your Forms are Deployed (v18.3 onwards) - Infographic</p>	<p>This guide will support you through what happens to deploy your custom form, and includes helpful tips and tricks on troubleshooting. Prerequisite: PIM Mobile Working Custom Form Builder (v18.1) - Portal.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 18.1, deploy, deployment, generate]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Custom Forms: Customising your Document Output Template (v18.1) - Infographic</p>	<p>This guide will show you all the customisable elements that you can use to create your base master template for the Custom Form Builder. In addition, there is a glossary of mail merge tags so that you can add key project information from the workflow database. For use by Custom Form Builder Administrators. Prerequisite:PIM Mobile Working Custom Form Builder (v18.1) - Portal.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 18.1, workspace, deploy, deployment, generate]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Document Management Series: How to Check in a Document to the DMS (v2017) - Infographic</p>	<p>Use this guide as a reminder on how to check in individual documents to the Document Management System using the Single Check In and multiple documents using the Bulk Check In. Prerequisite: PIM Document Management (v2017).</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, dms, working files, publish, save, upload a document]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Mobile Working: How to Sync your Device (v2017 & 18.1) - Infographic</p>	<p>This is a guide for options available on how to synchronise the app, and understand the current state of the data on your device.</p> <p>[Keywords and Related Searches - 2017, print out, cheat sheet, quick reference, union square, usq, workspace, version, release, number, upgrade, personal zone, activity zone, training]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Custom Forms: Custom Form Builder Glossary (v18.3 onwards) - Infographic</p>	<p>Use this guide for all the options for setting up questions and sections in your custom form, details are given to explain what additional configuration is possible. For use by Custom Form Builder Administrators. Prerequisite: PIM Mobile Working Custom Form Builder (v18.1) - Portal</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 18.1, mobile working, app, device, field, setting, option]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Document Management Series: How to Check out a Document from the DMS (v2017) - Infographic</p>	<p>Use this guide as a reminder on how to check out a document from the Document Management System, recognize when a Document has been checked out, and by who. Prerequisite: PIM Document Management (v2017).</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 2017, dms, edit a document]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Project Administration Tools for Defect Management and Observations - Infographic</p>	<p>Learn how to utilize the extra tools available for specific users on a project for defect management. The Bulk Edit feature will only be available if you are running PIM v19.1 onwards and have SQL Server Reporting Services (SSRS) installed and configured for use.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 19.1, mobile working, defect, snag, punch list, bulk edit, observation management, item reviewer]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Document Lifecycle Manager Series: View Historical Register of Issues (v2017) - Infographic</p>	<p>Learn how to access the Historical Register of Issues which indicates all documents which have been sent in an issue on an individual project. Prerequisite: PIM Document Lifecycle Manager (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, 2017, workspace, dlm, report, register, historical issue]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
Identify your PIM Version & Release as an Administrator - Infographic	<p>The Health Monitor tab within the PIM Admin Zone will tell you which version of PIM you are using. Use this guide to know where to find this information and what each section of the number means. For use by PIM Administrators only.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, version, release, upgrade, personal zone, activity zone, training, support, case, customer care]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Admin How to Configure Third Party Access (v2016/17) - Infographic	<p>Use this guide to learn how to set up the third party (Extranet) access to your PIM system. You will learn about setting the security so that the user will only see the information they are associated with. Suggested Prerequisites: PIM Security Course</p> <p>[Keywords and Related Searches - 2016, 2017, print out, cheat sheet, quick reference, union square, usq, workspace, admin, f01, security manager, partner licence, external user]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Document Lifecycle Manager Jargon Buster - Infographic</p>	<p>This Jargon Buster will help you become familiar with the terms used in the Document Lifecycle Manager.</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 2015, 2016, 2017, dlm, document control system, dcs, place holder, rendition, register, report, set, uncategorized, unclassified, number scheme]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Mobile Working - Set-up Process for Projects & Enquiries (v2017) - Infographic</p>	<p>This guide will show you how to set up Mobile Working on projects and enquiries. Prerequisite: PIM Fundamentals (v2017)</p> <p>[Keywords and Related Searches - print out, cheat sheet, quick reference, union square, usq, workspace, 2017, process, snag reviewer, item reviewer, work package, subcontractor, snagging, key document, offline document, synchronise]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Admin Series: Skills and Training Administration - Quick Reference Guide</p>	<p>If you are an administrator this guide will help you configure the Skills and Training feature within PIM. Learn how to configure, edit and remove Skill Categories and Areas as well as utilise the search features to track your organisation's qualifications.</p> <p>[Keywords and Related Topics: quick reference, cheat sheet, union square, v19, v2017, v2016, admin, matrix, skill matrix, qualifications, skill journal]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Business Intelligence Set Up (v2017 onwards) - Self Paced Learning</p>	<p>In this 30-minute course, you will learn how to create reports using the Business Intelligence tool.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, create a bi report, dashboard, union square, workspace, video, admin, administration, business intelligence, set up, reporting, accounting, highlevel report, overview, 2017, 19]</p>	<p>Super User,Project Manager,Quality Manager,Estimator,Quantity Surveyor,Site Manager,Directors/VPs,Project Architect/Engineer/Technician</p>
<p>PIM Project Accounting Series: Admin and Adjustments (v2016 Onwards) - Self-Paced Learning</p>	<p>In this 1-hour course, you will learn how to use the Project Accounting Administration tools available. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, utilise pa landing page, adjust cost transactions, reporting of data, manage rate, 2015, 2017, v19, 2019, sales payments, admin, set up, video]</p>	<p>Super User,System Administrator,Directors/VPs,Finance/Accounting Administrator</p>

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Asset Name	Description	Role
PIM Project Accounting Series: Project Set up (v2016 Onwards) - Self-Paced Learning	<p>In this 1-hour course, you will learn how to set up the key project accounting information. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, pa, 2015, 2017, v19, 2019, configure, video]</p>	<p>Super User, System Administrator, Project Manager, Quality Manager, Estimator, Quantity Surveyor, Site Manager, Directors/VPs, Finance/Accounting Administrator, Project Architect/Engineer/Technician</p>
PIM Outlook Add In (v2017) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to use the Outlook Add In to save emails that you send and receive, into the Document Management System. Prerequisites: PIM Fundamentals (v2017).</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, publish, search folders, sync, synchronise, attachments, sent, received, inbox, incoming, videos, infographic, 2017, 19, video]</p>	<p>HR Specialist, Super User, System Administrator, End User, Project Manager, Document Controller, Quality Manager, Estimator, Quantity Surveyor, Sales & Marketing, Site Manager, Business/Office Manager, Directors/VPs, Finance/Accounting Administrator, Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
<p>PIM Fundamentals Series: Working with Enquiries (v2017 onwards) - Self-Paced Learning</p>	<p>In this 30-minute course, you will learn about enquiries fundamentals. You will go through the entire lifecycle of an enquiry. Using scenarios, you will be talked through setting up your enquiry, adding your contacts and eventually converting to a project. This is 1 of 3 courses in the PIM Fundamentals series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, fundamentals, getting started, enquiry records, enquiries, 2017, 19, video]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Security Series: Users and Access (v19.1 Onwards) - Self-Paced Learning</p>	<p>This 3-hour course is for those tasked with managing user licences and security permissions in PIM. Learn how to assign licenses to new users, apply security permissions to zones, dashparts, bands and find out about useful reports. Prerequisites: PIM Fundamentals (v2017) and PIM Document Management (v19.0 onwards).</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, admin, manager, set up, change security,19, 19.1, video]</p>	<p>Super User,System Administrator</p>
<p>PIM Project Accounting Series: Purchasing (v2016 Onwards) - Self-Paced Learning</p>	<p>In this 1-hour course, you will learn how to create purchase orders, purchase credits notes and enter purchase adjustments. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, pa, 2015, 2017, v19, 2019, approval, invoice line, video]</p>	<p>Super User,Directors/VPs,Finance/Accounting Administrator</p>

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Asset Name	Description	Role
<p>PIM Fundamentals Series: Working with Projects (v2017 onwards) - Self-Paced Learning</p>	<p>In this 30-minute course, you will learn about projects fundamentals. You will go through the entire lifecycle of a project. Using scenarios, you'll be talked through creating your record, adding contacts, editing details and making use of the project searches for reporting purposes. This is 1 of 3 courses in the PIM Fundamentals series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, job, case, 2017, 19, video]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
<p>PIM Document Management (v2017) - Self-Paced Learning</p>	<p>In this 1.5-hour course, you will learn how to use the powerful search features in the Document Management System to find documents and emails, and how to use the Working Files dashpart to save and edit documents. Prerequisite: PIM Fundamentals (v2017).</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, dms, information zone, document store, publish, check in, bulk check in, check out, clone, replace, download, recycle, version, document pools, search, filter, view, categories, preview, jargon buster, video, 2017]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>

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Asset Name	Description	Role
PIM Project Accounting Series: Resource Planning (v2016 Onwards) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to plan resource availability for projects. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, pa, 2015, 2017, v19, 2019, cost effect band, video]</p>	Super User,Project Manager,Quality Manager,Estimator,Quantity Surveyor,Site Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Template Set up (v2017) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to set up new templates in MS Word and save them into the Document Management System. Prerequisites: PIM Fundamentals (v2017) and PIM Document Management (v2017).</p> <p>[Keywords and Related Searches - 2017, self paced, elearning, online learning, training, union square, workspace, create, sample, example, infographic, docx, dms, pools, mail merge, set up, video]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Project Accounting Series: Invoicing (v2016 Onwards) - Self-Paced Learning	<p>In this 1-hour course, you will learn how to draft, create and post invoices as well as correcting invoices and resolving missing time issues. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, pa, 2015, 2017, v19, 2019, correct, post, draft, approval, video]</p>	Super User,Directors/VPs,Finance/Accounting Administrator

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Asset Name	Description	Role
PIM Document Management (v19.0 onwards) - Self-Paced Learning	<p>In this 1.5-hour course, you will learn how to use the powerful search features in the Document Management System to find documents and emails, and how to use the Working Files Dashpart to save and edit documents.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, dms, information zone, document store, publish, bulk check in, check out, clone, replace, download, recycle, version, document pools, find, filter, view, categories, preview, bulk edit properties, upload large files, 2gb, edit multiple documents, template, video, 19]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Project Accounting Series: Forecasting (v2016 Onwards) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to set up and use Fee Forecasting and Non-Labour Cost Forecasting within Projects. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, pa, non labour cost forecasting, 2015, 2017, v19, 2019, video]</p>	Super User,Directors/VPs,Finance/Accounting Administrator
PIM Fundamentals: Getting Started (v2017 onwards) - Self-Paced Learning	<p>In this 30-minute course, is the best place to start if you're new to PIM. You will learn about the various zones in PIM, as well as learn about dashparts on the Personal Zone and how to use them. You will learn how to add new contacts and organisations from the Activity Zone, and how to find, view, and edit those record types.This is 1 of 3 courses in the PIM Fundamentals series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, fundamentals, information zone, dashboard, contact, quick find, advanced search, edit, 2017, 19, video]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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Asset Name	Description	Role
PIM Project Accounting Series: Ledger Connector (v2016 Onwards) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to use the Ledger Connector and export into your Ledger System. This is 1 of 7 courses in the Project Accounting series.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, pa, 2015, 2017, v19, 2019, sales document, sage, purchase invoice, video]</p>	Super User,Directors/VPs,Finance/Accounting Administrator
PIM Sub Contractor Tendering (v2016 & 2017) - Self-Paced Learning	<p>In this 1-hour course, you will learn how to create work packages, issue the tender, and update PIM with the responses within the Sub Contractor Tendering (SCT) module. Prerequisite: PIM Fundamentals (v2016) or (v2017).</p> <p>[Keywords and Related Searches - 2017, self paced, elearning, online learning, training, union square, workspace, bid, videos]</p>	Super User,Project Manager,Quality Manager,Estimator,Quantity Surveyor,Site Manager,Project Architect/Engineer/Technician
PIM Document Lifecycle Manager (v2017 onwards) - Self-Paced Learning	<p>In this 1-hour course, you will learn how to create and manage place holders, add renditions into the Document Lifecycle Manager, and issue them via email, download, electronic media, or hardcopy.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, dlm, workspace, place holders, renditions, revisions, drawings, registers, reports, architect, architectural assistant, design and build, revit, register, sync, synchronise, model file, drawings, autocad, network share, jargon buster, video, document control, issuing, drawing, placeholder, 2017, 19]</p>	Super User,Project Manager,Document Controller,Quality Manager,Quantity Surveyor,Site Manager,Project Architect/Engineer/Technician
PIM Absence Administration (v2017-v19.2) - Self-Paced Learning	<p>Take this training if you need to set up and maintain the administrative functions of employee absence such as setting up entitlement for new starters and managing employee entitlement for the year ahead.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, 2016, 2017, 19, union square, workspace, daily entitlement, leave, holiday, pto, contact record, approve, approvals, dashpart, request, matrix, approval route, video, accrual, rates, admin, configure, absence administration, absence configuration, manager, approval notifications, approval routes]</p>	HR Specialist,Super User,System Administrator,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator

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Asset Name	Description	Role
PIM DLM Administration (v2017) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to configure the Document Lifecycle Manager and the document issues, set up number schemes, sets, and work packages. Prerequisites: PIM Fundamentals (v2017), PIM Document Management (v2017) & PIM Document Lifecycle Manager (v2017).</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, dlm, workspace, numbering schemes, admin, config, configuration, setting, jargon buster, video, document control, issuing, drawing, placeholder, 2017, 19]</p>	Super User, System Administrator, Project Manager, Document Controller, Quality Manager, Quantity Surveyor, Site Manager, Project Architect/Engineer/Technician
PIM Document Lifecycle Manager Series: DLM Approval Management (v2017) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to set up document review workflows, get online comments and control the approval status of the Document Lifecycle Manager documents. Prerequisites: PIM Fundamentals (v2017), PIM Document Management (v2017) and PIM Document Lifecycle Manager (v2017).</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, dlm, workspace, approval management, mark up, drawings, approval route, commenting, resubmittal, video, document control, 2017, 19]</p>	Super User, Project Manager, Document Controller, Quality Manager, Quantity Surveyor, Site Manager, Project Architect/Engineer/Technician
PIM Contract Management (PIM v2017.6 & Workflow Mobile v18.2) - Self-Paced Learning	<p>In this 30-minute course, you will learn about Contract Management as a system for managing many types of contractual communications, such as RFIs, instructions, change orders, variations or valuations, etc. This course will show you how to use the RFI type to send, receive and respond to requests for information. Prerequisite: PIM Fundamentals.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, request for information, instructions, video, cm, approval, rasterex, 2017, 19]</p>	Super User, Project Manager, Quality Manager, Estimator, Quantity Surveyor, Site Manager, Project Architect/Engineer/Technician
PIM Security Course (v2017) - Self-Paced Learning	<p>This 5-hour course is for those tasked with managing user licences and security permissions in PIM. You will learn how to assign licences to new users, apply security permissions to zones, dashparts, bands and document pools, create new document pools and set pool requirements. Prerequisites: PIM Fundamentals (v2017) and PIM Document Management (v2017).</p> <p>[Keywords and Related Searches - 2017, self paced, elearning, online learning, training, union square, workspace, admin, trusted, partner, user roles, entity records, dms, security provider, contact role, employee, video, deltek learning lab, dll, sandpit]</p>	Super User, System Administrator

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Asset Name	Description	Role
PIM Mobile Working (v19.2) - Portal	<p>Use this portal to learn how to use the Mobile Working App and the main features within the main PIM System.</p> <p>[Keywords and Related Searches - mobile, mobile app, union square, usq, 19, 2019, reporting, defect, snagging, punch lists, on site, site manager, photo]</p>	Super User,Project Manager,Estimator,Quantity Surveyor,Site Manager
PIM Security Series: Security Manager Role and Interface (v19.1) - Clickguide	<p>As the PIM Administrator you are the main point of contact for setting up and removing users' access as well as maintaining the security for zones, bands, dashparts and document pools. Throughout this document, you will learn to look at the different areas within the Admin zone including: users, web administrator, and security console.</p> <p>[Keywords and Related Searches - union square, v2019, 2019, 19, 19.1, usq, workspace security, security manager, how to create a new user, setting up a new user, user setup, administrator]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
Deltek Collaboration: PIM Integration for Administrators - Clickguide	<p>In this document, you will find the setup features for using Deltek Collaboration with PIM.</p> <p>[Keywords and Related Searches - union square, v19.1, v2019, 2019, admin zone, administrator, space, integration, kona]</p>	System Administrator,End User
PIM Email Management Quick Start Series: Outlook Add In (v2017.7 onwards) - Self-Paced Learning	<p>In this 30-minute course, you can learn how to make the most out of the Outlook Add-In with your integrated system. Learn how to use the Outlook Add-In to save emails that you send and receive, into the Document Management System as well as setting up your mobile phone to publish emails.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, email management, integration, ajera, vision, vantagepoint, publish, video]</p>	System Administrator,End User

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Asset Name	Description	Role
PIM Absence (v2017 - v19.2) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to view and book absence in either hours or days. This course also offers optional content on how to approve absence.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, 2016, 2017, 19, union square, workspace, daily entitlement, leave, holiday, pto, contact record, approve, approvals, dashpart, request, matrix, approval route, video, accrual, rates]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Powered by Union Square 2016 Portal	<p>This portal provides a searchable list of videos and webinar recordings for the 2015 release of Union Square. This also includes access to the self-paced Security Course.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, union square, workspace, usq, fundamentals, enquiry records, project, document management, dms, email, absence, outlook add-in, dlm, document lifecycle manager, finance, project accounting, pa, 2016, 2015]</p>	<p>HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician</p>
PIM Project Accounting: Purchasing v20.0 - Self Paced Learning	<p>In this course, you will learn how to create Purchase Orders within your Deltek PIM System, link documents to your purchase orders and create credit notes. You will learn how to send and approve your Purchase Orders to complete the entire process.</p> <p>[Keywords: PIM, Union Square, PA, Project Accounting, v20, create purchase orders, purchase order approvals, purchase credit notes, invoice line approval]</p>	<p>Super User,Directors/VPs,Finance/Accounting Administrator</p>

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Asset Name	Description	Role
PIM Core Certification Exam	<p>The Deltek Professional PIM Core Certification Exam validates skills within the Deltek PIM product suite. Successful completion of the Certification exam is required to receive the Professional Certification. Deltek Training is not required to be certified. Passing the exam confirms you have practical application knowledge required to be a Deltek PIM Certified User.</p> <p>[Keywords and Related Searches - PIM, certification, test, exam, study guide, agreement, recommended training, study suggestions, sample questions, badge, certification badge, product certification]</p>	
PIM Absence Administration v20.0 - Self-Paced Learning	<p>Take this training if you need to set up and maintain the administrative functions of employee absence such as setting up entitlement for new starters and managing employee entitlement for the year ahead.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, 2016, 2017, 19, union square, workspace, daily entitlement, leave, holiday, pto, contact record, approve, approvals, dashpart, request, matrix, approval route, video, accrual, rates, admin, configure, absence administration, absence configuration, manager, approval notifications, approval routes]</p>	HR Specialist, Super User, System Administrator, Business/Office Manager, Directors/VPs, Finance/Accounting Administrator
Deltek PIM Online Help	<p>The Deltek PIM Help System provides help for all application areas. This can also be found and launched from the help system through the help link within the PIM interface. Each section contains the help topics for each area of functionality, such as projects, document management, and campaigns. The help system provides the following types of topics: Procedures, Field Descriptions, Concepts and Overviews.</p> <p>[Keywords and Related Searches - online help, documentation, PIM, union square, written help, getting started, system administration, organisations, projects, enquiries, actions, campaigns, records, v20, v20.0]</p>	

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Asset Name	Description	Role
PIM Skills and Training Series: How to Enter your Skills (v2016 & 2017) - Infographic	<p>Use this guide to learn how to enter your skills and qualifications into your PIM system. You will also learn how to view completed courses and those qualifications which have been earned as well as qualifications which are due to expire.</p> <p>[Keywords and Related Searches - 2016, 2017, 2019, 19, 2020, 20, Skills, Qualifications, cheat sheet, quick reference, union square, usq, workspace, HR, Training]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician
PIM Time and Expense (v2017 onwards) - Self-Paced Learning	<p>In this 30-minute course, you will learn how to enter time and claim expenses via the Timesheets Dashpart.</p> <p>[Keywords and Related Searches - self paced, elearning, online learning, training, union square, workspace, project, enquiry, overtime, workstages, resource plan, mobile timesheets, ios, android, 2017, 19, video]</p>	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

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Asset Name	Description	Role
PIM How to Use the Bulk Edit Features in the DMS (v19.1) - Infographic	Use this guide to learn how to use the Baskets functionality to edit properties and document pool locations of multiple documents within the DMS. [Keywords and Related Searches - 2016, 2017, 2019, 19, 2020, 20, Bulk Edit, Basket, cheat sheet, quick reference, union square, usq, workspace, Document Management, Information Zone, Documents tab]	HR Specialist,Super User,System Administrator,End User,Project Manager,Document Controller,Quality Manager,Estimator,Quantity Surveyor,Sales & Marketing,Site Manager,Business/Office Manager,Directors/VPs,Finance/Accounting Administrator,Project Architect/Engineer/Technician

Deltek PIM - DLZ Enhanced



Asset Name	Description	Role
PIM - Learning Lab	This course provides you with up to 4 hours of hands-on experience, navigating the Deltek PIM interface in a Learning Lab sandbox environment. Please note that Learning Lab Courses require you to fill in and send a Request Form before the course can be made available to you. The Request Form will open on your screen when you click on the link to launch the course.	