

The cover features two prominent diagonal stripes. A light blue stripe runs from the top-left corner towards the bottom-right, and a darker blue stripe runs from the bottom-left corner towards the top-right, intersecting the first stripe.

Deltek

Deltek Specpoint

SaaS Administrator Guide

July 22, 2022

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Overview

Welcome to your Specpoint solution. Specpoint is delivered via the cloud to meet the ever-changing needs of the construction industry. This allows you to leverage the benefits of the cloud, while taking advantage of the latest Deltek software capabilities.

This SaaS Administrator guide is a critical component of the administrator's role—both during the initial activation and ongoing management of the Specpoint solution. Here you will also find information to help you manage your Specpoint implementation:

- Available environments
- Requirements for the development of customer-specific content
- General information regarding the offering itself.

The latest version of this guide is always available from the Support Center and the online help.

Designated Administrator

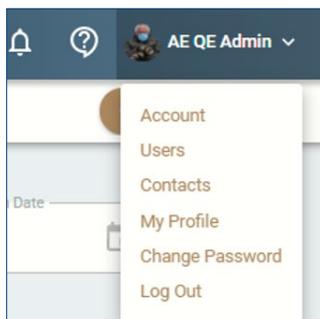
Each Specpoint firm must have a designated administrator for the [Deltek Support Center](#). You must provide the name and email address of your company's designated administrator during, or prior to, signing your Subscription Agreement.

This administrator is responsible for managing your organization's Specpoint implementation with Deltek. In addition, your administrator's responsibilities include the following:

- Access management for your Specpoint environment
- Adding new users
- Assigning roles, disciplines, and permissions
- Facilitate internal training and adoption of the software

Core Administration Menu Choices

This information is located in the dropdown menu in the upper right of the window.



How to Stay Informed

Deltek is committed to keeping you informed of any developments that may affect the availability or functionality of your Specpoint solution. There are several ways to stay informed:

- Deltek Customer Support Site
 - Knowledge Base articles

- Notifications
- Deltek Specpoint Learning Portal

Specpoint Customer Assistance Program

To access Specpoint FAQ and training videos, register for the [Specpoint Customer Assistance Program](#).

Support Center Site

The Deltek Support Center site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Support Center site provides:

- Search for product documentation, such as release notes, install guides, technical guides, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Community
- Access cloud-specific documents and forums
- Search Deltek's knowledge base (more on this in the following section)
- Submit a support case and check on its progress
- Transfer requested files to a Support Center analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Support Center analyst online
- Request a Call with Support
- Change contacts and communications preferences with Deltek

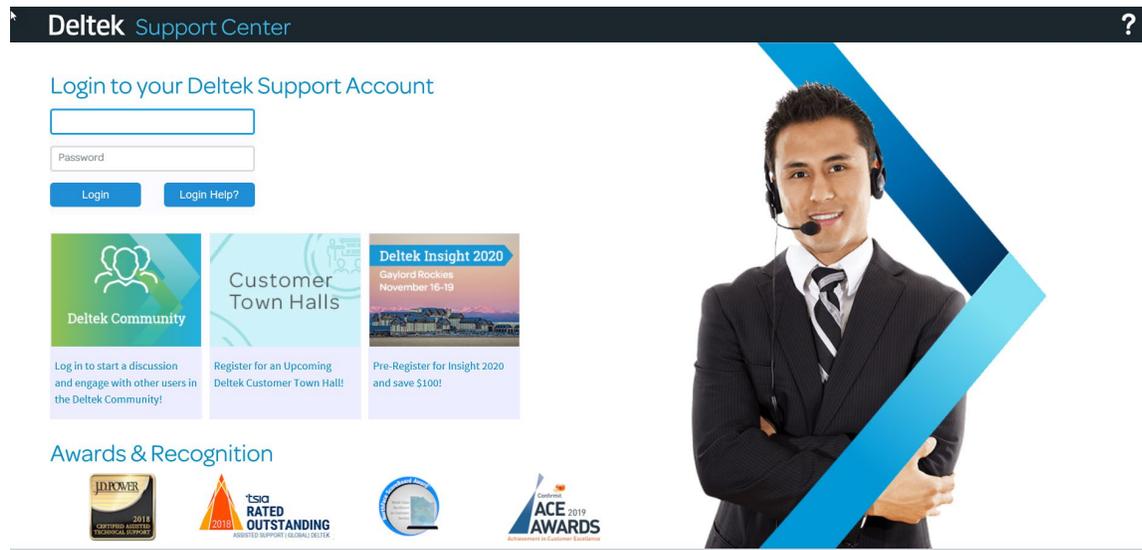
Access Support Center

To access the Support Center:

1. Go to <http://support.deltek.com>.
2. Enter your Support Center **Username** and **Password**.
3. Click **Log In**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

For more information regarding the Deltek Support Center, refer to the online help available from the web site.



Deltek Support Center Knowledge Base

The Support Center Knowledge Base contains Specpoint-related articles, as well as announcements regarding planned and unplanned maintenance. After subscribing to a KB, you will receive an email any time that KB is changed or updated.

To subscribe to Specpoint Knowledge Base articles:

1. Go to https://deltek.custhelp.com/app/answers/detail/a_id/84696.
2. Log on to the Deltek Support Center site using the credentials provided to you when your initial Specpoint order process was completed.
3. Click **Subscribe**.



Print

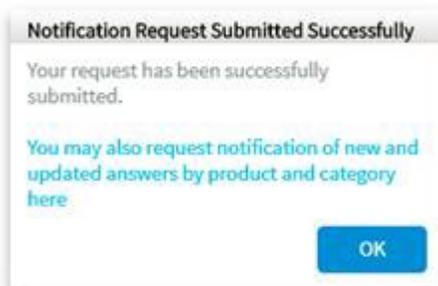


Email this page



Subscribe

4. Click **OK** on the confirmation screen.



Standing Maintenance Windows

Deltek maintains a standing maintenance window the first weekend of every month, from Saturday at midnight to Monday at midnight. Please note, while we try to maintain a consistent maintenance window, the times may sometimes deviate; maintenance window times will always be included in communications.

Region Served	Maintenance Time Window
Americas	12 am–12 am Eastern Time
Europe, Middle East, Africa	6 am–6 am Central European Time
Pacific Rim	1 pm–1 pm Standard China Time

Credential Management Tools

The following tools are available to Specpoint customers:

- **Users:** As the administrator, you have administrative rights to User Management. Also as the administrator, you can manually enter your company's employees.
Upon entering a user, the employee email address will be used as the login name for that user. The user will receive an invitation to accept the terms and conditions and to set their password.
- **Self Service:** Individual users can use the Forgot your Password self-service function.

Please see the User Management Accounts section of this document for further information on how to use User Manager and the Self Service tool.

Getting Started

Administrator role users are assigned by the Deltek Onboarding Team. This section provides detailed information for setting up your users in through the User Management screen. As the administrator, you can create, activate, disable, and remove user accounts.

After you have received your Welcome Email, you are ready to begin. Be sure to follow the steps outlined below to ensure that your solution is set up correctly.

Activate Your SaaS Customer Administrator Account

As the administrator, you receive your login name (also referred to as your Username) through a Deltek New User Invite email. Click **Activate Your Login** from the email to create a password. Follow the instructions on the Create Password screen that displays.

Access Specpoint

Once a valid password is entered and confirmed, the Deltek Specpoint Log In screen displays. Enter your **Username** (email address) and **Password** to log in.

Your company can have more than one user with full administrator rights to Specpoint. As the administrator, you can create a new user in Specpoint and assign that user with full Admin rights to the Specpoint application.

Create Users

As the administrator, you have administrator rights to manage users. Here, you can create, modify, deactivate, resend invitations, cancel invitations and remove user accounts for all employees in your firm.

Once users have activated their accounts, they can use their username and password to access Specpoint.

Add a New User

To add a new employee:

1. Select **Users** from the drop-down available from your name, on the top right of the screen.
2. On the User Management screen, click **+ New User**.
2. Complete the fields on the form.

Field/Option	Description
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
User Email	Enter the email address of this user. It will be the user login.
Permissions	Permissions are defined as follows:

Field/Option	Description
	<ul style="list-style-type: none"> ▪ Admin – Full administrative rights to the account ▪ Author – Editing rights for data in the account ▪ Reviewer – Do not use. Functionality coming in a future release.
Discipline	<p>Select from the following disciplines:</p> <ul style="list-style-type: none"> ▪ Architectural ▪ Civil ▪ Construction ▪ Consultant ▪ Coordination ▪ Electrical ▪ Facilities Management ▪ Mechanical ▪ Plumbing ▪ Structural
Role	<p>Each discipline has specific roles within it. See the available roles by discipline:</p> <p>Architectural Discipline</p> <ul style="list-style-type: none"> ▪ Architect ▪ Architectural Engineer ▪ Architectural Intern ▪ Design Architect ▪ Designer ▪ Interior Designer ▪ Job Captain ▪ Landscape Architect ▪ Master Planner ▪ Principal ▪ Project Architect ▪ Project Manager ▪ Senior Architect ▪ Senior Design Architect ▪ Senior Interior Designer

Field/Option	Description
	<ul style="list-style-type: none"> ▪ Senior Project Architect <p>Civil Discipline</p> <ul style="list-style-type: none"> ▪ Civil Engineer ▪ Director of Engineering ▪ Senior Engineer - Civil <p>Construction Discipline</p> <ul style="list-style-type: none"> ▪ Construction Manager ▪ General Project Manager ▪ Project Estimator ▪ Project Manager ▪ Purchasing Manager ▪ Quality Manager <p>Consultant Discipline</p> <ul style="list-style-type: none"> ▪ Civil Engineer ▪ Construction Specialist ▪ Electrical Engineer ▪ Engineer - Intern ▪ Environmental Engineer ▪ HVAC Specialist ▪ Master Planner ▪ Mechanical Engineer ▪ MEP Engineer ▪ Plumbing Engineer ▪ Senior Civil Engineer ▪ Senior Consultant ▪ Senior Electrical Engineer ▪ Senior Engineer ▪ Senior Structural Engineer ▪ Structural Engineer ▪ Structural Engineering Technician <p>Coordination Discipline</p> <ul style="list-style-type: none"> ▪ Administrative ▪ Administrative Support ▪ BIM Coordinator

Field/Option	Description
	<ul style="list-style-type: none"> ▪ BIM Manage ▪ Director of Specifications ▪ Owner ▪ Senior Specifications Writer ▪ Specifications Writer <p>Electrical Discipline</p> <ul style="list-style-type: none"> ▪ Director of Engineering ▪ Electrical Engineer ▪ Senior Electrical Engineer <p>Facilities Management Discipline</p> <ul style="list-style-type: none"> ▪ Building & Facility Manager ▪ Maintenance Director <p>Mechanical Discipline</p> <ul style="list-style-type: none"> ▪ Director of Engineering ▪ HVAC Specialist ▪ Mechanical Engineer ▪ Project Engineer ▪ Senior Engineer <p>Plumbing Discipline</p> <ul style="list-style-type: none"> ▪ Director of Engineering ▪ Plumbing Engineer ▪ Senior Plumbing Engineer <p>Structural Discipline</p> <ul style="list-style-type: none"> ▪ Project Engineer ▪ Project Engineer - Intern ▪ Project Manager ▪ Senior Consultant ▪ Senior Engineer ▪ Senior Structural Engineer ▪ Structural Engineer ▪ Structural Engineering Technician

3. Click **Save**. Once saved, users are sent an invitation with instructions on how to set their password. The **Status** is updated.

Tip: Auto-Generated Emails

When you create a user account, an email is automatically generated and sent to the user. The user must follow the instructions in the email to activate their account.

If any user is unable to locate the system-generated activation email, you can resend the invitation from the User Management screen.

Configure SPAM filters

You must make sure that the auto-generated emails are allowed through your company's SPAM filters.

To configure your company's SPAM filters:

1. Configure your SPAM filter to allow:
 - [Specpoint.mydeltek.com](https://specpoint.mydeltek.com)

Note: This domain is owned by Deltek. It is safe and can be trusted by all Specpoint customers.

Maintaining User Accounts

From User Management, you can:

- Create, modify, deactivate user accounts
- Resend user invites
- Cancel user invites

Create User Logins

Please see the steps detailed in the Getting Started, Create Users section of this document.

Modify User Logins

To edit a user's record

1. Click .
2. You may edit the following fields:
 - First Name
 - Last Name
 - Permissions
 - Discipline
 - Role
 - Status

Notes:

- You may not change the user email address.
- The **Forgot your password** link on the login screen enables users to reset their passwords themselves, without having to contact Deltek Support Center.

Deactivate User Logins

Deactivate employee logins when they leave the company, or when consultants have completed a project.

To deactivate a user login:

1. From the User Management screen, locate the user.
2. From the ellipse, click **Deactivate**.
3. Confirm that you would like to deactivate the user.

Resend User Invitations

To resend a user invitation:

1. From the User Management screen, locate the user to whom you need to resend the invitation.
2. From the ellipse, click **Resend Invite**.

Resend Invite is only available for users that have outstanding invitations.

Cancel User Invitations

To cancel a user invitation:

1. From the User Management screen, locate the user to whom to cancel the invitation.
2. From the ellipse, click **Cancel Invite**.

Cancel Invite is only available for users that have outstanding invitations.

Password Requirements

How long does the password stay active?

Passwords are active for 90 days. A warning will be given seven days before the password expires.

What are the Password Requirements?

- Passwords must be at least 14 characters in length.
- Passwords must contain:
 - At least one non-alphanumeric character
 - At least one uppercase letter
 - At least one lowercase letter
 - At least one numeric value

Disaster Recovery

Deltek provides a disaster recovery environment with all offerings. Unless otherwise specified, the disaster recovery site is more than 250 miles away (DR250) from the production hosting facility.

On an annual basis, Deltek coordinates and executes a disaster recovery test of each cloud offering, usually on a weekend between May and September. You will receive advance notice of the testing and may be asked to validate the disaster recovery site once it has been brought online.

After a successful test, the service is rolled back to the production environment.

Backup and Retention Policy

Deltek Cloud Operations provides a point in time restore of the production database. Data in the production databases is backed up and retained in the following manner:

Objects	Backup Frequency	Retention Period
Date	Daily	7 days
Data	Weekly (every Saturday)	30 days
Transaction Logs	Every 15 minutes	

The backup and retention policy is subject to ongoing review and change.

Browser

Set Your Browser to Work with Specpoint

Browsers must support cookies and JavaScript. Support for pop-up windows is recommended but may not be required depending upon the feature being accessed. See your IT team for assistance to make sure these requirements can be met. Specpoint is supported on Chrome, Firefox, and Edge, and is officially supported on the latest two major versions of each browser family.

Frequently Asked Questions

How do I change or add an administrator?

If you are currently an administrator and want to add or remove someone as an administrator, you can do this by going to the User Management screen and changing the permissions for that user.

If you are adding or changing the account administrator, you must contact the Deltek Support Center.

If all administrators have left your organization, an officer from your organization needs to submit, on company letterhead, authorization to change the administrator. This can be submitted electronically or via fax.

The authorized letter must contain the following information:

- The name of the previous designated administrator
- The previous administrator's email address
- The name of the new administrator
- The email address of the new administrator
- The mailing address for the new administrator
- The name and office address of the company officer initiating the request

To make the request electronically:

1. Go to **Submit Case** in the Deltek Support Center.
2. Select **Support Center** as the **Product**.
3. Select the **Severity Level**.
4. Select **Application** as the **Issue Type**.
5. Enter **Administrator Change** as the **Summary**.
6. Enter the **Detail** for your request.
7. Attach the authorization letter.
8. Click **Continue** to submit the request.

To make the request by fax:

1. Complete the request on company letterhead.
2. Send the authorization letter by fax to (339) 469-8970.

Where do I find system maintenance schedules?

Deltek makes every effort to minimize the scheduled maintenance windows of your Specpoint solution. Scheduled maintenance windows are communicated to you several ways to ensure you are always informed and able to plan accordingly.

Regular maintenance windows are scheduled for the first Saturday of the month, from Saturday midnight through Monday midnight, though your site may be down for only a short time or only intermittently during this time.

How do I report an unplanned outage?

The administrator should report all unplanned outages to Deltek. In most cases, Deltek is already aware of the outage and working to resolve it.

The administrator must verify the following before reporting the outage to Deltek.

- The Internet connection is still working. A workstation or laptop can bring up www.deltek.com.
- The user is entering the correct password.

After the Designated Account administrator verifies these two items, they should notify Deltek by completing the Report an Outage form. To find the form, log on to the Support Center and click **Cloud Solutions**.



Cloud Solutions

On the Cloud solution page there is a form for Reporting a service disruption.

REPORT A SERVICE DISRUPTION

If you need to report a service disruption with your production environment please complete the following:

NOTE: This is for Production environments only. Non-Production environment disruptions can be reported using [Support a Case](#).

Time of Disruption

Production Instance URL

Description/Business Impact

Upload Screenshot

How do I report an unplanned outage after hours?

To report an unplanned outage:

1. Follow the prior instructions or call the Deltek On-Call Support at 1-888-668-7651.
2. Select option 1.
3. Provide your client ID.
4. Explain the issue is an unplanned outage with Deltek Cloud.

Should I bookmark application links?

Users should not bookmark application links. Instead, users should always first navigate to their cloud portal and click the application links. This ensures the user is accessing the applications correctly.

About Deltek

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