Deltek

Deltek Specpoint 1.0

Release Notes for A/E Users

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Overview

Welcome to Specpoint 1.0!

The Deltek Specpoint Release Notes for A/E Professional Firm Users contain a summary of the key features for the first release.

Specpoint Overview

Deltek Specpoint addresses the following major shortcomings in today's A/E design processes: design automation and product selection.

Design Automation

Design Automation is re-envisioning the way A/E firms design and construct buildings. The module enables you to capture, analyze, and deploy information at scale. Specpoint offers baseline associations for all project elements, otherwise known as assemblies, families, and product types. Each element maintains either administrative, performance, product, or execution properties. You can maintain each element or property as a best practice that you can deploy to build another project that has a similar location, size, scale, scope, and/or owner. By mitigating tedious tasks, professionals have the freedom to focus on coordinating assembly information in early design phases, all the way to accurate product selection during design development.

Product Selection

Specpoint evolves Product and Material Selection to create a more informed, productive, and inclusive experience. The platform maintains an updated library and assets that relate to manufacturers and products. Each manufacturer or product is represented by a card. Product cards contain product names, properties, and resources that have gone through a rigorous approval process by Deltek. Selected product cards will update the product type properties dynamically and detect inconsistencies between products. If a design professional has modified product type properties, the product selection dialog will update results to correlate with modifications. Not only is the product data always the latest, but the process of inserting or changing the information is automated. Specpoint is creating alignment between Design Professionals and Product Manufacturers in an effort to transcend the traditional method of developing designs.

Release Highlights

Highlights of this release include the following:

- **Navigation**: Specpoint provides various menus for accessing the available pages, windows, and features.
- **Dashboard**: This dashboard serves as a single point of access to information and resources to help you manage your A/E firm’s operations. The dashboard includes the Project Research Map, Firm Contacts widget, AIA News widget, Recently Listed widget, and Deltek News widget.
- **Projects**: Specpoint provides features and pages, such as the Projects Home page and the Project Overview page, which enable you to create and manage project specifications for your A/E firm.
- **Project Contents**: Features for adding, modifying, and removing the contents of your project are available in the project workspace. This workspace enables you to manage different layers of content in your project, such as project elements, element content items, and project management properties.

- **Project Notes**: Use project notes on a project or a project element to keep project-related information updated or provide additional context to a decision.
- **Preview and Output**: These features allow you to preview, publish, and export the contents of your A/E firm's project specifications.
- **Products**: Specpoint's module for product selection enables you to browse, search, research, and select product listings for your project specifications. This platform provides features which help you select products and seamlessly integrate product-related content in your projects.
- **Admin Settings**: Use these settings to update your company account information and manage users for your A/E firm.
- **User Settings**: These settings enable you to update your user information, change your password, and log out of Specpoint.
- **Help Resources**: Specpoint provides you with multiple resources that you can access if you need information and assistance.

For complete and detailed information about the available features in Specpoint, see *Deltek Specpoint Help for A/E Users*.

Refer to the following for help and information:

- Deltek Support Center
- *Deltek Specpoint SaaS Administrator Guide*
- *Deltek Specpoint Help for A/E Users*

Supported Deployment Technology

Before you use Deltek Specpoint, ensure that your computer satisfies the recommended minimum system requirements:

System Requirement	Description
Screen Resolution	▪ 1920 × 1080 ▪ 1920 × 1040
Web Browser	▪ Google Chrome™ ▪ Mozilla Firefox™ ▪ Microsoft Edge® Use the latest versions for each recommended browser.

Key Features

This portion includes summaries of the key features included in Specpoint 1.0.

A/E Account Setup

As the designated account administrator, you can set up the account for your A/E firm and your own user account to enable your A/E firm's access to Specpoint. After you receive a user invitation email from Deltek, Specpoint requires you to perform the following:

- Enter your new password.
- Update your user profile information.
- Update your A/E firm's account settings and information.

User Access

This portion includes descriptions of the available features for user access in Specpoint.

User Account Setup

You can set up your user account to log in and access Specpoint. After you receive a user invitation email from Deltek, you must enter your new password and update your user profile information.

User Login

With an active user account, you can log in to Specpoint. On the Log In page, enter your valid email address and password to log in.

If you forget your password, you can reset your password from the Log In page by using your valid email address.

Common Application Elements

This portion includes descriptions of available common application elements and features that you can use in various areas and pages in Specpoint.

User Interface

Specpoint's user interface design optimizes user experience and navigation. The platform's user interface is responsive, which adjusts your view of the available data and options on each page to accommodate various screen resolutions, browser window sizes, and devices.

For the recommended screen resolutions, see Supported Deployment Technology.

Image Upload Utility

The Image Upload Utility enables you to upload photos to Specpoint. You can use this tool to upload the following images:

Image	Location
Project Image	Project Overview Page
Profile Image	My Profile Window

Navigation

This portion includes descriptions of the menus for accessing the various pages, windows, and features in Specpoint. The following menus are available:

- Top Menu
- Help Menu
- User Profile Menu
- Project Dashboard Menu

Top Menu

You can use this menu to access key areas and pages in Specpoint. On the top menu, the following options are available:

- **Home Icon** : Access the projects area and open the Projects Home page.
- **Map Icon** : Access the home dashboard, the Project Research Map, and other available widgets.
- **Special Navigation Menus**: This displays menu options for specific areas in Specpoint.
- **Help Menu** : Access the available help resources.
- **User Profile Menu**: Access options for your user account. For administrators, options for managing your A/E firm account are available.

Help Menu

You can use this menu from the help icon ( ) to access help resources for Specpoint. On the help menu, the following options are available:

- **Online Help**: Access user documentation.
- **Email Help Desk**: Depending on your user permission, send an email to your A/E firm's designated account administrator or Specpoint's dedicated help desk for support requests or questions.
- **Deltek Support Center**: As the designated account administrator for your A/E firm, submit a case or call/chat with Deltek Customer Care.
- **Privacy Policy**: View Deltek's privacy policy.
- **Terms of Use**: View Specpoint's terms of use.
- **Build Number**: View the platform's current build number, which you can use as a reference for checking features and reporting issues.

User Profile Menu

You can use this menu to manage your Specpoint user account. On the user profile menu, the following options are available:

- **My Profile**: Open the My Profile window, update your user information, and upload a profile photo.
- **Change Password**: Update your login password.
- **Log Out**: End your user session.

In addition, the following options are available only to administrators:

- **Account**: Open the Account Settings page and manage account information for your A/E firm.
- **Manage Users**: Open the User Management page and manage users within your A/E firm.

Project Dashboard Menu

You can use this special navigation menu to access different pages on the project dashboard. The following options are available on this menu:

- Overview
- Schedule
- Workspace
- Export

Home Dashboard

The home dashboard serves as a single point of access to information and resources to help you manage your A/E professional firm's operations.

The following features are available on the dashboard:

- Project Research Map
- Firm Contacts
- AIA News
- Recently Listed
- Deltek News

Project Research Map

Specpoint includes the Project Research Map, which enables you to browse and research project data from firms within Specpoint or Deltek e-SPECS. You can use this feature to research the following layers of information for each project: overview, families, and manufacturers.

In the project research map, the following components are available:

- Project Filters Pane
- Map Tab
- Results Tab

Project Filters

Multiple project filters are available. In this pane, you can use the following filter options to filter or search for projects:

- Select Saved Search
- Days Since Project Updated
- My Specpoint Projects Only
- Country
- State
- Building Type
- Sustainability
- Construction Budget
- Assembly
- Family
- Manufacturer Specified
- Manufacturer

You can configure any combination of filters. The filters are dynamic. When you select a value for a filter, other filters will display only the available options with respect to your current selection.

You can also save, load, and delete search criteria to maintain insight on a group of projects over a period of time. The search criteria that you specify in the project filters apply to the Project Research Map and Top 10 Results on the Map tab and the All Search Results list on the Results tab.

Map Tab

The Map tab displays the project data through a heat map representation. You can use the map on this tab to navigate to and view project locations. You can also perform the following actions on the map:

- Pan to different map locations.
- Zoom in and out.
- Revert to the default location and zoom level.
- Show or hide the map legend.

Top 10 Results

On the Map tab, you can access the Top 10 Results list, which displays the top 10 projects that fit the currently set filters. You can use this pane to view the top 10 search results in a list view simultaneously with the Project Research Map. This pane previews each project with the following information:

- Last Updated
- State/Province
- Building Type
- Budget

Results Tab

The Results tab displays all project data or filtered search results in a list view. You can view the projects with the following information and options:

- Date Last Updated
- Project Name (for your A/E firm's projects only)
- Project Number (for your A/E firm's projects only)
- State/Province
- Building Type
- Contract Type
- Construction Type
- Sustainability
- Construction Budget
- Level of Specification
- View Option

You can sort the projects based on the information above and export the list of projects as a CSV, XLSX, or PDF file.

You can also use this tab to view overview, family element, and manufacturer information for a specific project. The following windows are available for viewing project information:

- Project Overview Data Window
- Project Manufacturers Window

Project Overview Window

You can use this window to view overview information about a project and its family elements. In the Project Overview window, the following information is available for public viewing:

- Last Updated
- Project Phase
- Level of Specification
- Construction Budget
- Building Type
- Construction Type
- Contract Type
- Sustainability

The availability of the information above depends on whether the project is from Specpoint or e-SPECS.

In addition, the following information is available only for your A/E firm's projects:

- Project Name
- Project Number
- Address (Address 1, Address 2, City, State/Province, and Zip/Postal Code)

You can also view the list of family elements and filter the families by family name and family source/base document.

Project Manufacturers Window

This window is only available for e-SPECS projects. The Project Manufacturers window lists the available manufacturers and their product listings for a given family as well as if the A/E firm specified the product listing in the family element. You can use this page to view the content outline of the family in the Family Detail portion.

Widgets

On the home dashboard, the following widgets are available:

- Firm Contacts
- AIA News
- Recently Listed
- Deltek News

Firm Contacts

You can use this widget to quickly access contacts within your A/E firm. For each contact, the following information is available:

- Name
- Role
- Contact Number
- Email Address

AIA News

You can use this widget to quickly access news from the American Institute of Architects.

Recently Listed

You can use this widget to view and access more information about the newest available product listings. This widget lists the four latest published product listings with their respective BPM's logo or name, product name, and photo preview.

You can also use this widget to open the Product Listings window. This enables you to browse and research the available product listings within Specpoint.

Deltek News

You can use this widget to quickly access the Deltek Media Center web page and read the latest news about Deltek.

Projects

This portion includes descriptions of the new features for working on your A/E firm’s project specifications.

Projects Home Page

You can use this page to create, view, and open projects. The Projects Home page serves as an access point to your A/E firm's projects. When your A/E firm has no projects, this page only displays the **+ Add A Project** button.

The following two portions are available on this page:

- Recent Projects
- All Projects

Recent Projects

On the Projects Home page, you can use this widget to access the seven projects that you last viewed or that a user created. Each project displays as a project card.

All Projects

On the Projects Home page, you can use this widget to access your A/E firm's projects and browse through the projects in the following views:

- Grid View
- Table View

Both views organize the projects by the available project groups and sort the projects by most recently viewed or created.

For projects, you can perform the following tasks in both views as applicable to your user permission:

- Expand or collapse project groups to show or hide their respective projects.
- Filter projects.
- Open the View Project Details pane and preview project information.
- Open the New Project Details pane and add a new project.
- Open a project on the Project Overview page.
- Open a project in the project workspace.
- Remove a project.

The Projects Home page enables you to manage project groups. A project group is a vehicle that allows administrators to organize projects within their account by type, sector, owner, discipline, or a combination of those.

For project groups, administrators can perform the following tasks:

- Create a new project group.
- Modify a project group.
- Remove a project group.

Project Cards

These cards are available on the Projects Home page. You can use project cards to preview project information while you browse for projects. A project card also enables you to load a project to the project dashboard or project workspace for viewing or modification. Each card displays a project's name and photo.

The following options are available on each project card:

- **Favorite Icon** : Mark or unmark a project as a favorite.
- **View Project Information** : Display the View Project Details pane and preview project information.
- **Menu Icon** : Display the following menu options:
  - **Go to Dashboard**
  - **Go to Workspace**
  - **Remove Project**

View Project Details Pane

The View Project Details pane enables you to view project overview information without leaving the Projects Home page. You can use this pane to view the following information:

- Project Details
  - Project Group
  - Project Number
  - Project Name
  - Project Location
- Project Parameters
  - Building Type
  - Construction Type
  - Contract Type
  - Sustainability
- Project Phase
  - Current Phase
  - Target Completion

New Project Details Pane

As an author or administrator, you can use the New Project Details pane to create a new project. The following fields are available in this pane:

- General Information
  - Project Group
  - Project Number
  - Project Name
  - Construction Budget
  - Owner
  - Gross Building Area
- Project Location

    - Address
    - Address 2
    - City
    - State/Province
    - Zip
    - Country
- Project Parameters
    - Building Type
    - Construction Type
    - Contract Type
    - Sustainability
- Initial Project Milestone
    - Design Phase
    - Start Date
    - Planned Phase Completion

Projects

You can use the project dashboard to open and work on a project. The project dashboard consists of the following available pages, which you can access from the project dashboard menu:

- Project Overview
- Project Schedule
- Project Workspace
- Export

Project Overview Page

You can use the Project Overview page to gain insight on multiple aspects of your project in a single place. This page serves as an area where you can track project health, priorities, and assignments for individual elements. This page organizes the available information into the following portions:

- Project Overview
- Design Progress
- Team Members

Project Overview and Details

On the Project Overview page, you can use the Details portion to view the following details for a project:

- Project Image (or a default project image based on the project's building type)
- General Information
    - Project Group
    - Project Name

  - Project Number
  - Owner
  - Construction Budget
  - Gross Building Area
- Project Parameters
  - Building Type
  - Construction Type
  - Contract Type
  - Sustainability
- Project Address and Map

Options which enable you to perform the following tasks are also available in this portion:

- Open the Edit Project Details pane and edit project details.
- Upload a project image.

Design Progress

On the Project Overview page, you can use the Design Progress portion to view the progress of a project's recently updated elements at an account level. This feature supports the following project elements:

- Assemblies
- Families
- Product Types

You can use the Design Progress feature to perform the following tasks:

- Preview the following project information:
  - Element Name
  - State
  - Assigned To
  - Date Modified
  - Current Level of Specification (LOS)
  - Target Level of Specification (LOS)
- Filter project elements based on the available previewed information.
- Navigate to the project workspace at the specific point for a selected project element.

Teams

On the Project Overview page, you can use the Teams portion to manage the team members of a project and determine who can access the project. Specpoint provides user groups based on disciplines.

The following teams are available:

- Architectural
- Structural

- Consultant
- Mechanical
- Electrical
- Plumbing
- Civil
- Coordination
- Construction
- Facilities Management
- Building Product Manufacturer

In the Teams portion, you can use the available features to perform the following tasks:

- View all members of a project team in each respective Team Members dialog box.
- Open the Add Team Members dialog box and add a member of your A/E firm to a project team.
- Open the Remove Team Members dialog box and remove a member from a project team.
- Open a Team Member Information dialog box and view general information or edit project team-specific details about a project team member.

Edit Project Details Pane

As an author or administrator, you can open this pane from the Project Overview page and edit information about a project. The following fields are available in this pane:

- General Information
  - Project Group
  - Project Number
  - Project Name
  - Construction Budget
  - Owner
  - Gross Building Area
- Project Location
  - Address
  - Address 2
  - City
  - State/Province
  - Zip
  - Country
- Project Parameters
  - Building Type
  - Construction Type
  - Contract Type

- Sustainability

Project Schedule Page

You can use the Project Schedule page to set and track a project's progress through the project design phases. This page displays the following project milestones or design phases in a timeline:

- Project Created
- Pre-Design
- Schematic Design
- Design Development
- Construction Documents
- Bidding & Negotiation
- Construction Administration
- Facilities Management

For each design phase, this page enables you to define the following parameters:

- Target Completion Date
- Actual Completion Date
- Current Level of Specifications (LOS)
- Target Level of Specifications (LOS)

Project Contents

This portion includes descriptions of the new features for working on your project specification contents, such as project elements and their respective content items.

Project Workspace

You can open a project in the project workspace or Workspace page.

The project workspace contains the following features which enable you to manage the active project's properties and contents:

- Project Workspace Action Bar
- Show/Hide Bar
- Element Search Bar
- Categories Pane
- Project Elements Pane
- Element Form
- Project Properties Pane

Project Workspace Action Bar

This bar is available in the project workspace. The project workspace action bar contains options which enable you to perform the following tasks:

- View project information, such as project parameters, selected products, and added items on this action bar.
- Show and hide options on this action bar to either make project workspace options accessible or maximize the size of the element form.
- Filter the available projects in the Project Elements pane to only elements that are currently in the project.
- Open the Product Listings window to browse, research, add, and remove product listings for the active project.
- Open the Notes window to view, create, modify, and comment on project notes for the active project.
- Open the Project Settings window to modify general settings that the active project uses, such as units of measure, family number format, and data collection.

Project Parameters Window

You can view a project's parameters in the project workspace from the project workspace action bar. In the Project Parameters window, the following information is available:

- Building Type
- Contract Type
- Construction Type
- Sustainability Type

Show/Hide Bar

On the Show/Hide bar, you can use the available options to show and hide panes in the project workspace. This feature enables you to maximize the size of your workspace area after you make your selections and configurations in each respective pane. The following options are available for their respective panes:

- Categories
- Project Elements
- Project Properties

Element Search Bar

This search bar is available in the project workspace. You can use this search bar to search for an assembly element, family element, and/or product type element. This feature displays the search results in the Project Elements pane and works with the filtering of the **Added to Project** option and your selection in the Categories pane.

Categories Pane

In the project workspace, you can use the Categories pane to select a discipline and an associated building category. Your selections in this pane filter the assemblies, families, and product types in the Project Elements pane for which you make further selections.

Project Elements Pane

In the project workspace, you can use the Project Elements pane to view assemblies, families, and product types. This pane lists the following available elements in the following hierarchy based on your selected category:

- Assembly Group
  - Sub-assembly Group
    - Sub-assembly Type
      - Family
        - Product Type

The available elements display in varying color codes to indicate their status relative to the active project and the available actions that you can perform on the element.

For working with project elements, you can perform the following tasks in this pane:

- Load more project elements to the list.
- Expand or collapse a project element to show or hide its child project elements.
- Select assemblies, families, and product types to view in, add to, or remove from the active project.

  When you add a project element, Specpoint adds associated project elements, such as its parent family or assembly, as applicable. Likewise, when you remove a project element, Specpoint removes associated project elements, such as its child families or product types, as applicable.

Family and Product Type Elements

Specpoint splits the traditional three-part section into two elements: a family and a product type.

A family typically has several product types nested under it. It contains administrative properties as well as properties that apply across all of its product types.

A product type contains product-specific performance properties, characteristics, and product (or material) selections.

Element Form

This portion is available in the project workspace. When you add an assembly, family, or product type from their respective panes, the element form enables you to work on the project element, its contents, and its properties.

The following contents are available:

- Options for project element addition, removal, and preview
- The form that contains an element’s content items, such as performance requirements, parts, articles, and paragraphs
- The Project Properties pane, which you can use to modify the view of element content items on the element form and to modify project properties

For a selected assembly, family, or product type in the project elements pane, you can perform the following actions:

Project Element	Available Actions
All	▪ Add or remove the project element to or from the project. ▪ Modify project management properties. ▪ Expand or collapse all content items.
Assembly	▪ Modify performance requirements.
Family	▪ Modify family properties, articles, and paragraphs. ▪ View family contents in the Section Preview window.
Product Type	▪ Work on the product type's articles and paragraphs. ▪ Indicate a drawing designation.

Project Properties Pane

This pane is available in the project workspace. When you add an assembly, family, or product type to a project, the Project Properties pane displays properties for project management and options for content visibility. You can view and specify values for the project management properties in the following fields:

- Assigned To
- State
- Current LOS
- Target LOS
- Drawing Tag (for product type elements only)

In addition, the following options are available for customizing your view of the element form:

- Show Hidden Properties
- Show Notes to Specifiers
- Show Shared Properties

Performance Requirements

For assemblies, these content items are available on the element form of the project workspace. The available performance requirements depend on the active assembly. You can use each property to define a performance requirement for a family and/or a product type under an assembly.

Element Tabs (Parts)

For family and product type elements, these parts are available on the element form of the project workspace. These parts display as tabs and organize the contents of a family or a product type based on a function or category. The following tabs are available:

- **General**: This part includes properties such as submittal requirements, quality assurance properties, and warranty options.
- **Product**: This part includes shared product type properties.
- **Execution**: This part includes property sets for quality control.

Articles

For family and product type elements, these articles are available on the element form of the project workspace. These articles group paragraphs and related property sets. You can perform the following actions on an article:

- Rearrange articles to prioritize specific contents and create a custom order.
- Activate an article to show the article and its paragraphs in the preview and output, and enable modifications for it.
- Inactivate an article to hide the article and its paragraphs from the preview and output, and disable modifications for it.
- Add custom articles.
- Remove user-added articles to clear unnecessary project-level content.

  You cannot remove baseline content. To omit baseline MasterSpec content from the preview and output, inactivate the article or property.

Each article displays with its article number and title. For each article, the following options are available:

- **Grip/Move**
- **Activate** or **Inactivate**
- **Add Icon**
- **Remove Icon**
- **Collapsed** or **Expanded** **Indicator**

Paragraphs

For family and product type elements, these paragraphs are available on the element form of the project workspace. A paragraph serves as the basic unit of content in a project element and is typically a property that describes a particular form and function of an element. You can perform the following options on a paragraph:

- Modify the paragraph contents.
- Select an option from the paragraph's option set.
- Enter a value in a paragraph's insert option.
- Add a new paragraph.
- Arrange paragraphs.
- Activate or inactivate a paragraph.
- Delete a user-added paragraph.

  You cannot remove baseline content. To omit baseline MasterSpec content from the preview and output, inactivate the paragraph.

For each paragraph, the following contents are available:

- **Property Title (Key)**: This serves as a title for the paragraph or a key that identifies a product type property.

- **Paragraph Content (Value)**: This is the actual information for a given element in the form of a sentence, phrase, or description.
- **Option Set**: These options enable you to select or enter values in a paragraph and specify properties according to your project requirements. Use option pills (**(Option)**) to select a recommended value, or use the insert option (**[Insert]**) to enter a custom value.

For each paragraph, the following options are available:

- **Grip/Move**
- **Activate** or **Inactivate**
- **Add Icon**
- **Remove Icon**

Shared Property

A shared property is a paragraph that multiple product types share from its source family. A shared property simplifies references to related contents as it applies to multiple product types. You can use shared properties to make paragraph changes across related project elements.

Product Type Property

This intelligent paragraph is now available. A product type property paragraph describes a particular product requirement for your project specifications. You can use a product type property to specify a particular property of a product type element in your project.

When you enter/select a value in the option set of a product type property, Specpoint filters the available listings in the Product Listings window to only product listings that fit your specified product type property.

Manufacturer Paragraph

This intelligent paragraph is now available. You can use this paragraph to select a specific manufacturer or product listing and fulfill a product type requirement in your A/E firm's project specifications.

When you select a manufacturer from the paragraph's option set, Specpoint adds the product listing to the project. The platform also selects the respective options in the option sets of associated product type properties to align content with the selected manufacturer.

Basis of Design (BOD) Product Paragraph

This intelligent paragraph is now available. You can use this paragraph to specify a product as a basis of design (BOD) and select comparable products.

When you select a product listing from the paragraph's option set as a comparable product, Specpoint adds the product listing to the project. The platform also selects respective options in the option sets of associated product type properties to align content with the selected product listing.

For a given product type, you can only use either a BOD paragraph or a manufacturer product type.

Notes to Specifier

These notes are available for select content items. You can use notes to specifier as guidance for using articles and paragraphs from MasterSpec.

Preview and Export

This portion includes descriptions of the key features for previewing content in the workspace as well as creating a Project Manual output.

Section Preview Window

This window displays the contents of a family and its product types in a traditional section view that is styling agnostic. Use the section preview to view all active family and product type properties, which Specpoint includes in your project output.

You can select an added family element in the Project Elements pane and click **Preview** to display the Section Preview window.

The section preview includes the following:

- All active articles
- All active paragraphs
- All user selections or entries
- All options in an option set without any user selections or entries
- Applicable properties for active product type elements under a given family

Export Dialog Box

You can use this dialog box to export the active project into a file format that you can view and share outside Specpoint. The Export dialog box is accessible from the project dashboard menu and is available only for projects that have at least one active family element.

In this dialog box, the following options are available:

- Export Name
- File Export Types
    - Portable Document Format (PDF)
    - Word Document (DOCX)
- Include Notes to Specifier
- Export

Project Notes

You can add a project note to a project or a specific project element for various purposes, such as keeping project-related information updated or providing additional context to a decision.

This portion includes descriptions of the available features for working with notes for your projects and project elements.

Notes Window

You can use the Notes window to add, view, and manage notes for a project and its project elements. This window displays each project note in their respective note cards and organizes these note cards onto boards based on the notes' work status. The following boards are available:

- New

- In Progress
- Complete

In this window, you can use the available filter fields to quickly find project notes:

- Note Name
- Created By
- Note Type
- Last Modified (MM/DD/YYYY)

Note Card

In the Notes window, note cards are available. A note card represents a project note that a member of the project team added and previews information about the note. On a note card, the following information and options are available:

- Color Code for Work Status
- Note Name
- Note Type
- Note Description
- Comment Indicator
- Last Modified
- Delete Icon

You can perform the following actions on a note card:

- Drag and drop a note card from one board to another to update the note's work status.
- Click a note card to view its details and comments.
- Edit a note that you added.
- Delete a note that you added.

Add Note Window

You can use this window to add a new note for the active project or the project element that you selected in the Project Elements pane in the project workspace.

In the Add Note window, the following fields which enable you to enter information for the new note are available:

- Add Note Name
- Note Type
- Description
- Comment

Note Details Window

The Note Details window displays specifics about a note and comments that project team members added to the note. You can perform the following actions for a note:

- View note details.
- Edit a note that you added.
- Add a comment to a note.
- Delete a comment from a note that you added.
- Delete a comment that you added.

In the Note Details window, the following fields are available:

- Note Name
- Note Type
- Description
- Comments
- Created By
- Last Modified

Product Selection

For this release, Specpoint provides features and pages that enable you to browse and select product listings for your A/E firm's projects. The following features are available for this release:

- Product Listings
- Product Listings Window
- Product Listing Cards

Product Listings Window

You can use this window to research available product listings from BPMs within Specpoint for your A/E firm's project. In this window, the following portions are available:

- Product List
- Product Listing Details

The Product Listings window has two modes based on the location from where you opened this window. The following modes are available:

- **General Browsing**: You can use this mode to browse and research product listings for your A/E firm's projects.
- **Project Level**: You can use this mode to browse, research, and select product listings for the active project. This mode enables you to add a product listing to a project as a recommended product, basis of design, or comparable product.

Project Level—Special Behaviors

In the project-level mode of the Product Listings window, the following special behaviors apply:

- **Project Assignment**: Specpoint assigns this window to the active project of its origin project workspace, which is the workspace from which you opened this window. This enables to you add and remove projects for the active project.

- **Multiple Windows**: You can open multiple Product Listing windows from multiple origin project workspaces. Each action you make in a Product Listing window registers to its respective active project.
- **Filtering by Category**: Specpoint filters the available product listings in this window based on your selected category in the Categories pane in the origin workspace.
- **Filtering by Family and Product Type**: Specpoint filters the available product listings in this window based on your selected family or product type element in the Project Elements pane in the origin workspace.
- **Filtering by Product Type Property**: Specpoint filters the available product listings in this window based on your selected options in the product type property paragraphs of the selected family or product type element in the origin workspace.
- **Filtering by Manufacturer Paragraph**: Specpoint filters the available product listings in this window based on your selected options in the manufacturer paragraph of the selected family or product type element in the origin workspace.

Product List

The Product List portion contains a list of product listing cards based on the selected filters and special behaviors. You can use various listing filters to filter and search for product listings.

General Browsing

In the general browsing mode of the Product Listings window, the following product listing filters are available:

- Listing Type
- Categories
- Families
- Product Types

Project Level

In the project-level mode of the Product Listings window, the following product listing filters are available:

- Listing Types
- All Listings (Added to Project Only)
- Manufacturers

Product Listing Detail Pane

This pane displays when you click a product listing from the product list. You can use the Product Listing Detail portion to learn more about a specific product.

In this pane, the following product listing details are available:

- **Product Images and Videos**: This displays all the available photos and videos that the BPM added for the product.
- **Properties**: This displays the product properties for the product based on its product type. For each product property, this also displays all the possible options for that property and the selected option, if applicable.
- **Resources**: This displays the product description, available documents for download, and links.

Product Listings

These listings are available in Specpoint as product listing cards on the Product Listings window. A product listing represents a product that a BPM offers within Specpoint or from SpecAgent.

Each listing has a type which determines the available information about the product and how you can add it into your A/E firm's project specifications. The following product listing types are available:

- Premium MasterSpec
- Premium Proprietary
- Premium
- Manufacturer

Product Listing Card

A product listing card represents a product listing that a BPM offers within Specpoint. You can use this card to view general information about a product listing while you browse or filter product listings as well as access complete details about the listing.

The following information is available on a product listing card, depending on the product's listing type:

- Corporate Logo or Company Display Name of the BPM
- Added to Project Indicator
- Approval Logo
- Publication Date
- Status
- Photo or Video
- Category
- Product Name
- Family
- Product Type
- Listing Type and Color Code

When you use the Product Listings window in the project level, each product listing card contains options for product selection. The following options are available on each product listing card:

- **Add Product** : Add the product listing to the active project as a recommended product or comparable product as applicable.
- **BOD**: Add the product listing to the active project as a basis of design.
- **Remove from Project** : Remove the product listing from the project.

When you add or remove a product listing to and from a project, Specpoint makes automated changes to the respective BOD and/or manufacturer paragraph as well as to related product type property paragraphs. This ensures that your project specification contents align with your product selections.

Admin Settings

As an administrator, you can use the following pages to update your company account information and manage users for your A/E firm:

- Account Settings Page
- User Management Page
- User Page

You can access these pages from the user profile menu.

Account Settings Page

This page is available to administrators. You can use the Account Settings page to view and update information about your A/E firm account. On this page, the following information is available:

- Account Name
- Admin/Author Limit
- In Use
- Subscription Expiration Date
- Account Number
- Display Name
- Public Phone Number
- Website
- Address 1
- Address 2
- City
- State/Province
- Postal Code
- Country
- Status
- Contact Name
- Contact Email
- Designated Account Administrator

You can only update your A/E firm's display information, such as the display name, address information, and contact information. You cannot update subscription-specific information, such as the user limits for your account, subscription expiry date, and company contact person.

User Management Page

This page is available to administrators. The User Management page displays a list of users within your A/E firm and the following information for each user:

- First Name

- Last Name
- Email
- Permissions
- Discipline
- Role
- Status

You can filter or sort the users based on the information above. You can also use the following options to manage users based on their user status:

Status	Option
No User Selected	▪ New User
Active	▪ Edit ▪ Deactivate
Inactive	▪ Activate
Pending Invite	▪ Resend Invite ▪ Cancel Invite

User Page

This page is available to administrators. The User page enables you to create a new user or update user information. You can use this page to enter or update the following information:

- First Name
- Last Name
- User Email
- Permission
- Discipline
- Role
- Status

User Settings

You can use the following settings that you can access from the user profile menu to manage your user account:

- My Profile Window
- Change Password
- Log Out

My Profile Window

You can use the My Profile window to view and update the following information for your user profile:

- Profile Photo
- Prefix
- First Name
- Last Name
- Suffix
- Title
- Phone Number
- Role (display only)
- Address 1
- Address 2
- City
- State/Province
- Postal Code
- Country

Change Password Screen

You can change your password from the user profile menu to ensure that your user account and your A/E firm's data are secure.

Log Out of Specpoint

You can log out of Specpoint to protect your A/E firm's data and settings.

Help Resources

Multiple help resources are available on the help menu () to provide you with information and assistance.

See Help Menu.

Online Help

You can use the Specpoint Help for A/E Users to learn about the available features and how to use them.

Specpoint Migration Support

This section includes questions that you might have when you migrate to Specpoint from a different Deltek Specification Solutions application or platform.

Migrating from e-SPECS

When migrating from e-SPECS to Specpoint, refer to the following answers to potential questions and concerns:

- **How can we migrate to Specpoint if we are running e-SPECS on-premises? What are the steps involved?**

  There is a cut-off date when moving to Specpoint. There is a period when e-SPECS customers will have both systems active to allow them to complete their existing e-SPECS projects.

- **What if we are running e-SPECS in the cloud? What factors are involved when we migrate to Specpoint**?

  The backend for e-SPECS and Specpoint are completely separate from each other. Thus, migration is similar to the process for e-SPECS on-premises.

  Refer to the question and answer above.

- **Will all of our custom office masters migrate correctly? If not, what is the process to migrate them?**

  Customers with office masters and e-SPECS Designer are not currently candidates for migration. Both are set for migration to Specpoint in June 2022.

- **Will all of our existing projects migrate correctly? If not, what is the process to migrate them?**

  There is no migration for e-SPECS projects. Customers will deploy Specpoint only for new projects.

Migrating from SpecBuilder Cloud

When migrating from SpecBuilder Cloud to Specpoint, refer to the following answers to potential questions and concerns:

- **Will all of our custom office masters migrate correctly? If not, what is the process to migrate them?**

  SBC customers who want to use existing projects as masters must recreate the projects in Specpoint.

- **Will all of our existing projects migrate correctly? If not, what is the process to migrate them?**

  There is no migration for SBC projects. Customers will deploy Specpoint only for new projects.

- **SBC is the only alternative for Mac users. Is Specpoint compatible with Mac computers?**

  Yes. We recommend that you use Chrome, Firefox, Edge, or Safari®. You might also experience minimal issues with the custom screen resolution of MacBooks.

Migrating from MasterWorks

When migrating from MasterWorks to Specpoint, refer to the following answers to potential questions and concerns:

- **What will be the migration process for Masterworks users?**

  Is there an intuitive import function in Specpoint for importing Word documents? Will this be a manual process or will there be some type of automation available to import the data?

  For existing projects in Microsoft® Word, you must complete these projects in Word. Customers will deploy Specpoint only for new projects.

- **Since customers typically manipulate Word documents, will Specpoint allow those users to export projects into a format that works with Word?**

  Similar to e-SPECS, exporting a project as a DOCX file will be available, but Specpoint will not track any changes in these exported files until these files are transferred over.

  There will be an import feature, but it is intended for sections not available in MasterSpec.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center 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 Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

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

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

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

Available Documentation for this Release

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
Deltek Specpoint Help for A/E Users	This guide contains descriptions of and procedural information about features included in Specpoint. You can access this guide from Specpoint's help menu.
Deltek Specpoint SaaS Administrator Guide	This guide contains descriptions of and procedural information about features that are available for administrators who are responsible for the initial activation and ongoing management of Specpoint.

About Deltek

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