Deltek

Deltek Specpoint 1.0

Release Notes for A/E Early Adopters

January 20, 2021

This edition published January 2021.

Contents

Disclaimer

The scope of these release notes is limited to the early adoption program and the features described are subject to change.

Important Notice

These release notes provide overview descriptions of features and enhancements planned for the upcoming Specpoint release. This document lists the currently planned work, but the actual scope and contents could change prior to the official release. Please use this document for guidance only.

Overview

Welcome to Deltek Specpoint Release Notes for A/E Early Adopters. These release notes contain a summary of the major new features.

New Features

This section includes summaries of the new features included in the early adoption program.

A/E Account Setup

As the designated account administrator, you can now 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 your Deltek onboarder, you must 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 new features for user access in Specpoint.

User Account Setup

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

User Login

With an active user account, you can now log in to Specpoint. Enter your valid email address and password to log in.

If you forget your password, you can now reset your password by using your valid email address on the Login page.

Common Application Elements

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

User Interface

Specpoint's user interface design which optimizes user experience and navigation is now available.

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

Image Upload Utility

The Image Upload Utility is now available to enable you to upload images 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

Specpoint now includes the following menus to enable you to access pages and features within the platform:

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

Top Menu

You can now use the navigation menu to access key areas and pages in Specpoint. The following options are now available on this menu:

- **Home Icon** : Access the Projects Home page.
- **Map Icon** : Access the home dashboard and the project research map.
- **Special Navigation Menus**: This displays menus and options for specific areas in Specpoint.
- **Help Menu**: Access multiple 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 now use the user profile menu to access help resources for Specpoint. The following options are now available:

- **Online Help**: Access user documentation.
- **Email Help Desk**: Send an email to your A/E firm’s designated account administrator or Specpoint's dedicated help desk, depending on your user permission, 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.

User Profile Menu

You can now use the user profile menu to manage your Specpoint user account. The following options are now available on this menu:

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

Additionally, the following options are now available only to administrators:

- **Account**: Manage account information for your A/E firm.
- **Manage Users**: Manage users within your A/E firm.

Project Dashboard Menu

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

- Overview
- Build
- Schedule
- Publish

Home Dashboard

The home dashboard is now available. This 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 widgets are now available on the dashboard:

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

Project Research Map

In this release, Specpoint includes the Project Research Map which enables you to browse and research project data from firms within both Specpoint and Deltek e-SPECS. This feature displays the following layers of information:

- Overview Information
- Sections
- Manufacturers

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

- Map Tab
- Results Tab
- Project Filters Pane

Map Tab

This tab is now available. The Map tab displays the project data through a heat map visualization and a map legend for reference. You can now use the project heat map on this tab to navigate to and view project locations. You can now 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, the Top 10 Results list is now available. This lists the top 10 projects that fit the current filter. You can now use this pane to view the top 10 search results in a list view simultaneously with the project heat map. This pane previews each project with the following information:

- Last Updated
- State
- Building Type
- Budget

Results Tab

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

- Date Last Updated
- Project Number (for your A/E firm's projects only)
- Project Name (for your A/E firm's projects only)
- State
- Building Type
- Budget

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

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

- Project Overview Data Window
- Project Manufacturers Window

Project Filters

Multiple project filters are now available. You can now use the following filter options in this pane to filter or search for projects:

- Select Save Search
- Days Since Project Updated
- My Firm's Projects Only

- Country
- State
- Building Type
- Construction Budget
- Assembly
- Family
- Manufacturer Specified
- Manufacturer

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

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

Project Overview Window

You can now use this window to view overview information about a project and its sections. In the Project Overview window, following information are now available:

- Project Name (for your A/E firm's projects only)
- Project Number (for your A/E firm's projects only)
- Address (Address 1, Address 2, City, State/Province, and Zip/Postal Code)
- Section Sources (Custom Office Masters or Default Office Masters)
- Created
- Last Updated
- LEED
- Section List

You can now filter the list of sections by the section's name and section source/base document.

Project Manufacturers Window

This window is now available. The Project Manufacturers window lists the available manufacturers and their products for a section as well as if the A/E firm specified the product in the project section. Under Section Detail, you can now use this page to view the content outline of the section.

Widgets

The following widgets are now available on the dashboard:

- **AIA News**: You can now use this widget to quickly access news from the American Institute of Architects.
- **Deltek News**: You can now use this widget to quickly access the Deltek Media Center web page and read the latest news about Deltek.

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

Projects

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

Project Home Page

You can now 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.

This following two widgets are now available on this page:

- Recent Projects
- All Projects

Recent Projects

This widget is now available on the Projects Home page. You can now use this widget to access the seven projects that you last viewed as project cards.

All Projects

This widget is now available on the Projects Home page. You can now use this widget to access your A/E firm's projects and browse through the projects in the following views:

- Grid View
- Table View

Additionally, you can now perform the following tasks in both views:

- Expand or collapse project groups to show or hide their respective projects.
- Filter projects.
- Preview project information.
- Open a project on the project dashboard.

As an author or administrator, you can now use this page to display the New Project Details pane and create a new project.

Project Cards

These cards are now available on the Projects Home page. You can now use project cards to preview project information while you browse for projects as well as 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 now available on each project card:

Option	Description
Favorite Icon ☆	Mark or unmark a project as a favorite.

Option	Description
View Project Information	Display the View Project Details pane and preview project information.
Menu Icon	View the following menu options: ▪ **Go to Dashboard**: Open the project on the Project Overview page of the project dashboard. ▪ **Go to Workspace**: Open the project on the Project Workspace - Build page of the project dashboard.

View Project Details Pane

This pane is now available. The View Project Details pane enables you to view project overview information without leaving the Projects Home page. You can now 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 now use the New Project Details pane to create a new project. The following fields are now available in this pane:

- 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
    - Phase Start Date
    - Planned Phase Completion

Project Dashboard

This dashboard is now available. You can now open a project on the project dashboard to 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 Workspace – Build
- Project Schedule

Project Overview Page

This page is now available. You can now use the Project Overview page to gain insight of multiple aspects of your project in a single place. This page contains varied information about your project and organizes these information into the following portions:

- Project Overview
- Design Progress
- Team Members

Project Overview and Details

This portion is now available on the Project Overview page. You can now 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 Number

    - Project Name
    - Construction Budget
    - Owner
    - Gross Building Area
- Project Parameters
    - Building Type
    - Construction Type
    - Contract Type
    - Sustainability
- Project Address

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

- Edit project details.
- Upload a project image.

Design Progress

This portion is now available on the Project Overview page. You can now use the Design Progress portion to view the progress of a project's elements at an account level. This feature now supports the following project elements:

- Level 3 Assemblies
- Families
- Product Types

This feature also now enables you to perform the following tasks:

- Preview the following project information:
    - State
    - Assigned To
    - Date Modified
    - Current LOD
    - Target LOD
- Filter project elements based on the available previewed information.
- Navigate to the project workspace at the specific point for a selected project element.

Teams

This portion is now available on the Project Overview page. You can now use the Teams portion to view and manage the teams and team members of your A/E firm's project.

The following teams are now available:

- Architectural
- Structural
- Consultant

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

This feature also now enables you to perform the following tasks:

- View all members of a project team.
- View details about a project team member.
- Edit project team-specific details about a project team member.
- Add a member of your A/E firm to a project team.
- Remove a member from a project team.

Edit Project Details Pane

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

- 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 Workspace

You can now open a project in the project workspace. In this workspace, the Build page is now available.

Project Workspace Action Bar

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

- Manage a project on the project workspace.
- 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 content area.

Show/Hide Bar

On the Build page, you can now use the options on the Show/Hide bar 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 now available for their respective panes:

- Categories
- Project Elements

Categories Pane

This pane is now available on the Build page. You can now 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

This pane is now available on the Build page. You can now use the Project Elements pane to view Level 3 to 5 Assemblies, Families, and Product Types.

This pane lists the following available elements in the following hierarchy based on your selected category:

- **Level 3**: Assembly - System
- **Level 4**: Assembly - Component
- **Level 5**: Assembly - Detail
- **Level 6**: Family
- **Level 7**: Product Type

Additionally, you can now 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 Level 3 Assemblies, Families, and Product Types.

Edit Workspace

This portion is now available on Build page of the project workspace. When you add an assembly, family, or product type from their respective panes, the edit workspace enables you to work on the project element.

At the top of the edit workspace, options are available for project element selections. For a selected Level 3 Assembly, Family, or Product Type in the Project Elements pane, you can now perform the following tasks:

- Add or remove the project element to or from the project.
- Activate or inactivate the project element.

Common Element Properties Pane

This pane is now available on Build page of the project workspace. When you add an assembly, family, or product type to a project, the Common Element Properties pane displays content related properties. You can now view and specify values for the element properties in the following fields:

- Assigned To
- State
- Current LOD
- Target LOD

Additionally, the following options are now available for customizing your view of the edit workspace:

- Hide All Properties
- Hide All Paragraphs
- Hide All Specifier Notes

View Project Parameters

You can now view a project’s parameters in the project workspace from the project workspace action bar. The following information are now available in the Project Parameters window:

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

Project Schedule Page

This page is now available. You can now use the Project Schedule page to 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

Products

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 and pages are now available for this release:

- Product Listings Window
- Product Listing Card

Product Listings Window

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

- Product List
- Product Listing Details

Product List

This portion is now available in the product listings window. The Product List portion contains a list of product listing cards based on the selected category in the project workspace for a project. You can now also use various listing filters to filter and search for product listings.

The following product listing filters are now available:

- Listing Type
- Not in Project

Product Listing Detail

This portion is now available in the Product Listings window. This portion only displays when you select a product listing from the product list. You can now use the Product Listing Detail portion to learn more about a specific project.

In this portion, the following product listing details are now available:

- Product Images and Videos
- Properties
- Resources
  - Product Description
  - Documents
  - Links

Product Listing Card

These cards are now available on the Product Listings window. You can now use a product listing card to view general information about a product listing while you browse or filter product listings as well as add a product listing to a project. The following information are available in a product listing card:

- BPM's Corporate Logo or Company Display Name
- Publication Date
- Product Listing State
- Product Listing Image
- Category
- Product Name
- Family
- Product Type
- Listing Type

Admin Settings

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

- Account Settings Page
- Manage Users Page
- User Page

Account Settings Page

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

- Account Name
- User 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 limit for your account, subscription expiry date, and company contact person.

Manage Users Page

This page is now available to administrators. The Manage Users 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 now filter or sort the users based on the information above. You can now also use the following options to manage users based on their user status:

Status	Option
Not Applicable	▪ New User
Active	▪ Edit ▪ Deactivate
Inactive	▪ Activate
Pending Invite	▪ Resend Invite ▪ Cancel Invite

User Page

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

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

User Settings

You can now 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

This window is now available. You can now 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 now 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 now log out of Specpoint to protect your A/E firm's data and settings.

Help Resources

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

See Help Menu.

Online Help

The Specpoint online help is now available. You can now use this online help to learn about the available features and how to use them.

> **Note:** This online help provides information about features planned for the upcoming Specpoint release. This help pertains to the currently planned work, but the actual scope and contents could change prior to the release. Please use this resource for guidance only.

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
Specpoint Help for AE Users	This guide contains descriptions of and procedural information about features included in the upcoming Specpoint release.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com