Using Deltek Customer Care Connect

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Introduction

Deltek Customer Care Connect (https://customercare.deltek.com) is provided for the convenience and exclusive use of Deltek clients. Its primary objective is to facilitate the use and understanding of Deltek products by providing a source of current technical and related support information.

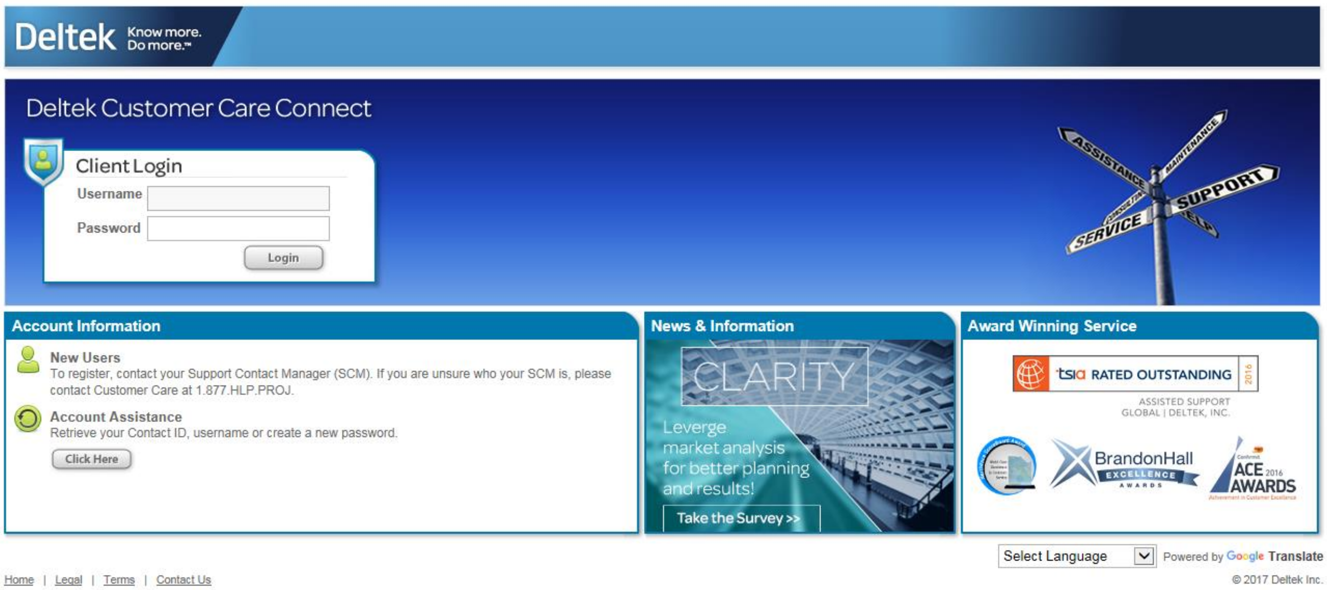
You can use the Support Portal to:

- Answer product-specific questions through an online knowledge base that contains the same up-to-date information used by Deltek Customer Care Analysts.
- Create your own support case and it will be logged into the support queue immediately.
- Check the status, view details, and update your support cases.
- Access user forums to ask questions, exchange ideas, and share knowledge about Deltek products and services with other Deltek customers.
- Chat with a live Deltek Customer Care Analyst.
- Download the latest product releases, hot fixes and service packs for the Deltek products you own.
- View, subscribe or unsubscribe to knowledge base articles
- Edit your preferences, account information, and contact information.
- Manage your company support contacts and access levels to the Support Portal.
- Manage your Deltek subscriptions.
- Provide feedback on the Connect site.
- Follow Deltek through various social media venues.

This help provides an overview of Deltek Customer Care Connect features and site navigation, and provides you with step-by-step instructions on using these features.

Access the Support Portal

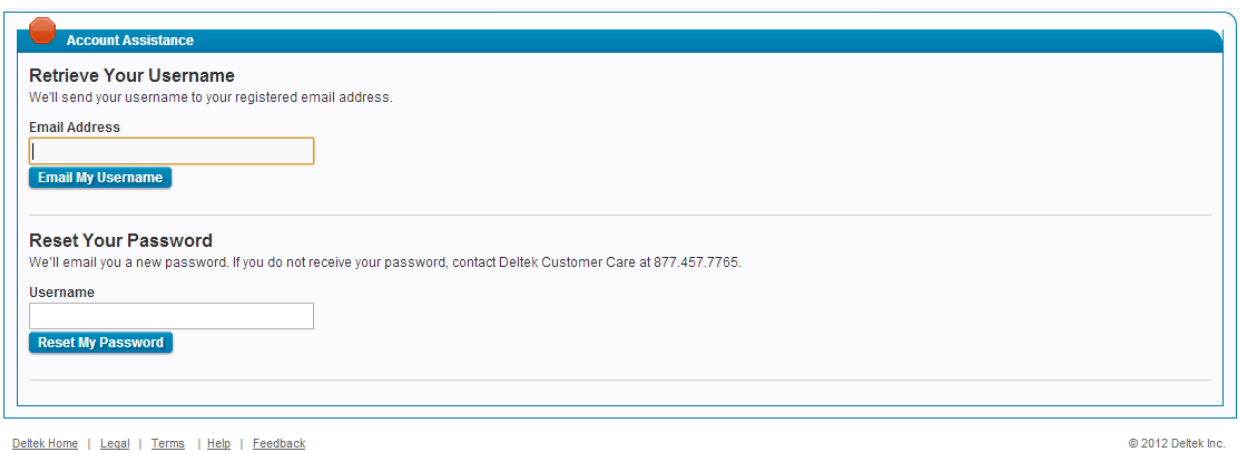
To access Deltek Customer Care Connect, login by clicking on **Support** and **Customer Care Connect Site** from Deltek's Corporate site (http://www.deltek.com) or type https://customercare.deltek.com) in your Web browser. Deltek Customer Care Connect is secure and a Username and Password are required to access.



If you do not have a current Username and Password, please contact the Support Contact Manager (SCM) at your company. If you are unsure who your Support Contact Manager contact Deltek Customer Care at 877.457.7765.

Forgot Your Username

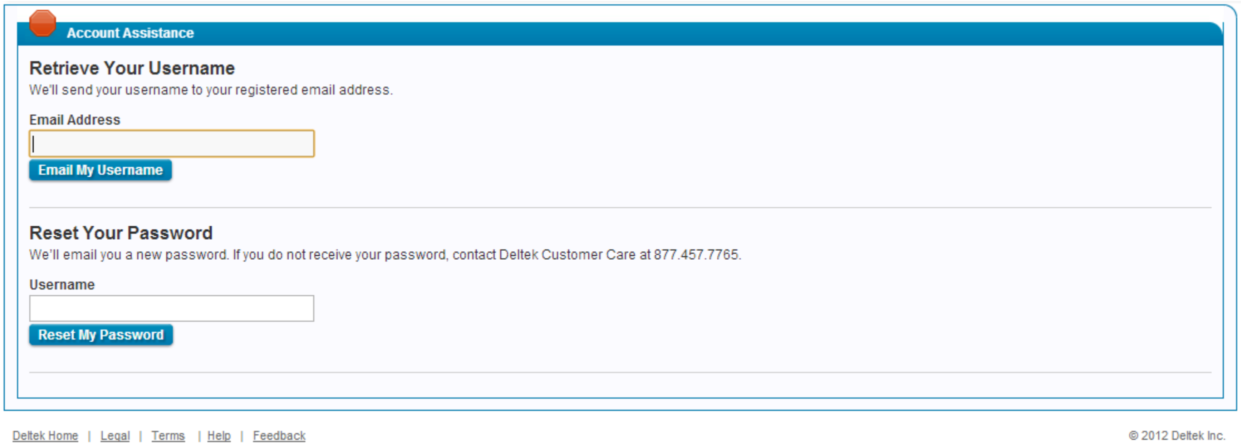
If you have forgotten your username, on the Login page, click on **Account Assistance**.



Under **Retrieve My Username**, enter your email address and click **Email My Username**. An email with your username will be emailed to your primary email address. If you do not receive the email promptly, contact Deltek Customer Care at 877.457.7765.

Forgot Your Password

If you have forgotten your password, on the Login page, click on **Account Assistance**.



Under **Reset Your Password** enter your username and click **Reset My Username**. An email with your secure link to reset your password will be emailed to your primary email address. If you do not receive the email promptly, please contact Deltek Customer Care at 877.457.7765.

Overview of Deltek Customer Care Connect Features and Navigation

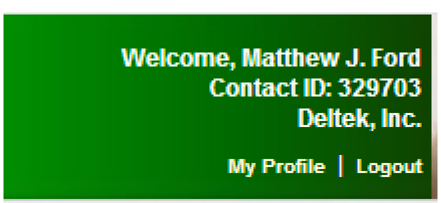
By design, Deltek Customer Care Connect ensures everything you need is easily accessible. The Home page contains the following areas:

- My Customer Care Plan
- Alerts
- Support Resources
- Customer Care's Mission
- My Deltek Contacts
- Cloud Solutions
- Quick Links
- Product Downloads
- Submit Case
- Quick Chat
- My Account
- Deltek University
- Payment Portal
- Stay Connected with Deltek

Video Overview: Learn more about the Customer Care Connect site by viewing this quick informative video.

Dashboard

At the top of each page on the Deltek Customer Care Connect site you will see the following information on the dashboard:



- **Contact Name** - This will display your name as entered in My Account – My Profile
- **Contact ID** – This 6 digit number is unique to each contact record. This number is required when calling into Customer Care (Contact Us) for support as it allows us to identify who is calling and personalize the phone tree menus based on your record. For example, you will only hear the options for the products you own and have support for.

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- **Organization Name** – This will display the name of your Organization.

My Profile

Use My Profile to view and edit your preferences, account information, and contact information. You can access your profile from the Customer Care Home page by clicking **My Profile** or by clicking the **My Account** tab and then selecting My Profile.

Update Your Profile

To update your profile:

1. Click **My Profile**.
2. Make the necessary changes to the following areas:

    - **Preferences** – Specify your **Preferred Language**. When you call Deltek Customer Care, the phone tree prompts you hear will be in the language you selected in that field with a few exceptions. There are some preferred language options that map to English (US) or English (UK) as the actual preferred language prompts are not available yet. Additionally, if the preferred language is not set or is set to 'Unknown' all prompts will be in English (US).

    Below is a chart that outlines which language is mapped to each Preferred Language value.

Preferred Language	Phone Prompt Language
English (US)	English (US)
English (AU)	English (US)
English (UK)	English (UK)
Danish	Danish
Dutch	English (UK)
Finnish	English (UK)
French	French
German	German
Italian	Italian
Norwegian	Norwegian
Swedish	Swedish

- **Account -** Change your username as needed.
- **Contact Information** - It is important to update your email address, office and mobile phone and other contact information whenever it changes by using this sub tab. Along with your personal Contact ID, your office and/or mobile phone number are used to also identify you when calling Customer Care for support. It allows us to present you with personalized menu options. Under Contact Information, you can also view the areas you have access to on the Connect site.

> The Support Contact Manager (SCM) at your organization is responsible for adding and editing contacts. They are responsible for granting access for the following functions of Deltek Customer Care Connect: access to Deltek Customer Care Connect, add additional Support Contact Managers, access to download corrections, and the ability to contact support.

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3. Click the **Save Changes** button.

Log Out

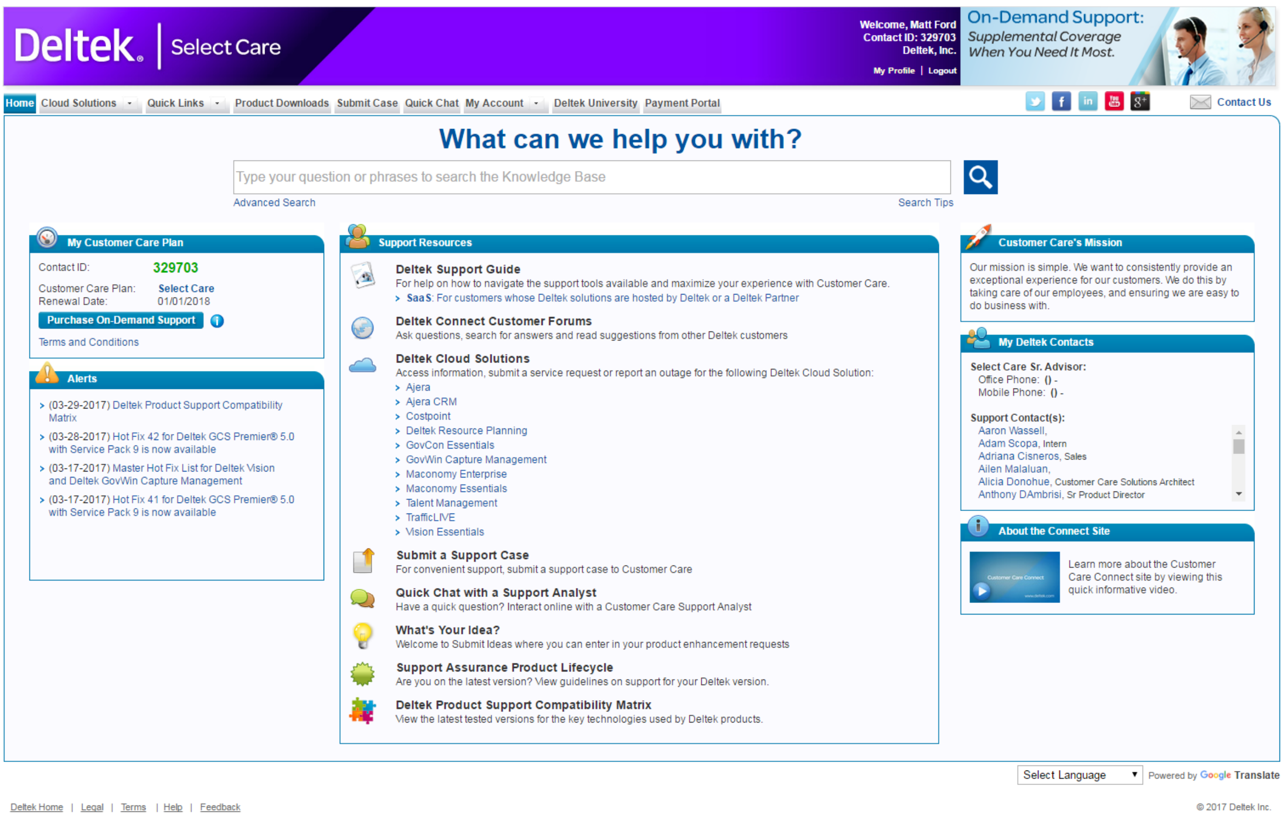
Click the Logout button to log out of the Deltek Customer Care Connect site.

Contact Us

Click Contact Us to access the Deltek Customer Care contact information and hours of availability.

Home

The Home page is your opening screen, and your portal into Customer Care Connect.



From this page you can access:

[Knowledge Base Search](#)

[My Customer Care Plan](#)

[Alerts](#)

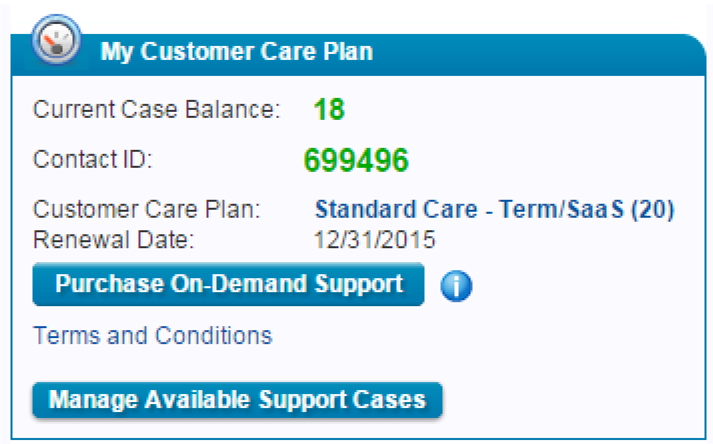
[Support Resources](#)

[My Deltek Contacts](#)

[Stay Connected with Deltek](#)

My Customer Care Plan

The My Customer Care Plan displays your current Customer Care Plan, your next renewal date and following options:



Purchase On-Demand Support

Deltek's On-Demand Support is available on-demand for situations that require brief, one-time access to our support experts for situations that are not covered by your annual maintenance fee. When you need more assistance than you have in-house, but don't require a full consulting engagement, consider On-Demand Support for:

- An in-depth conversation around specific product functionality
- Review of a specific issue facing your firm as a result of customization or unique implementation of the Deltek solution
- Full weekend coverage when installing a critical upgrade or business process.

On-Demand Support is priced individually, and our team is happy to work within your budget to deliver the extra support you require for each incident.

To submit your request for On-Demand Support services:

1. Click on **Request On-Demand Support**, review the information and click on the **Click Here** link. This will email mail OnDemandSupport@deltek.com. Advanced Customer Care will contact you directly to discuss the specific details and determine how they can help.

> **Click to view additional information on On-Demand Support**. You can also click the

Terms and Conditions

Click to view Deltek's Terms and Conditions which can also be found at http://www.deltek.com/terms.

Manage Available Support Cases

For those Customer Care Plans that have case limits, the My Customer Care Plan widget enables you to view your cases balance, cases used and the ability to purchase additional cases simply by clicking on **Manage Available Support Cases**.

> See **My Customer Care Plan** for additional information.

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Alerts

The Alerts section is designed to display important Deltek Customer Care and product related alerts and announcements such as Product and Hot Fix releases or any scheduled maintenance to Deltek Customer Care Connect or the Deltek Customer Care phone system. Any product related alerts you see under Alerts, only pertain to the product(s) you own.

View an Alert

To view an alert:

1. Under **Alerts** click on the alert you want to view. The **Alert** details page will display.

View Additional Details of an Alert

To view additional details of an alert, such as when it was created and last updated:

1. Under **Alerts** click on the alert you want to view.
2. While viewing the alert, scroll down and press next to Details. This will expand the details window and show you the **Products** and **Categories** the article is associated with. It will also display the date the article was created and last updated.

Rate an Alert

To rate an alert:

1. Under **Alerts** click on the alert you want to view.
2. After viewing the alert, while still on the article, scroll down to **Answer Feedback**.
3. Using the following scale rate how helpful the knowledge base article was:

   ★★★★★ Solved – No Case Required

   ★★★★☆ Solved – But the Article was not complete

   ★★★☆☆ Not Solved – Opening Case

   ★★☆☆☆ Not Solved – Still Searching

   ★☆☆☆☆ Not Solved – Stopped Searching

Print an Alert

To print an alert:

1. Under **Alerts** click on the alert you want to view.
2. After viewing the alert, if you would like to print this alert, simply click Print at the bottom of the open article. This will show a print preview of the article and open a Print dialog box.
3. Select your printer and press the **Print** button.

Email an Alert

To email an alert:

1. Under **Alerts** click on the alert you want to view.

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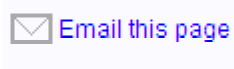
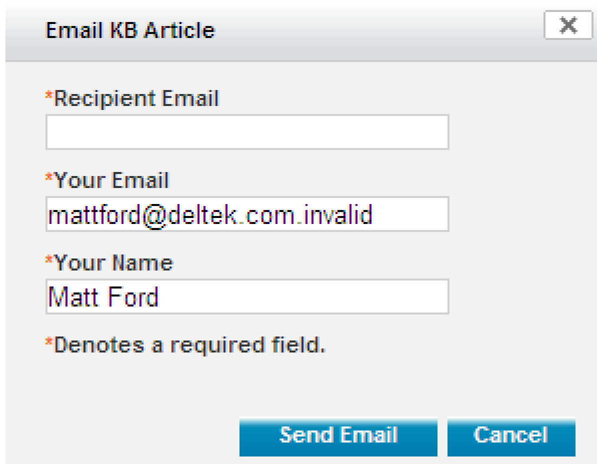
2. After viewing the alert, if you would like to email this alert to yourself, a co-worker, etc., simply click 

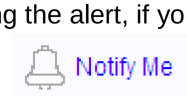
at the bottom of the open article. The following form will appear:



3. Fill in the **Recipient Email** field with an email address that you would like to send the article to.
4. Click the **“Send Email”** button.

Subscribe to an Alert

To subscribe to an alert:

1. Under **Alerts** click on the alert you want to view.
2. After viewing the alert, if you would like to be emailed a notification of any updates made to this alert, simply click 

at the bottom of the open article.

Unsubscribe to an Alert

To unsubscribe to an alert:

1. Click **My Knowledge Base Items**.
2. Click on the knowledge base article you want to unsubscribe to.
3. At the bottom of the article and click the **“Delete Request”** button at the bottom of the open article.

Customer Care's Mission

Our mission is simple. We want to consistently provide an exceptional experience for our customers.   We do this by taking care of our employees, and ensuring we are easy to do business with.

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My Deltek Contacts

Ever have an issue with your Deltek Connect site permissions, such as needing to set up as an Authorized Support Contact or given the ability to download product releases/hot fixes, but were not sure who in your organization to reach out to?   The My Deltek Contacts widget makes it easy to identify those individuals in your organization who have been designated as either a Deltek Support Contact (PSC) or Support Contact Manager (SCM).

To contact one of these contacts to have them modify your permissions:

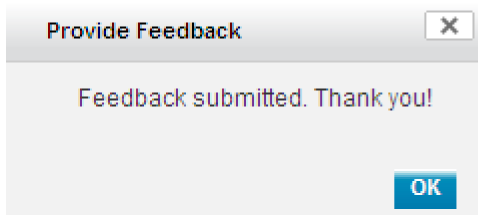
1. Click on the name of the SCM you want to contact. it will open an email with their name in the To: field.
2. Communicate those permissions you are looking to have modified and then send the email.

Feedback

Deltek Customer Care is constantly looking for ways to improve the Customer Care Connect site. A lot of the features and enhancements you see today were a result of feedback received from our customers. We encourage everyone to voice their opinion and offer their suggestions on what Deltek can do to improve your online experience. Provide Feedback allows you to submit a suggestion, complaint or other feedback about the Customer Care Connect site.

To provide feedback:

1. Click on **Feedback** at the footer of any one of the pages on the Connect site.
2. Verify that your email address in the **Email** field is correct. If the address is incorrect, please go to My Account – My Profile and update your email address.
3. In the **Your Feedback** section, enter your feedback regarding Deltek Customer Care Connect.
4. Click the **“Provide Feedback”** button. The following dialog box will appear.



5. Click the **“OK”** button.

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Support Resources

The Support Resources section provides easy access to frequently used Customer Care features. This section is located on the Customer Care home screen.

From the Support Resources section, you can access the following:

- Customer Care Support Guide
- Deltek Connect Customer Forums
- Deltek Cloud Solutions
- Submit a Support Case
- Quick Chat with a Support Analyst
- What's Your Idea?
- Support Assurance Product Lifecycle
- Deltek Product Support Compatibility Matrix

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Customer Care Support Guide

The Customer Care Support Guide introduces you to our Customer Care organization, helps you navigate the many support tools available, sets clear expectations, and maximizes your experience when contacting Customer Care.

The Customer Care Support Guide:

- Reviews the benefits of your Support and Maintenance Plan
- Provides an overview of our support model and operating procedures
- Covers how to open a new case, update an existing one, or how to escalate a case if necessary
- Highlights best practices on how to maximize your overall support experience with Deltek

Searching the Knowledge Base

Deltek Customer Care Connect includes a powerful search capability to find answers to question or provide information on a particular topic of interest. You can utilize the Basic Search to find technical answers or use the Advanced Search not only find technical answers but also browse Product Guides, Release Notes, forum posts and other product information.

Access to the knowledge base is available from the Customer Care Homepage or by clicking **Enterprise Search** under the **Quick Links** tab.

Using the Basic Search

To search using the Basic Search:

1. On the Home page enter in your question or phrases in the "What can I help you with?" search box and click the . You can also select Quick Links – Enterprise Search.
2. Refine your search by selecting a **Product** and/or **Category** and click Search.

Using the Advanced Search

Tutorial: View the **Search Tips & Tutorials** for additional information. Also review the **Search FAQ**.

To search using the Advanced Search:

1. On the Home page under the "What can I help you with?" search box select **Advanced Search**. If you used the Basic Search, you can click **Advanced Search** under the Search by Keyword search box.
2. Select any of the **Data Sources** form the **Sources** drop-down.

   Tutorial: View the **Sources** for additional information.

3. Type in one or more keywords representing what you are looking for, i.e. a document name, a KB article # and then click the **Search** button.
4. You can select any **Filters** that may help your search for a resolution or topic of interest.
5. To view any of the results you can click on **Quick View** which will give you a preview of the results or you can click on the **Summary/Title** to open the search result.

Refine Your Search Results

To sort your Enterprise Search results:

1. Click on **Advanced Search**.
2. Type in one or more keywords representing what you are looking for, i.e. a document name, a KB article # and then click the **Search** button.
3. Once your results appear you can:
   - Narrow results according to one item in a facet
   - Narrow results by excluding one or more items in a facet
   - Select more facet items using the search box
   - Narrow results using combinations of facets

Tutorial: Select the links above for a quick tutorial on using facets.

Sort Your Search Results

The results returned by your search are automatically sorted to display the most relevant answers at the top of the list. If you need to sort the results by modified date, click the **Sort By: Modified Date** option.

Tutorial: View the **Sort By** tutorial for additional information.

Utilizing Queries and Filters

Adding a Saved Query or a Saved filter

To save your queries and/or filters:

1. Click on **Advanced Search**.
2. Type in one or more keywords representing what you are looking for, i.e. a document name, a KB article # and then click the **Search** button.
3. Select any of your facets/filters.
4. Once the results refresh, at the bottom of the last facet click Query or Filter, to respectively save the search expression as a query or as a filter.
5. Enter a name for the query or filter, and then click Save.

Tutorial: View the **Adding a Saved Query or Filter** tutorial for additional information.

Using a Saved Query or a Saved filter

To use your queries and/or filters:

1. In the upper-right corner under Contact Us, select Do More and click the Select Saved Filter or Select Saved Query drop-down list.

   The drop-down list appears only when at least one saved query or one saved filter exists. When only queries are saved, the Select Saved Filter drop-down list is named Select Saved Query.

2. In the drop-down list, select the saved query or filter expression that you want to perform.

Tutorial: View the **Using a Saved Query or Filter** tutorial for additional information.

Deleting a Saved Query or a Saved filter

To use your queries and/or filters:

1. In the upper-right corner under Contact Us, select Do More and select Manage Filters.
2. In the Saved Queries and Filters page, in either the Saved Queries section or the Saved Filters section, click **Delete** next to the saved query or saved filter that you want to eliminate.
3. Click **Return to Search**.

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Tutorial: View the **Deleting a Saved Query or Filter** tutorial for additional information.

Exporting Your Search Results

To export your Enterprise Search results to MS Excel:

1. Click on **Advanced Search**.
2. Type in one or more keywords representing what you are looking for, i.e. a document name, a KB article # and then click the **Search** button.
3. Once your results appear click on Do More – Export to Excel

Tutorial: View the **Exporting Results** tutorial for additional information.

Source Tips & Tricks

Knowledge Base

Rate a Knowledge Base Article

To rate a knowledge base article:

1. Utilize the **Basic** or **Advanced Search**.
2. Click the **Summary** link to open the knowledge base article.
3. After viewing the knowledge base article,, while still on the article, scroll down to **Answer Feedback**.
4. Using the following scale rate how helpful the knowledge base article was:

 Solved – No Case Required

 Solved – But the Article was not complete

 Not Solved – Opening Case

 Not Solved – Still Searching

 Not Solved – Stopped Searching

Print a Knowledge Base Article

To print a knowledge base article:

1. Utilize the **Basic** or **Advanced Search**.
2. Click the **Summary** link to open the knowledge base article.
3. After viewing the knowledge base article, if you would like to print this knowledge base article, simply click 

at the bottom of the open article. This will show a print preview of the article and open a Print dialog box.
4. Select your printer and press the **Print** button.

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Email a Knowledge Base Article

To email a knowledge base article:

1. Utilize the **Basic** or **Advanced Search**.
2. Click the **Summary** link to open the knowledge base article.
3. After viewing the knowledge base article. if you would like email this knowledge base article to yourself, co-worker, etc., simply click Email this page at the bottom of the open article. The following form will appear:
4. Fill in the **Recipient Email** field with an email address that you would like to send the article to.
5. Click the **"Send Email"** button.

Subscribe to a Knowledge Base Article

To subscribe to a knowledge base article:

1. Utilize the **Basic** or **Advanced Search**.
2. Click the **Summary** link to open the knowledge base article.
3. After viewing the knowledge base article, if you would like to be emailed a notification of any updates made to this knowledge base article, simply click Notify Me at the bottom of the open article.

Unsubscribe to a Knowledge Base Article

To unsubscribe to a knowledge base article:

1. Click **My Account – My Knowledge Base Items**.
2. Click on the knowledge base article you want to unsubscribe to.
3. At the bottom of the article and click the **"Delete Request"** button at the bottom of the open article.

Release Documentation

Downloading Documentation

When viewing Release Documentation search results, when you click on a document it will by default open in a Quick View.

To download release documentation:

1. While the document is in Quick View mode, click Open in the upper-right corner of the previewed document.

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Deltek Connect Customer Forums

Deltek Connect Customer Forums provide a place for customers to discuss support topics and learn. At its heart are the message boards, where members post questions and answers. Registered members may browse or search the boards for information as well as post messages, track discussions, and get e-mail notifications on new posting activity.

Access to the **Deltek Connect Customer Forums** is available from the Customer Care Homepage or by clicking on the **Quick Links** tab.

Register for Customer Forums

To register for customer forums:

1. Click in **Deltek Connect Customer Forums** or the **Forums** tab.
2. Enter a **Display Name**. Your display name is your Forum identity. It appears whenever you post to the message boards or send private messages. Most members create anonymous names for the sake of privacy and to help them feel more comfortable participating. Be creative, have fun with it, but choose carefully: you cannot change your screen name once registration is complete.
3. Click **Submit**. You will now be in Deltek Connect Customer Forums and can begin personalizing your experience

Log onto Customer Forums

Once you've set your display name, you can log into the boards and begin personalizing your experience.

To log into customer forums:

1. Click on **Deltek Connect Customer Forums** or the **Forums** tab. You will automatically be logged in.

Personal Profile and My Settings

Tutorial: View the **Setting Up Your Forums Profile and Settings** tutorial for additional information.

Navigating the Customer Forums

Tutorial: View the **Navigating the Connect Customer Forums** overview.

Browse Customer Forums

Many users like to get started by exploring the message boards. Choose a category that best fits your topic. Look over the list of boards, find one whose title pertains to your question or comment, and then click on its title. Take some time to read ones that look promising by clicking the message title or subject. You can use the **Previous/Next** buttons to browse to other pages and messages.

Use the **Go To** pull-down menu to go directly to boards in any category of the Forum. If you can't find what you need by browsing, use the Search Forum tool.

Search Customer Forums

To search the forums, type keywords for your topic into the Search Forums text box and click the search icon. (This text box is found near the top of most pages). A page of search results will be displayed. Browse the search results in the same manner you would a title.

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To perform a more in-depth search, click the **Advanced** link found on to the right of the search box on the search results page. This search allows you to limit your query to a specific board, specific parts of the message (subject vs. body) and other advanced parameters.

You can also search for forum members by clicking the **User Search** from the search drop-down menu.

Post a Message

To post a message in user forums:

1. Click on **Deltek Connect Customer Forums** or the **Forums** tab.
2. Go to the board you want to post on, and click the **New Message** link near the top of the message list. This will open the Post Message page.
3. In the **Subject** field, type a title for your message. This is the only part of the message that shows up on the message listing page, so try to make it something that will be clear and concise. Use keywords about your topic.
4. In the **Body** field, type your message. Put details about your topic here. If you are posting on a technical topic, it is helpful to include all pertinent information regarding your inquiry in the body.
5. Use the controls to change the fonts, colors, and other aspects of your message. You can add smiley faces using the smiley menu. And you can format the text at the character or paragraph level.
6. Click **Check Spelling** to look for misspelled words, or you can click Preview Post to see what your post will look like on the boards.
7. When you are happy with your message, click the **Submit Post** button. Your message will be added to board and everyone else on the board will be able to read it.

Reply to a Message

Use the Reply button in a message to write a response to a particular post. You'll see a screen similar to the Post Message screen. There are a few differences:

- When you reply to a post, the subject line will be filled in for you automatically. You can change it if you want.
- You can use the Quote Message button to paste the message to which you are replying into the body of your reply.

Also, when you post a message as a reply, it will be added to the existing thread. It won't create a new thread.

Kudos

Kudos is a content rating system that lets you vote for the messages you think are the most useful or important. When you give kudos to a message, you are giving a thumbs-up for good content and a pat on the back to its author. Your kudos help to boost the value of certain messages and enhance the reputation of their authors.

You can give Kudos to any posts in the community except your own.

To give kudos to a message and its author:

1. In the post you want to give Kudos click on 

If you change your mind about the quality of the message, you can revoke your kudos.

To revoke kudos you've given:

1. Click **Options > Revoke My Kudos from this Message**.

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Accepted Solution

Accepted Solutions is a way for you to choose the reply that best answers a question that you've posted. When you accept a solution, both the question and the solution get special icons and links that take you directly from the question to the answer.

An Accepted Solutions icon also appears on boards and in search results so you can see which messages have solutions.

To mark a message as a solution:

1. In the post you want to mark as a solution, click on **Accept as Solution**.

If you change your mind or if another reply provides an even better answer, you can revoke the first selection and accept the second reply.

To revoke an accepted solution:,

1. Click **Options > Unmark as Accepted Solution**.

You can choose another solution or leave the question unsolved.

For additional Forums information, **visit the Help section inside Customer Forums**.

Subscriptions emails will come from Community Mailer at **mailer@lithium.com**.

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Deltek Cloud Solutions

Deltek offers SaaS solutions that leverage the company's expertise and deep understanding of government contractors, architectural and engineering firms, and numerous other professional service sectors, such as Tax and Audit, IT and Management Consulting, Advertising and Legal. Deltek SaaS solutions are designed to meet the unique requirements of these companies for CRM/Capture Management, Market Intelligence, Project and Resource Management, Financials, Reporting, and Analytics. The following is Deltek's portfolio of SaaS solutions:

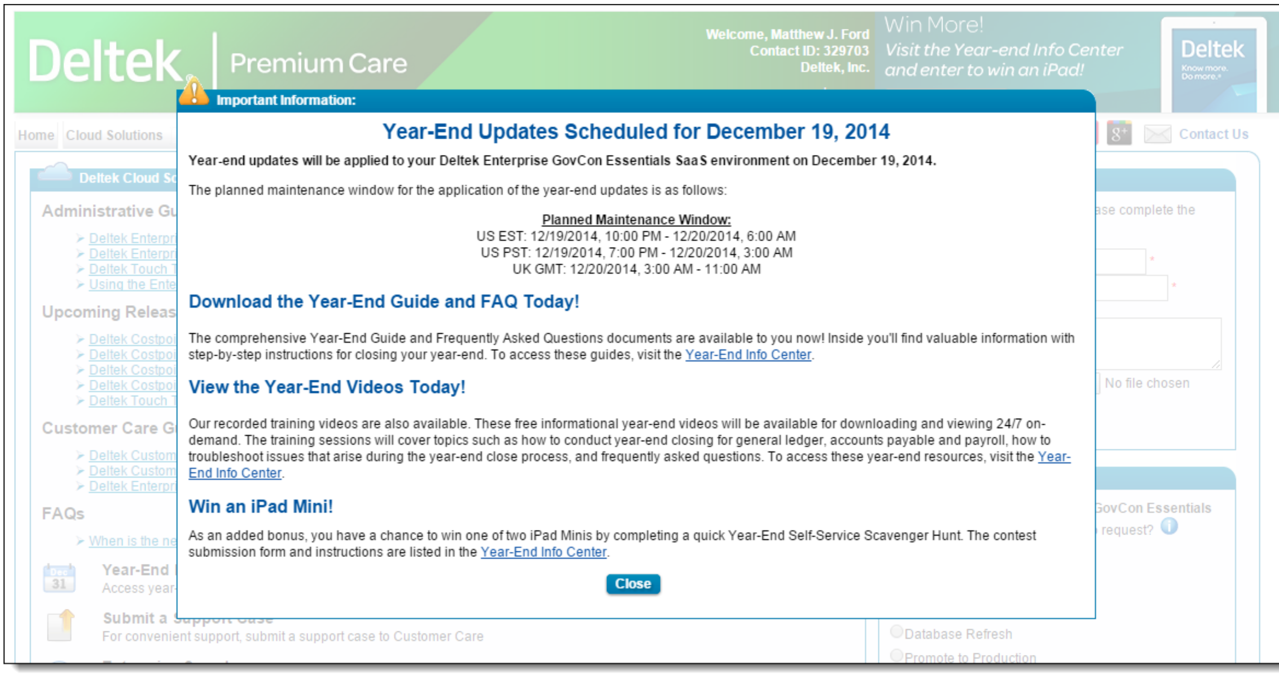
- Ajera CRM
- Ajera
- Costpoint Foundations/Costpoint Essentials
- Costpoint Enterprise
- Deltek for Professional Services
- Deltek Resource Planning
- GovCon Essentials
- GovWin Capture Management
- Maconomy Essentials
- Maconomy Enterprise
- Talent Management
- TrafficLIVE
- Vision Essentials

Customers who purchase a SaaS solution utilize the Customer Care Connect site like all our on-premise customers. They submit cases, search for information in the Enterprise Search, post in our forums, etc.

SaaS customers must designate a SaaS Administrator. The SaaS Administrator is responsible for managing their organization's implementation and any ongoing service requests. To make it easier for these administrators to do this, we setup a specific Cloud Solutions page per Deltek SaaS solution which can be accessed under **Support Resources** or on the **Cloud Solutions** tab at the top of the Connect site. These options only appear if you own one of Deltek's Cloud Solutions.

The key features of the Cloud Solutions pages include the following:

- **Upgrades, Hotfixes, and Service Packs:** Deltek applies software upgrades, hotfixes, and service packs to the Cloud environment on a regular basis, during planned maintenance windows. Information regarding these type of maintenance activity are shared using a specific knowledge base article that sends an alert to the SaaS Administrator and it also displays as a pop-up alert on the Cloud Solution page.
- **Planned Maintenance and Unplanned Maintenance/Outages:** If Deltek needs to perform planned maintenance outside of the regular recurring maintenance windows, or if planned maintenance is projected to create an outage that would exceed the 4 hour standard, we utilize the same knowledge base article as above.. In the unlikely event of unplanned maintenance, or a service outage, Deltek will use same knowledge base article to communicate details of the unplanned maintenance or service outage event to SaaS Administrators. If an unplanned outage or maintenance task necessitates the need to communicate directly with the SaaS Administrators, we facilitate that communication via email.



- **Documentation:** All SaaS solution documentation can be viewed and downloaded using the Enterprise Search, however to make it easier to find each Cloud Solution self-service page has a designated Documentation area which communing contains the following information:
  - Administration Guides
  - Release Notes/Upcoming Releases
  - FAQs
  - Help and Learning Resources
  - Customer Care Guides and Resources
- **Report an Outage**: To report a critical site availability situation beyond calling into Customer Care, SaaS Administrators can utilize the Report an Outage widget.
- **Service Requests**: Each Cloud Solution has their own unique set of Service Requests and many of these service requests can be submitted via the Service Request widget on their respective Cloud Solutions self-service page. The Service Request widget includes an informational article describing each request, their requirements and the expected response time. For those requests not available through the self-service page, SaaS Administrators can initiate a case using the Submit Case option.

Reporting an Outage

When reporting an outage, a SaaS Administrator can call into Customer Care or complete the Report an Outage widget as follows:

1. Go to the **Cloud Solution** tab and select the Cloud Solution that you are experiencing an outage with. If prompted for login credentials, please use your Deltek Support site username and password.
2. In the **Report an Outage** widget, click on the **Time of Outage** field and select the **Date and Time** the outage took place.
3. In the **Instance URL**, add your instance URL used to access Vision.

4. Under **Description/Business Impact**, please provide a description of the outage and the steps to recreate.   Note: Time of Outage, Instance URL and Description/Business Impact are required fields.
5. If available and applicable, use the **Browse** button to upload a screenshot of the issue.
6. Click **Submi**t. Upon submission a dialog box will appear with the following: "You are about to report a Site Down critical site availability situation which will result in a Site Down triage by Deltek Customer, please continue ONLY if you are unable to login to the application..." with a Continue and Cancel button. If the request is not a critical site availability situation press Cancel otherwise pressing Continue will submit the Service Issue and a dialog box will appear continuing the Case No. for the request and a link to My Support Cases, where the case can be viewed or updated. In the meantime site down triage by Customer Care is taking place.

This information can also be found in **KB Article # 72781**.

Submitting a Service Request

Each Cloud Solution has their own unique set of Service Requests and the steps differ per Service Request. For instructions on each Service Request select your Cloud Solution below:

- Ajera CRM
- Ajera – Coming Soon
- Costpoint Foundations/Costpoint Essentials
- Costpoint Enterprise – Coming Soon
- Deltek for Professional Services
- Deltek Resource Planning
- GovCon Essentials
- GovWin Capture Management
- Maconomy Essentials
- Maconomy Enterprise
- Talent Management – Coming Soon
- TrafficLIVE – Coming Soon
- Vision Essentials

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Submit a Support Case

If you are unable to resolve your inquiry by using the **Knowledge Center** feature, you can submit your question or issue directly to Deltek Customer Care.

Enter a Support Case

When you submit a case through Deltek Customer Care Connect, it immediately shows up in the Deltek's Support Case incident tracking system. A Deltek Customer Care Support Analyst reviews the case and will provide a solution or request additional information.

To submit a support case:

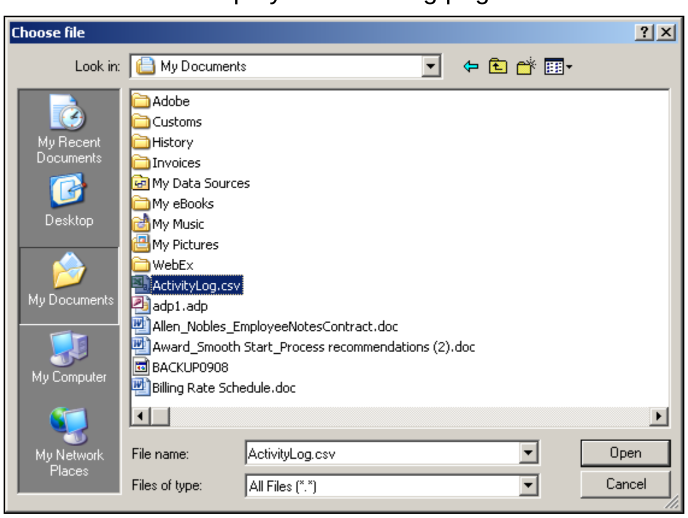
1. Click **Submit a Support Case** from the Customer Care Homepage or by clicking on the **Submit Case** tab.
2. Select a **Product** from the **Product** drop-down list.
3. Select a **Sub-Product** from the drop-down list.
4. Select a **Severity Level** from the drop-down list.

   Click here to View the Severity Level Definitions. You can also click the

5. Select **Technical** or **Application** from the **Issue Type** drop-down list. Is this an application issue or is it technical?
6. In the **Subject/Version**, provide a short description of the problem and the version of the product you are experiencing the issue or question with.
7. Provide detailed notes in the **Question** field.
8. If you have a file or files that may assist the support representative in resolving the question, upload the file(s) in the **Attach Documents** section.

   To attached a file:

   a. Click **Browse** to display the following page:



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b. Browse to the file location. For example: C:\Documents and Settings\jdoe\My Documents\ActivityLog.csv

c. Click **Open**.

d. Repeat the same process if you need to add additional files.

9. Click the **"Continue"** button.

> When you click **Continue**, it will search for knowledge base articles that may be relavent to your question. To view a knowledge base article click the subject link. If one of the knowledgebase articles resolves your question, do not click **Finish Submitting Question**, click on any other area of Deltek Customer Care Connect to cancel the request.

10. Click the **"Finish Submitting Question"** button if one of the five knowledge base articles does not resolve your question.

    After you click **Finish Submitting Question**, your case number is displayed.

Search for a Support Case

To search for a case:

1. Click **Check My Support Cases**.
2. Use the **Search by Product**, **Search by Category or Search by Keywords or Case Number** to find one of your cases.

Check the Status of a Support Case

To check the status of a support case:

1. Click **Check My Support Cases**.
2. Use the **Search by Product**, **Category, Status or by Keywords or Case Number** to find one of your cases.
3. Once you have found your case, you can check the status of the case by looking at the Status column.

> **Click here to View Case Status Definitions**.

Update a Support Case

To update a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter your additional notes.
4. Upload additional files in **Attach Additional Documents to Question**.
5. Select whether or not you want a response to your question using the **Do you want a response?** Drop-down.
6. If the severity of the case has changed, whether you need to lower the severity or increase the severity, select a **severity level** from the **Severity Level** drop-down list.

Click here to View the Severity Level Definitions. You can also click the

7. If your organization utilizes their own case tracking system for questions/issues submitted to Deltek, you can enter your internal case number in the **Additional Reference Number** field.
8. Click **Submit**. This will update the case and notify the Deltek Customer Care Support Analyst that you have updated the case.

Modify the Severity Level of a Support Case

To modify the severity level of a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter your additional notes.
4. Upload additional files in **Attach Additional Documents to Question**.
5. Select whether or not you want a response to your question using the **Do you want a response?** Drop-down.
6. Select a **severity level** from the **Severity Level** drop-down list, whether you need to lower the severity or increase the severity,

Click here to View the Severity Level Definitions. You can also click the

7. If your organization utilizes their own case tracking system for questions/issues submitted to Deltek, you can enter your internal case number in the **Additional Reference Number** field.
8. Click **Submit**. This will update the case and notify the Deltek Customer Care Support Analyst that you have updated the case.

Print a Support Case

To print a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to close.
3. Simply click 

at the bottom of the open article. This will show a print preview of your case and open a Print dialog box.
4. Select your printer and press the **Print** button.

Close a Support Case

To close a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case

3. Next to **Add additional information to your question**, enter any pertinent information that may help the Support Customer Care Analyst understand why you are closing the case. This information could allow us to create a new knowledge base article.
4. Upload any files in **Attach Additional Documents to Question**.
5. Select “No, my question has been resolved. Please close the case.” from the **Do you want a response?** Drop-down.
6. Click **Submit**. This will close the case and notify the Deltek Customer Care Support Analyst that you have update/closed the case.

Reopen a Support Case

A support case can only be updated if it had been closed for less then 7 days. If closed for 8+ days, you will no longer have the option to Update Case, however you can use **Submit Case** to submit a new case to Customer Care.

To reopen a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter your additional notes.
4. Upload additional files in **Attach Additional Documents to Question**.
5. Select “Yes, my question is still outstanding. Please respond to my question.” from the **Do you want a response?** Drop-down.
6. If the severity of the case has changed, whether you need to lower the severity or increase the severity, select a **severity level** from the **Severity Level** drop-down list.

Click here to View the Severity Level Definitions. You can also click the

7. If your organization utilizes their own case tracking system for questions/issues submitted to Deltek, you can enter your internal case number in the **Additional Reference Number** field.
8. Click **Submit**. This will update the case and notify the Deltek Customer Care Support Analyst that you have updated the case.

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Quick Chat with a Support Analyst

Quick Chat provides a two-way, real-time chat interaction with a Deltek Customer Care Support Analyst. This feature is designed for quick, uncomplicated questions.

User Requirements

The user requirements are as followed:

- Microsoft .NET Framework 3.0 or later is required
- Users may be prompted to install the Interactive Intelligence Collaboration ActiveX control if they have not installed it previously. This enables the Chat dialog to appear in their browser.
- For the Java versions of Chat, you must have a browser that runs Sun's Java VM 1.5.0_12 or later, such as Internet Explorer.
- Firefox and Internet Explorer are supported for DHTML Chat.
- Google Chrome is currently not supported. Initiating a Chat Session

In addition, and the chat application URL (https://ccchat.deltek.com) to Trusted Sites, which can be found in Internet Explorer under Tools > Internet Options > Security tab.

Hours of Operation

Chat is available Monday - Friday: 07:00 AM - 10:00 PM EST only.

> Chat is a feature not currently available for Acumen. Talent Management and TrafficLIVE customers.

Initiate a Chat Session

To chat with a Customer Care analyst:

1. Click **Quick Chat with a Support Analyst** from the Customer Care Home page or click on the **Quick Chat** tab.
2. Select the product you want to chat on from the **Chat Topic** drop-down.
3. Enter a brief summary of your issue or question in the **Summary** field. You can enter up to 50 characters.
4. When the chat window opens, you can type in a message in the space provided and then click the **Send** button and/or wait for a Deltek Customer Care Support Analyst to answer.

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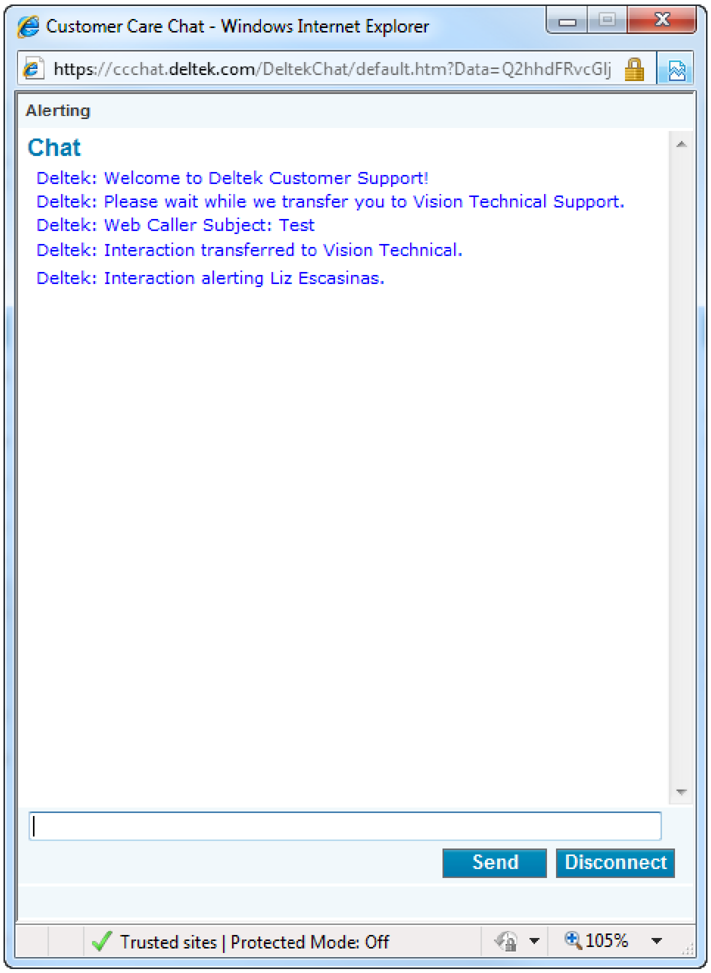

5. When you have finished your Live Help session, click **Disconnect**.

> To view a complete transcript of your chat, go to **My Account** and click **My Support Cases** and view your chat case.

Print the Chat Dialog

To print your chat session dialog:

1. While chatting with a Customer Care Analyst or just prior to disconnecting your chat right-click on the chat window and select **Print**.
2. Select your printer and press the **Print** button.

What’s Your Idea?

Your feedback and suggestions drive our product and solution development. Please use this form to suggest new features or modifications to your Deltek solution. Although we are not able to respond to each submission, we carefully review each and every submission and take all requests and recommendations into consideration as we continue to develop world-class solutions that can help your firm achieve more.

To submit your idea:

1. Go to **Submit Ideas**, which can be accessed by selecting Submit Ideas on the Quick Links tab or selecting **What's Your Idea?** under Support Resources on the Home tab.
2. Select the **Product** you are submitting the Enhancement Request / Design Issue for.
3. Enter in the **Details** for your idea. Include the product version information, database type, operating system, server version information, etc. if it is pertinent to your request.
4. **Attach any documents** to help illustrate your idea.
5. Click **Continue** to submit your idea.

Customer Care will review your idea and if it’s something that has already by incorporated in your version or a future version, a Customer Care agent will contact you. If it is something that has not been incorporated, Customer Care will submit to Product Management for review.

Video Tutorial: View the **What is an Enhancement Request?** for an overview of what an enhancement tequest is and how to submit one to Customer Care using What’s Your Idea?.

View Your Ideas/Enhancement Requests

To view your ideas/enhancement requests:

1. Click **My Account** - **My Support Cases**.
2. Enter in “My Idea Feature/Enhancement Request” in the **Search by Keyword or Case No**. field and click **Search**. Your results will display all of your submitted enhancement requests.

Support Assurance Product Lifecycle

Deltek Support Assurance is a program that was designed to protect your investment in Deltek products with comprehensive, high quality support services and consistent, predictable guidelines for how your Deltek solution will be maintained and supported in the future. With Support Assurance, you can more effectively plan for your business with the comfort of knowing that Deltek will be there to support you.

Support Assurance is provided as a benefit to Deltek customers with a current Support and Maintenance Plan contract.

Customer Care Support Lifecycle

To view the Customer Care Support Lifecycle for your Deltek Product:

1. Click **Support Assurance Product Lifecycle** from the Customer Care Home page.
2. Under the **Support Assurance Product Lifecycle** select your product from the Select Product drop-down and click Go. This will display the support life cycle for your product.

Product Lifecycle Phase Descriptions

To view the Product Lifecycle Descriptions and Policies:

1. Click **Support Assurance Product Lifecycle** from the Customer Care Home page.
2. Under the **Support Assurance Product Lifecycle** select your product from the Select Product drop-down and click Go. This will display the support life cycle for your product.
3. Click View Product Lifecycle Descriptions and Policies.

Deltek Product Support Compatibility Matrix

The Deltek Product Compatibility Matrix contains updated information on the latest tested versions for the key technologies used by Deltek products. This information is designed to give guidance on product deployment. The information is divided into 3 categories – Embedded Technology, Supported Deployment Technology and Compatible Deployment Technology.

Stay Connected with Deltek

Explore our online community on Twitter, Facebook, LinkedIn, YouTube and Google+. Network with other Deltek users, employees and experts and ask questions, gain knowledge, attend events, download reports and more – all within Deltek's Social Community.

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Quick Links

The Quick Links tab provides easy access to frequently used Customer Care features. This tab will display on any page you access on the Connect site where you can access the following:

- Enterprise Search
- Year-End Info Center
- Deltek Connect Customer Forums
- Support Assurance Product Lifecycle
- Submit Ideas

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Year-End Info Center

The Year-End Info Center contains information on year-end related articles, documentation and videos. The page will remain active all year and new information will be added thought the year.

To view year-end related articles, videos, etc. for the product(s) you own:

1. Select your product from the **Select Product:** drop-down click Go.

Enterprise Search

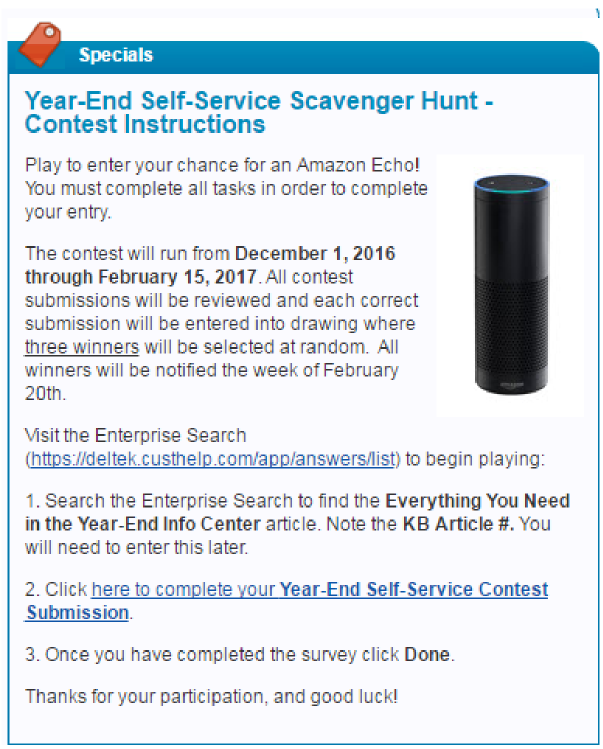
See **Enterprise Search** for more information.

Deltek Connect Customer Forums

See **Deltek Connect Customer Forums** for additional information.

Specials

The Specials section displays the current Year-End Contest where you can complete a short survey to be entered to win a prize. This contest generally runs from December 1st through the end of February.



Product Downloads

Deltek Customer Care Connect includes the ability to download the latest release for the product(s) you own, as well as any available literature such as Installation Guides and Release Notes.

Deltek Software Manager

The Deltek Software Manager (DSM) is your central place to download all the Deltek products you own. From the Deltek Software Manager application, you can download complete releases, service packs, and hot fixes from the same location. The application provides an enhanced user experience for downloading products, such as the ability to download multiple files and resume downloads if disconnected. When selecting hot fixes to download, the application will also include all previously posted dependent hot fixes

From Deltek Software Manager, you can easily:

- Identify which hot fixes need to be downloaded (including dependencies) and then download all you have selected, including their dependencies.
- Download the latest software releases to ensure that you are working with the most current version.
- Download all files related to a release, including all software, documentation, third-party products, service packs, and hot fixes.
- View which files have been downloaded and which files are available for download.

User Requirements

The requirements are as followed:

- Microsoft Windows XP or higher. Both 32-bit and 64-bit platforms are supported on all of these operating systems. MACs are not supported
- Internet Explorer: 10, 11
- Microsoft .NET Framework 4.5.2
- Ports HTTPS (80, 443) and FTP (21)
- Allow access thru firewall and proxy's for the following sites and port combinations:

  > If your firm does not allow FTP traffic you may set DSM to only use HTTP traffic

  - dsm.deltek.com (80 Inbound/Outbound and 443 Inbound/Outbound)
  - ftp-us.deltek.com (21 Inbound/Outbound and 20000-30000 Outbound)
  - ftp-intl.deltek.com (21 Inbound/Outbound and 20000-30000 Outbound)

  > 20000-30000 Outbound is the data communication channel for FTP requests. Only outbound calls need to be made on those ports.

- Firefox and Internet Explorer are supported. Chrome is not currently supported.

> Please review the **Prerequisites Knowledge Base Article # 63248**.

Install Deltek Software Manager

To install Deltek Software Manager:

1. Click the **Product Downloads** tab or go to https://dsm.deltek.com/dsm.htm
2. Click on **Run Deltek Software Manager**. The following window will appear as we verify application requirements.

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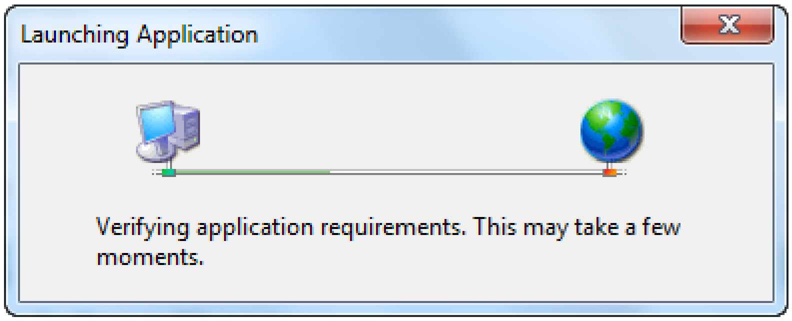
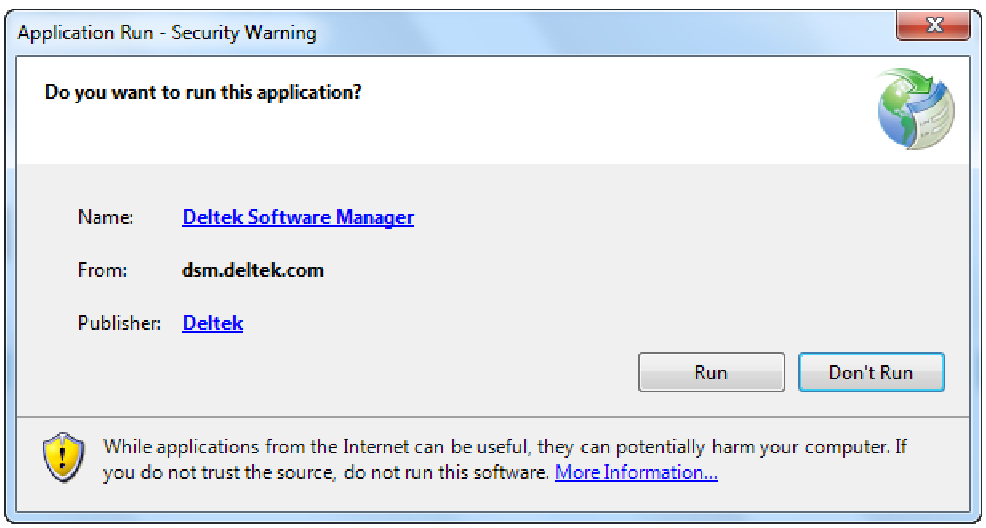


If you encounter any problems during this verification process please refer to **KB Article # 52469**.

3. Once the application requirements have been verified an Application – Security Warning will appear. Click Run.



After you select Run, DSM will start to download.

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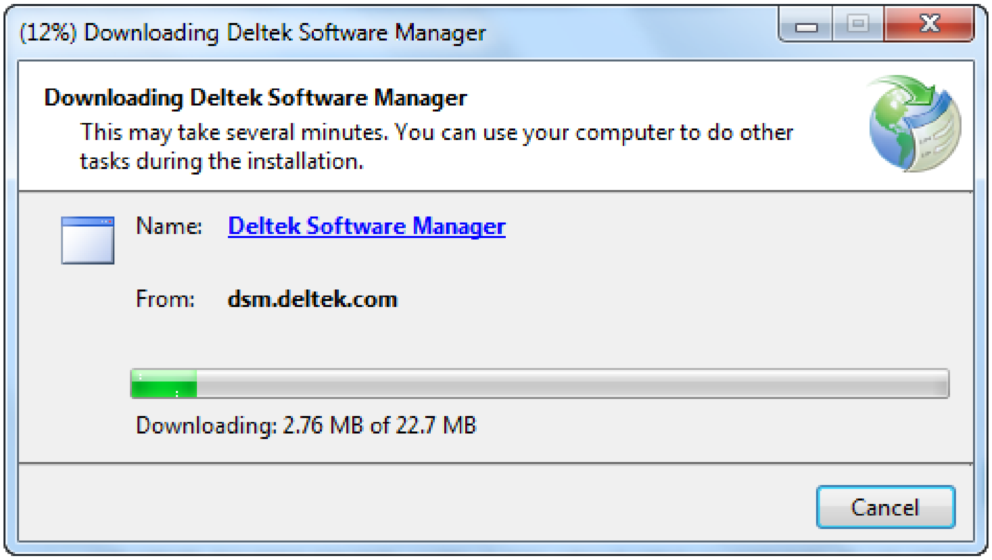
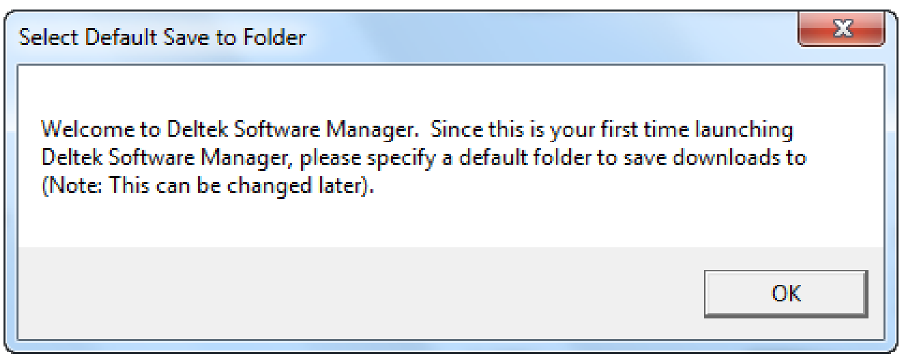
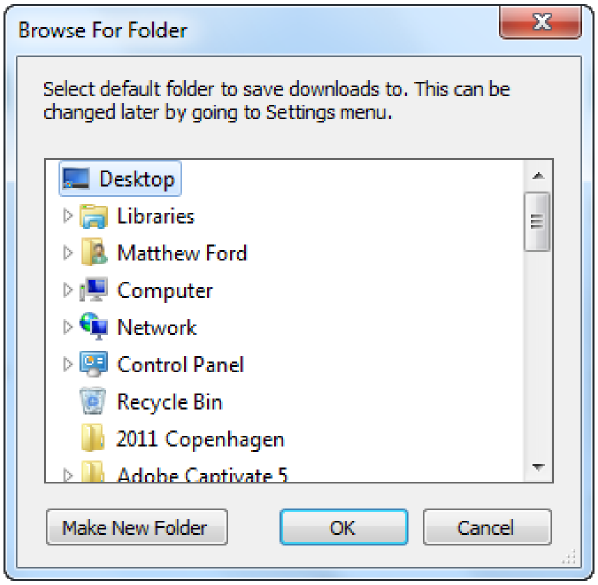


4. After the download completes, if you launched DSM from the Product Downloads tab you will be prompted to specify a default folder to save downloads to. Click OK. If you launched DSM via https://dsm.deltek.com/dsm.htm you will need to log in using the same username and password you use to log into the Connect site and then you will be prompted to select a default folder to save downloads.



5. Browse out to your local drive or to a network drive and select a folder where you want downloads to save to. If you do not already have a folder created, you can use the Make New Folder button and create a new folder. Once you have your folder selected, click OK.



6. After clicking OK a Deltek Software Manager Tutorial window will appear.

You can watch the tutorial or press the Continue button which will bring up the Deltek Software Manager.

> If you do not want this tutorial window to appear during each login, check the “Do not show tutorial on logon (The tutorial can still be launched from the Help menu).

Log into Deltek Software Manager

To log into the Deltek Software Manager:

1. Click the **Product Downloads** tab or go to https://dsm.deltek.com/dsm.htm
2. Click on **Run Deltek Software Manager**.

If you launched DSM from the Product Downloads tab you will automatically be logged in, using your Deltek Customer Care Connect site credentials. If you launched DSM via https://dsm.deltek.com/dsm.htm you will need to log in using the same username and password you use to log into the Connect site.

Tutorial: View the **Using the Deltek Software Manager** tutorial for additional information.

Access DSM Online Help

To access online help for DSM:

1. Click the **Product Downloads** tab or go to https://dsm.deltek.com/dsm.htm
2. Click on **Run Deltek Software Manager**.
3. Click on **Help** and select **Deltek Software Manager Help.**

For additional information, **Deltek Software Manager – Frequently Asked Questions**.

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My Account

My Account gives you access to following:

- **My Support Cases** — View the list of all questions you have submitted, check the status, view the details, update questions with new information, or indicate you no longer need an answer.
- **My Products** — View a current list of your organizations' licensed Deltek products.
- **My Customer Care Plan** — View your current Customer Care Plan and your next renewal date. Standard Customers can manage the number of available support cases they have left and purchase additional cases if needed.
- **My Knowledge Base Items —** View all the knowledgebase articles that you have subscribed to and unsubscribe from any knowledgebase articles.
- **My Profile** — View and edit your preferences, account information, and contact information.
- **Contact Management** — Add or edit support contacts and determine the areas of the support case available to individual contacts. This is only available only to Support Contact Managers at your company.
- **Change Password** — Update your password.
- **My Subscriptions** — Manage your Deltek Email Subscriptions.
- **Payment Portal –** Manage your Deltek Invoices

My Support Cases

At any time while in Deltek Customer Care Connect, you can check the status of your open cases, view past cases, update open cases with new information, raise or lower the severity of a case or close a case. To access your support cases, simply click **Check My Support Cases** from the Customer Care Homepage or by clicking on the **My Account** tab and selecting **My Support Cases**.

> You will be able to access all support cases entered by Submit Case, Quick Chat, phone, email and fax in Deltek Customer Care Connect.

Search for a Support Case

To search for a support case:

1. Click **Check My Support Cases**.
2. Use the **Search by Product**, **Search by Category or Search by Keywords or Case Number** to find one of your cases.

Check the Status of a Support Case

To check the status of a support case:

1. Click **Check My Support Cases**.
2. Use the **Search by Product**, **Search by Category or Search by Keywords or Case Number** to find one of your cases.
3. Once you have found your case, you can check the status of the case by looking at the Status column.

> Click here to View Case Status Definitions.

Update a Support Case

To update a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter your additional notes.
4. Upload additional files in **Attach Additional Documents to Question**.
5. Select whether or not you want a response to your question using the **Do you want a response?** Drop-down.
6. If the severity of the case has changed, whether you need to lower the severity or increase the severity, select a **severity level** from the **Severity Level** drop-down list.

> Click here to View the Severity Level Definitions. You can also click the

7. If your organization utilizes their own case tracking system for questions/issues submitted to Deltek, you can enter your internal case number in the **Additional Reference Number** field.
8. Click **Submit**. This will update the case and notify the Deltek Customer Care Support Analyst that you have updated the case.

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Modify the Severity Level of a Support Case

To modify the severity level of a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter your additional notes.
4. Upload additional files in **Attach Additional Documents to Question**.
5. Select whether or not you want a response to your question using the **Do you want a response?** Drop-down.
6. Select a **severity level** from the **Severity Level** drop-down list, whether you need to lower the severity or increase the severity,

Click here to View the Severity Level Definitions. You can also click the

7. If your organization utilizes their own case tracking system for questions/issues submitted to Deltek, you can enter your internal case number in the **Additional Reference Number** field.
8. Click **Submit**. This will update the case and notify the Deltek Customer Care Support Analyst that you have updated the case.

Print a Support Case

To print a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to close.
3. Simply click Print at the bottom of the open article. This will show a print preview of your case and open a Print dialog box.
4. Select your printer and press the **Print** button.

Close a Support Case

To close a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter any pertinent information that may help the Support Customer Care Analyst understand why you are closing the case. This information could allow us to create a new knowledge base article.
4. Upload any files in **Attach Additional Documents to Question**.
5. Select “No, my question has been resolved. Please close the case.” from the **Do you want a response?** Drop-down.
6. Click **Submit**. This will close the case and notify the Deltek Customer Care Support Analyst that you have update/closed the case.

Reopen a Support Case

A support case can only be updated if it had been closed for less then 7 days. If closed for 8+ days, you will no longer have the option to Update Case, however you can use **Submit Case** to submit a new case to Customer Care.

To reopen a support case:

1. Click **Check My Support Cases**.
2. Click the **Subject/Version** of the case you want to update. You will see the entire discussion thread for the case
3. Next to **Add additional information to your question**, enter your additional notes.
4. Upload additional files in **Attach Additional Documents to Question**.
5. Select "Yes, my question is still outstanding. Please respond to my question." from the **Do you want a response?** Drop-down.
6. If the severity of the case has changed, whether you need to lower the severity or increase the severity, select a **severity level** from the **Severity Level** drop-down list.

> Click here to View the Severity Level Definitions. You can also click the

7. If your organization utilizes their own case tracking system for questions/issues submitted to Deltek, you can enter your internal case number in the **Additional Reference Number** field.
8. Click **Submit**. This will update the case and notify the Deltek Customer Care Support Analyst that you have updated the case.

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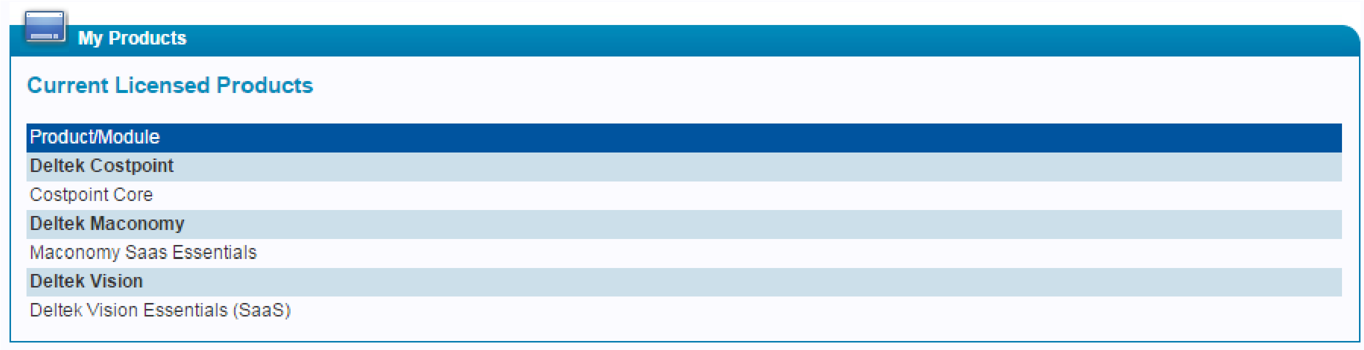
My Products

My Products will display the current list of your organizations' licensed Deltek products.



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My Customer Care Plan

View your current Customer Care Plan and your next renewal date. Standard Customers can manage the number of available support cases they have left and purchase additional cases if needed.

Current Customer Care Plan

This area will display your current Customer Care Plan and the next renewal date for that plan.

Deltek Customer Case Management

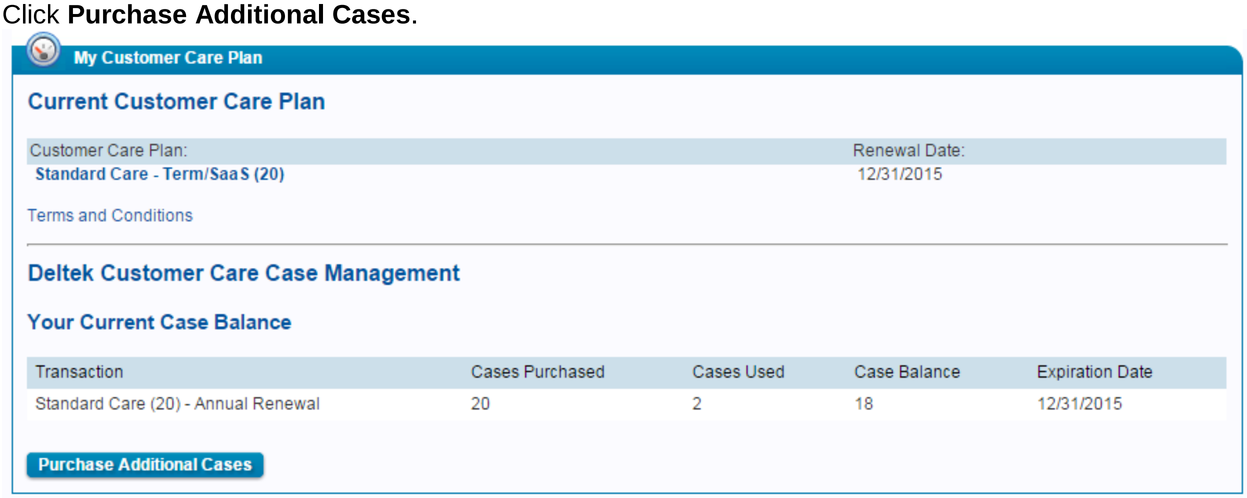
The Case Management area will only display for those customers who own a Standard Care Plan.

Your Current Case Balance

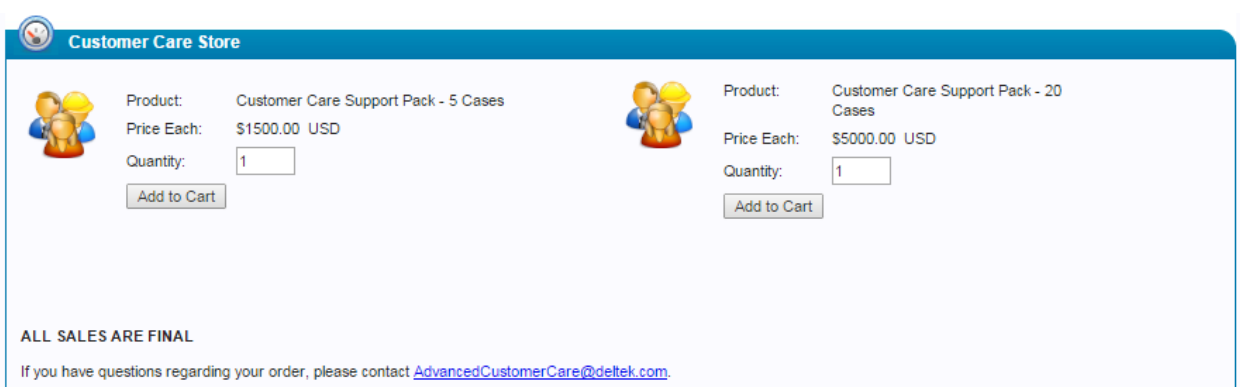
This area will display the number of cases you have purchased for your plan for the current year. You can view how many cases you have used, your current balance and when your cases will expire. If you are running low or have run out of cases you can purchase additional cases in packs of 5 or 20.

To purchase additional cases:

1. In the Home page, in the My Customer Care Plan widget, click **Manage Available Support Cases** or go to **My Account – My Customer Care Plan**.
2. Click **Purchase Additional Cases**.



3. Choose between the case packs and click **Add to Cart**, after updating Quantity.



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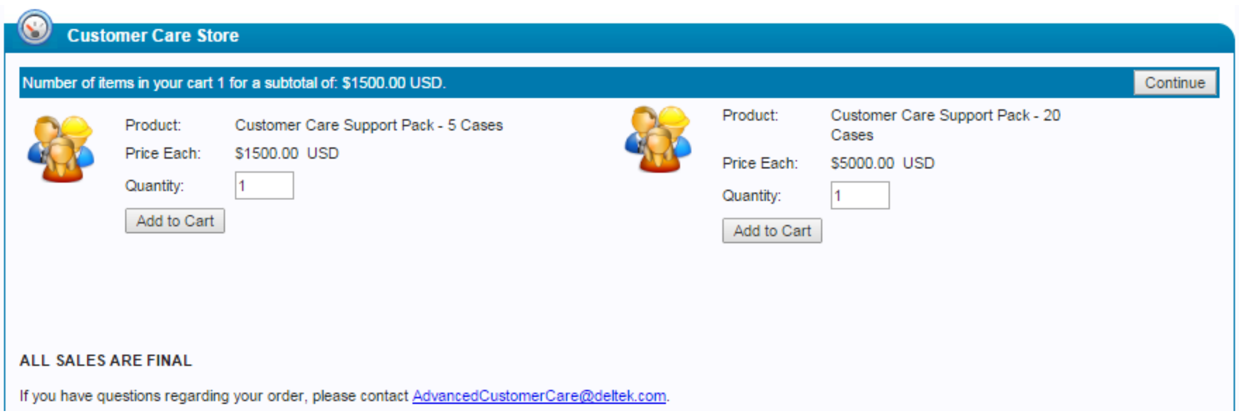
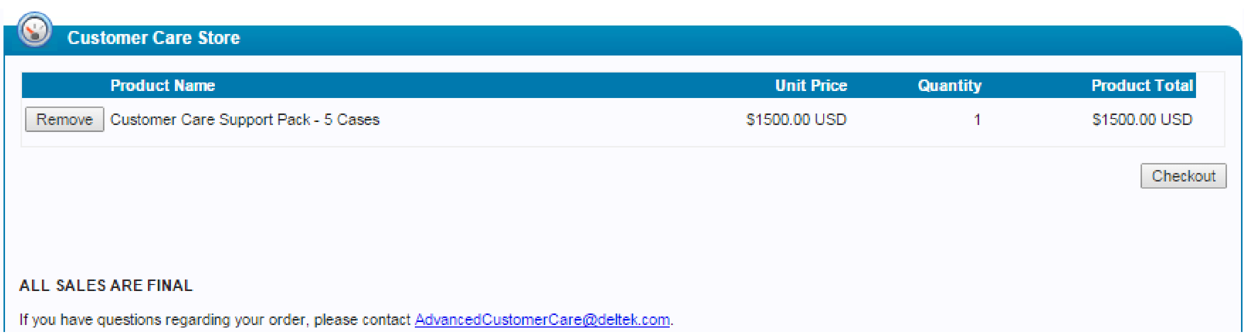
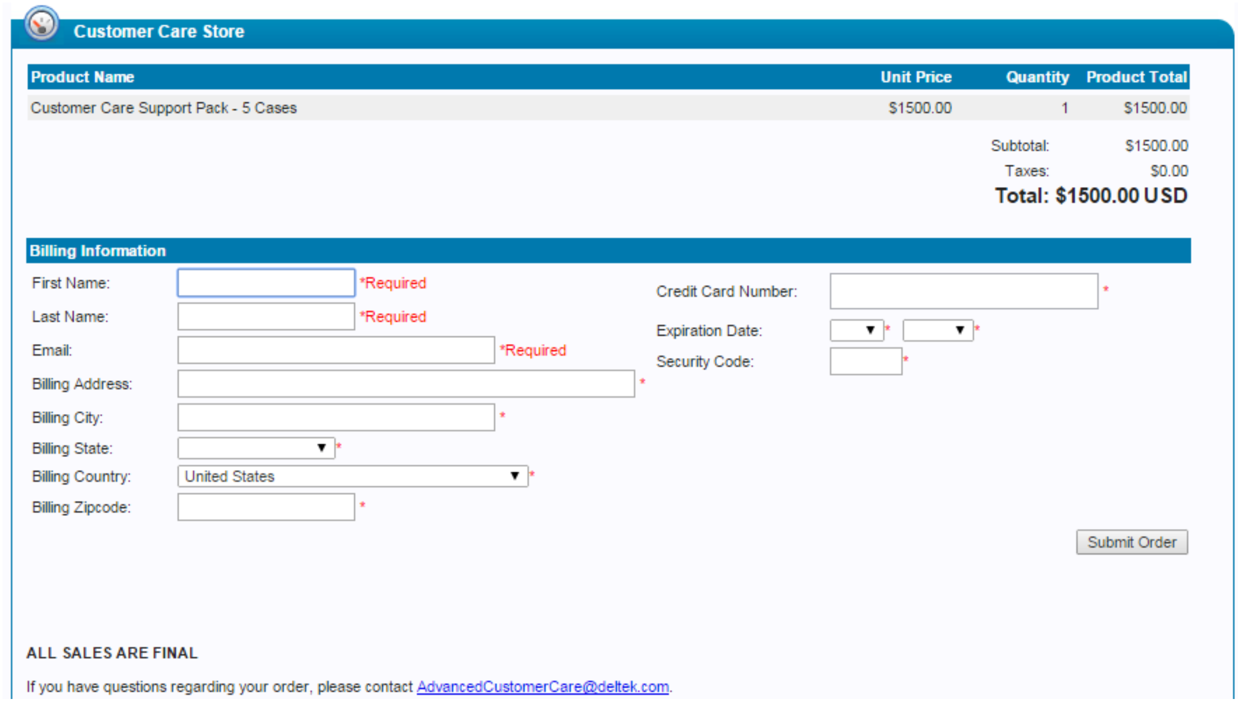
4. Click **Continue**.



5. Confirm that the order is correct and click **Checkout**.



6. This should then bring you to the next screen to enter your credit card details. Fill in all information needed and click **Place Order**.



Customer Care Store

Product Name	Unit Price	Quantity	Product Total
Customer Care Support Pack - 5 Cases	$1500.00	1	$1500.00

Subtotal: $1500.00
Taxes: $0.00
Total: $1500.00 USD

Billing Information

First Name: *Required
Last Name: *Required
Email: *Required
Billing Address: *
Billing City: *
Billing State: *
Billing Country: United States *
Billing Zipcode: *

Credit Card Number: *
Expiration Date: * *
Security Code: *

Submit Order

ALL SALES ARE FINAL

If you have questions regarding your order, please contact AdvancedCustomerCare@deltek.com.

My Knowledge Base Items

You have the ability to view all the knowledge base articles that you have subscribed to and when Deltek updates an article that you have subscribed to, you will receive a notification by email. Access to the **My Knowledge Base Items** is available from the Customer Care Homepage by clicking on **My Knowledge Base Items** or by clicking on the **My Account** tab and then selecting My Knowledge Base Items.

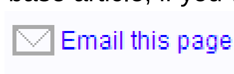
Unsubscribe to a Knowledge Base Article

To unsubscribe to a knowledge base article:

1. Click **My Knowledge Base Items**.
2. Click on the knowledge base article you want to unsubscribe to.
3. At the bottom of the article and click the **"Delete Request"** button at the bottom of the open article.

Email a Knowledge Base Article

To email a knowledge base article:

1. Click **Knowledge Center**.
2. Use the **Search by Keyword**, **Advanced Search** drop-down menus and/or **Search Type** to search for a resolution or topic of interest.
3. Click the **Summary** link to open the knowledge base article.
4. After viewing the knowledge base article, if you would like email this knowledge base article to yourself, co-worker, etc., simply click 

at the bottom of the open article. The following form will appear:
5. Fill in the **Recipient Email** field with an email address that you would like to send the article to.
6. Click the **"Send Email"** button.

Print a Knowledge Base Article

To print a knowledge base article:

1. Click **Knowledge Center**.
2. Use the **Search by Keyword**, **Advanced Search** drop-down menus and/or **Search Type** to search for a resolution or topic of interest.
3. Click the **Summary** link to open the knowledge base article.
4. After viewing the knowledge base article, if you would like to print this knowledge base article, simply click 

at the bottom of the open article. This will show a print preview of the article and open a Print dialog box.
5. Select your printer and press the **Print** button.

My Profile

Use My Profile to view and edit your preferences, account information, and contact information. You can access your profile from the Customer Care Home page by clicking **My Profile** or by clicking the **My Account** tab and then selecting My Profile.

Update Your Profile

To update your profile:

1. Click **My Profile**.
2. Make the necessary changes to the following areas:
   - **Preferences -** Specify the defaults for the knowledge base articles and Submit Case pages. To save a step when searching for knowledge base articles or entering a support case, change the default product to the primary Deltek product you use.
   - **Contact Information -** Update your email address, office and mobile phone and other contact information whenever it changes.
3. Click the **Save Changes** button.

Contact Management

Contact Management is only available to Support Contact Managers at your company. A Support Contact Manager is responsible for adding new support contacts and editing existing contacts. Access to the **Content Management** is available from the Customer Care Homepage or by clicking on the **My Account** tab and then selecting **Contact Management**.

Add a New Contact

To add a contact:

1. Click **My Account - Contact Management**.
2. Click **Add Contact** to display the following page:
3. Enter the information for the new support contact. If you use an email address that already exists as a contact for your organization, the contact will be updated with the new information.
    - *__Email Address –__ Use lowercase letters only. The email address will default as the Username. Note: This email address has to be a unique email address and not used for any other contact record on the Connect site.
    - *__Username –__ The email address will default as the Username.
    - **First Name**
    - ***Last Name**
    - *__Office Phone__ — Minimum 10 numbers; space characters allowed e.g., 999.999.9999.
    - **Office Phone Extension**
    - **Alternate Phone** — Minimum 10 numbers; space characters allowed e.g., 999.999.9999.
    - ***Job Title**

    Set the appropriate permissions:

    - **SaaS Administrator (Will display for Vision Essentials and Deltek for Professional Services Only) –** Select Yes if the contact should be a SaaS Administrator. By selecting this option you are granting privileges and authorizing them to perform all actions and requests listed in the Vision Essentials SaaS Customer Admin Guide. Please make sure you understand the implications prior to granting access. If the Yes is grayed out and you see the "Maximum number of SaaS Administrators has been reached" message, you will not be able to designate this contact as a SaaS Administrator at this time. Simply, proceed with creating the new contact. You will need to remove the SaaS Administrator permission from an existing contact (See the Editing an Existing Contact section) and then you will be able to add that SaaS Administrator permission to this new contact.
    - **SaaS Administrator (Will display for Maconomy Essentials Only) –** Select Yes if the contact should be a SaaS Administrator. If the Yes is grayed out and you see the "Maximum number of SaaS Administrators has been reached" message, you will not be able to designate this contact as a SaaS Administrator at this time. Simply, proceed with creating the new contact. You will need to remove the SaaS Administrator permission from an existing contact (See the Editing an Existing Contact section) and then you will be able to add that SaaS Administrator permission to this new contact.
    - **Online Support Contact** — Select Yes if the contact can access the Connect site.

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- **Primary Support Contact** — This option is read-only. It is there to display which contacts are Primary Support Contacts.
- **Authorized Support Contact** — Select Yes if the contact can submit cases Connect site. If the Yes is grayed out and you see the "Maximum number of Authorized Support Contacts has been reached" message, you will not be able to designate this contact as an Authorized Support Contact at this time. Simply, proceed with creating the new contact. You will need to remove the Authorized Support Contact permission from an existing contact (See the To edit a contact: section) and then you will be able to add that Authorized Support Contact permission to this new contact.
- **Access My Invoices** – Select Yes if the contact can access the Billing Portal (EPS) and manage invoices for your organization.
- **Support Contact Manager** – Select Yes if you want the contact to manage support contacts and the support functions they can perform.
- **Download Corrections** — Select Yes if the contact can download Deltek correction files. This provides access to the Product Downloads tab and ability to upload files from the Transfer Files to Support.
- **View All Cases** — Select Yes if the contact can view all cases added by your organization. If No is selected the contact will only see the cases associated with their record.

  In order to view cases a contact must be an Authorized Support Contact.

4. Click **Add New Contact**.

   The asterisk (*) indicates a required field.

Update an Existing Contact

To update a contact:

1. Click **My Account - Contact Management**.
2. Click on the name of the contact you need to edit.
3. Update any of the contact information that needs to be modified.
4. Select Yes or No for Deltek Customer Care Connect site function you want to activate or de-activate.

- **SaaS Administrator (Will display for Vision Essentials and Deltek for Professional Services Only) –** Select Yes if the contact should be a SaaS Administrator. By selecting this option you are granting privileges and authorizing them to perform all actions and requests listed in the Vision Essentials SaaS Customer Admin Guide or Deltek for Professional Services SaaS Customer Admin Guide. Please make sure you understand the implications prior to granting access. If the Yes is grayed out and you see the "Maximum number of SaaS Administrators has been reached" message, you will not be able to designate this contact as a SaaS Administrator at this time. Simply, proceed with creating the new contact. You will need to remove the SaaS Administrator permission from an existing contact (See the Editing an Existing Contact section) and then you will be able to add that SaaS Administrator permission to this new contact.
- **SaaS Administrator (Will display for Maconomy Essentials Only) –** Select Yes if the contact should be a SaaS Administrator. If the Yes is grayed out and you see the "Maximum number of SaaS Administrators has been reached" message, you will not be able to designate this contact as a SaaS Administrator at this time. Simply, proceed with creating the new contact. You will need to remove the SaaS Administrator permission from an existing contact (See the Editing an

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Existing Contact section) and then you will be able to add that SaaS Administrator permission to this new contact.

- **Online Support Contact** — Select Yes if the contact can access the Connect site.
- **Primary Support Contact** — This option is read-only. It is there to display which contacts are Primary Support Contacts.
- **Authorized Support Contact** — Select Yes if the contact can submit cases Connect site. If the Yes is grayed out and you see the "Maximum number of Authorized Support Contacts has been reached" message, you will not be able to designate this contact as an Authorized Support Contact at this time. Simply, proceed with creating the new contact. You will need to remove the Authorized Support Contact permission from an existing contact (See the To edit a contact: section) and then you will be able to add that Authorized Support Contact permission to this new contact.
- **Access My Invoices** – Select Yes if the contact can access the Billing Portal (EPS) and manage invoices for your organization.
- **Support Contact Manager** – Select Yes if you want the contact to manage support contacts and the support functions they can perform.
- **Download Corrections** — Select Yes if the contact can download Deltek correction files. This provides access to the Product Downloads tab and ability to upload files from the Transfer Files to Support.
- **View All Cases** — Select Yes if the contact can view all cases added by your organization. If No is selected the contact will only see the cases associated with their record.

> In order to view cases a contact must be an Authorized Support Contact.

5. Click **Update Contact** to accept the changes or click any other Deltek Customer Care Connect option to cancel the changes.

Remove an Existing Contact

Currently you cannot delete a contact record associated with your organization in Content Management however you can remove the contact record which will disable and inactive them and remove them from your Contact Management view.

To remove a contact:

1. Click **My Account – Contact Management**.
2. Click on the name of the contact you need to disable.
3. Update any of the contact information that needs to be modified.
4. Select the **Remove Contact** permission to **No**.
5. Click **Update Contact** to accept the changes or click any other Deltek Customer Care Connect option to cancel the changes.

Sort the List of Contact

To sort contacts:

1. Click **My Account – Contact Management.**
2. Select any of the column headers to sort.

Change Password

At any time while logged into the Support Portal you have the ability to change your login password, .

To change your password:

1. Click **Change Password**
2. Enter your old password under **Old Password**.

> If you were automatically logged in and you forgot your password, you can logout of Deltek Customer Care Connect you can can request a password reset. See Forgot Your Password for more information.

3. In the **Enter new password** field enter in a new password and repeat it on the **Confirm new password** field.
4. Click the **"Submit"** button.

> Passwords will need to be changed every 180 days and require a minimum number of characters.

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My Subscriptions

With My Subscriptions you have the ability to update your subscriptions at any time. Access to the **My Subscriptions** is available from the Customer Care Homepage by clicking on the **My Account** tab and then selecting **My Subscriptions**.

Subscribe to Deltek Communications

To subscribe to Deltek email communications:

1. Click **My Subscriptions**.
2. Enter or update your information.
3. Check the email communications you wish to subscribe to. You can also select “Subscribe me to” all Deltek Communications.
4. Click the **Update my subscription** button.

Unsubscribe to all Deltek Communications

To unsubscribe to Deltek email communications:

1. Click **My Subscriptions**.
2. Uncheck the email communications you wish to unsubscribe to. You can also select “Unsubscribe me from” all Deltek Communications.
3. Click the **Update my subscription** button.

Deltek University

Deltek University delivers learning solutions for every role, at every stage in the learning journey. Equip your staff with the product knowledge they need to succeed – and achieve. Accelerate your implementation. Prepare your people for change. Gain insights into your industry. Click on **Deltek University** to access the **Learning Zone**.

The Deltek Learning Zone offers you, the learner, a range of options to achieve your learning objectives. From self-paced courses and quick performance support videos, to fully interactive virtual live classes, the Deltek learning zone is flexible enough to meet the demands of your schedule and the way that you learn best.

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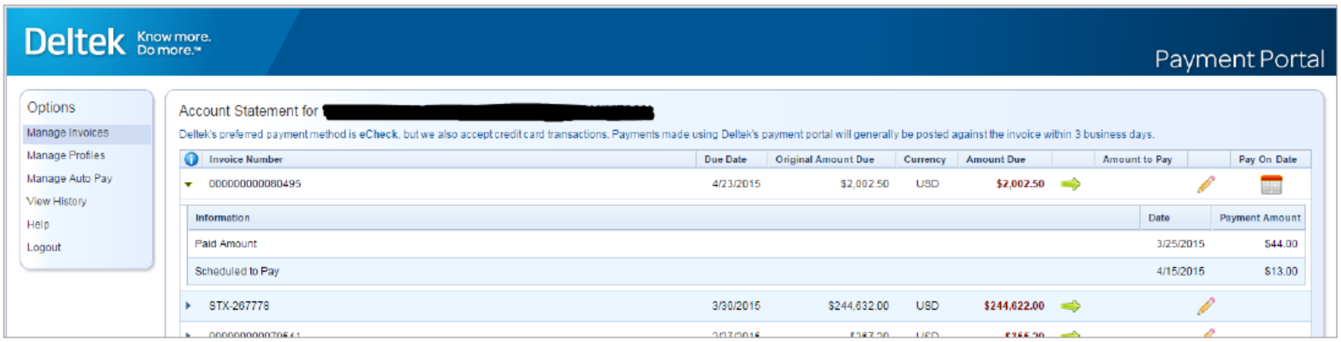
Payment Portal

You may pay your Deltek invoice by eCheck or credit card using Deltek's Payment Portal, a secure, online payment portal designed to boost your productivity by streamlining your payment process. You can access via **My Account – Payment Portal** which will automatically log you into the portal. You can also access at https://paymentportal.deltek.com where you will be prompted to login.



For information on how to use the Payment Portal view the **[Payment Portal User Guide](#)**.

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Additional Information

GovWin – A Deltek Network

A place for government contractors of any size to Grow, Manage and Connect.

Deltek University

Give your people the information edge. Visit the Deltek University and sign-up for a course today!

Deltek Corporate Events

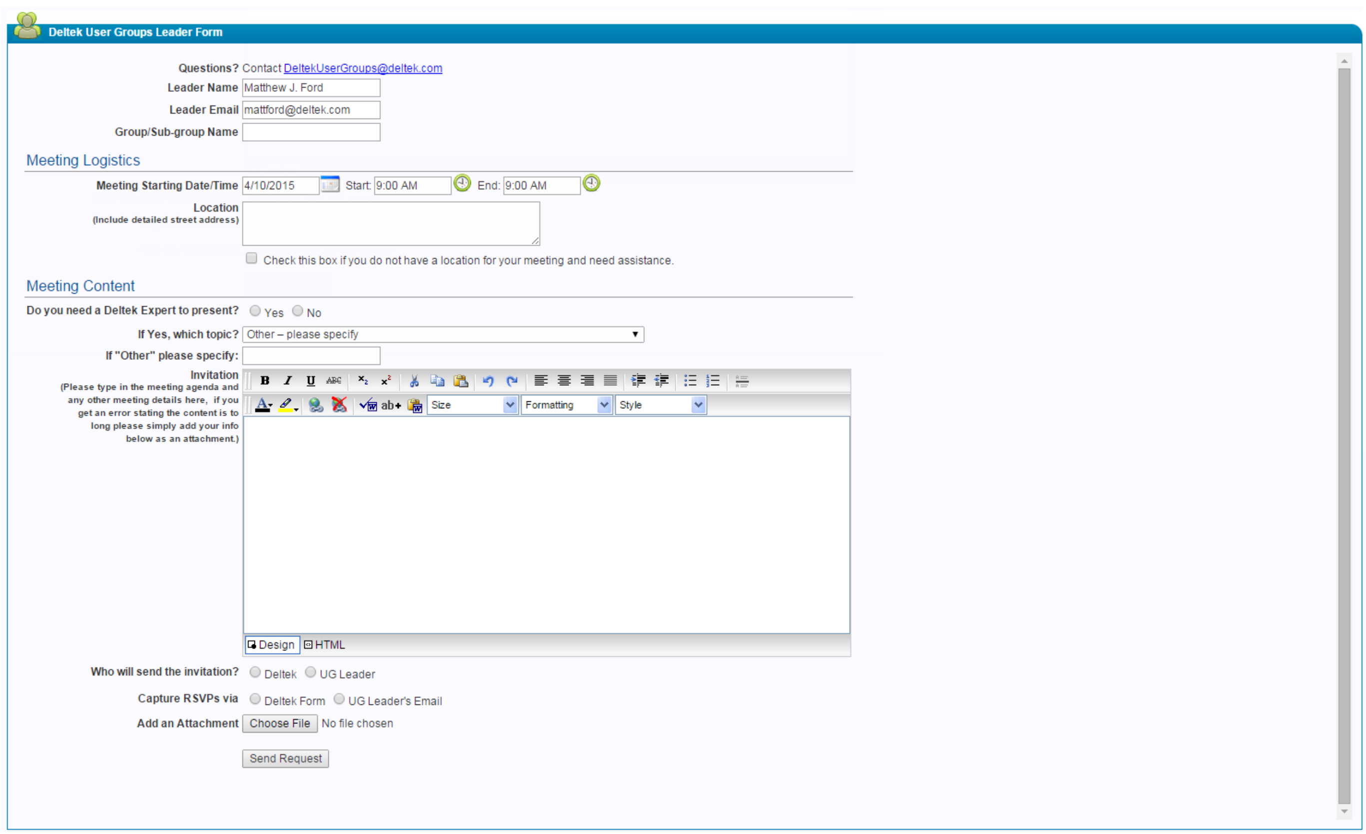
View information on our events ranging from our annual user conference to industry trade shows and online demos and webcasts

Deltek User Groups

Share information. Exchange ideas. Enhance skills. Deltek User Groups offer an ideal networking environment for you and other Deltek users.

Deltek User Groups Leader Form

The User Group Support Form is used by leaders to request Deltek support for their user group meetings. If you need access to the form please contact Customer Care Operations.


Deltek User Groups Leader Form

Questions? Contact DeltekUserGroups@deltek.com
Leader Name: Matthew J. Ford
Leader Email: mattford@deltek.com
Group/Sub-group Name:

Meeting Logistics

Meeting Starting Date/Time: 4/10/2015 Start: 9:00 AM End: 9:00 AM
Location (Include detailed street address)
Check this box if you do not have a location for your meeting and need assistance.

Meeting Content

Do you need a Deltek Expert to present? Yes No
If Yes, which topic? Other – please specify
If "Other" please specify:
Invitation (Please type in the meeting agenda and any other meeting details here, if you get an error stating the content is to long please simply add your info below as an attachment.)
Size Formatting Style
Design HTML
Who will send the invitation? Deltek UG Leader
Capture RSVPs via Deltek Form UG Leader's Email
Add an Attachment Choose File No file chosen
Send Request

To request Deltek support with your User Group meeting:

1. Click on My Account – User Group Meeting Support.

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2. Provide your contact details and group name using **Leader Name, Leader Email and Group/Sub-group Name** fields.
3. In the **Meeting Logistics** area
    a. Select your Meeting Date and the Start/End Time.
    b. Enter in the location of your meeting, including a details street address. If you do not have location.
4. In the **Meeting Content** area:
    a. Select whether or not you need a Deltek Expert to present at your meeting.
    b. If an expert is requested, select a topic the expert should present on. If a specific topic is not in the drop-down list, select Other and then specific what topic you would like covered.
    c. In the **Invitation** area, type in your meeting agenda and any other meeting details. If you receive an error stating the content is too long simply add your information as an attachment. For example, a MS Word document.
5. Select who should send the Meeting Invitation.
6. Select whether RSVPs should come directly to you or via Deltek's registration form.
7. If you have any additional documentation click on Choose File and attach the additional information.
8. Click on **Send Request**.

Deltek will respond to all submissions within 2 business days. Please allow at least 5 business days for the creation of the email invitation.

If you have questions regarding this form please contact Deltek User Groups.

Deltek (Nasdaq: PROJ) is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations in 80+ countries around the world use Deltek to research and identify opportunities, win new business, optimize resources, streamline operations, and deliver profitable projects. Using Deltek, you will ***Know More and Do More.*** Find out why at www.deltek.com.