



Deltek

# Deltek WorkBook

SaaS Administrator Guide V1

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## Overview

Welcome to WorkBook. As the SaaS Administrator for your company, you are responsible for the following:

- Maintaining role security and user accounts, with the initial assistance of the Implementer
- Distributing WorkBook access information to all company employees
- Working with Deltek on service requests related to your SaaS solution
- Communicating WorkBook times and impacts to all company employees
- Knowing how to submit customer care requests in the case of any issues

This guide provides you with the information necessary to perform successfully in your role as a SaaS Administrator.

All SaaS customer accounts are required to have an active/valid SaaS Administrator at all times. Up to two administrators per company is allowed.

## Changing SaaS Administrator

If your organization needs to change the SaaS Administrator listed on your customer account, you must submit a support case to Deltek Customer Care as described in the [Submitting a Support Case](#) section in this document. If the current SaaS Administrator is not available, the case can be submitted by any other Support Contact within the business.

In the event that the SaaS Administrator is no longer with the company and there are no additional Support Contacts available internally to raise the request for the new SaaS Administrator, a request must be submitted via email to [CCOPS@deltek.com](mailto:CCOPS@deltek.com). This request must include a formal letter on company letterhead and have the signature of the CEO, CFO, or President of the Company. The request should also include the name of your Company, your Deltek Client ID, the new SaaS Administrator's name, email address, title, and phone number. Alternatively, you can fax the request to Deltek at +1.339.469.8970. Absent administrator change requests are typically completed within 2 business days.

Your SaaS Administrator must be an individual within your company that has licensed the cloud service from Deltek. Your consultants do not need to be a SaaS Administrator in order to implement your solution, nor to be an Authorized Support Contact whom can submit Customer Care Cases.

# Role Security and User Accounts

## Creating and Configuring Roles and Accounts

When you are given access to the WorkBook environment, the Administrator accounts is already set up for you. The username will be created following the format agreed with your organization. In addition, you will receive an email with a temporary password for this account. You will be asked to change your temporary password after your initial log in.

**Note:** If you lose or forget your SaaS Administrator password, you must submit a service request through Deltek Customer Care to restore access to the Administrator account.

The SaaS Administrator account includes administrative permissions that give you full access to all areas of WorkBook that are licensed to your organization. As the SaaS Administrator, you then have the responsibility of creating user accounts and assigning them the required license type and access rights

**Warning:** Deltek recommends that SaaS Administrators be cautious in setting up further Administrator accounts within WorkBook. Such accounts provide access to all of your data and all functions and should only be provided sparingly.

Once you have received initial solution training from your Implementer, you will be able to set up user accounts by accessing the user creation dialog from the resources within WorkBook.

## Password Policies

Deltek works continuously to protect the security, privacy, and integrity of the data stored within each customer's SaaS instance of WorkBook.

As a result, WorkBook allows clients to define multiple aspects of the password requirements, including:

- Minimum Password Length
- Does the password require numbers
- Does the password require special characters
- Does the password require upper or lower case characters, or both
- Password expiry period
- Invalid logon attempts before user account locked

## Reset Password

If the SaaS Administrator has forgotten their password and requires it to be reset, they must raise a Service Request via the Deltek Support Center Site.

As a SaaS administrator, you can reset the password for any user from the login tab in the user setting on the employee information card.

An alternative to this function is to use the **Password Self-Service** function in WorkBook where users can reset their password. This authenticates via email and allows the user to change their password with the email-verified authentication code.

# Environments

## Types of Environments

There are a number of different types of application environments that are available in Deltek's SaaS offerings. By our definition, an *Environment* is the collection of software and infrastructure necessary to operate one of Deltek's SaaS products. This includes shared security services, monitoring, web and application servers, database servers, operating systems, storage, memory, and networks. Each environment can have one or more customer-specific database instances associated with it, which may or may not require additional subscription fees.

Each of these environments has a specific purpose and are available with specific offerings. There may be additional subscription costs to gain access to some of the environments below.

### Production Environments

All Deltek SaaS services provide a production environment that is held to the highest operational standard. These environment instances are highly secure and managed under strict control. Only authorized Deltek Cloud Operations employees are allowed access to the infrastructure and application layers of the solution. Customer access is provisioned through the application front end only or through very specific, tightly controlled methods, such as an application-specific API layer. These environments serve as the focal point for Disaster Recovery replication and backup procedures. Customers generally only have one production instance unless they are running more than one company or entity under separate subscriptions.

### Non-Production Environments

Any application environment that is not designated for live production use is by nature a non-production environment. Service levels for non-production environments differ in several ways from production environments. For example, a severity 1 service incident is meant for a production down scenario. Because non-production environments are not production, the highest level severity for any incident is a severity 2. There are other key aspects to the service that are either different or do not apply to certain non-production environments, including but not inclusive of: backup and retention, DR, access management, level of access, performance, uptime, and service levels.

The following are definitions of common non-production environments.

#### Implementation Non-Production Environments

The purpose of this type of non-production environment is to facilitate a customer implementation. This environment is only available during implementation. Availability for these databases and service level objectives will be treated the same as non-production environments.

#### Preview Environments

Deltek WorkBook allows customers to request a preview environment prior to the release of a new version of the software. This can be used for testing a new version without disruption of current test non-production environments. Availability for these databases and service level objectives will be treated the same as non-production environments.

## Disaster Recovery

Deltek provides a Disaster Recovery (DR) environment with all offerings. Typically, the disaster recovery site is more than 250 miles away (DR250) from the production hosting facilities unless otherwise specified. Deltek coordinates and completes a disaster recovery test on an annual basis per offering. Customers receive communications about the DR testing, which typically takes place in the northern hemisphere summer months, between May and September. Testing is typically done over a weekend, and customers may be asked to validate the DR site once it has been brought online. After a successful test, the service is rolled back to the production environment.

## Backup & Retention

### Production Environments and Databases

Production environments and databases are backed up incrementally on an hourly basis, and a full backup is taken nightly. Backups occur on the local database server and are transported to an in-region secure storage location. A full production backup is taken nightly and retained for a period of 30 days. Backups that are outside the retention window are deleted from our systems.

# Managing Workbook SaaS Implementations

## Service Requests

As the SaaS Administrator for your company, you have the ability to request additional services from Deltek.

You can submit a service request through the Deltek Support Center site. Service requests can only be submitted by a designated SaaS Administrator. If Deltek receives a service request from someone other than a designated SaaS Administrator, the request will be rejected. If you would like your Implementer to raise Service Requests on your behalf, please request this using the Add Additional SaaS Administrators Service Request.

You can submit requests for the following services using the Deltek Support Center site:

- **Environment Upgrade** — This Service Request is used to request an upgrade of one of your environments to a newer release version of WorkBook. The lead time for an environment upgrade is 5 business days.
- **SaaS Administrator Change** — This request can be raised by the SaaS Administrator to authorize further SaaS Administrator accounts. This can be an employee within your organization or an Implementer if you would like them to raise Service Requests on your behalf. Please ensure the following information is populated in the Service Request

Contact Name: \_\_\_\_\_

Contact Email: \_\_\_\_\_

Role: \_\_\_\_\_

The name, email address, and role of the new SaaS Administrator must be populated.

- **Database Backup Request** — In the event that a backup copy of a WorkBook database is needed, a request can be made by the SaaS Administrator to have a database backup shipped to the customer or restored to another environment. When making such a request, it is important to include the point in time from which the backup is to be pulled. All backup database requests will be transmitted via secure FTP. Customers are allowed 4 database backup requests annually. Database backup requests are typically completed within 3 business days.

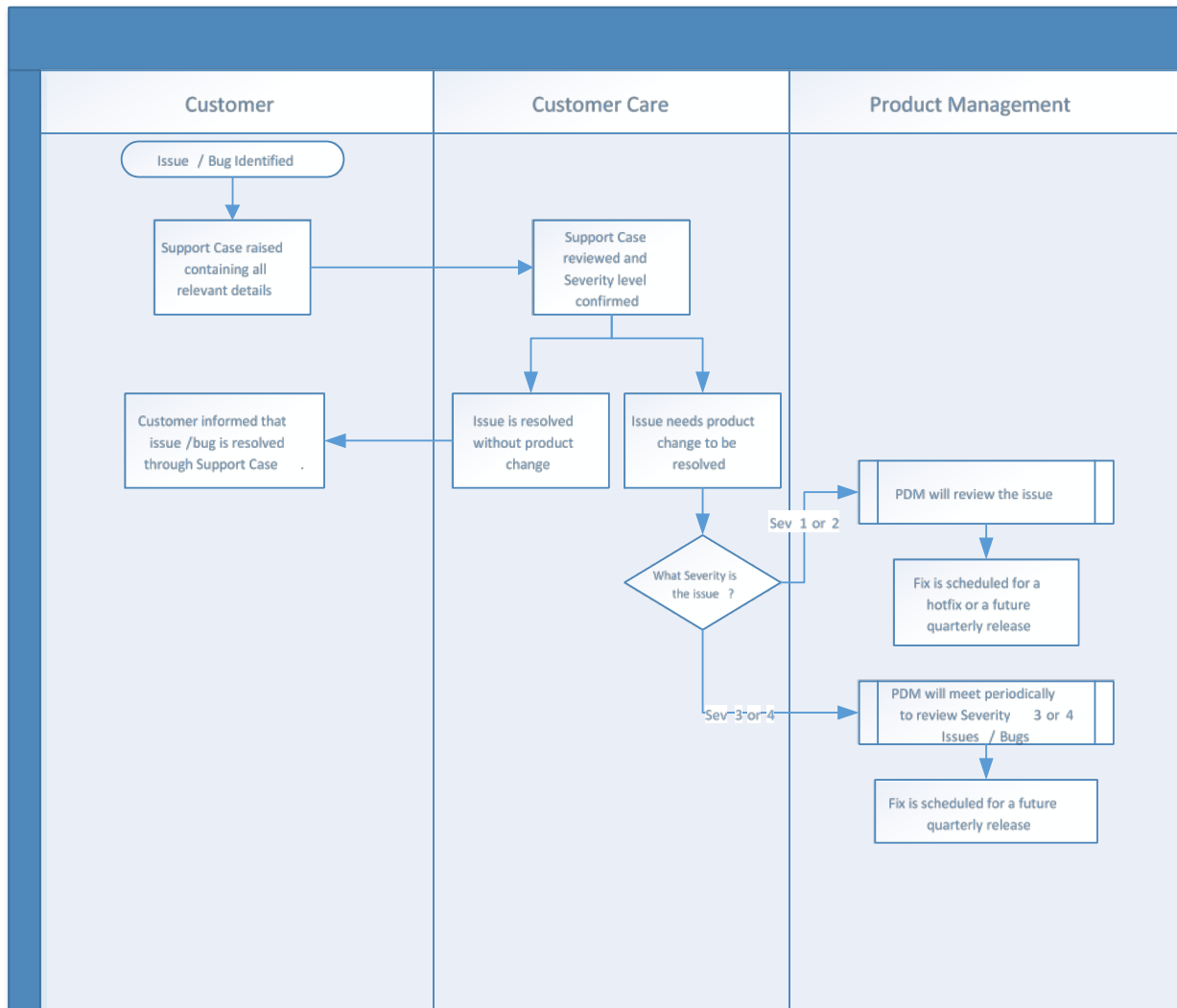
## Bug Fix Process

If you identify an issue or bug within WorkBook, submit details of the issue to Customer Care as a support case.

If an issue is deemed to be either Severity 1 or Severity 2, it is reviewed internally to decide if it can wait for a scheduled release, or if an immediate fix is required. In this case, the bug fix is then released as a patch to the current main release version.

The process for reporting an issue or bug is as follows:





## Enhancement and New Feature Requests

If you identify enhancements or new features within the WorkBook environment that may be advantageous to all customers, either the SaaS Administrator or the Implementer can request a change to be considered to the product. This change may be considered for a future release. Requests must be submitted to Customer Care as a support case with the subject “New Feature Request”.

## Special Notices

### Environment Time Zones

It is possible that your environment will be hosted in one of several data centers. It is important to note that the location of the data center will dictate the time zone of your server. One example of how this could impact your system is the transaction timestamp is representative of the time zone where your solution is hosted. This will particularly impact customers with multiple geographical locations.

## Disaster Recovery

In accordance with Deltek's SOC 2 compliance, Deltek provides customers a Disaster Recovery Plan to roll over operations and service to a Disaster Recovery (DR) site. Deltek conducts an annual test per offering to ensure that any DR Service levels can be met and that Deltek's DR plan and business continuity plans are effective and current. Deltek notifies customers of the potential impact of the planned exercise for annual Disaster Recovery testing in accordance with its SOC compliance.

### RPO

"Recovery Point Objective" or "RPO" is the maximum amount of data loss for service recovery in accordance with the Deltek Disaster Recovery Plan(s). Deltek offers a 24-hour RPO service level agreement.

### RTO

"Recovery Time Objective" or "RTO" is the time by which the Services must be recovered after a disaster in accordance with the Deltek Disaster Recovery Plan definition. The recovery of the services are only performed by Deltek on Deltek Systems and Services only. Deltek provides a 24-hour RTO service level agreement.

## Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Deltek WorkBook, Deltek makes a wealth of information and expertise readily available to you.

### Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

**Attention:** Find out more about these and other services from the Deltek Support Center.

### 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.

## Raising a Service Request

Service Requests are routine tasks for actions to be completed against your environment. The majority of tasks are performed as a result of such requests. Support Cases should only be raised for issues in the environments or one-off processes where a Service Request does not exist. Service Requests that are logged via a standard support case will not be actioned and Deltek will instead require you to raise a Service Request using the Deltek Support Center.

As the SaaS Administrator, you will be responsible for raising Service Requests in the Deltek Support Center.

1. Log in to <https://deltek.custhelp.com>.
2. Click **Cloud Solutions** and select WorkBook.

The Service Requests are listed in the bottom right hand corner of the screen.

3. Select the correct Service Request.
4. Enter the requested details.
5. Submit the Service Request.

## Submitting a Support Case

Support cases should be submitted during system setup when advised by the Implementer. Post Go-Live they should be submitted for issues you identify in the system.

1. Login to <https://deltek.custhelp.com>.
2. Click **Submit a Case**.
3. Enter a detailed description of the issue and attach any supporting documentation.
4. Click **Continue** to submit the case.

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## About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. [www.deltek.com](http://www.deltek.com)