

# Deltek Touch for GovWin Capture Management 1.4

User Guide

January 2015

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This edition published January 2015.

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## Overview

Deltek Touch for GovWin Capture Management (CM) is a mobile application that enables you to view, add, and edit company, contact, and opportunity information for GovWin CM from your touch screen device.

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The official name of the application is *Deltek Touch for GovWin Capture Management*. This document only uses it at first mention. The succeeding instances of the application name display *Touch CM*.

In addition, the application name in *Google Play*, *Apple App Store*, and *Windows Store* displays *Deltek Touch CM for GovWin*.

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This document contains detailed information and instructions on how to use various features of Touch CM.

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To use the full functionality of Touch CM, you must be on the latest Touch server and GovWin CM. You can use the application with lower versions of GovWin CM and Touch server, but new features will not be available. Touch CM server must be installed and configured using the guidelines in the *Deltek Touch CM for GovWin Technical Installation Guide*.

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## Mobile Device Requirements

The Touch CM application supports mobile devices that run on the following operating systems:

- Apple iOS 7 and higher
- Android 4.x and higher
- Windows Phone 8.1 and higher

## If You Need Assistance

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

### Customer Services

For over 20 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 Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training



Find out more about these and other services from the [Customer Care Connect site](#).

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### Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes



If you need assistance using the [Customer Care Connect site](#), the online help available on the site provides answers for most questions

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## Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

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



If you do not have a username and password for the Customer Care Connect site, contact your firm's Touch CM for Deltek GovWin Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

## Available Documentation for this Release

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

Document Name	Description
Deltek Touch CM for GovWin Installation Guide	This document provides instructions for the installation and configuration of application.
Deltek Touch for GovWin Capture Management Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.

## Getting Started

### Install Touch CM

1. On the *Google Play*, *Apple App Store*, or *Windows Store*, search for the application (*Deltek Touch CM for GovWin*).
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application, then follow the screen prompts to accept the terms of agreement and usage tracking.



Touch CM supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.



Tap **Connection Help** on the **Server URL** screen to view information about establishing connection to Touch CM:

- The Touch server must be installed by your administrator in order to use the Touch CM application.
- During setup, the administrator creates a Touch server URL, which is different than your normal GovWin CM URL that you access through a PC.
- The Touch server URL uses the format <https://<server>/deltektouch/vision/cm> by default, where **<server>** refers to the host name of your Touch server. The default URL can be changed to something else by your GovWin CM administrator. For more information, see Deltek Knowledge Base [#73672](#).
- Make sure that the URL is correct by copying and pasting the URL from an email. For example, the **s** in **https** is often missed when typing the URL directly in the field.
- Contact support if you continue to have connection issues.

### Log On to Touch CM

1. Tap *Deltek CM*.
2. In your initial login, the application prompts you to accept **Terms and Use of Service and Usage Statistics Tracking**. Tap the corresponding buttons.



It tracks the number of times you access the application and how often you use certain features. Touch CM does not track any personal or confidential data, such as user name, contracts, and customers.

3. Enter your organization's Touch CM URL using a format that your administrator provides. For example, **https://<server>/deltektouch/vision/cm/**.



For more information about establishing connection to Touch CM, click **Connection Help**.

4. Tap **Connect**.
5. Tap the **User ID** and **Password** fields to enter corresponding values.
6. Tap the **Database** field, then scroll through the list.



7. Tap a database, then tap **Done**.
8. Tap **Log In**. For initial login, you can either create a PIN or skip PIN creation. For more information, see [Security PIN](#).



Touch CM remembers your user ID and selected database (and domain if Windows Authentication is being used) on your next login. To log in using a different user ID and database, tap **Forget Me on this Device** on **Settings**. All your user settings and favorites will be lost.

## Security PIN

For initial login, Touch CM allows you to either create a PIN or skip PIN creation.

- To create a PIN, enter a four-digit PIN, then re-enter it to confirm. Instead of entering your password on your next login, you need to enter your PIN.
- To skip PIN creation, tap **Skip PIN Setup**. You have to enter your password each time you log in to the application.





You can also use Windows Authentication to log on to Touch CM. Based on a server-side setting, the application prompts you to log on using your domain credentials to log on to the Vision Server. You then have the option to log on to Vision using either Windows Authentication or a standard user name and password. Logging on with domain credentials (either for the Vision server or database) requires you to use a PIN.

When using domain credentials, the **Skip PIN Setup** button does not display.

## Log Out of Touch CM

To log out of the application, take one of the following actions:

- Press the **Home** button of your device.
- Tap , then tap **Log Out**. If you choose to do this, Touch CM prompts you for your PIN or password on your next login regardless of the timeout period.
- Tap , then tap **Settings**. Tap **Log Out**.



If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**.

## Closing Touch CM

If you close Touch CM and re-open it from the Home Screen or Task Bar, you will be taken to the last screen that you accessed and you do not need to enter your PIN or password. If your session has timed out, you will be prompted to enter your PIN or password the next time the application communicates with GovWin CM.



## Screen Display

Touch CM consists of the following features, which you access by tapping :

- **Contacts** — Use this feature to search, view, add, edit, or delete contact records.
- **Customers** — Use this feature to search, view, add, edit, or delete customer records.
- **Opportunities** — Use this feature to search, view, add, edit or delete opportunities.
- **Calendar** — Use this feature to access and manage calendar activities.
- **Task and Activities** — Use this feature to access and view tasks and activities.
- **Settings** — Use this feature to access and manage configuration of Touch CM on your device.
- **Help** — Use this feature to access the user guide for Touch CM. You can also access this from **Settings**.

### Field Indicators

Several indicators mark the fields on the screen when you add/edit records or configure settings. They are as follows:

- **Required** — You must enter a value in this in order to continue a task. This field is marked with an asterisk (\*).
- **Editable** — This field allows you to enter a value. This field is marked with  when you enter a value. Tap  to clear the field.
- **Read Only** — This field only displays information and is not editable.



**Known Issue:** On Windows Phone devices, scrolling response is sometimes slow in notes fields due to a defect in a third party tool used in Touch CM.

### Links

Links are displayed as [underlined blue text](#). Each link functions differently depending on the information it contains. Tap a link to activate these functions:

- **Telephone/Mobile/Fax Number** — Prompts your device to call the number. If your device does not have call capabilities, such as tablets, it opens a context menu where you can choose to add the phone number to your device's contact list or copy the information to the clipboard.
- **Address** — Opens your device's default browser to go to your device's default map app and display the location of the address.
- **Email Address** — Opens your device's email message editor, where the email address is automatically added as a recipient.

## User-Defined Fields

Touch CM displays all user-defined fields used in Vision on the **UDF** tab. Including empty fields helps you verify instantly that certain UDFs already exist.

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By default, the tab name is **Misc**.

The administrator can configure user-defined drop-down fields so that you can enter a value that is not in the list. In that case, you can either enter a text in the lookup list or select an option from the available list. This applies to drop-down lists that are “Not limited to list” in the User Defined Components configuration.

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## Contacts

The **Details** screen enables you to view contact information as well as add, edit, or delete contact records. To access the screen, tap  then **Contacts**, search for a customer, then tap  in the contact name.



- By default, Touch CM searches for active records only. To find inactive contacts, tap **All**.
- Touch CM honors GovWin CM role security. Thus, you have the same access (such as read, edit, add, and delete) to client records in Touch CM as you do in GovWin CM.

## View Contact Records

To view a contact record, enter the contact name or the customer name of the contact in the **Search** field and then tap **Search** on the keyboard. All contact records associated with your search entry display on the screen.

To display all available contact records, tap the Search field to display the keyboard and then tap **Search** without using a search entry.



Touch CM displays 25 contact records at a time by default, but you can change this on **Settings**. To display the next set of contact records, scroll to the bottom of the screen and then tap **More**.

## Contact Information

The following table lists the information that displays on the **Contacts** screen.

Contact Info	Description
Business Phone	Displays the contact's business phone number.
Bus. Fax	Displays the contact's business fax number.
Mobile	Displays the contact's mobile phone number.
Home	Displays the contact's home phone number.
Pager	Displays the contact's pager number.
Email	Displays the contact's email address.
Notes	Displays miscellaneous information about the contact.
Business	Displays the business address of the customer associated with the contact.
Home/Other	Displays the contact's home or alternative address.
Activities	Lists all activities linked to the contact.
Contracts	Lists all contracts linked to the contact.

Contact Info	Description
Opportunities	Lists all opportunities linked to the contact.
Employees	Lists all employees linked to the contact.







- For all phone fields, you can tap the corresponding number to call it.
- For all email address and home/other address fields, you can tap them to compose a message or open the address in a map.

## Filter Contact Records

When viewing contact records, use the tabs on the top of the screen to filter contact records as follows:

- **Active** — Tap this tab to view all active contact records. This is the default search.
- **Mine** — Tap this tab to view all contact records associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed contact records.
- **All** — Tap this tab to view all contact records that match your search entry.

## Add a Contact



1. Open the **Add Contact** screen by taking one of the following actions:
  - Tap , then tap **Contacts**. Tap .
  - On the **Customer Info** or **Details** (of **Opportunities**) screen, tap  and then tap **Contact** under **Create New**.
2. Tap the **First Name**, **Last Name**, and **Email** fields to enter the corresponding information.
3. Tap  beside the **Company** field then select a company to associate with the contact.






You must provide information on at least two of the **First Name**, **Last Name**, **Email**, or **Company** fields. This information is used to search for existing contact records to prevent you from entering a duplicate record.

If the contact name you entered is similar to an existing contact record, Touch CM lists those contact records.


- To append an existing record, select the customer record from the lists.
- To create a new record, tap **Add New Contact**.

4. Tap **Next**.
5. Tap . The contact record is automatically associated with your employee record.
6. Tap the fields to enter or select the appropriate information about the contact (see [Contact Information](#)), then tap . The contact record is automatically associated with your employee record



## Edit a Contact Information

1. Tap , then tap **Contacts**.
2. Search for the contact record to edit.
3. Tap the contact record, then tap .
4. Edit the necessary fields, then tap .

## Delete a Contact Record

1. Tap , then tap **Contacts**.
2. Search for the contact to delete and then tap **Edit**.
3. Tap **Delete Contact**.
4. Tap **Delete Contact** to confirm the deletion.

## Customers

The **Customer Info** screen allows you to view customer information as well as to add, edit, or delete customer records. To access the screen, tap  then tap **Customers**, search for a customer, and tap  in the customer name.



- By default, Touch CM searches for active records only. To find inactive customers, tap **All**.
- Touch CM honors GovWin CM role security. Thus, you have the same access rights (read, edit, add, delete, etc.) to client records in Touch CM as you do in GovWin CM. Contact your Touch CM administrator for support.  
Currently, Touch CM does not support record-level security.

## View Company Records

To view a company record, enter the company name or number in the **Search** field and then tap **Search** on the keyboard. All customer records that have a name, number, or alias containing your search entry display on the screen.

To display all available company records, tap the Search field to display the keyboard and then tap **Search** without using a search entry.



Touch CM displays 25 company records at a time. To display the next set of company records, scroll to the bottom of the screen and then tap **More**.

## Customer Information

The following table lists the information that displays on the **Customer Info** screen.

Customer Info	Description
Type	Displays the business classification of the company.
Notes	Displays miscellaneous information about the company.
Address	Displays the primary address of the company.
Address List	Lists the company's addresses. <b>Primary</b> indicates that the address is the default address for the company.
Contacts	Lists all the contacts that are linked to the company.
Activities	Lists all the activities that are linked to the company.
Contracts	Lists all the contracts that are linked to the company.
Opportunities	Lists all the opportunities that are linked to the company.
Employees	Lists all the employees that are linked to the company.



The **Contacts**, **Activities**, **Contracts**, and **Employees** fields will be fully functional in future releases.




You can only view first level association information for **Contacts**, **Opportunities** and **Employees**.

## Filter Customer Records

When viewing customer records, use the tabs on the top of the screen to filter customer records as follows:

- **Active** — Tap this tab to view all active customer records. This is the default search.
- **Mine** — Tap this tab to view all customer records associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed customer records.
- **All** — Tap this tab to view all customer records that match your search entry.



## Add a Customer

1. Open the **Add Customer** screen by taking one of the following actions:
  - Tap , then tap **Customers**. Tap .
  - From a customer or opportunity record, tap  and then select **Customer** under **Create New**.
2. Enter name of the company in the **Name** field and then tap **Next**.



If the company name you entered is similar to an existing customer record, Touch CM lists those records.

- To append an existing record, select the customer record from the list.
- To create a new record, tap **Add New Company**.

3. Tap  beside the **Type**, **Number**, **Relationship**, and **Status** fields to edit the customer information.
4. Enter or select the appropriate information on the **Add Customer** screen.
5. Tap **Done**.
6. (Optional) Tap the **Notes** field to enter additional information about the customer, then tap **Done**.
7. Tap the **Add Address** field, then tap  on the **Primary Address** screen to enter an address of the customer.







After you create an address, you cannot change the address description using Touch CM.

8. Tap **Done** on the **Add Customer Address** screen and then tap **Back** on the **Primary Address** screen to return to the **Add Customer** screen.





9. Tap .



## Edit a Customer Record

1. Tap , then tap **Customers**.
2. Search for the customer record to edit.
3. Tap the customer record and then tap .
4. Tap  in the fields to edit.
5. Modify the necessary information and then tap .

## Delete a Customer Record

1. Tap , then tap **Customers**.
2. Search for the customer to delete and then tap .
3. Tap **Delete Customer**.
4. Tap **Delete Customer** to confirm the deletion.

## Opportunities

The **Details** screen of an opportunity enables you to view customer information as well as add, edit, or delete opportunities. To access the screen, tap  then tap **Opportunities**, search for an opportunity, and tap  in the opportunity name.



- By default, Touch CM searches for active records only. To find inactive opportunities, tap **All**.
- Touch CM honors GovWin CM role security. Thus, you have the same access rights (read, edit, add, delete, etc.) to opportunity records in Touch CM as you do in GovWin CM. Contact your Touch CM administrator for support.  
Currently, Touch CM does not support record-level security.

### View Opportunity Records

To view an opportunity, enter the opportunity name in the **Search** field and then tap **Search** on the keyboard. All opportunity records associated with your search entry display on the screen.

To display all available opportunity records, tap the Search field to display the keyboard and then tap **Search** without using a search entry.



Touch CM displays 25 opportunities at a time. To display the next set of opportunities, scroll to the bottom of the screen and then tap **More**.

### Opportunity Information

The following table lists the information that displays on the Opportunities screen.

Opportunity Info	Description
Title	Displays the opportunity title.
Opp Number	Displays the opportunity number.
Description	Displays a brief description of the opportunity.
Organization	Displays the organization in your firm that is responsible for pursuing the opportunity.
Primary Customer	Displays the name of the primary customer associated with the opportunity. Selecting the primary customer associates the opportunity automatically with the selected customer. Touch CM prompts you whether to assign the Owner role to the newly selected customer.
Primary Contact	Displays the name of the primary contact associated with the opportunity. Selecting the primary contact associates the opportunity automatically with the selected contact. Touch CM prompts you whether to assign the Owner role to the newly selected contact.

Opportunity Info	Description
Principal	Displays the name of the employee who is the principal-in-charge for the opportunity. Selecting the principal associates the opportunity automatically with the selected employee.
Project Manager	Displays the name of the employee who is the project manager for the opportunity. Selecting the project manager associates the opportunity automatically with the selected employee.
Supervisor	Displays the name of the employee who is the supervisor for the opportunity. Selecting the supervisor associates the opportunity automatically with the selected employee.
Total Value	Displays the estimated monetary amount of the expected revenue if the opportunity results in an awarded project.
Win Probability	Displays a number that represents the probability that the opportunity will become a project.
Weighted Revenue	Displays the weighted revenue of the opportunity that results from the <b>Total Value</b> and <b>Win Probability</b> .
Currency	Displays the functional currency for the company. This field only displays if you are using a multicurrency database and you have rights to the field. The available options must include currencies that are enabled for the company (and all currencies for all companies, if <b>MultiCompany</b> is enabled).
Date Opened	Displays the date on which the opportunity was identified. Tapping this field displays the <b>Date Range</b> screen.
Date Closed	Displays the date on which the opportunity was closed. Tapping this field displays the <b>Date Range</b> screen.
Days Open	Displays the number of days the opportunity has been open. Tapping this field displays the <b>Date Range</b> screen.
Stage	Displays the current stage of the opportunity.
Type	Displays the type of job associated with the opportunity.
Source	Displays the source of the opportunity.
Record Status	Displays the status of the opportunity. Tapping this field displays the <b>Estimate</b> screen.
Estimated Start Date	Displays the date on which the job associated with the opportunity is expected to begin. Tapping this field displays the <b>Estimate</b> screen.
Estimated End Date	Displays the date on which the job associated with the opportunity is expected to be completed. Tapping this field displays the <b>Estimate</b> screen.

Opportunity Info	Description
Subcontractors/Partners	Lists all subcontractors or partners linked to the opportunity.
Contacts	Lists all contacts linked to the opportunity.
Activities	Lists all activities linked to the opportunity.
Companies	Lists all companies linked to the opportunity.
Employees	Lists all employees linked to the opportunity.



The **Vendor/Partners** and **Activities** fields will be fully functional in future releases.  
You can only view first level association information for **Contacts**, **Customers**, and **Employees**.



Touch CM and Vision do not include address information for opportunities.




## Filter Opportunities

When viewing opportunities, use the tabs on the top of the screen to filter opportunities as follows:



- **Active** — Tap this tab to view all active opportunity records. This is the default search.
- **Mine** — Tap this tab to view all opportunities associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed opportunity records.
- **All** — Tap this tab to view all opportunities that match your search entry.

## Adding an Opportunity

You can open the **Add Opportunity** screen by taking one of the following actions:





- Tap , then tap **Opportunities**.
- Tapping  on the **Details** screen (of **Contacts**) and then tapping **Opportunity** under **Create New**. This action creates a new opportunity and associates it to the contact.
- Tapping  on the **Customer Info** screen and then tapping **Opportunity** under **Create New**. This action creates a new opportunity and associates it to the customer.

### Add an Opportunity on Opportunity Screen





1. Tap , then tap **Opportunities**.
2. Tap .
3. Enter or select the appropriate values on the **Add Opportunity** screen.

4. Tap .




### Add an Opportunity on Details Screen

1. Tap , then tap **Contacts** to search for the contact record to edit.
2. Tap the contact record and then tap .
3. Under **Create New**, tap **Opportunity**.
4. Enter or select the appropriate values on the **Add Opportunity** screen.
5. Tap .
6. Enter the details for the association to the contact, then tap .

### Add an Opportunity on Customer Info Screen

1. Tap , then tap **Customers** to search for the customer record to edit.
2. Tap the customer record and then tap .
3. Under **Create New**, tap **Opportunity**.
4. Enter or select the appropriate values on the **Add Opportunity** screen.
5. Tap .
6. Enter the details for the association to the customer, then tap .



### Edit an Opportunity

1. Tap , then tap **Opportunities**.
2. Search for the opportunity to edit.
3. Tap the opportunity and then tap .
4. Edit the necessary fields and then tap .



You cannot change the primary contact and company of an existing opportunity record.

### Delete an Opportunity

1. Tap , then tap **Opportunities**.
2. Search for the opportunity to delete and then tap .
3. Tap **Delete Opportunity**.
4. Tap **Delete Opportunity** to confirm the deletion.





## Associations

You can link one or more records to a new or an existing record and define relationships between the linked records on the **Association** screen.





You can view, add, and edit associations on the **Opportunities** screen of either the **Details** (for **Contracts**) or **Customer Info** (for **Customers**) screen.


### Associate a Record to a New Record

1. Tap , then tap **Contacts**, **Customers**, or **Opportunities**.
2. Search for the record that you want to view, then tap the name.
3. Tap  to display the context menu.
4. Under **Create New**, tap any of the following record types:
  - **Opportunity** – on the **Details** (for **Contracts**) or **Customer Info** (for **Customers**) screen
  - **Customer** – on the **Details** screen (for **Opportunities**)
  - **Contact** – on the **Customer Info** (for **Customers**) or **Details** (for **Opportunities**) screen
5. Enter or select appropriate information, then tap .
6. Enter or select the role information in the following fields, then tap :
  - **Role** — Tap this field, select a role for an opportunity, then tap **Done**.
  - **Role Description** — Tap this field, then enter a description.

### Associate a Record to an Existing Record





1. Tap , then tap **Contacts**, **Customers**, or **Opportunities**.
2. Search for the record that you want to view, then tap the name.
3. Tap  to display the context menu.
4. Under **Associate Existing**, tap any of the following record types:
  - **Opportunity** – on the **Details** (for **Contracts**) or **Customer Info** (for **Customers**) screen
  - **Customer** – on the **Details** screen (for **Opportunities**)
  - **Contact** – on the **Customer Info** (for **Customers**) or **Details** (for **Opportunities**) screen

You can also use the search field for an existing record.




5. From the list, tap the record.
6. Enter or select the role information in the following fields, then tap :

- **Role** — Tap this field, select a role for an opportunity, then tap **Done**.
- **Role Description** — Tap this field, then enter a description.

## Edit an Association

1. Tap , then tap **Contacts**, **Customers**, or **Opportunities**.
2. Search for the record that you want to update, then tap it.
3. Tap  beside the **Contacts**, **Customers**, or **Opportunities** field.
4. Tap  beside the record name for the association that you want to edit.
5. Update the role information, then tap **Done**.
6. Tap .

## Remove an Association

1. Tap , then tap **Contacts**, **Customers**, or **Opportunities**.
2. Search for the record which association you want to remove, then tap it.
3. Tap  beside the **Contacts**, **Customers**, or **Opportunities** field.
4. Tap  beside the record name for the association that you want to delete.
5. Tap **Remove Association**.




## Calendar

Touch CM now allows you to view calendar activities for today and the next seven days. By default, activities for today, the next seven days, and previous seven days are displayed. If you scroll up, Touch CM displays activities from the previous week. If you scroll down, it displays activities for the next week.



In CM configuration, Activity Types have a Display setting, which controls where activities are displayed in Touch CM. Only activities that are associated with a Calendar activity type display on the **Calendar** screen. All other activities display on the **Tasks and Activities** screen.

### View Calendar Activities

1. Tap , then tap **Calendar**.
2. Take one of the following actions:
  - Tap  beside each line to view **Activity Details**.
  - Tap  to view the activities for the current day.
  - Search for an appointment by entering part of the appointment subject in the Search field and then tap Search on the keyboard. All appointments associated with your search entry display on the screen. To display all available appointments, tap the Search field to display the keyboard and then tap Search without using a search entry.



Scroll up to view activities from the previous week or scroll down to view activities for the next week.






## Tasks and Activities

Touch CM now allows you to view non-calendar activities for today and the next seven days. If you scroll up, Touch CM displays activities from the previous week. If you scroll down, it displays activities for the next week.



In CM configuration, Activity Types have a Display setting, which controls where activities are displayed in Touch CM. All activities that are not associated with a Calendar activity type display on the **Tasks and Activities** screen.

### View Tasks and Activities

1. Tap , then tap **Tasks and Other Activities**.
2. Take one of the following actions:
  - Tap **All** or **Incomplete** to display corresponding activities based on the selected filter.
  - Tap  to view the tasks and activities for the current day.
  - Search for an activity by entering part the activity subject in the Activity Search field and then tap Search on the keyboard. All activity associated with your search entry display on the screen. To display all available activities, tap the Search field to display the keyboard and then tap Search without using a search entry.
3. Scroll through the list. You can tap  each line to view activity details.





Scroll up to view activities from the previous week or scroll down to view activities for the next week.

## Settings


Use the information in this section to configure Touch CM on your device.

### Change Search Result Sorting

1. Tap , then tap **Settings**.
2. Tap  beside the **Display By** field.
3. Select a sort setting from the list.


### Enable PIN

To make accessing Touch CM easier on your next login, you can use a four-digit security PIN instead of your user name and password.



1. Tap , then tap **Settings**.
2. In **Use PIN**, slide the toggle switch to **ON**.
3. Enter your password, tap **OK**.
4. Enter your PIN, then reenter it to confirm.

### Disable PIN

Disabling your security PIN requires you to enter your password each time you access the Touch CM. If you use Windows Authentication, this option is not available.

1. Tap , then tap **Settings**.
2. In **Use PIN**, slide the toggle switch to **OFF**.

### Change Security PIN


1. Tap , then tap **Settings**.
2. Tap  beside the **Change PIN** field.
3. Enter your password and then tap **OK**.
4. Enter a four-digit security PIN and then reenter it to confirm.

### Enable/Disable Usage Tracking

Usage tracking keeps a record of the number of times you accessed Touch CM and the futures that you used.







Usage tracking does not track any personally identifiable data or confidential information, such as customer and contact names.

1. Tap , then tap **Settings**.


2. Use the **Usage Tracking** slider to enable (**ON**) or disable (**OFF**) usage tracking.

## Configure Touch CM Settings


1. Tap , then tap **Settings**.
2. You can modify the following:
  - **Display By** – To change the search result sorting (by **First, Last** or **Last, First**), tap  beside the **Display By** field.
  - **Use PIN** – Slide to turn on or off. Setting it to **ON** will require you to enter a 4 digit PIN instead of your Vision password on your next login. If you use Windows Authentication, you cannot turn this off.
  - **Change PIN** – To change the current PIN, tap  beside the **Change PIN** field and then enter a four-digit security PIN.
  - **Logged User** – To change the current user, tap **Forget Me on this Device**, then log in again. All options and favorites are lost.
  - **Database** – To change the current database to which you are logged in, tap **Forget Me on this Device** and then log in again. All options and favorites are lost.
  - **Usage Tracking** – Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of Touch CM (for example, the number of times you access the application). Deltek uses this information to determine what features are being used in the application. No confidential information (such as projects, customers, or user names) is tracked. This anonymous information is only available to Deltek and is not publicly available.
  - **Help** – Tap to access the Touch CM help. You can also **Help** access by tapping , then tapping **Help**.
  - **Privacy Policy** – Tap to view the Legal Notices and Privacy Statement information page of Deltek.
  - **About** – Tap to view the device and operating system information, which includes the following:
    - Device Type
    - Operating System
    - User Agent Name and Version
    - Application (Native App or Web App) Version
    - Touch Server Version
    - Web Service Version
    - Core System Version

You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek support if you have an issue with the application.

  - **Log Out** – When you close Touch CM on the device, there is a timeout period during which you do not have to enter your password or PIN when you reopen the application. After the timeout period expires, the application logs you out automatically. You must enter your PIN or password when you reopen it. You can,

however, tap **Log Out** to force the logout before the timeout period expires. You can also log out by tapping , then tapping **Log Out**.

- **Forget Me on this Device** – Tap to delete all information details from the application, requiring user ID, password, and database on the next login. All options and favorites are lost.



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