

Deltek Touch CRM for Vision 1.4.1

Technical Installation Guide

April 2015

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Overview

Deltek Touch CRM for Vision is a mobile application that enables you to view, add, and edit client, contact, and opportunity information for Vision from your touch screen device.



The official name of the application is *Deltek Touch CRM for Vision*. This document only uses it at first mention. The succeeding instances of the application name display *Touch CRM*.

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

This document provides instruction for the installation and configuration of the Touch CRM for Vision Web server.

If You Need Assistance

If you need assistance installing, implementing, or using Touch CRM for Vision, 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](#).

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

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 CRM for Vision Administrator.

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

Additional Documentation

The following table lists the additional 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 CRM for Vision User Guide	This document contains detailed information and instructions on how to use various features of Touch CRM for Deltek Vision.
Deltek Touch CRM for Vision Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, and sub-releases. You can access DSM directly or through the Deltek Customer Care Connect site.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Customer Care site, you do not have to log on since you are already logged into the Customer Care site.

Accessing DSM Directly

To access Deltek Software Manager directly, complete the following steps:

1. Launch Deltek Software Manager by taking one of the following actions:
 - Click [here](#).
 - On your desktop, click **Start » All Programs » Deltek Software Manager**.
2. In the Deltek Software Manager logon dialog box, enter your Deltek Customer Care **User ID** and **Password**, and click **Logon**.
3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

4. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



You can change this folder anytime in the Settings dialog box.

5. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.



If you clicked the link in step 1 to access DSM, the application automatically selects Deltek Touch CRM for Vision for you.

6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.



To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

Accessing DSM from within the Customer Care Connect Site

To access Deltek Software Manager from within the Customer Care Connect site, complete the following steps:

1. In your Web browser, go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**, and click **Log In**.
3. When the Customer Care Connect site displays, click the Product Downloads tab.
You are automatically logged into Deltek Software Manager.
4. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.



When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

5. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



You can change this folder anytime in the Settings dialog box.

6. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
8. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.



To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click [here](#).
- To view a tutorial on how to use Deltek Software Manager, click [here](#).
- To view more information on troubleshooting Deltek Software Manager, click [here](#).



The above troubleshooting link will only work if you are logged into Deltek Customer Care Connect.

Prerequisites

- This particular release (Touch installer 1.4.1), which includes Touch Server 1.4.0.1, only covers the PHP update.



The Touch installer works with Vision 7.3 Cumulative Update #16 and Vision 7.4 Cumulative Update #04.

When installing Touch CRM on a dedicated server, ensure that the Vision Web service URL (for example, <https://server.company.com/vision/visionservices.aspx>) can be accessed from the Touch Server. This includes ensuring that the required TCP/IP ports (for example, 443) are open and the GovWin CM server can be resolved via DNS from the Touch Server.

- Touch CRM requires that Vision is accessible to your mobile device either over the Internet or via a private network to which your device is connected. For additional information about known issues, see Deltek Knowledge Base [#72783](#).
- If you are going to access Touch CRM from the Internet, open a port in your firewall to access the Touch CRM virtual directory, which will be installed on the IIS server. Deltek strongly recommends that you use HTTPS protocol in your production deployment.







When Vision is not exposed to the Internet, a VPN can be used to connect the mobile device to the corporate network on which Vision resides to provide the connection needed for Touch CRM. However, while the most common VPN configurations will most likely work without problems, Deltek has not tested all possible VPN types and configurations to ensure compatibility.

- When using Secure Sockets Layer (SSL), you must have a certificate issued by a trusted certificate authority. You must not use self-signed certificates. Wild card certificates are acceptable if they come from a trusted certificate authority.
- You must install Touch CRM on an IIS server that is installed on Windows 2008, Windows Server 2008 R2, Windows Server 2012, or Windows Server 2012 R2.
- Touch CRM supports native device browsers and mobile applications downloaded from *Google Play*, *Apple App Store*, and *Windows Store*. If you are using an unsupported version of Vision (compatibility mode), you can use your device's native browser to enter your organization's Touch CRM URL.



The Touch CRM URL has the format <https://<server>/deltektouch/vision/crm>, where <server> refers to the host name of your Touch Server.

Compatibility Mode Definitions

Compatibility Mode	Description
Fully Compatible 	You must be on the latest version of each component (Touch CRM application, Touch Server, and API). All features and functions in the application are available to you.
Partially Compatible 	At least one of the components (Touch Server and/or API) is an older version. Some features of the application are hidden and not available to you.
Browser Compatible 	At least one of the components (Touch Server and/or API) is an older version. The current application does not work with the Touch Server or API, but you can still use the application through the mobile browser.
Incompatible 	There are some combinations of API and Touch Server that make it impossible to even use the browser version to run the application.

Supported Mobile Operating Systems

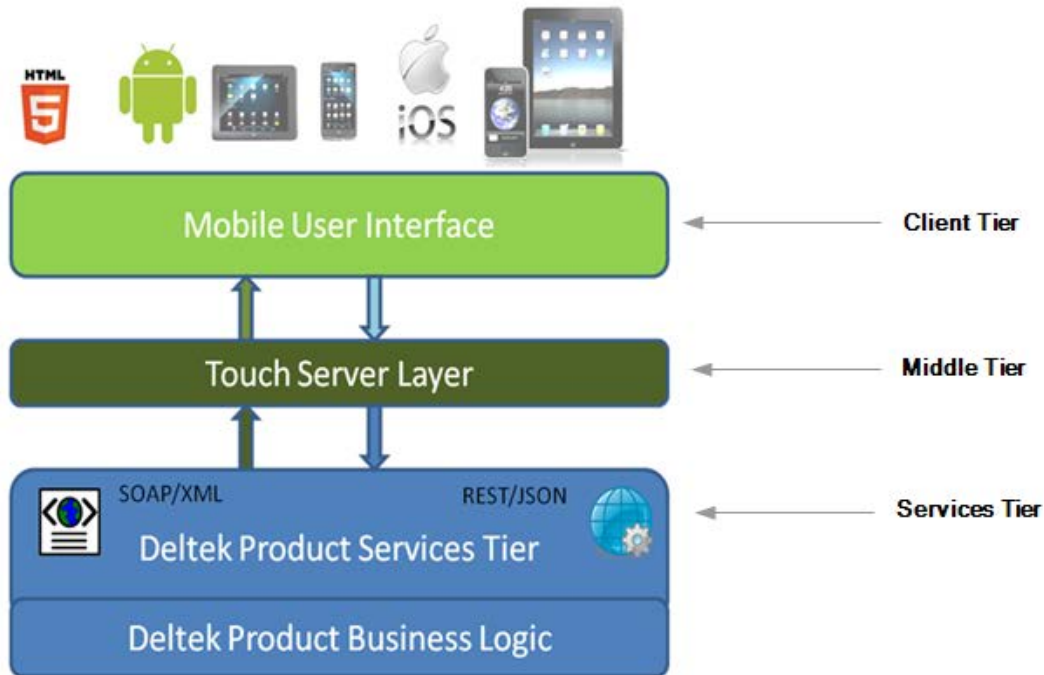
Touch CRM for Vision supports mobile devices that run on the following operating systems:

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

Touch CRM Infrastructure

The Touch CRM infrastructure is composed of the client tier, middle tier, and services tier.

Technical Platform



Client Tier and Middle Tier

Touch CRM Server (Middle Tier) is used to optimize service delivery and provides a platform for future third-party product integration. It is based on Sencha Touch and uses JSON, Ajax, and PHP.

Touch Client (Client Tier) is a hybrid application and created using HTML 5 and CSS 3 but with the ability to access the native device capabilities using Apache Cordova (also known as PhoneGap).

Services Tier

For Touch CRM, the services tier corresponds to the Vision Web services.



The Touch client tier does not directly access the database. It accesses the business logic via the Vision CRM web services.

Microsoft IIS Web Server Configuration on Windows 2008 Server

Perform this procedure if you are going to install the Touch CRM application on Windows Server 2008. The Touch CRM installer checks if Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.



Touch CRM requires Anonymous Authentication and does not support Basic Authentication.

To configure Microsoft IIS Web server on Windows 2008 Server, complete the following steps:

1. Click **Windows » Start » Administrative Tools » Server Manager**.
2. Expand the **Roles** tree on the left pane, and click **Web Server (IIS)**.
3. When the Web Server (IIS) screen displays, click **Add Role Services** in the bottom right pane.
4. On the Select Role Services screen, perform the following actions:
 - Click **Web Server » Application Development**, and select **ISAPI Extensions** and **CGI**.
 - Click **Web Server » Management Tools**, and select **IIS Management Scripts and Tools**.
 - Click **Web Server » Management Tools » IIS 6 Management Compatibility**, and select **IIS 6 Metabase Compatibility**.
5. Click **Next**, and then click **Install**.
6. When the installation completes, click **Close**.
7. Expand the **Web Server (IIS)** tree on the left pane, and click **Internet Information Services (IIS) Manager**.
8. On the Internet Information Services (IIS) Manager screen, expand the IIS computer name icon on the left pane of the Internet Information Services (IIS) Manager window.
9. Right-click the IIS computer name icon, and select **Stop**.
10. Right-click the IIS computer name icon on the left pane of the Internet Information Services (IIS) Manager window, and select **Start**.
11. Close the Services Manager window.

Microsoft IIS Web Server Configuration on Windows 2012 Server

Perform this procedure if you are going to install the Touch CRM application on Windows Server 2012. The Touch CRM installer checks if Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.



Touch CRM requires Anonymous Authentication and does not support Basic Authentication.

To configure Microsoft IIS Web server on Windows 2012 Server, complete the following steps:

1. From the desktop view, display the Charm Bar. To do this, take one of the following actions:
 - Move the cursor to the bottom right corner of the screen, which causes the bar to display on the right.
 - On your keyboard, press the Windows key + **C**.



For more information about Charm Bar, see the following link:

<http://windows.about.com/od/windowsforbeginners/a/Get-To-Know-The-New-Windows-8-Start-Menu.htm>.

2. Click **Start » Administrative Tools » Server Manager**.
3. On the left pane, click **IIS**.
4. On the right pane, scroll down to see the **ROLES and FEATURES** section.
5. From the **Tasks** drop-down list, select **Add Roles and Features**. The Add Roles and Feature Wizard displays.
6. Click **Next**.
7. Select the **Role-based or feature-based installation** option.
8. On the Select Destination Server page, verify if the **Select a server from the server pool** option is selected. Click **Next**.
9. On the Select server roles page, expand **Web Server (IIS) » Web Server » Application Development**, select **CGI** and **ISAPI** extensions
10. On the Select server roles page, expand **Web Server (IIS) » Web Server » Management Tools**, and then select **IIS Management Scripts and Tools**.
11. On the Select server roles page, expand **Web server (IIS) » Web Server » Management Tools » IIS 6 Management Compatibility » IIS 6 Metabase Compatibility**.
12. Click on **Next**. The Select features page displays.
12. Click **Next**, and then click **Install**.

Touch CRM for Vision Installation

Before you proceed, make sure that you downloaded the server component from Deltek Software Manager (DSM). After you install the server part, you can access the database using the Touch CRM app (named *Deltek Touch CRM for Vision* on *Google Play*, *Apple App Store*, or *Windows Store*) on your mobile device.



For more information about DSM, see [Downloading Deltek Products using Deltek Software Manager](#) in this document.

To install Deltek Touch, complete the following steps:

1. Run **DeltekTouchVisonCRM141.exe** to launch the Deltek Touch installation program.



Taking into consideration the enhanced security in Windows Server 2008, Deltek recommends that you select the **Run as Administrator** option when launching the installation executable even if you (as the logged-on user) have local administrative rights. To do this, right-click the installation executable file name in Windows Explorer and then click **Run as Administrator** on the shortcut menu.

2. On the Welcome to the Deltek Touch Vision CRM 1.4.1 Installation Wizard page, click **Next**.
3. On the License Agreement page, review the license agreement, select the **I accept the terms of the license agreement** option and then click **Next**.
4. On the Choose Application Installation Directory page, verify if the default location for the Deltek Touch software is correct and then click **Next**. Otherwise, click **Browse** to navigate to the installer folder.



The default folder is C:\Program Files (x86)\Deltek\Touch on a 64-bit machine or C:\Program Files\Deltek\Touch on a 32-bit machine.

5. *This step only applies if Vision is **NOT** installed in the same server as Touch CRM.* On the IIS Website Information page, enter or choose **Default Web Site** in the **Website Name** field and then click **Next**.
6. On the Deltek Vision Site page, enter your company's Vision server and then click **Next**.



- Your Vision server must end with `VisionServices.asmx`.
- When installing Touch CRM on a dedicated server, ensure that the Vision Web service URL can be accessed from the Touch Server.

7. On the Customer Experience Improvement Program page, select the **Send the Installation Data to Deltek** option if you want to participate.
8. On the Pre-Installation Summary page, review the installation details you provided.
 - If you want to change any settings, click **Back**, and make the necessary changes.
 - If you are done, click **Install** to begin the installation.




If there are errors, the `DeltekTouchInstall.log` file displays.

9. During the installation process, one of the following scenarios occur on the Setup Status page:
 - If you do not have Microsoft Visual C++ installed in your computer, the Microsoft Visual C++ Redistributable (x86) window displays, containing the Microsoft Software License Terms. Click **I agree to the license terms and conditions** and then click **Install**. Wait until the Setup Successful message displays and then click **Close**.
 - If you have Microsoft Visual C++ installed in your computer, the Modify Setup message on the Microsoft Visual C++ Redistributable (x86) window displays. Click **Close** and then click **Yes** to confirm your action.
-



The PHP upgrade, which contains the latest security fixes, requires the Microsoft Visual C++ Redistributable (x86) installation.

10. When the installation is done, on the InstallShield Wizard Complete page. This page contains the URL of the database that you need to access in order to log into Touch CRM on your mobile device. Send this URL to all the users who will be using Touch CRM. Click **Finish**.



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