Deltek Touch Time & Expense for Vision 1.7.7

Technical Installation Guide

February 2018

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Overview

Deltek Touch Time & Expense for Vision is a time-tracking tool that allows you to view, enter, update, and submit timesheet data and expense reports as well as approve timesheets (if you are a Timesheet system administrator) from anywhere at any time using your touch screen device and synchronize that data to the Vision database. To use the application, the Touch Server component must be installed into your Vision infrastructure (on your existing Vision application server or a separate server).

> The official name of the application is *Deltek Touch Time & Expense for Vision*. This document only uses it at first mention. The succeeding instances of the application name display *Touch Time & Expense*.
>
> In addition, the application name in *Apple App Store* and *Google Play* displays *Deltek Vision Time & Expense.*

This document provides instructions for the installation and configuration of the Touch Time & Expense.

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 Touch Time & Expense 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**.

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   > 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

Before you install Touch Time & Expense, it is important to understand the following information:

- Touch Time & Expense works with Vision 7.6 Cumulative Update #09.

    - To use the full functionality of Touch Time & Expense, you must be on the latest Touch Server and Vision.

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

    - You must own Vision Core.

- You must install Touch Time & Expense on an IIS server that is installed on Windows Server 2012, Windows Server 2012 R2, or Windows Server 2016.

- Starting with 1.7, Touch Time & Expense requires that the Vision server be accessed using Secure Sockets Layer (SSL)/Transport Layer Security (TLS). Deltek recommends that you update your configuration to support this change to avoid issues with future releases should your system not already be configured this way.

    - 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 Time & Expense. 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.

    - Touch Time & Expense does not support two-factor authentication (2FA) and multifactor authentication (MFA).

- When using SSL, you must have a certificate issued by a trusted certificate authority. You must not use self-signed certificates. Wild card certificates work if they come from a trusted certificate authority; however, they are not recommended as best practice.

- Touch Time & Expense supports mobile applications downloaded from *Apple App Store* and *Google Play*. If you are using an unsupported version of your Vision core product (compatibility mode), you can use your device's native browser to enter your organization's Touch Time & Expense URL but with some limitations.

    - Starting with 1.7.7, Windows Phone is no longer supported.

    - The Touch Time & Expense URL has the format https://<server>/deltektouch/vision/time, where <server> refers to the host name of your Touch Server.

    - If you are on iOS 9.0 or lower, Touch Time & Expense would not be available from *Apple App Store*. In this case, you would not be able to download or update it.

    - In addition, Touch Server 1.3 and lower are already incompatible because the Chrome browser does not work with these versions any more due to a major change on Chrome.

- Touch Time & Expense installer installs PHP 7.1.8 in this release.

> **Apple's iOS blocks connections to servers with deprecated secure transport layers***.*
>
> Starting with iOS 9, Apple's iOS mobile operating system started blocking deprecated transport layers. As of iOS version 10, iOS blocks connections to servers that have either TLS 1.0, SSL 3 (or lower) enabled or any older protocols. Only TLS 1.1 and/or TLS 1.2 may be enabled for connections to be successful. If you try to connect to IIS servers running Touch CRM, an error message displays, such as "invalid server URL" if any of the deprecated protocols are enabled.
>
> To resolve this issue, the following must be performed to Touch Server:
>
> - Deprecated transport layers disabled
> - Supported transport layers enabled (if not already) – TLS 1.1 and/or TLS 1.2
> - Restart the server
>
> For more information on how to disable the deprecated transport layers, see the following support article from Microsoft: *How to disable PCT 1.0, SSL 2.0, SSL 3.0, or TLS 1.0 in Internet Information Services* at https://support.microsoft.com/en-us/kb/187498.

Compatibility Mode Definitions

Compatibility Mode	Description
Fully Compatible with Vision	You must be on the latest version of each component (Touch Time & Expense application, Touch server, and API). All features and functions in the application are available to you.
Partially Compatible with Vision	You can use the Touch Time & Expense application in this environment but some features will be hidden until Touch Server and Vision core is updated.
Potentially Compatible with Vision but no Longer Tested	The Touch Time & Expense application may be compatible with Vision, but this combination is no longer tested or supported by Deltek.
Incompatible	You cannot use both the Touch Time & Expense (native application) and its browser version..

Touch Time & Expense 1.7.7 (Native Application) Version Compatibility

Touch Server \ Vision	7.6 CU#20	7.6 CU#09	7.6 CU#06	7.6 CU#03	7.6	7.5	7.4 CU#16	7.4 CU#06	7.4 CU#04 and #05	7.4 CU#03 or Lower	7.3 CU#16 or Higher	7.3 CU#13 to CU#15	7.3 CU#12 or Lower	7.2 CU#14 or Higher	7.2 CU#13 or Lower	7.1 CU#11 or Higher	7.1 CU#10 or Lower	7.0 SP1 HF#6 or Higher	7.0 SP1 HF#5 or Lower	6.2
1.7.7																				
1.7.4																				
1.7.3																				
1.7.2																				
1.7.0																				
1.6.3																				
1.6.0																				
1.5.0																				
1.4.1																				
1.4.0																				
1.3.0																				
1.2.0																				
1.1.0																				
1.0.x																				

For Touch Time & Expense 1.7.6 (or lower), see the Deltek Touch Time & Expense Technical Installation Guide of that release.

Supported Mobile Operating Systems

Touch Time & Expense supports mobile devices that run on the following operating systems:

- Apple iOS 10.0 and higher
- Android 4.4 and higher

Deltek Touch Infrastructure

The Deltek Touch infrastructure is composed of the application tier, middle tier, and services tier. The Touch Server (middle tier) is used to optimize service delivery and transform data when necessary. The Touch Server only communicates with the product service layer and does not have access to the database.

The Touch application (client tier) is a hybrid application created using HTML 5 and CSS 3 but with the ability to access the native device capabilities.

> This infrastructure applies to Deltek Touch Time & Expense for Vision, Deltek Touch CRM, Deltek Touch for GovWin CM, and Deltek Touch CRM for Ajera.

Technical Platform
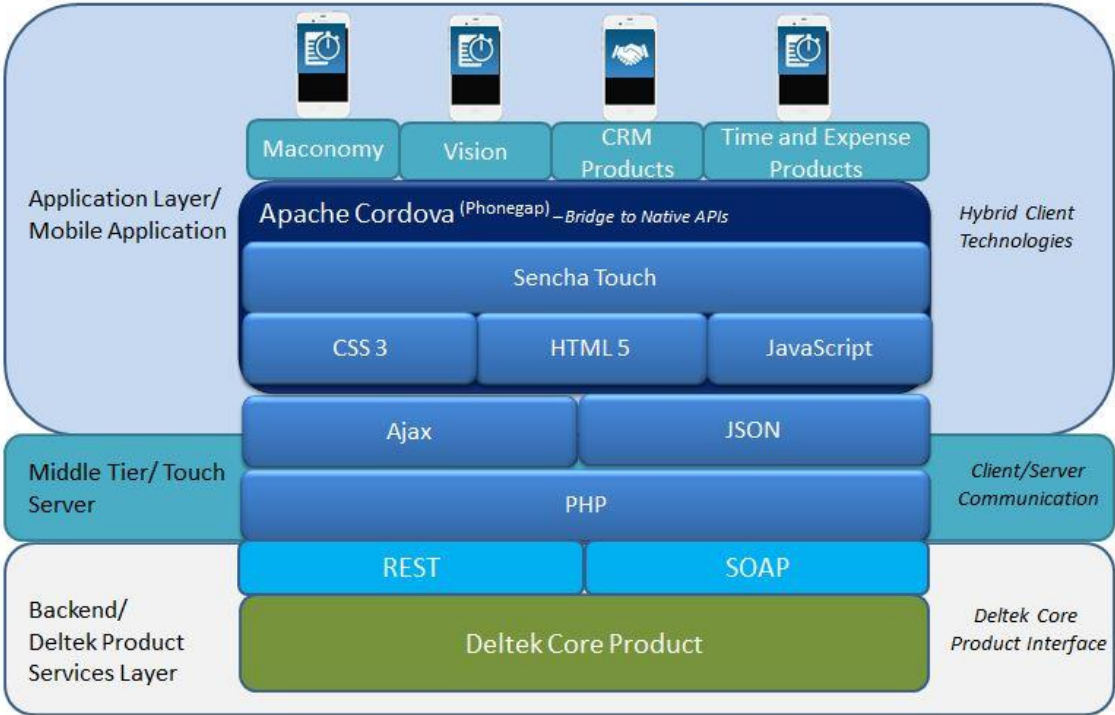
Supported Deployment Scenarios

The Deltek Touch for Vision application may be installed on another IIS server or as a separate directory on an existing Vision IIS server.

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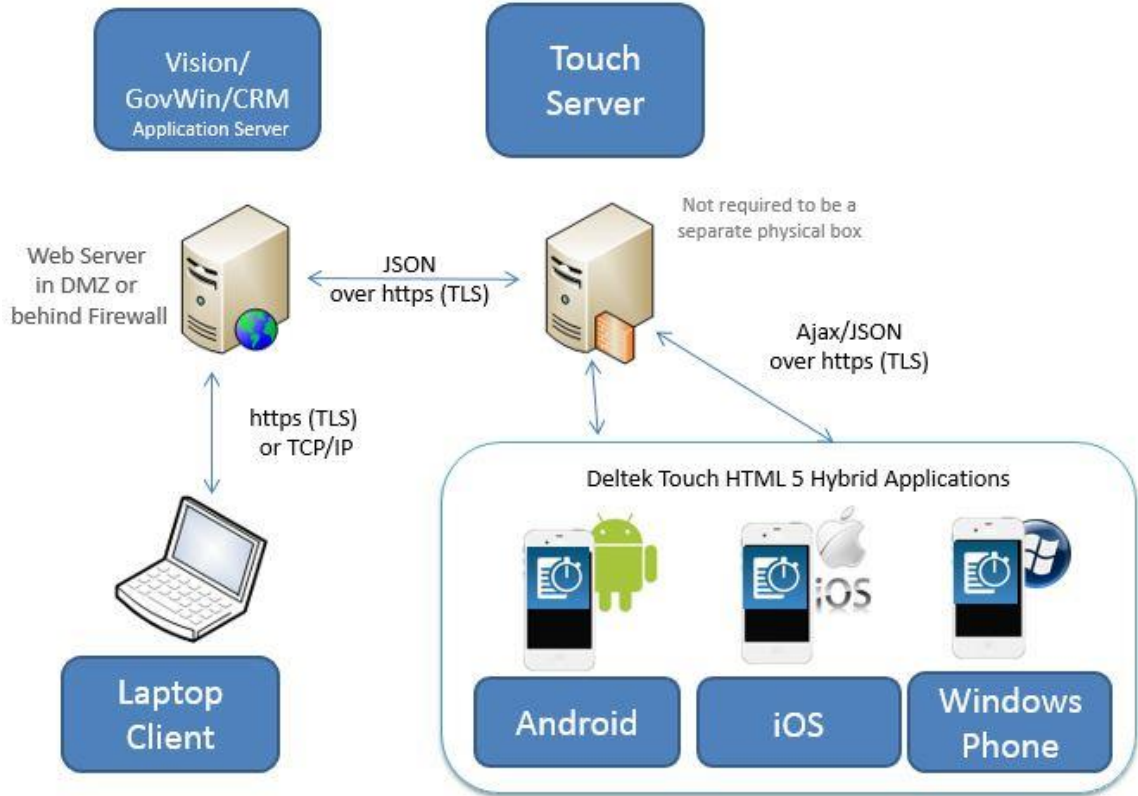
Perform this procedure if you are going to install the Touch Time & Expense application on Windows Server 2012. The Touch Time & Expense installer checks if Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is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

> Touch Time & Expense 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 the 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 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.

13. Click **Next**, and click **Install**.

Touch Time & Expense Installation

Before you proceed, make sure that you downloaded the server component from Deltek Software Manager (DSM). Once the server part is installed, download the application from *Google Play, Apple App Store*, or *Windows Store* and install it in your device.

> For more information about DSM, see Downloading Deltek Products using Deltek Software Manager in this document.

To install the Deltek Touch application, complete the following steps:

1. Run **DeltekTouchVisionTimeandExpense177.exe** to launch the Touch Time & Expense installation program.

   > Taking into consideration the enhanced security in Windows Server 2008, Deltek recommends selecting the **Run as Administrator** option when launching the installation executables even if you (as the logged-on user) has local administrative rights. You can access this option by right-clicking the installation executable file name in Windows Explorer, and clicking **Run as Administrator** on the shortcut menu.

2. On the Welcome to the Deltek Touch Vision Time & Expense 1.7.7 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 click **Next**.

4. On the Choose Application Install Directory page, verify if the default location for the Deltek Touch software is correct, and click **Next**. Otherwise, click **Browse** to navigate to the installation folder.

   > The default folder is C:\Program Files (x86)\Deltek\Touch on a 64-bit machine and 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 Time & Expense*. On the IIS Website Information page, select or enter the default Web site and virtual directory name, and click **Next**. Wait until the installer finishes validating PHP.

6. On the Deltek Vision Web Services URL page, either enter the Web Services URL or accept the default value, and click **Next**.

   > Your Vision server must end with VisionServices.asmx.
   >
   > When installing Touch Time & Expense 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 Installation Data to Deltek** option if you want to participate.

8. On the Pre-Installation Summary page, review the installation details that you provided.

   - If you want to change any settings, click **Back**, and make the necessary updates.

   - 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 click **Install**. Wait until the Setup Successful message displays, and 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 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 Time & Expense on your mobile device. Send this URL to all the users who will be using Touch Time & Expense. Click **Finish**.

Appendix A: Touch Server URL in Email

Logging on for the first time no longer requires users to enter the complete URL of the Touch Server. You now send them an email message containing a link that either directs them to the appropriate app store (if Touch Time & Expense is not yet installed) or populates the **Touch Server URL** field with their company URL.

> This feature only supports Touch Server 1.6.3 and higher.

ProductApplication.php

The Touch Server has been updated with the ProdcuctApplication.php file that performs the linking and passes the **Touch Server URL** value to the application or redirects you to the appropriate app store.

Link for Customers

The link that you send to users is a hyperlink. When users click the hyperlink, the following scenarios occur:

1. If Deltek Touch is not installed, it takes them to the appropriate app store to download the application.

   a) Users then download the application from the app store.

   b) They click the link again (and proceed to step 2).

2. If the application is installed, it populates the **Touch Server URL** field with their company URL.

3. They tap the **Connect** button to connect to the Touch Server.

How to Create the Link to Email Users

Each application may have specific steps required to create a hyperlink. This section describes the steps that apply to Microsoft Outlook. For other applications, see the documentation on creating a hyperlink.

1. Use the following format for the hyperlink:

   https://<yourdomain>/deltektouch/vision/time/visionshared/backend/visiontimeurl. php

2. Replace **<yourdomain>** with the company's domain information. The domain must be externally accessible to devices on the Internet. The following part of the hyperlink, however, is fixed:

   deltektouch/vision/time/visionshared/backend/visiontimeurl.php

3. Create the instructional text in the email message where you will embed the link.

4. Highlight the word "here," right-click, and select **Hyperlink** from the menu (alternatively, click the Insert tab, and click the **Hyperlink** button).

5. Paste the hyperlink into the **Address** field of the dialog box, and click **OK**.

> **For Example:**
>
> You have been given access to Deltek Touch Time & Expense. Click this link from your device to start using it:
>
> https://<yourdomain>/deltektouch/vision/time/visionshared/backend/visiontimeurl.php
>
> If you have not yet installed Touch Time & Expense, you will need to click the link twice: once to install the app and once after installation to populate your company's URL. If you have already been using Touch on your device, there is no need to click the link.
>
> If you cannot click the link, you can also copy and paste it into your browser on your device.

When users receive the email, click the link, and the application is installed, the **Server URL** screen displays.

Appendix B: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Touch Time & Expense, 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 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 site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site 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 Connect Customer Forums
- 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
- Use Quick Chat to submit a question to a Customer Care analyst online

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

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

Deltek 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 and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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