

Deltek Touch CRM for Vision 1.5

Release Notes

June 2015

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Contents

- Overview 1
- Pre-Installation Information..... 2
 - Mobile Device Requirements 3
- For Additional Information 4
 - Customer Care Connect Site 4
 - Available Documentation for this Release 5
- Major New Features 6
 - One Touch Application for All CRM Products 6
 - Ability to Add and Edit Activities 6
- Enhancements..... 9
 - Improved Search Functionality for Activities 9
 - Market Field Name on Client Info..... 9
 - Cordova Update to Fix Remote Exploit of Secondary Configuration Variables in Apache Cordova on Android (CVE-2015-1835) 9

Overview

Welcome to Deltek Touch CRM for Vision Release Notes. These release notes contain a summary of the following:

- Pre-Installation Information
- Major New Features
- Enhancements



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

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

Pre-Installation Information





Before you begin the installation of Touch CRM, it is important to understand the information discussed in this section.

- Touch CRM requires that your Deltek CRM core product 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](#).
- Touch CRM works with Vision 7.5.
- Touch CRM supports applications from *Apple App Store*, *Google Play*, and *Windows Store*.



For more information, see *Deltek Touch CRM Technical Installation Guide*.

Compatibility Mode Definitions

Compatibility Mode	Description
Fully Compatible with Vision 	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 with Vision 	At least one of the components (Touch Server and/or API) is an older version. New features of the application are hidden and not available to you.
Potentially Compatible with Vision but no Longer Tested 	The native or browser application may be compatible with Vision, but this combination is no longer tested or supported by Deltek.
Incompatible 	There are some combinations of API and Touch Server that make it impossible to even use the browser version to run the application.

Native Application Version Compatibility

Vision	7.4 CU #06	7.4 CU #05 or Lower	7.3 CU #13 or Higher	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 #11 or Lower	7.0 SP1 HF#6 or Higher	7.0 SP1 HF#5 or Lower	6.2
1.5											
1.4											
1.3											
1.2											
1.1											
1.0.X											

Mobile Device Requirements

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

- Apple iOS 8 and higher
- Android 4.1 and higher
- Windows Phone 8.1 and higher

For Additional Information

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:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- 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
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes



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 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 CRM for Vision User Guide	This document contains detailed information and instructions on how to use various features of Touch CRM.
Deltek Touch CRM Installation Guide	This document provides instructions for the installation and configuration of application.

Major New Features

This section includes summaries of the new features included for the 1.5 release.

One Touch Application for All CRM Products

In this release, Deltek uses only one Touch CRM application, which can already recognize which CRM core product you are using, for all supported CRM products. You only need to enter the corresponding URL that Deltek sends you.



Certain field names may vary, depending on your Deltek CRM core product.



For more information, see the corresponding user guide of your Deltek CRM core product. For this application, see *Deltek Touch CRM for Vision User Guide*.

Ability to Add and Edit Activities

Touch CRM now allows you to add and update calendar and task activities. The following table describes the new and updated screens related to these capabilities:

Type	Screen
Activity Details	<p>Touch CRM features a more compressed view of the Activity Details screen, allowing you to easily view and edit any activities associated to a contact, client, or opportunity.</p> <ul style="list-style-type: none"> You can send an email message to employees, contacts, or all attendees by tapping . You can edit the activity details by tapping , redirecting you to the Edit Activity screen.
Edit Activity	<p>This screen allows you to view and edit activity details, such as attendees, location, activity type, priority, start/end date and time, reminder, activity status, and related notes. It also allows you to create a follow-up.</p>
Attendees	<p>This screen allows you to select and edit attendees. It displays when you click the any of the Contact, Employee, or Contact & Employee Attendees field.</p> <p>Primary Contact</p> <p>All primary contacts display with an asterisk (*). Tapping a primary contact displays a screen with the contact information, such as position, company name, contact number, email address. The window also allows you to remove the contact from the activity.</p> <p>The same window also displays when you tap other contacts. The window for these contacts, however, allows you to make the contact primary. The Make Primary button only displays on the screen for the selected contact.</p>


Type	Screen
	<p>Owner</p> <p>By default, the creator is the owner of the activity. The Make Owner button only displays on the screen for the selected employee.</p>

Mark Activity Status

When viewing an activity list, you can tap beside the task completed or uncompleted. This functionality is the only difference between the **Calendar** and **Task and Other Activities** screens. When editing the activities, however, the **Calendar** and **Task and Other Activities** work exactly the same.

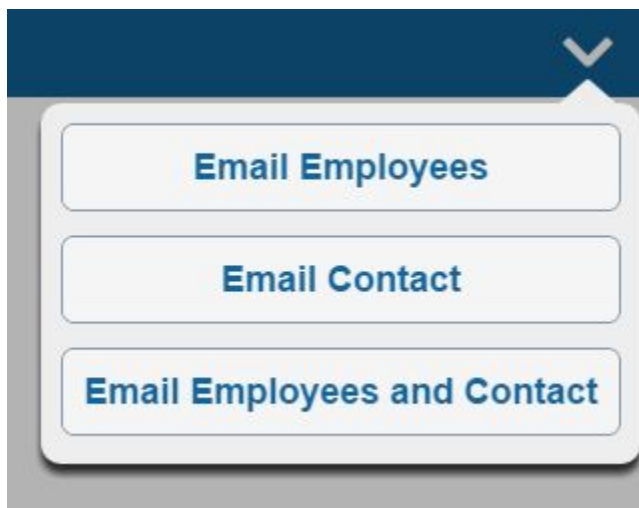
Add a Contact or an Employee

To add a contact or an employee, tap the **Contact and Employee Attendees** field on the **Add Activity** or **Edit Activity** screen. Then, you can take any of the following actions:



- Scroll through the list of names and then tap beside the selected name.
- Enter part of the first name, preferred name, last name, or client/vendor name/alias in the search field and then tap .

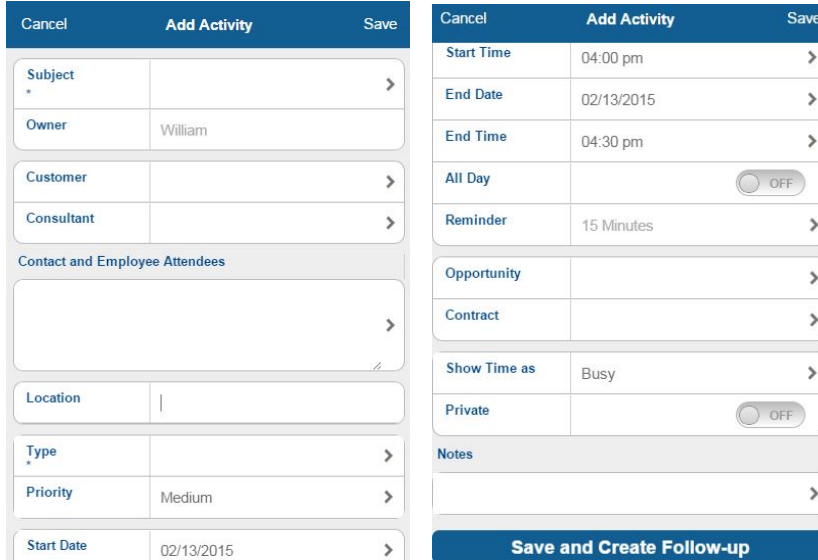
Send a Message to Attendees

You can send the activity details directly to an employee, a contact, or all attendees on the **Activity Details** screen. It uses the default email application of Touch CRM, with the employees, contacts, or all attendees listed in the **To** field.



Add a Task or Calendar Activity

To add an activity, tap  and then tap either the **Calendar** or **Tasks and Other Activities** menu option, depending on what you need to set up. Tapping  on the **Calendar** or **Tasks and Other Activities** screen displays the **Add Activity** screen.



Cancel	Add Activity	Save
Subject *		
Owner William		
Customer		
Consultant		
Contact and Employee Attendees		
Location		
Type		
Priority Medium		
Start Date 02/13/2015		

Cancel	Add Activity	Save
Start Time 04:00 pm		
End Date 02/13/2015		
End Time 04:30 pm		
All Day OFF		
Reminder 15 Minutes		
Opportunity		
Contract		
Show Time as Busy		
Private OFF		
Notes		
Save and Create Follow-up		

- The **Subject** and **Type** fields are required.
- Tapping the **Save and Create Follow-up** button saves your changes you made to the **Add Details** screen and creates a copy of the activity for a follow-up. It then displays the **Activity Details** screen, where you can view all fields from the original activity, except for the **Start Date/Time** and **End/Date Time** fields. The values of these fields default to today and the next half hour, respectively.

Edit a Calendar or Task Activity

To edit an activity, tap  on the **Activity Details** screen. The **Edit Activity** screen displays, allow you to update the selected activity.

Enhancements

This section includes summaries of the enhancements made to existing features in the 1.5 release.

Improved Search Functionality for Activities

The search functionality has been enhanced such that when you search for an activity on **Calendar** or **Tasks and Other Activities** screen, Touch CRM only filters those activities within the current year (six years before and after today's date). If the activity that you search does not fall within the said range, it is not included in the list of search results.

In addition, one of the following scenarios occurs when creating or updating an activity.

- If you are viewing or editing an existing activity, tapping back returns you to the activity list with the same date range from which you came. For example, if it displays 4/20 - 4/26 and you tap the 4/20 activity, tapping back should bring you to the 4/20 - 4/26 list.
- If you are adding a new activity, tapping back should take you to the activity view from where the activity was added with the date range for that activity in view. For example, if you add a calendar activity for 12/30, tapping back should take you to the Calendar view with the seven-day date range to which 12/30 is included, that is 12/13-1/15.

Market Field Name on Client Info

The **Client Info** screen now uses the **Market** field name to display the business classification of the client. In the previous release, this field was called **Type**.

Cordova Update to Fix Remote Exploit of Secondary Configuration Variables in Apache Cordova on Android (CVE-2015-1835)


This release addresses **CVE-2015-1835**. Android applications built with the Cordova framework that do not have explicit values set in Config.xml can have undefined configuration variables set by Intent. This can cause unwanted dialogs appearing in applications and changes in the application behavior that can include the app force-closing.



Deltak strongly suggests that you install the latest application version, which includes the security patch from the vendor.



For more information about this vulnerability, see <https://cordova.apache.org/announcements/2015/05/26/android-402.html>.



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