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Deltek Touch Time & Expense for GovCon 1.2.7

Technical Installation Guide

September 16, 2016

Contents

Overview

Deltek Touch Time & Expense for GovCon, the touch screen version of the Web-based Time Collection module, enables you to enter, view, and sign timesheet information and capture expenses from your touch screen device. This product is for iOS and Android devices and does not replace the current Deltek Mobile Time product for Blackberry devices.

To use Touch Time & Expense for GovCon, a server component must be installed on a Web server, which can be an existing Deltek Time & Expense Web server.

The official name of the application is *Deltek Touch Time and Expense for GovCon*. 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 the Google Play Store and the Apple App Store displays *GovCon Time & Expense*.

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

The following Deltek Time timesheet features are not available in Touch Time & Expense:

- **Interim Charges** — Interim charges cannot be created in Touch Time & Expense. However, interim charges already in timesheet can be charged. Interim charge edit does occur on timesheet sign.

- **Hours Proration** — Users with proration will only be able to view Entered hours. The proration of the hours still will occur on timesheet sign.

- **Reverse Timesheet** — Users will not be able to reverse timesheets within Touch Time & Expense. If timesheet class requires reverse timesheet, user must perform timesheet corrections in browser-based timesheet.

- **Line Level Approval** — Approvals should be performed in a browser-based timesheet screen.

- **Timesheet Print** – Users will not be able to print timesheet. They will need to use browser based timesheet to print.

- **Day Comments** — Users will not be able to enter day comments since time in/out and start/stop times are not supported.

- **Timesheet Comments** — Users will not be able to enter/view OVERALL timesheet comments/notes.

Specific users will not be able to use Touch Time & Expense based on their timesheet class business rules for the following Deltek Time & Expense features:

- **Time In/Out** — Users with timesheet classes will not be allowed to use Touch Time & Expense if this feature is enabled. This is checked at login.

- **Start/Stop Time** — Users with timesheet classes with this feature will not be allowed to use Touch Time & Expense if this feature is enabled. This is checked at login.

- **Single Sign On** — All users must provide authentication information. LDAP and database authentication are supported. If Deltek Time & Expense is configured for SSO, the system will require the user for authentication using the Active Directory password. If password is complex, consider using PIN authentication.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe®
Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it
here free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.

2. In the **Annotations** pane that displays, click 💬 **Sticky Note**. The cursor changes to
   match the button.

3. Position the cursor at the location in the guide where you want the note to appear, and
   click. A note icon is inserted at the location and a text box pops up.

4. Enter your information in the text box.

5. Continue adding notes as needed.

6. Save the document.

> Deltek recommends that you save the document to a slightly different filename so as to keep the
> original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note
icon to edit the information.

Supported Mobile Operating Systems

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

- Apple iOS 9.0 and higher
- Android 4.4 and higher

Prerequisites

Before you begin the installation and setup of Touch Time & Expense, it is important to understand the following information:

- You must have installed Deltek Time and Expense 9.0.1 and the latest Hot Fix Bundle.

- If you are going to access Touch Time & Expense from the Internet, open a port in your firewall to access the Touch Time & Expense virtual directory, which will be installed on the IIS server. Deltek recommends that you use HTTPS protocol in your production deployment.

- You must install Touch Time & Expense on an IIS Web server. You can use existing IIS Web server, but not an embedded WebLogic Web server.

- Touch Time & Expense supports applications from the *Apple App Store.* You may be able to use the native browser of your device to enter your organization's Touch Time URL.

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

Technical Considerations

The following requirements must be met to run Touch Time & Expense:

- You must install Touch Time & Expense on an IIS server that is installed on Windows 2008, Windows Server 2008 R2, or Windows Server 2012.

- 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.

- Touch Time & Expense supports applications from the *Apple App Store.*

> The Touch Time and Expense URL has the format **https://<server>/deltektouch/govcon/time**, where **<server>** refers to the host name of your Touch server.

Compatibility Mode Definitions

Compatibility Mode	Description
Fully Compatible	You must be in Touch application 1.2.7 and Touch Server 1.2.7. All features and functions in the application are available to you. Deltek strongly suggests that you install the latest version of each component (Touch Time application, Touch server, and API.)
Partially Compatible	At least one of the components (Touch server and/or API) is an older version. Some features of the application are disabled or hidden and not available to you.

Compatibility Mode	Description
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.

Deltek Touch Time & Expense Setup

Use the following check list as a guide for setting up Touch Time & Expense Collection.

Step	Procedure	✓
1	Verify and apply the product license	
2	Enable the PIN option	
3	Set UDT short labels	
4	Set default view and sort options	
5	Configure charge lookup options	
6	Create the message bundle location (Optional — Only if custom text is defined)	
7	Customize application text and generate the message bundle file (Optional — Only if custom text is defined)	
8	Configure Mobile Row Lookup Limit and Active Mobile Time	
9	Configure Mobile Expense Setting (Optional — Only if Expense is licensed)	
10	Define Batch Expense Type (Optional — Only if Expense is licensed)	

For new installation, you need to perform all of the steps above to set up Touch Time & Expense Collection. For upgrade installation, you do not need to perform steps 2, 3, 4, and 5.

Step 1: Verify and Apply the Product License

Touch Time & Expense requires Deltek Time Collection version 9.0.1 or higher. To determine the version you currently have, check the About Deltek Time & Expense dialog box.
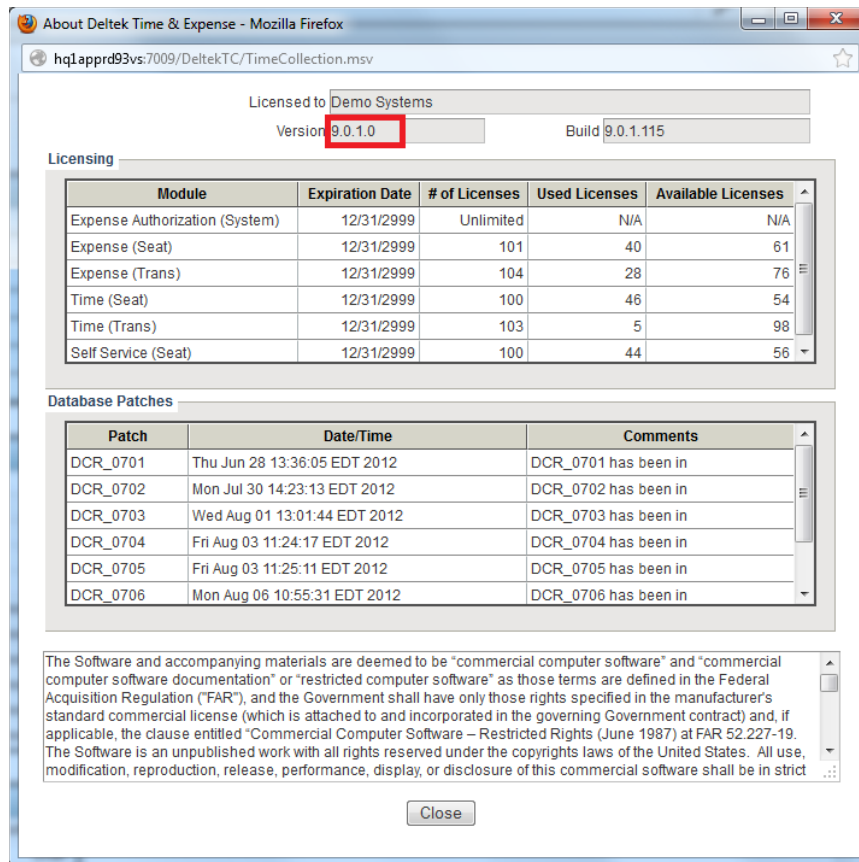
> The licensing of Touch Time & Expense is based on "Web Time" and "Web Expense" license keys. If user has a license to Time, or Expense, they will be able use Touch Time & Expense.

Step 2: Enable the PIN Option

This step is optional. If configured, users will be allowed to create a 4-digit PIN that they can use to log on to Touch Time & Expense instead of a password. The PIN becomes a key for encryption which contains the user's login credentials. The PIN is not stored on device and is used to decrypt user's credentials.

The PIN is not automatically synchronized when the user's password changes and it cannot be used to log on to the desktop version of the Time Entry module.

If user's associated password changes, the user's PIN will fail authentication and the user will be required login with new password by tapping **Change User** option. After login, the system will give user the ability to create a new PIN.

To enable the PIN option, complete the following steps.

1. On the Deltek Time & Expense with ESS Administration menu, click **Product Configuration » General Configuration**.

2. On the General Options tab, select the **Allow PIN use on mobile device** check box.

3. Click **Save**.

Employees who want to use a PIN must create it during first login or by enabling the **PIN** option on the Touch Time & Expense Settings screen.

Step 3: Set UDT Short labels

Because mobile devices have a more limited screen space, you may want to create abbreviated versions of UDT labels.

To set UDT short labels for Touch Time, complete the following steps:

1. On the Deltek Time & Expense with ESS Administration menu, click the **Product Configuration » General**.

2. On the UDT tab, enter an abbreviated version for each applicable UDT in the **Mobile Label** column. For example, if UDT 01 is Account, the abbreviated version could be Acct.

Step 4: Set Default View and Short Options

Set the default options for both Timesheet View (1 column/ 6 rows or 1 column/3 rows) and Timesheet Line Sort (sort by **Project ID**, **Project Description**, or **Line Number**). Employees can later override these default options from the **Options** menu within Touch Time.

To set the default options, complete the following steps

1. On the Deltek Time & Expense with ESS Administration Time menu, click the **Settings » Time Configuration**.

2. On the Miscellaneous tab, click **Mobile Defaults » Timesheet View**, and select the number of lines (3 or 6) that you want to display on the timesheet.

This option only impacts Deltek Mobile Time for Blackberry legacy product.

3. On the **Timesheet Line Sort** list, select the default for sorting timesheet lines: **UDT 01**, **UDT 02**, or **Line Number**.

4. Click **Save**.

Default View only applies to Mobile Time for Blackberry devices.

Step 5: Configure Charge Lookup Options

Configure the charge lookup options that will be available to employees on the Search Charge Lookup screen of Touch Time & Expense.

To set the default options, complete the following steps:

1. On the Deltek Time & Expense with ESS Time menu, click **Settings » Timesheet Classes**.

2. On the Basic Information tab, use the Search feature to select the Timesheet Class that you want to configure for Touch Time.

3. Select the check box next to each lookup option you want to enable in the **Costpoint/Mobile Time Lookup** option:

  ▪ **Show Project**

  ▪ **Show MO** (this option is available only to Costpoint users)

  ▪ **Show Account**

4. Click **Save**.

> While the Basic Information tab screen is open, confirm that the **Time In/Out** and **Start/Stop Times** options are disabled. If these options are enabled, members of this timesheet class will not be able to access Touch Time & Expense.

Step 6: Create the Message Bundle Location

Create a location for storing the Touch Time & Expense message bundles. Complete this step if you want to customize Touch Time Collection.

To set the message bundle location, complete the following steps:

1. Open the Domain Details screen on the Technical Console

2. In the **Mobile Message Bundle Location** field, enter the location where message bundle files should be stored.

3. Click **OK** to save your changes.

Step 7: Customize Application Text and Generate the Message Bundle File

Customize text and generate the Touch Time & Expense message bundles. Complete this step if you want to customize Touch Time Collection.

To customize the application's text and generate the message bundles, complete the following steps:

1. On the Deltek Time & Expense with ESS menu, click **Configuration » Custom Text**.

2. On the Custom Text screen, select **Mobile** on the **Module** list.

3. On the **Screen/Application** list, select the screen or application for which you want to create custom text.

4. If applicable, select a value on the **Page** list.

5. Select the check box next to the message you want to customize, and click **Edit**.

6. In the **Edit Text** field, enter the custom text, and click **OK**.

7. Repeat these steps for each remaining application that requires custom text.

8. Click **Create File(s**) to generate the message bundle files.

9. On the Create File(s) dialog box, review the selected languages. If you don't want to generate a message bundle for any of the selected languages, clear the check box next to the language.

10. Click **Create File(s)**.

The files are saved in the location you provided in the **Mobile Message Bundle Location** field of the Domain Details screen in the Technical Console.

Step 8: Configure Mobile Row Lookup Limit and Active Mobile

This step only applies if you have installed Deltek Time & Expense 9.0.1 Hot Fix Bundle # 6 or higher. You can perform the following actions within the Technical Console:

- You can use the **Mobile Max Rows** field on the Domain Details screen within the Technical Console to control the number of rows to display in search results for several screens such as Charge and UDT Lookup. The default value for this field is 25. If you set this field to a value higher than 25, the system will require you to provide more refined search criteria.

> Setting this field to a higher value increases the amount of data being transferred to the device and may impact performance.

- You can enable or disable mobile access by domain within the Technical Console using the **Mobile Access** field.

To specify these settings, complete the following steps:

1. On the Technical Console, open the Domain Details screen.
2. In the **Mobile Max Rows** field, enter a value from 1 to 200.
3. In the **Mobile Access** field, select the appropriate option.

Step 9: Configure Mobile Expense Setting

The Mobile Expense setting allows you to view, add, and edit out-of-pocket expenses. This setting also allows you to add receipt attachments to imported corporate credit card expenses on Touch Time and Expense.

To enable or disable the Mobile Expense setting, complete the following steps:

1. On the Technical Console, open the Domain Details screen.
2. In the **Mobile Expense** option, select the appropriate action.

Step 10: Define Batch Expense Type

This step only applies if you are licensed for Deltek Expense and plan to utilize the expense capture capabilities. It is necessary to set up a Batch Type since capturing of out-of-pocket expenses leverages the same framework as the Batch Expense feature — the ability to import centralized billed credit card transactions. The captured out-of-pocket expenses will be assigned to the batch type created in this step.

The required fields for the Batch Type are as follows:

- **Code**
- **Description**
- **Source** — Must be "Manual Entry"
- **Payment Method** — Must assign an employee paid based payment method
- **Bill Currency** — Must be equal to Expense base currency

Touch Time & Expense 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.

Technical Platform
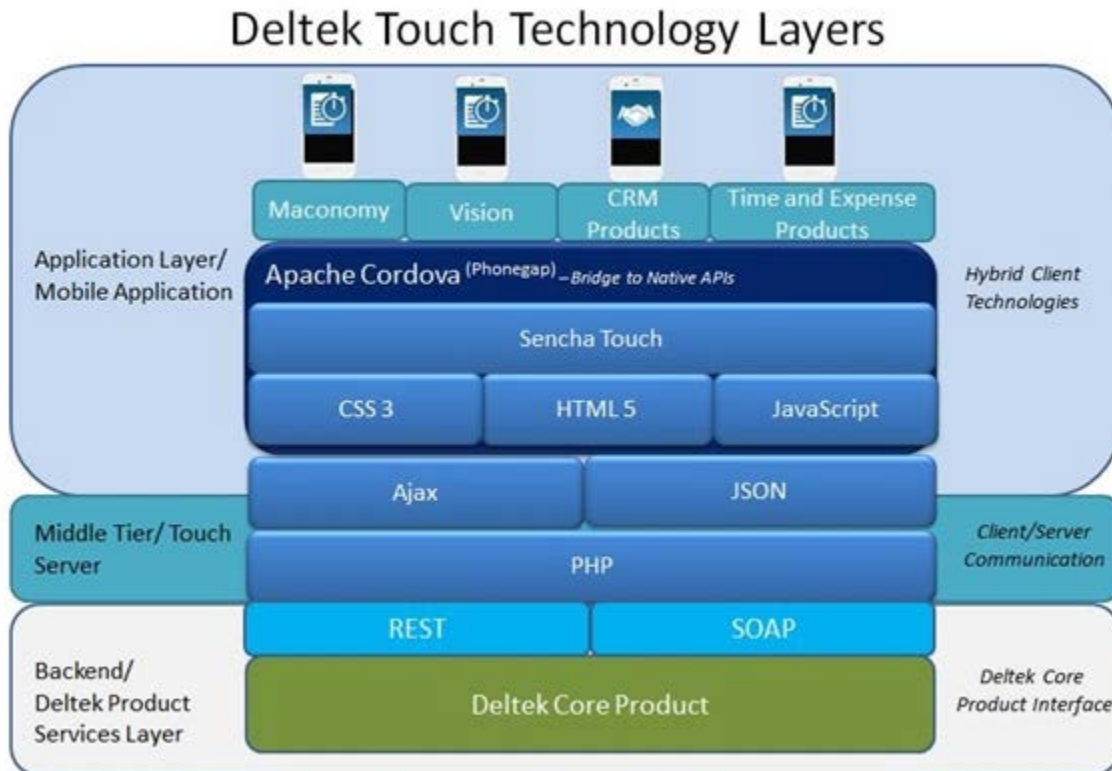
Client Tier and Middle Tier

Touch Time & Expense server (middle Tier) optimizes 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 Time & Expense Client (client tier) is a hybrid application created using HTML 5 and CSS 3 but with the ability to access the native device capabilities.

The client tier and middle tier components are shown in this diagram:
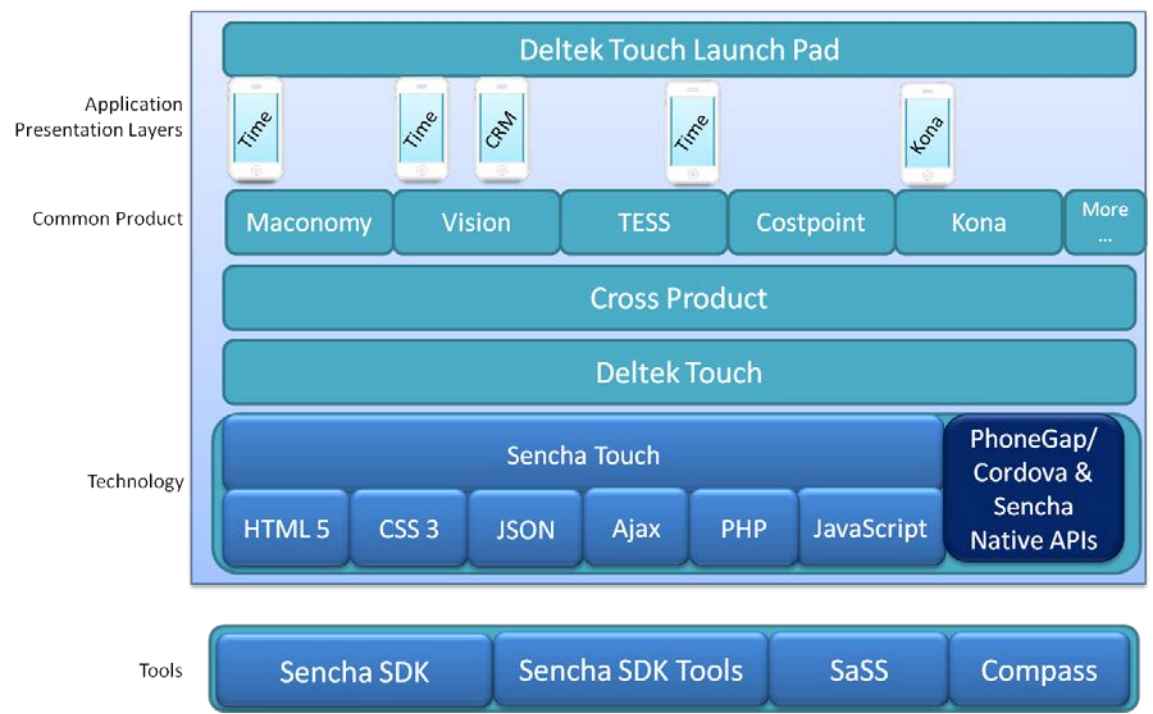
Supported Deployment Scenarios

Touch Time & Expense may be installed on another IIS server or as a separate virtual directory on an existing TESS IIS Web server.
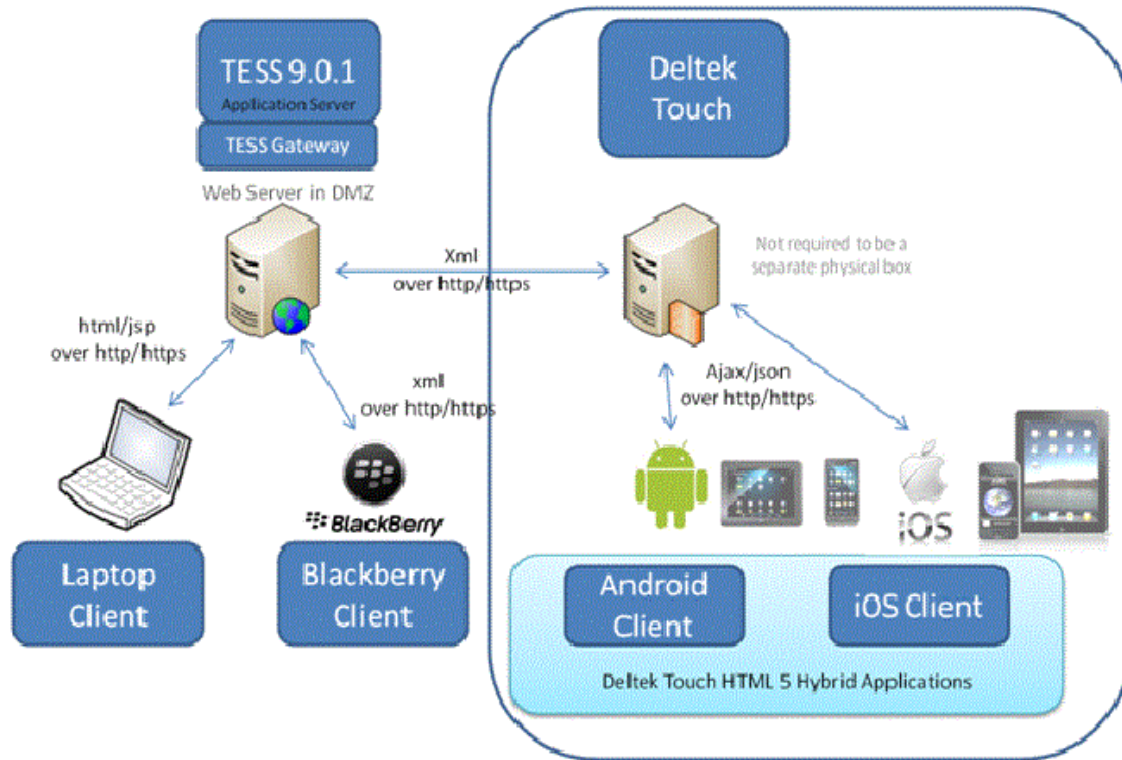
> Unless you are using a VPN, Deltek recommends the use of HTTPS protocol over HTTP when transmitting data over the Internet. HTTPS encrypts the data in transit.

Microsoft IIS Web Server Configuration on Windows 2008 Server

Perform this procedure if you are going to install Touch Time & Expense on Windows Server 2008. The Touch Time 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.

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

1. Click **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. Click **Close** when the installation completes.

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 click **Stop** on the shortcut menu.

10. Right-click the IIS computer name icon on the left pane of the Internet Information Services (IIS) Manager window, and click **Start** on the shortcut menu.

11. Close the Services Manager window.

Microsoft IIS Web Server Configuration on Windows 2012 Server

Perform this procedure if you are going to install Touch Time & Expense on Windows Server 2012. The Touch Time 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.

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 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.

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

Touch Time & Expense Installation

Before you proceed, make sure that you downloaded the server component from Deltek Software Manager (DSM). After the server part is installed, download the application from the Apple App 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 Touch Time & Expense, complete the following steps:

1. Run **DeltekTouchGovCon127.exe** to launch the Deltek Touch installation program.

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

2. On the Welcome to the Deltek Touch GovCon 1.2.7 (GA) 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 Touch Time & Expense is correct, and click **Nex**t. 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. On the IIS Website Information page, select or enter the default Web site, and click **Next**.

   > Select the **Please check the box if the website is configured for SLL** check box to use the HTTPS protocol when transmitting data over the Internet.

6. On the GovCon Product Information page, perform the following actions, and click **Next**:

   - **Hostname or IP Address** — Enter the IP address (for example, 10.2.2.154) or the fully qualified host and domain name (for example, appsvr01.yourdomain.com) of your Time and Expense server.

   - **Port Number** — Enter the port that your Time and Expense server uses to listen for requests.

7. 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.

8. On the InstallShield Wizard Complete page, click **Finish** when the installation is done.

> You can run the installer multiple times to install several instances of Touch Time & Expense. Each instance, however, requires a new virtual directory pointing to a different physical location (Install Directory).

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using 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 Time & Expense 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 and Expense for Govcon User Guide	This document contains detailed information and instructions on how to use various features of the application.
Deltek Touch Time and Expense for GovCon 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 government contractors, professional services firms and other project- and people-based businesses. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 20,000 organizations and millions of users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, recruit and develop talent, optimize resources, streamline operations and deliver more profitable projects. Deltek – Know more. Do more.®

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