



Deltek

Deltek Touch Expense for Ajera

Touch 1.0 Installation Guide

November 20, 2020

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Overview

Deltek Touch Expense for Ajera is a project-based accounting system that allows you to view, enter, update, and submit expense reports from anywhere at any time using your touch screen device and synchronize that data to the Ajera database.

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

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

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login**.
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

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

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

6. In the left pane, 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.

Options include:

- **Complete**
- **Cumulative Updates**
- **HotFixes**
- **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.

Note: 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 to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to <https://dsm.deltek.com/DeltekSoftwareManagerLite>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Logon**.
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

Note: The download behavior and download folder may differ depending on the browser and browser settings that you are using.

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](#).

Note: When you click a link, you will be asked to log into DSM if you aren't already logged in.

Prerequisites

Before you install Touch Expense for Ajera, it is important to understand the following information:

- Touch Expense for Ajera works with Ajera 9.0 and higher.

Note: When installing Touch Expense for Ajera on a dedicated server, ensure that the Ajera Web service URL 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 Ajera.

- You must install Touch Expense for Ajera on an IIS server that is installed on Microsoft Windows Server 2012 R2, Microsoft Windows Server 2016, or Microsoft Windows Server 2019.
- If you are going to access Touch Expense for Ajera from the Internet, open a port in your firewall to access the Touch Expense for Ajera virtual directory, which will be installed on the IIS server. Deltek recommends that you use HTTPS protocol in your production deployment. HTTPS encrypts the data in transit.

Note: When Touch Expense for Ajera is not exposed to the Internet, a VPN can be used to connect the mobile device to the corporate network on which Ajera resides to provide the connection needed for Touch Expense for Ajera. 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 Expense for Ajera requires that the server be accessed using Secure Sockets Layer (SSL)/Transport Layer Security (TLS).
- 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 Expense for Ajera supports applications from *Apple App Store* and *Google Play*.

Note: The Touch Expense for Ajera URL has the format `https://<server>/deltektouch/ajera/expense`, where <server> refers to the host name of your Touch Server.

This version of Touch Expense for Ajera only supports iOS 10.0 and higher. If you are on iOS 9.0 or lower, Touch Expense for Ajera would not be available from *Apple App Store*. In this case, you would not be able to download or update it.

- Touch Expense for Ajera installer installs PHP 7.4.11 in this release.

Note: Apple's iOS requires connections to servers with TLS 1.2.

Starting with iOS 9, Apple's iOS mobile operating requires that server connections be made with TLS 1.2. Other protocols may be enabled. For connections to be successful, TLS 1.2 must be enabled. If you try to connect to IIS servers running Touch Expense for Ajera, an error message displays, such as "invalid server URL" if TLS 1.2 is not enabled.

To resolve this issue, the following must be performed to Touch Server:

- Supported transport layers enabled (if not already) - TLS 1.2
- Restart the server.

Supported Mobile Operating Systems

Touch Expense for Ajera supports mobile devices that run on the following operating systems:

- Apple iOS 12.0 and higher
- Android 8.0 and higher

Deltek Touch Infrastructure

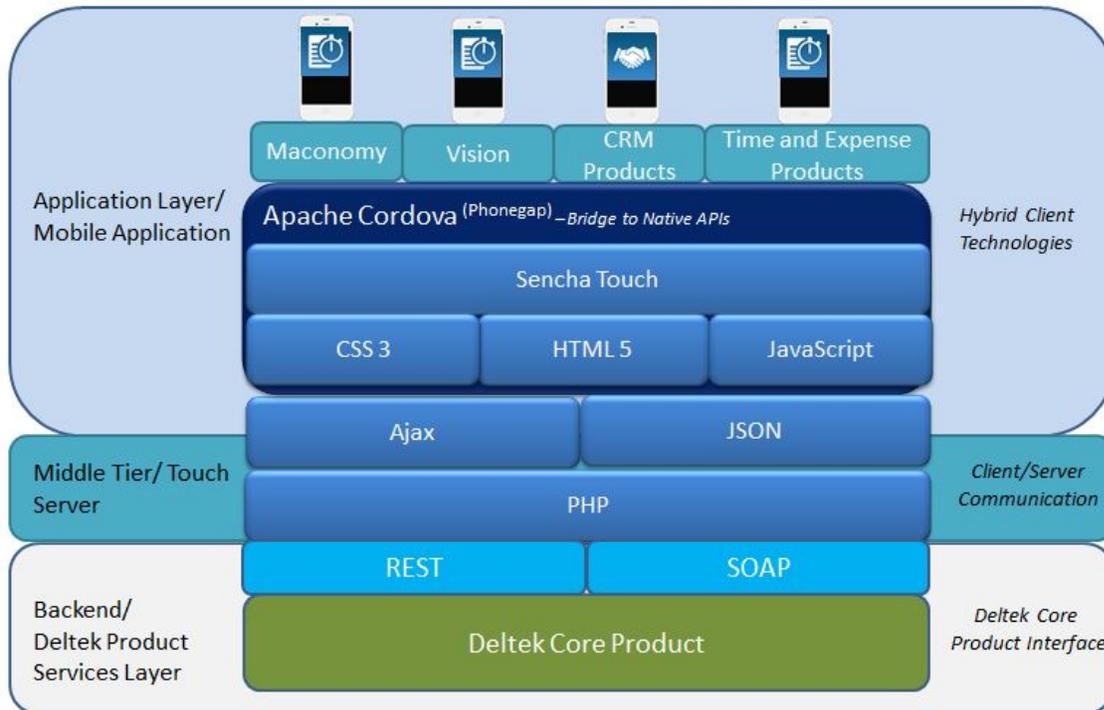
The Deltek Touch infrastructure is composed of the application tier, middle tier, and services tier. The Touch Server (middle tier) is used to optimize service delivery and transform data when necessary. The Touch Server only communicates with the product service layer and does not have access to the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

Note: This infrastructure applies to Deltek Touch Expense for Ajera, Deltek Touch CRM, Deltek Touch for GovWin CM, and Deltek Touch CRM for Ajera.

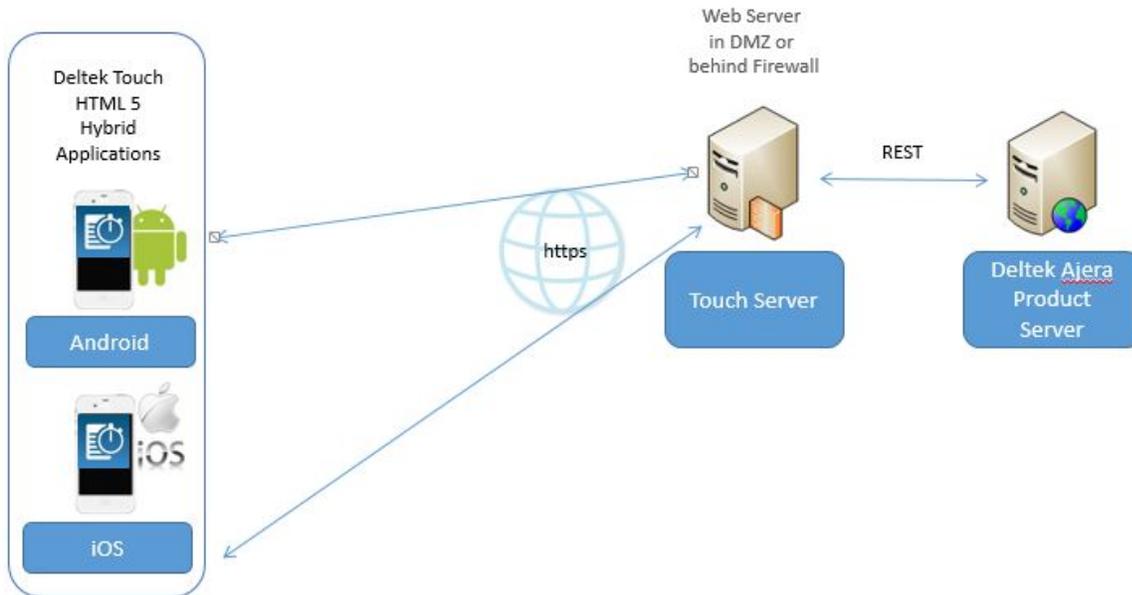
Technical Platform

Deltek Touch Technology Layers



Supported Deployment Scenarios

The Touch Expense for Ajera 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 Server 2012 R2

Perform this procedure if you are going to install the Touch Expense for Ajera application on Windows Server 2012 R2. The Touch Expense for Ajera installer checks if Microsoft IIS is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

Note: Touch Expense for Ajera requires **Anonymous Authentication** and does not support **Basic Authentication**.

To configure Microsoft IIS Web server on Windows 2012 Server R2 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**.

Attention: 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. Click on **Next**. The Select features page displays.
12. Click **Next**, and then click **Install**.

Microsoft IIS Web Server Configuration on Windows 2016 Server

Perform this procedure if you are going to install the Touch Expense for Ajera application on Windows Server 2016. The Touch Expense for Ajera installer checks if Microsoft IIS is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

Note: Touch Expense for Ajera requires **Anonymous Authentication** and does not support **Basic Authentication**.

To configure Microsoft IIS Web server on Windows 2016 Server, complete the following steps:

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

Microsoft IIS Web Server Configuration on Windows 2019 Server

Perform this procedure if you are going to install the Touch Expense for Ajera application on Windows Server 2019. The Touch Expense for Ajera installer checks if Microsoft IIS is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

Note: Touch Expense for Ajera requires **Anonymous Authentication** and does not support **Basic Authentication**.

To configure Microsoft IIS Web server on Windows 2019 Server, complete the following steps:

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

Install Touch Expense for Ajera

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* or *Apple App Store* and install it in your device.

Attention: 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 **DeltekTouchAjeraExpense1017.exe** to launch the Touch Expense for Ajera installation program.
2. On the Welcome to the Deltek Touch Expense for Ajera 1.0 Installation Wizard page, click **Next**.
3. 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.

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

4. *This step only applies if Ajera is **NOT** installed in the same server as Touch Expense for Ajera.* 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.
5. On the Deltek Ajera Web Services URL page, either enter the Ajera API URL. You can find this in Ajera, Setup, Utility, Setup integrations, API Settings tab.

Note: When installing Touch Expense for Ajera on a dedicated server, ensure that the Ajera API URL can be accessed from the Touch Server.

6. On the Customer Experience Improvement Program page, select the **Send Installation Data to Deltek** option if you want to participate.
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.

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

8. 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.

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

9. 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 Expense for Ajera on your mobile device. Send this URL to all the users who will be using Touch Expense for Ajera. Click **Finish**.

Upgrade Touch Expense for Ajera

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* or *Apple App Store* and install it in your device.

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

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

1. Run **DeltekTouchAjeraExpense1017.exe** to launch the Deltek Touch Expense for Ajera installation program.
2. On the Welcome to the Deltek Touch Expense for Ajera 1.0 Installation Wizard page, click **Next**.
3. On the Deltek Ajera Web Services URL page, enter the Ajera API URL. You can find this in Ajera, Setup, Utility, Setup integrations, API Settings tab.

Note: When installing Touch Expense for Ajera on a dedicated server, ensure that the Ajera API URL can be accessed from the Touch Server.

4. 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 upgrade.

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

5. 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.

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

6. When the upgrade is done, the InstallShield Wizard Complete page will display. Click **Finish**.

Appendix A: Touch Server URL in Email

ProductApplication.php

The Touch Server has been updated with the ProductApplication.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

Android

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

1. If Touch Expense is not installed, it takes them to the *Google Play 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.

iOS

The link that you sent to users contains two hyperlinks.

1. If Touch Expense is not installed, users tap the first hyperlink, which takes them to the *Apple App Store* to download the application.
2. If the application is already installed, users tap the second hyperlink, which 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

1. 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.
2. Use the following format for the hyperlink:
https://<yourdomain>/deltektouch/ajera/expense/ajerashared/backend/ajeraurl.php
3. 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/ajera/expense/ajerashared/backend/ajeraurl.php
4. Create the instructional text in the email message where you will embed the link.
5. Highlight the word "here," right-click, and select **Hyperlink** from the menu (alternatively, click the Insert tab, and click the **Hyperlink** button).

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

For example:

You have been given access to Touch Expense. Click this link from your device to start using it:

<https://<yourdomain>/deltektouch/ajera/expense/ajerashared/backend/ajeraurl.php>

If you have not yet installed Touch 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: Configuration File

The configuration file (configuration.ini) is a setting file that Touch Expense for Ajera uses to provide environment information to the Touch application. The new parameters in configuration.ini are used to support the enhanced PIN security.

```
[PIN_SETTINGS]
MIN_LENGTH=""
COMPLEXITY=""
UNIQUE_HISTORY=""
PIN_EXPIRATION=""
```

Description of the New Parameters

[PIN_SETTINGS]

- **MIN_LENGTH** – This parameter represents the minimum PIN length, which is set to **6** by default is 6 and allows 4-12 characters.
- **COMPLEXITY** – This parameter represents the PIN complexity feature. It prevents you from using all the same numbers or a sequence of numbers in your PIN. It is set to **true** by default.
- **UNIQUE_HISTORY** – This parameter represents the limit PIN reuse. It does not allow you to use the same PIN over and over. By default, it is set to **0**, which means you can reuse PIN. It accepts values from 0 to 6.
- **PIN_EXPIRATION** – This parameter represents the limit on how long a PIN is valid before requiring you to change it. By default, it is set to **90** days. It accepts values from 0 (which means no limit) to 90.

Appendix C: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Touch Expense for Ajera, 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 Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center 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 Deltek Support Center 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 Support Center Community
- 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
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Additional Documentation

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 Support Center.

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

About Deltek

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