

Deltek

# Deltek Touch for Maconomy®

Touch 3.3 Multitenancy Setup Guide

**September 2019**

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## Overview

This document provides instructions on how to set up multitenancy in Deltek Touch for Maconomy. This release, however, only supports Internet Information Services (IIS) for multitenancy.

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

Before you install Deltek Touch, install the following prerequisite software:

Software Name	Suggested Installation Link
Microsoft IIS URL Rewrite 2.1	<a href="http://www.iis.net/downloads/microsoft/url-rewrite">http://www.iis.net/downloads/microsoft/url-rewrite</a>
Microsoft IIS Application Request Routing	<a href="http://www.iis.net/downloads/microsoft/application-request-routing">http://www.iis.net/downloads/microsoft/application-request-routing</a>

**Attention:** Make sure you understand the role of new parameters introduced in the configuration.ini file of Deltek Touch. For more information, see the *configuration.ini* of the Deltek Touch for Maconomy Technical Installation Guide.

## Install Multitenant Touch Server

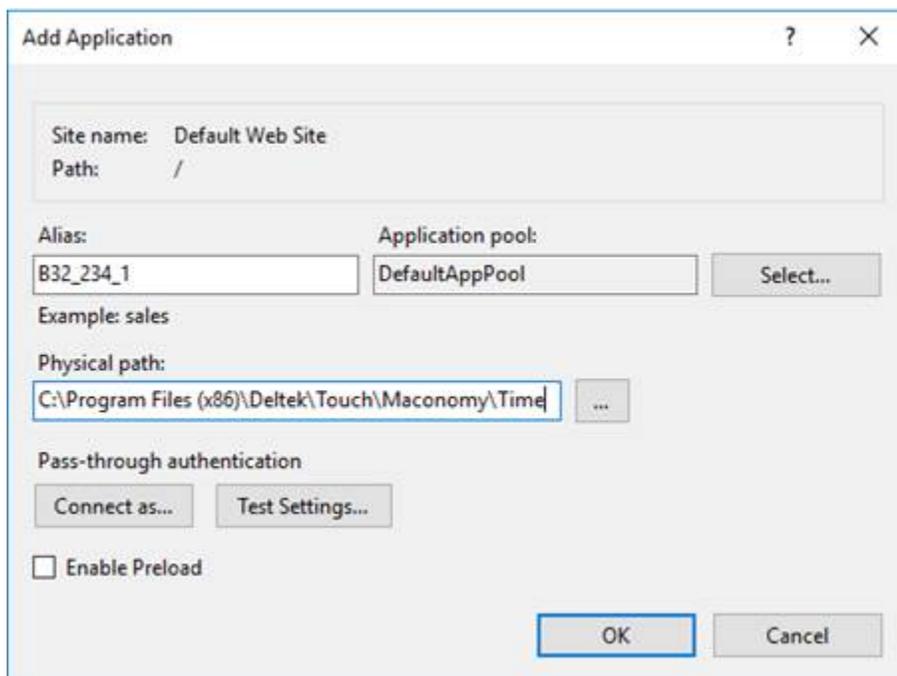
This section describes the instructions in installing and enabling a single-version (for example, Touch 3.3) multitenant system using the IIS manager.

To install and enable a single-version multitenancy setup in Touch, complete the following steps:

1. Install Deltek Touch for Maconomy.

**Attention:** For more information, see the [Deltek Touch for Maconomy 3.3 Technical Installation Guide](#).

2. Make sure to add application(s) to a site using the Add Application dialog box on the IIS manager. The screenshot below displays a sample application:



**Note:** The **Alias** field displays the application name. The **Physical path** field refers to the Touch installation directory pointing to the Time folder. You can create as many systems as need, for example, three IIS applications:

- <https://touch.company.com/Customer1>
- <https://touch.company.com/Customer2>
- <https://touch.company.com/Customer3>

3. Make sure all Web services are available and accessible by Deltek Touch.
4. Make sure that you have all the required connection details to the Web services (for example, database name of the REST, and IP Address of the REST API for containers and filedrop).
5. Set up the proxy server.

**Attention:** For more information, see the [Set Up the Proxy Server](#) section in this document.

6. Set up the configuration.ini file.

**Attention:** For more information, see the [Set Up the configuration.ini File](#) section in this document.

7. Set up the core configuration.ini file.

**Attention:** For more information, see the [Core configuration.ini File](#) section in this document.

8. Set up the tenant configuration.ini file.

**Attention:** For more information, see the [Tenant configuration.ini File](#) section in this document.

9. Perform the file naming for the configuration.ini file.

**Attention:** For more information, see the [Create File Name for the configuration.ini File](#) section in this document.

You can also install multiple versions of Touch on the same multitenant Touch server.

**Attention:** For more information, see the [Upgrade Multitenant Touch Server](#) section in this document.

## Set Up the Proxy Server

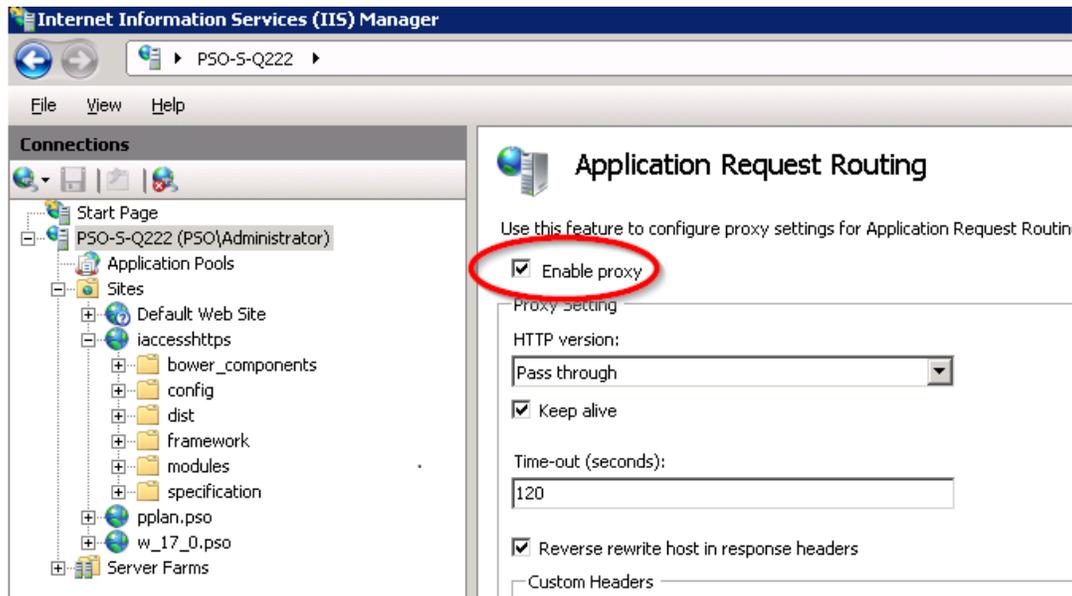
To set up the proxy server, complete the following steps:

Before you set up the proxy server in IIS, you need to install the **Microsoft IIS URL Rewrite 2.1** and install the **Application Request Routing (ARR)**.

**Attention:** For more information on Microsoft IIS URL Rewrite, see <http://www.iis.net/downloads/microsoft/url-rewrite>.

In IIS 8.0 and 8.5, you need to install the “Web Platform Installer” before you can install the ARR plugin. For more information on installing the ARR plugin, see <http://www.microsoft.com/en-us/download/details.aspx?id=39715>.

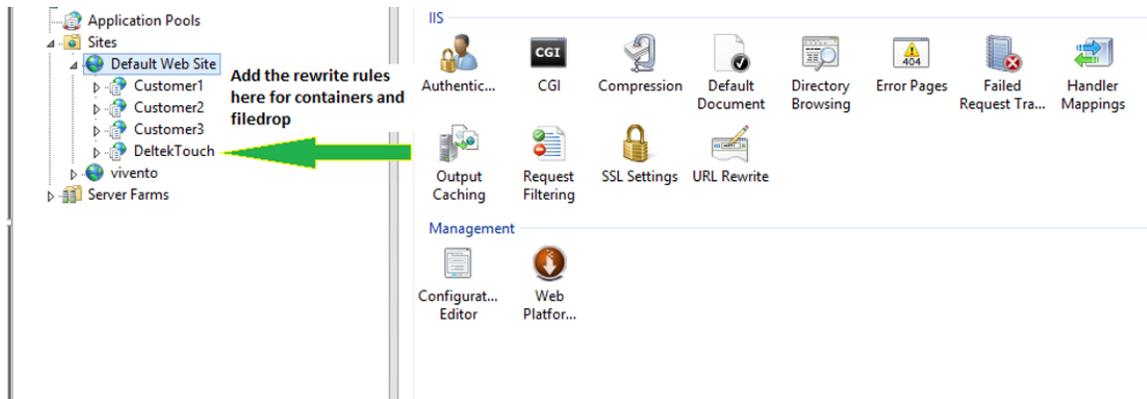
1. Restart IIS Manager.
2. In the Application Request Routing configuration window, click **Server Proxy Settings**.
3. Select **Enable proxy**.



**To perform the proxy server setup, complete the following steps:**

1. Add the rewrite rules for the proxy in the IIS manager. First click the website where you want to define the rewrite rules.

Deltek recommends that rules must be added to the local site (for example, DeltekTouch) not to the root site (for example, Default Web Site).



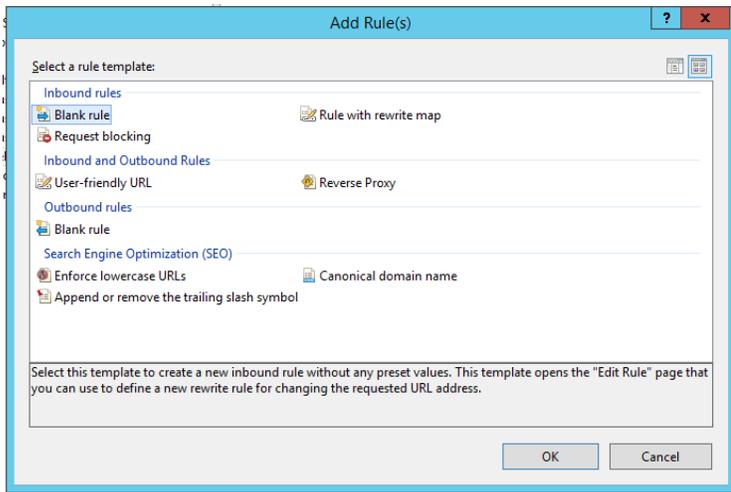
2. Click the **URL Rewrite** applet.
3. Add the rules for “containers” REST API for a specific client. For more information, see the Add Rules to “containers” REST API section.
4. Add the rules for “filedrop” REST API for a specific client. For more information, see the Add Rules to Filedrop API section.
5. Restart the IIS Manager.

## Add Rules to the “containers” REST API

**To add the rules to container API, complete the following steps:**

1. Open the **URL Rewrite** applet.

2. In the Actions pane, click **Add Rule(s)**.
3. On the Add Rule(s) dialog box, select the **Blank Rule** option in the **Inbound rules** section.



4. Click **OK**.
5. On the Edit Inbound Rules window, enter or select the appropriate values:

 Edit Inbound Rule

---

**Match URL**

Requested URL:  Using:

Pattern:

Ignore case

**Conditions**

**Server Variables**

**Action**

Action type:

Action Properties

Rewrite URL:

Append query string

Log rewritten URL

Stop processing of subsequent rules

- **Name** – Set the rule name (for example, Customer1Containers).

- **Requested URL** – Select the **Matches the Pattern** option.
  - **Using** – Select the **Wildcards** option.
  - **Pattern** – Enter the pattern, **proxycode/containers/\***.
  - **Ignore case** – Select this option.
  - **Conditions** – *Do not change anything.*
  - **Server Variables** – Add the HTTP\_X\_FORWARDED\_PROTO with an **https** value if the Touch server is setup with **https**. Otherwise, use **http**. Checked the 'Replace the existing value.'
  - **Action**
    - **Action type** – Select the **Rewrite** option.
    - **Action Properties**
      - **Rewrite URL** – Enter the URL for the RESTful API, for example, <http://10.1.1.111:1111/containers/{R:1}>.
      - **Append query string** – Select this option.
      - **Log rewritten URL** – Do not select this option.
    - **Stop processing of subsequent rules** – Do not select this option.
6. On the right pane, click **Apply**.

## Add Rules to the Filedrop API

To add the rules to the filedrop API, complete the following steps:

1. Open the **URL Rewrite** applet.
2. In the Actions pane, click **Add Rule(s)**.
3. On the Add Rule(s) dialog box, select the **Blank Rule** option in the **Inbound rules** section.
4. Click **OK**.
5. On the Edit Inbound Rules window, enter or select the appropriate values:
  - **Name** – Set the rule name (for example, Customer1Filedrop).
  - **Requested URL** – Select the **Matches the Pattern** option.
  - **Using** – Select the **Wildcards** option.
  - **Pattern** – Enter the pattern, **proxycode/filedrop/\***.
  - **Ignore case** – Select this option.
  - **Conditions** – *Do not change anything.*
  - **Server Variables** – Add the HTTP\_X\_FORWARDED\_PROTO with an **https** value if the Touch server is setup with **https**. Otherwise, use **http**. Checked the 'Replace the existing value.'
  - **Action**
    - **Action type** – Select the **Rewrite** option.
    - **Action Properties**

- **Rewrite URL** – Enter the URL for the RESTful API, for example, <http://10.1.1.111:1111/filedrop/{R:1}>.
  - **Append query string** – Select this option.
  - **Log rewritten URL** – Do not select this option.
  - **Stop processing of subsequent rules** – Do not select this option.
6. On the right pane, click **Apply**.

## Set Up the configuration.ini File

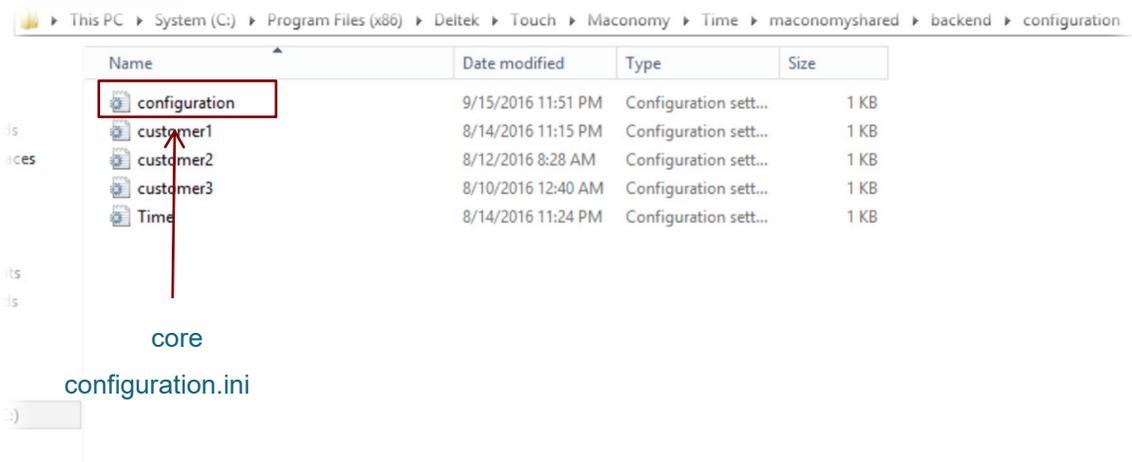
There are two types of configuration.ini file needed when setting up the multitenancy for Deltek Touch: one “core” configuration.ini and individual tenant’s configuration.ini (which resides in the configuration folder of the Touch Server).

### Core configuration.ini File

The core configuration.ini file does not contain the connection details of the Web services users need. It only contains the information whether this is a multitenant environment. For more information, see the Appendix section of this document.

In the Touch client-side application, setting the value of the **Server URL** field and tapping **Connect** instructs Deltek Touch to connect to the Touch Server. When the Touch Server receives the request from Deltek Touch, it performs the following actions:

- Retrieves the configuration.ini file by calling certain methods in the “RemoteCall.php.”
- Checks the parameter “DYNAMICSCRIPT.” If it is set to true, multitenancy is enabled.
- If the parameter “DYNAMICSCRIPT” is true, the “RemoteCall.php” analyzes the value entered in the **Server URL** field whether the user is connecting via native application or the “URL” or connecting via browser. The tenant code extracted by the “RemoteCall.php” is dependent on the URL. For example, in the URL <http://clientsite.com/customer1>, the Touch Server looks for customer1.ini (which contains the connection details for the Web service) in the Touch Server.



### Sample Content of the Core configuration.ini File

```

; *****
;
; Maconomy Touch Configuration File
; *****
[SERVER_DATA]
DYNAMICSCRIPT="TRUE"
TOUCHSERVER="2.3.0.0"
HELPODOCURL="http://clientsite.com/deltektouchdownloads/docs/DeltekTouchforMaconomyUserGuide.pdf"

[REST_PROXY_DATA]
REST_HTTP_PROTOCOL=""
REST_DOMAIN_NAME=""
REST_HTTP_PORT=""
REST_PROXYPASS_CLIENT_CODE=""
REST_CONTAINER_NAME=""
REST_FILEDROP_NAME=""
REST_VERSION=""
REST_DATABASE=""
REST_LANGUAGE=""
REST_IIS_TOUCH_FOLDER_NAME=""
REST_AUTHENTICATION_TYPE=""

[REST_MODULE_SETUP]
USERESTFORTIME="false"
USERESTFOREXPENSE="false"
USERESTFORAPPROVALS="false"

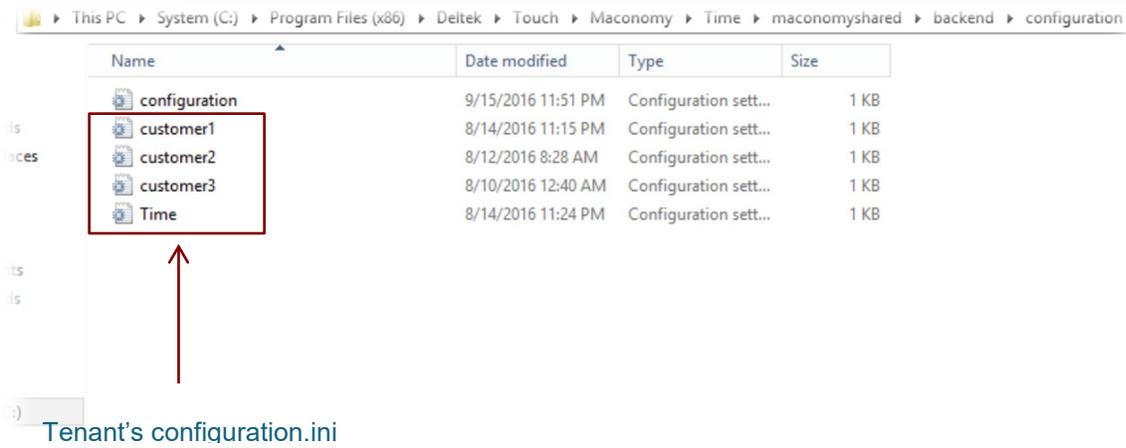
```

### Tenant configuration.ini File

After setting up the core configuration.ini file, create each specific tenant configuration.ini. The tenant configuration.ini contains the connection details about the Web service that Touch client-side application needs.

**Note:** The tenant configuration.ini resides in the configuration folder of the Touch server along with the core configuration.ini.

Install Multitenant Touch Server



Sample Content of the Tenant configuration.ini File

```

; *****
;
; Maconomy Touch Configuration File
; *****

[SERVER_DATA]
URL="http://10.1.1.1:1111/cgi-
bin/Maconomy/MaconomyTouch.x1demo.en_US_CPA.exe/Standard/DeltekTouchWS.ms"
CHARSET='UTF-8'
DYNAMICSCRIPT='false'
DEBUGGERFL="false"
TOUCHSERVERVER="2.3.0.0"
HELPDOCURL =
'http://clientsite.com/deltektouchdownloads/docs/DeltekTouchforMaconomyUserGuide.pdf'
CLIENTURL='https://clientsite.com/224SSO'

[REST_PROXY_DATA]
REST_HTTP_PROTOCOL="https"
REST_DOMAIN_NAME="clientdomain.com "
REST_HTTP_PORT=""
REST_PROXYPASS_CLIENT_CODE="224SSO"
REST_CONTAINER_NAME="containers"
REST_FILEDROP_NAME="filedrop"
REST_VERSION="v1"
REST_DATABASE="x1db"

```

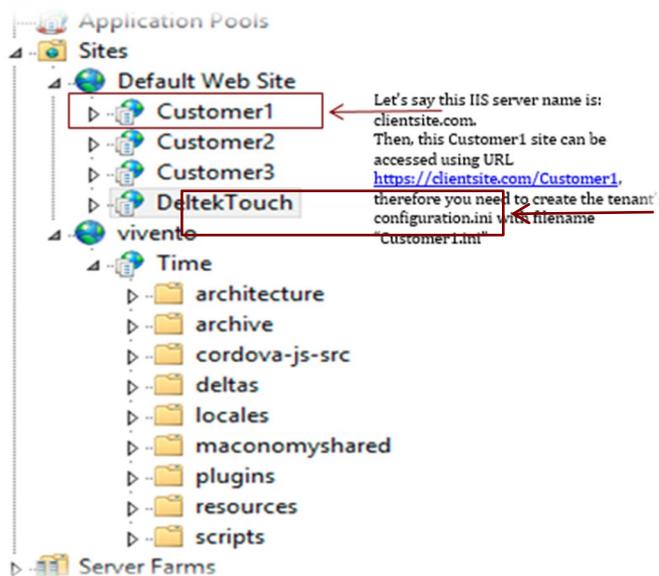
```
REST_LANGUAGE="en_US_CPA"
REST_IIS_TOUCH_FOLDER_NAME="MacTouchMulti"
REST_AUTHENTICATION_TYPE="BASICAUTH"
```

```
[REST_MODULE_SETUP]
USERESTFORTIME="true"
USERESTFOREXPENSE="true"
USERESTFORAPPROVALS="false"
```

## Create File Name for the configuration.ini File

Observe the following guidelines in creating a file name for the configuration.ini file:

- The file name for the core configuration.ini is always “configuration.ini” and resides in the configuration folder (for example, /time/maconomyshared/backend/configuration).
- The file name for the tenant configuration.ini is always dependent on the Web site name. For example, the “customer 1” Web site name is “Customer1” and the Web site setup for this customer1 can be accessed using the URL <http://samplesite.com/Customer1>. This means you need to create the tenant’s configuration.ini with file name of “Customer1.ini”



## Upgrade Multitenant Touch Server

This section describes the instructions in upgrading a multitenant Touch server.

### Upgrade All Tenants

This procedure allows you to upgrade all tenants, on a single-version multitenant Touch server to another Touch version.

**Example:** You currently have a Touch 3.1 installation shared by several customers. All customers would like to use Touch 3.2.

**To upgrade all tenants, complete the following steps:**

1. Run the Touch Installer for the specific Touch version you want to install (for example, Touch 3.2).

**Attention:** For more information, see the [Deltek Touch for Maconomy Technical Installation Guide](#) of the version you want to install.

2. After installing the specific version of Touch, update the tenant configuration.ini file manually. You should apply changes in configuration.ini to tenant configuration.ini.

**Attention:** For more information, see the [Set Up the configuration File](#) section in this document.

### Upgrade One Tenant

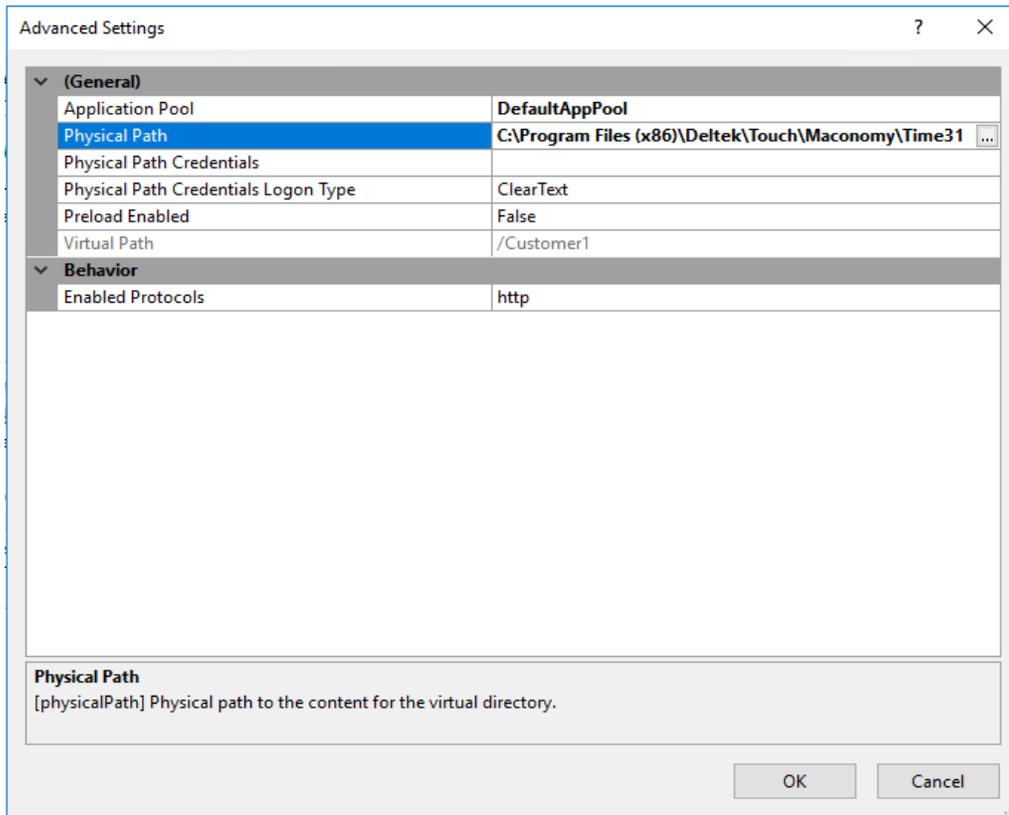
This procedure allows you to install another Touch version in one (or more) tenant on a multitenant Touch server.

**Example:** You currently have a Touch 3.1 installation shared by several customers. One (or more) customers would like to use Touch 3.2, while other customers prefer to stay on Touch 3.1.

**To upgrade one tenant, complete the following steps:**

1. In the Touch Installation folder, copy and paste the current Time folder and rename it "Time<Version>" (for example, Time31). There are now two Time folders in the same folder:
  - Time (*This will be used by customers who want to move to 3.2*)
  - Time31 (*This will be used by customers who want to stay on 3.1*)
2. Modify the IIS applications you wanted to stay on Touch 3.1.

Right-click on the IIS application and then click **Manage Application » Advanced Settings**.



3. Upgrade Touch.

- a. Rename the current configuration.ini file in the Time folder to “configuration – dynamic.ini.”
- b. Rename the “backup configuration.ini” to “configuration.ini.”
- c. Run the installer of the Touch version you want to install (for example, Touch 3.2). Follow the instructions to install Touch. After installation, the Time folder is updated to Touch 3.2, while Time31 remains unchanged (stays as Touch 3.1).
- d. Modify the configuration.ini file for the Time folder (Touch 3.2).

```

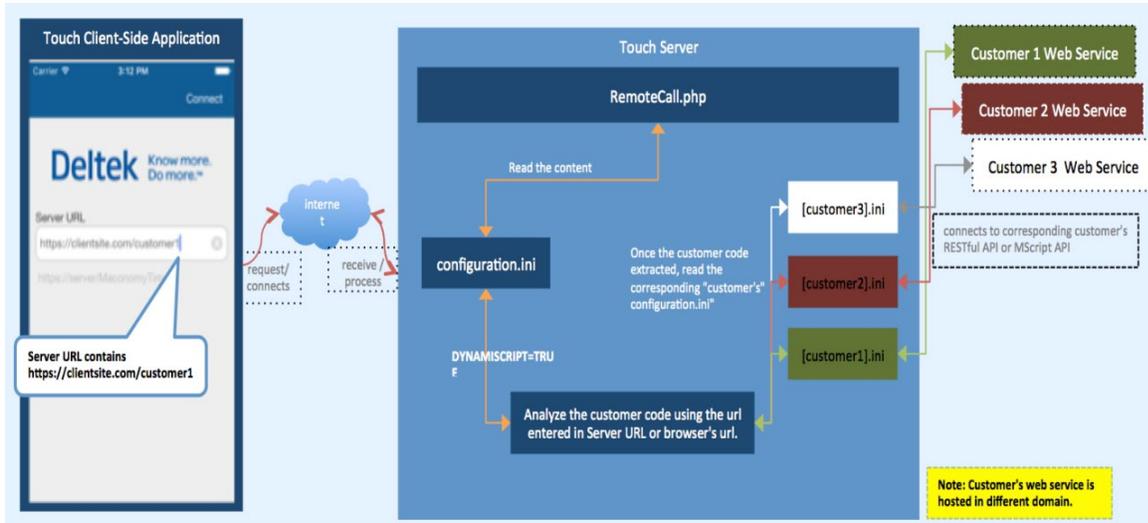
; *****
; Maconomy Touch Configuration File
; *****

[SERVER_DATA]
DYNAMICSCRIPT="true"
TOUCHSERVERVER="3.2.0.0"
    
```

- e. Modify the tenant configuration.ini file to mimic the configuration.ini changes from the Touch 3.2 installation.

You now have a Touch server supporting Touch 3.1 and 3.2. If you want to move customers from one Touch version to another, you only need to change the IIS application physical path to the right Touch installation folder.

# Appendix A: Supported Deployment Scenario



## Appendix B: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Touch for Maconomy, 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 for Maconomy User Guide	This document contains detailed information and instructions on how to use various features of the application.
Deltek Touch for Maconomy Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.
Deltek Touch for Maconomy Upgrade Guide	<i>This document is only intended for Technical Consultants.</i> It describes necessary steps to upgrade to the latest Touch system.
Deltek FPU Release Notes for Maconomy Touch	<i>These documents are only intended for Technical Consultants.</i>  The document names vary depending on the supported Maconomy version. Each document contains a summary of the pre-installation information, enhancements, and API changes to Touch for each supported Maconomy version. It is part of the Deltek Touch for Maconomy 1.4 product information suite and should only be distributed internally within the Maconomy organization and to partners.
Deltek Touch for Maconomy Layout Customization Guide	<i>This document is only intended for Technical Consultants.</i> It describes tasks necessary for the customization of layouts of the Deltek Touch for Maconomy application.
Deltek Touch for Maconomy MScript and REST Web Services Comparison Guide	This document describes the differences between MScript and Representational State Transfer

Document Name	Description
	(REST) Web services to help technical consultants prepare for implementing Deltek Touch for new users or migrate their current Touch installation to REST.

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