

Deltek Touch CRM for Vision 1.2.2

Technical Installation Guide

February 28, 2014

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This edition published February 2014.

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Overview

Deltek Touch CRM for Vision is a mobile application that enables you to view, add, and edit client, contact, and opportunity information for Vision from your touch screen device.



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


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

This document provides instruction for the installation and configuration of the Touch CRM for Vision Web server.

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.

If You Need Assistance

If you need assistance installing, implementing, or using Touch CRM for Vision, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 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 portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

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



[If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions](#)

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 Touch CRM for Vision 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 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 for Deltek Vision.
Deltek Touch CRM for Vision Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.

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 Deltek Touch CRM 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**.
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.



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 CRM for Deltek Vision, it is important to understand the following information:

- Touch CRM works with Vision 7.1 Cumulative Update #011 and Vision 7.2.



To use the full functionality of Touch CRM, you must be on the current Vision server.

When installing Touch CRM 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 CRM.

- You must install Touch CRM for Vision on an IIS server that is installed on Windows 2008, Windows Server 2008 R2, or Windows Server 2012. This can be the same as your Vision server or a separate server.
- If you are going to access Touch CRM for Vision from the Internet, open a port in your firewall to access the Touch CRM virtual directory, which will be installed on the IIS server. Deltek strongly recommends that you use HTTPS protocol in your production deployment.



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 CRM. 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.

- 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 CRM for Vision supports native device browsers and mobile applications downloaded from *Google Play* and *Apple App Store*. If you are using an unsupported version of Vision (compatibility mode), you can use your device's native browser to enter your organization's Touch Time URL.



The Touch CRM URL has the format <https://<server>/deltektouch/vision/crm>, where <server> refers to the host name of your Touch server.

Compatibility Mode Definitions

Compatibility Mode	Description
Fully Compatible	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	At least one of the components (Touch server and/or API) is an older version. Some features of the application are hidden and not available to you.
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.
Non Compatible	There are some combinations of API and Touch server that make it impossible to even use the browser version to run the application.

Supported Mobile Operating Systems

Touch CRM for Vision supports mobile devices that run on the following operating systems:

- Apple iOS 5 and higher
- Android 2.3.3 and higher, excluding 3.x

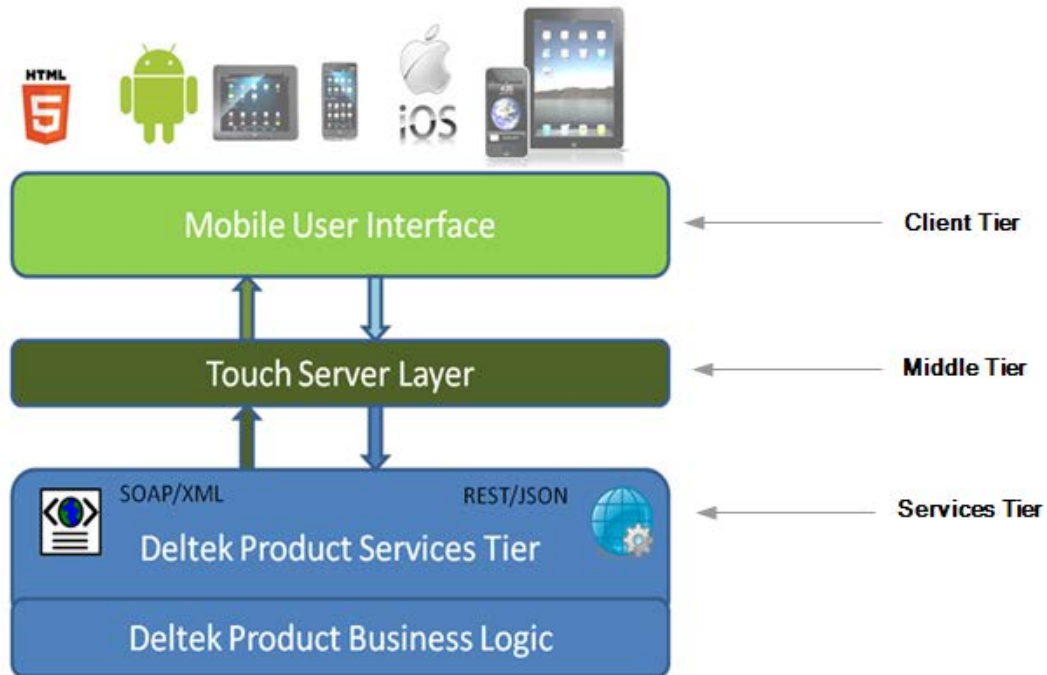


In this release, Delttek only supports iOS (iPhone, iPod Touch, and iPad) and Android devices.

Touch CRM Infrastructure

The Touch CRM infrastructure is composed of the client tier, middle tier, and services tier.

Technical Platform

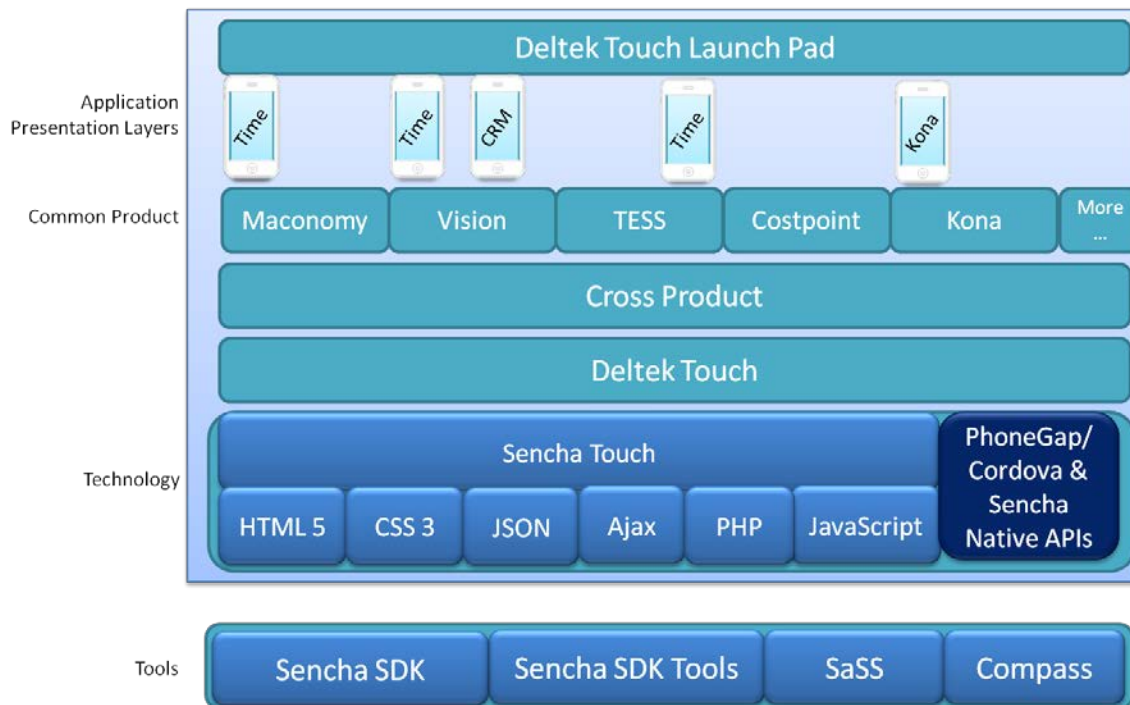


Client Tier and Middle Tier

Touch CRM Server (Middle Tier) is used to optimize 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 Client (Client Tier) is a hybrid application and created using HTML 5 and CSS 3 but with the ability to access the native device capabilities (mobile device app only).

The following diagram displays the client tier and middle tier components:

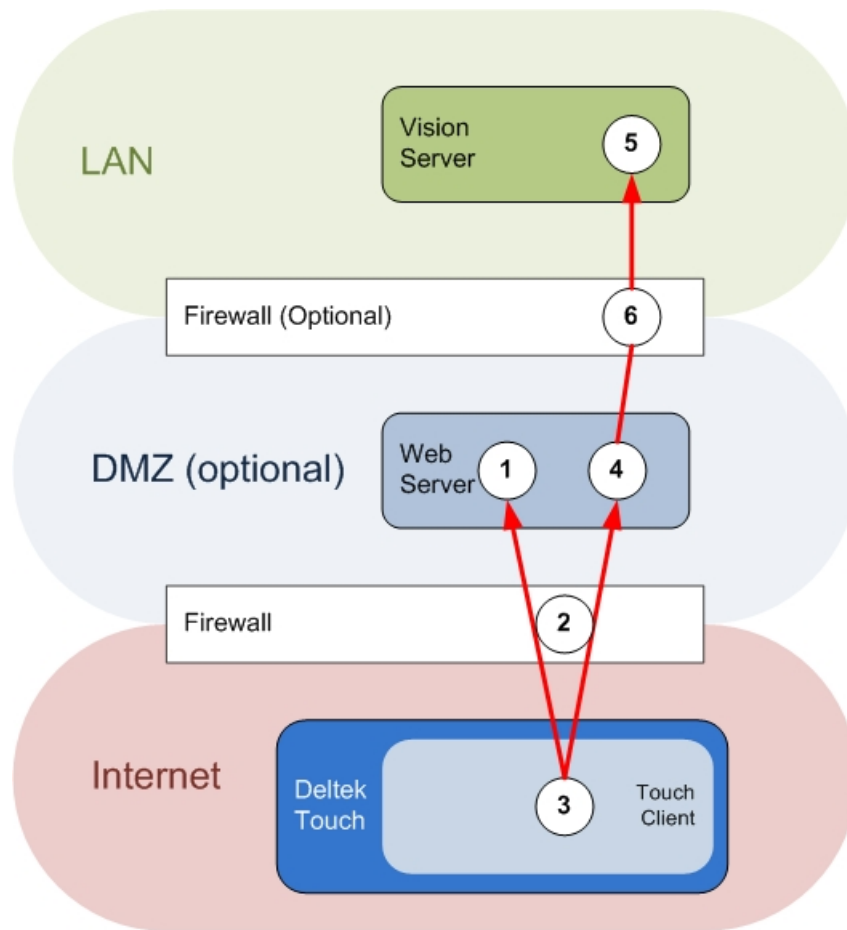


Services Tier

For Touch CRM, the services tier corresponds to the Vision Web services. The following diagram illustrates the interaction between Vision and Deltek Touch (client + middle tier).



The Touch client tier does not directly access the database. It accesses the business logic via the Vision CRM web services.



Microsoft IIS Web Server Configuration on Windows 2008 Server

Perform this procedure if you are going to install the Touch CRM application on Windows Server 2008. The Touch CRM 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 CRM requires Anonymous Authentication and does not support Basic Authentication.

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

1. Click **Windows » 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. When the installation completes, click **Close**.
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 select **Stop**.
10. Right-click the IIS computer name icon on the left pane of the Internet Information Services (IIS) Manager window, and select **Start**.
11. Close the Services Manager window.

Microsoft IIS Web Server Configuration on Windows 2012 Server

Perform this procedure if you are going to install the Touch CRM application on Windows Server 2012. The Touch CRM 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 CRM 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 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.
12. Click **Next**, and then click **Install**.

Touch CRM for Vision Installation

Before you proceed, make sure that you downloaded the server component from Deltek Software Manager (DSM). After you install the server part, you can access the database using the Touch CRM app (named *Touch CRM for Deltek Vision* on *Apple App Store* and *Google Play*) on your mobile device.



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

To install Deltek Touch, complete the following steps:

1. Run **DeltekTouchVisonCRM122.exe** to launch the Deltek Touch installation program.



Taking into consideration the enhanced security in Windows Server 2008, Deltek recommends that you select the **Run as Administrator** option when launching the installation executable even if you (as the logged-on user) have local administrative rights. To do this, right-click the installation executable file name in Windows Explorer and then click **Run as Administrator** on the shortcut menu.

2. On the Welcome to the Deltek Touch Vision CRM 1.2.2 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 then click **Next**.
4. On the Choose Application Installation Directory page, verify if the default location for the Deltek Touch software is correct and then click **Next**. Otherwise, click **Browse** to navigate to the installer folder.



The default folder is C:\Program Files (x86)\Deltek\Touch on a 64-bit machine or 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 CRM.* On the IIS Website Information page, enter or choose **Default Web Site** in the **Website Name** field and then click **Next**.
6. On the Deltek Vision Site page, enter your company's Vision server and then click **Next**.




- Your Vision server must end with **VisionServices.asmx**.
- When installing Touch CRM 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 the Installation Data to Deltek** option if you want to participate.
8. On the Pre-Installation Summary page, review the installation details you provided.
 - If you want to change any settings, click **Back**, and make the necessary changes.
 - If you are done, click **Install** to begin the installation.



If there are errors, the **DeltekTouchInstall.log** file displays.

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



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