Deltek

Deltek Touch 3.5 for Maconomy® 2.5.1

Upgrade Guide

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Contents

How to Upgrade to Deltek Touch 3.5

If existing Deltek Touch for Maconomy users would like to benefit from the new Deltek Touch 3.5 release, a Deltek consultant would need to upgrade their system. The necessary steps are described in this section.

> **Note:** End users need to upgrade the native application to the latest version by downloading it from *Apple App Store* or *Google Play* depending on the operating system of their devices.

I - Prerequisites for Maconomy

You need to have **Maconomy 2.5.1 (or higher)**, in order to be able to upgrade the Touch backend to version 3.5.

If your Maconomy is older, you will not be able to upgrade to Touch 3.5 backend. However, you can see below which is the newest Touch backend available for your Maconomy version (if your Maconomy version is still supported by Touch).

> **Note:** Starting with Touch 3.0, we are bundling Touch with a specific Maconomy release. Therefore:
>
> - Touch 3.5 backend is available only for Maconomy 2.5.1.
> - Touch 3.4 backend is available only for Maconomy 2.5 and 2.4.6.
> - Touch 3.3 backend is available only for Maconomy 2.4.5.
> - Touch 3.2 backend is available only for Maconomy 2.4.4.
> - Touch 3.1 backend is available only for Maconomy 2.4.3 and 2.3.4.
> - Touch 3.0 backend is available only for Maconomy 2.2.6 and 2.1.8.
> - Touch 2.3 backend is available for all other supported Maconomy versions.

II - Prerequisites for Touch Server

- If the Touch Server is installed on a Windows machine that is using Apache as a Web server and your Maconomy version is 2.3 or later, you need to upgrade to Apache 2.4.

  > **Note:** The Maconomy Web server is certified for Apache 2.0 and 2.2. The Touch Server must run on Apache 2.4.

III - Recommendation for Linux Customers

If the Touch Server is installed on a Linux machine, see the Deltek Touch for Maconomy Installation on Linux Server section of the *Deltek Touch 3.5 for Maconomy 2.5.1 Installation Guide*.

IV - Install Touch Server and Web Application

You can find the files mentioned in this section in DSM, under the corresponding Maconomy release:

- On Windows, run **DeltekTouchMaconomy35.exe** to launch the installation program.

- On Linux, run **DeltekTouchMaconomyLinux35.tar** to launch the installation program.

> **Note:** Starting with Touch 3.0, we are bundling Touch with a specific Maconomy release. Therefore, Touch Server 3.5 is available in DSM only for Maconomy 2.5.1.

V - Install Web Service

You need to check your current Web service version. To do this, open Deltek Touch for Maconomy, tap **Settings**, tap **About**, and check Web Service.

If your current Web service version is 3.5.0.36.21, you do not need to do anything, else complete the following steps:

> **Note:** Starting with Touch 3.0, we are bundling Touch with a specific Maconomy release. Therefore Touch Web service 3.5 is available in DSM only for Maconomy 2.5.1.

A. Install Web Service on the Maconomy Server and Web Server

The Touch 3.5 Web service is included in the Maconomy 2.5.1 APU. When the Maconomy 2.5.1 APU is installed, the Touch 3.5 Web service is installed as well.

You do not have to do anything in this step. You should proceed to step B.

B. Check MaconomyTouch CGI Program

Starting with 1.4, Touch uses the MaconomyTouch CGI program instead of MaconomyMScript. Switching to MaconomyTouch CGI is necessary for security reasons because it enforces a default timeout of one hour.

Verify that your Maconomy Web server has already have MaconomyTouch.*.exe and MaconomyTouch.*.I (in …/cgi-bin/Maconomy). If so, the MaconomyTouch CGI program is already installed. Otherwise, you can install MaconomyTouch like any CGI program using **MConfig**. From the **(Re)install CGI programs** drop-down list, select the **Install unconditionally** option.

C. Check Configuration.ini

Make sure that configuration.ini is using the **MaconomyTouch** CGI program, instead of MaconomyMScript, in **URL**.

> **Note:** The configuration.ini structure has been changed. It contains only URL (instead of URL, MSCRIPTNAME, and LANGUAGE). Make sure that the URL contains the full path (for example, URL='http://myhost:20003/cgi-bin/Maconomy/MaconomyTouch.w16de.en_US.exe/Standard/DeltekTouchWS.ms').

D. Manually Update Custom Files

In case you have changed the standard settings and/or standard layouts, you have customizations. **It is very important to ensure that your custom files are updated.**

To check if there are any customizations, find the **MaconomyMScript** folder on the Maconomy Web server. The said folder must contain a Standard sub-folder, which includes all standard layouts and settings.

If there is a Custom sub-folder in the **MaconomyMScript** folder, it means that you likely have customizations. Each file in the **…\MaconomyMScript\Custom** folder must be changed manually to include all changes made in the standard file.

In case you have customizations, **there are important changes in this release**:

- **New server settings**, which controls the user settings, are now introduced.

  When upgrading, double-check if the default values for the server settings match the customer's expectations, and update your custom DeltekTouch.I accordingly. Complete these actions prior to rolling out Touch 3.5 to the end users. Some of the server settings are applied only when the end user uses a fully compatible Touch 3.5 for the first time.

  For more details about the new server settings, see the Installation Guide.

- With Maconomy 2.5.1, the Touch **Approvals functionality** now uses the new web service (REST). Shifting from MScript to REST web service updates the approval workflow and layouts with some changes. If you customized any of the MScript approval layouts, apply the same customizations in the new REST approval layouts.

  For more details, see Appendix A: Screens, Layouts, and Metadata Files in the Layout Configuration Guide.

- Assuming you have a specific Maconomy setup for timesheets, changes are made to the standard REST layouts for timesheets to accommodate **overtime**. If you customized the timesheet layouts to add overtime, you have to ensure your customizations do not overlap with the new standard functionality.

Appendix A: Question & Answer

Which Maconomy Version is This Touch Version Available For?

Starting with Touch 3.0, we are bundling Touch with a specific Maconomy release.

Therefore the fully compatible setup, for this Touch version, is possible only for **Maconomy 2.5.1**.

If you are on the above Maconomy version, after completing the steps in the previous section, you should now have a fully compatible Touch setup, including:

Android Application	iOS Application	Web Application	Touch Server	Web Service	Maconomy
3.5	3.5	3.5	3.5	3.5.0.36.21	2.5.1

How About Other Maconomy Versions?

Other Maconomy version that were supported by Touch previously have a partially compatible Touch setup, including the Touch 3.5 iOS and Android application, older Touch Server, Web Service, and Web Application.

They can use the new native applications, but they cannot get the new backend software (Touch Server, Web Service and Web Application).

What Has Changed in the Latest Version Compared to the Previous Touch Version?

What has **changed** in Touch 3.5 compared to Touch 3.4:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application
    - Web application

What had **changed** in Touch 3.4 compared to Touch 3.3/3.3.1:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application

- Web application

What had **changed** in Touch 3.3 compared to Touch 3.2:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application
    - Web application

What had **changed** in Touch 3.2 compared to Touch 3.1:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application
    - Web application

What had **changed** in Touch 3.1 compared to Touch 3.0:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application
    - Web application

What had **changed** in Touch 3.0 compared to Touch 2.3.2:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application
    - Web application

What had **changed** in Touch 2.3.2 compared to Touch 2.3.1:

- Android native application
- iOS native application

What had **changed** in Touch 2.3.1 compared to Touch 2.3:

- Android native application
- iOS native application

What had **changed** in Touch 2.3 compared to Touch 2.2:

- All components:
    - Touch installer
    - Touch server
    - Web service
    - Android native application
    - iOS native application
    - Web application

Pay special attention to:

- Touch server and web service are not available for all Maconomy versions
- There is no new Windows application.
- You must use minimum MConfig 8.17 because it contains a fix for the FPU installation.

Which Web Service Should I Use When Upgrading?

Deltek Touch 3.x supports two Maconomy Web services:

- MScript-based - This is the old Web service used in Deltek Touch 1.x, compatible with all above mentioned Maconomy versions.
- RESTful Web service - This is the new and generic Web service available in newer Maconomy versions.

> **Note:** If your Maconomy version is 2.3 or higher, Deltek strongly recommends that you choose REST Touch when you upgrade.

When upgrading Touch, Deltek recommends that, if your Maconomy version allows it (from 2.2.4 or higher), you upgrade directly to Deltek Touch 3.x using the RESTful Web services. This means that in the Deltek Touch Installer, on the Maconomy Product Information page, you select the **Maconomy 2.2.4 or later** option and fill out the necessary information on the REST Proxy Data, REST Module Setup, and Deltek Maconomy Coupling Services pages. By doing so, the installer helps you with performing all REST proxy-related setup.

- If you do not do this and would like to switch to REST Touch after the upgrade, you need to manually perform the REST proxy setup.
- If the customer's Maconomy version allows it, select REST Touch during the upgrade even if the customer ultimately wants to use MScript Touch. It is much easier to disable REST than to manually set up the REST Touch.

For customers on older Maconomy versions (2.2.3 or lower), you can upgrade only to Touch 2.x using the MScript Web services.

Which Web Service Should I Use After Upgrading?

If you upgrade, as recommended, and the customer has Deltek Touch using MScript Web services before the upgrade, you should consider to switch Touch to RESTful Web services.

> **Note:** REST is the future. Some new 3.5 functionality is only available if you use REST and, in the future, most new functionality will require REST. We do very limited testing on MScript. Therefore, it is recommended to switch to REST.

Deltek recommends that you consider the following:

- REST (in Touch 3.x) requires Maconomy 2.3 GA (or higher), 2.4 GA (or higher), or 2.5.

- REST can be used for everything (time, expense, mileage, purchase orders, absence, allowance, rejections, and approvals). If you have Java extensions in these areas, Deltek highly recommends that you switch to REST in Deltek Touch.

- There are some functional differences in Touch 3.x, depending on whether you use the MScript or REST Web service. For more details, see the *Deltek Touch for Maconomy MScript and REST Web Services Comparison Guide*.

- If you have custom layouts, you need to migrate your customizations to the REST layouts. For example, if you have a custom ExpenseSheetLayout.I, you need to add the same customizations to ExpenseSheetLayoutREST.I. For more details, see the *Deltek Touch for Maconomy Layout Configuration Guide*.

- If you have changed the server settings (in DeltekTouch.I), see *Deltek Touch for Maconomy MScript and REST Web Services Comparison Guide* for some settings are not applicable to REST.

- If you have customized queries (in DeltekTouch.I), depending on the nature of the change, you might not be able to switch to REST because REST does not support query customization.

- If you have heavy weight customization (for example, changes in .ms files), make sure that the same functionality is available via Java extension.

- If the customer is not ready to switch Touch to using RESTful web services, you need to disable REST in the configuration.ini. This can be achieved by having all flags in [REST_MODULE_SETUP] set to false:

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

How Do I Switch to RESTful Web Service?

1. Make sure that REST is enabled in Maconomy and you have the proxy server set up.

2. Make sure all customizations (layouts, DeltekTouch.I, .ms) are replicated for REST (REST layouts, Java extensions).

3. Cange the configuration.ini file to fill in the REST connections details and switch the UseRESTForTime, UseRESTForExpense, and/or UseRESTforApprovals flags.

Which is the Touch Web Service Version for My Maconomy?

To check your current Web service version, open Deltek Touch for Maconomy. To do this, tap **Settings**, tap **About**, and check Web Service.

We recommend the following Touch Web Service versions:

- Maconomy X1 (**no longer supported**): 2.3.0.6.12
- Maconomy 2.0 (**no longer supported**): 2.3.0.8.15
- Maconomy 2.1 (**no longer supported**): 3.0.0.9.16
- Maconomy 2.2: 3.0.0.14.17
- Maconomy 2.3: 3.1.0.4.19
- Maconomy 2.4: 3.3.0.4.20
- Maconomy 2.5: 3.4.0.16.21
- Maconomy 2.5.1: 3.5.0.36.21

How Do I Install Older Touch Web Services?

Starting with Touch 3.1 and Maconomy 2.4.3, the Touch web service is included in the Maconomy APU.

For older Maconomy and/or Touch backends, the Touch web service was installed mostly via Hot Fix (FPU), as follows:

Maconomy	Touch Web Service
X1 Service Packs 25, 26, 27, 28 and 29 **(no longer supported)**	fpu.w1200.touchapi_2_3_0_0.zip
2.0 (no longer supported)	**fpu.w1500.touchapi_2_3_0_0.zip**
2.1.1, 2.1.2, 2.1.3, 2.1.4, 2.1.5, 2.1.6, 2.1.7 **(no longer supported)**	fpu.w1600.touchapi_2_3_0_0.zip
2.1.8 **(no longer supported)**	fpu.w1600.touchapi_3_0_0_0.zip
2.2, 2.2.1, 2.2.3, 2.2.4, 2.2.5	fpu.w1700.touchapi_2_3_0_0.zip
2.2.6	fpu.w1700.touchapi_3_0_0_0.zip
2.3 GA, 2.3.1, 2.3.2, 2.3.3	fpu.w1900.touchapi_2_3_0_0.zip
2.3.4	APU
2.4 GA, 2.4.1, 2.4.2	fpu.w2000.touchapi_2_3_0_0.zip
2.4.3, 2.4.4, 2.4.5	APU

2.5, 2.5.1	APU

- If your Maconomy version is not listed in the table, you need first to upgrade Maconomy to any of the above versions because Deltek Touch for Maconomy does not support your current Maconomy version.

- If your Maconomy version is listed in the table and the Web service is N/A, and you are on the latest web service mentioned, you do not have to do anything in this step because the Web service is not available for your Maconomy version. You can skip all below steps

- If your Maconomy version is listed in the table and the Web service is N/A, and you are not on the latest web service mentioned, you should download the latest FPU from DSM and install it. The FPU should be installed the same way as an application patch using MConfig. This process installs the Web services and Maconomy dictionaries on the Maconomy server.

- If your Maconomy version is listed in the table and the Web service is in the APU, you do not have to do anything in this step because the Web service is already installed on the Maconomy server. You should proceed to step B.

- If your Maconomy version is listed in the table and there is an FPU specified, you need to download the FPU from DSM and install it.The FPU should be installed the same way as an application patch using MConfig. This process installs the Web services and Maconomy dictionaries on the Maconomy server.

> **Note:** It is recommended to use the latest MConfig when installing the FPU.

If the Maconomy system has already had Touch installed, **you are prompted to apply it to the Web server when installing the FPU.** Click **Yes.** This action should install the Touch Web service on the Maconomy Web server, so you do NOT need to do it manually.

If you do not get the message, you need to apply the Web service using MConfig on the Maconomy Web server manually:

1. On the **Web** product, select the **MScript** option.

2. From the **(Re)install Deltek Touch framework** drop-down list, select the **Install unconditionally** option.

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 Installation Guide	This document provides instructions for the installation and configuration of the application.
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 Layout Customization Guide	*This document is only intended for Technical Consultants.* It describes tasks necessary for the customization of layouts of the Deltek Touch for Maconomy 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 MScript and REST Web Services Comparison Guide	This document describes the differences between MScript and Representational State Transfer (REST) Web service framework to help technical consultants prepare for implementing Deltek Touch for new users or migrate their current Touch installation to REST.

About Deltek

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