Deltek

Deltek Touch CRM 1.7.38.2

Technical Installation Guide

November 2026

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Overview

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

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

This document provides instruction for the installation and configuration of the Touch CRM for your Deltek CRM core product.

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 CRM, it is important to understand the following information:

- Touch CRM works with Vision or Ajera CRM 7.6 Cumulative Update #69 or higher.

  Note:

  - To use the full functionality of Touch CRM, you must be on the latest Touch Server and your Deltek CRM core product.
  - When installing Touch CRM on a dedicated server, ensure that the Web service URL of your Deltek CRM core product (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 server of your Deltek CRM core product can be resolved via DNS from the Touch Server.
  - You must own a Deltek CRM core product.

- You must install Touch CRM on an IIS server that is installed on Windows Server 2012, Windows Server 2012 R2, Windows Server 2016, or Windows Server 2019.
- If you are going to access Touch CRM 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.

  Note:

  - When your Deltek CRM core product is not exposed to the Internet, a VPN can be used to connect the mobile device to the corporate network on which Deltek CRM core product 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.
  - Touch CRM does not support two-factor authentication (2FA) and multifactor authentication (MFA)

- Starting with 1.7, Touch CRM requires that the Vision, GovWin Capture Management, or Ajera CRM server be accessed using Secure Sockets Layer (SSL)/Transport Layer Security (TLS). Deltek recommends that you update your configuration to support this change to avoid issues with future releases should your system not already be configured this way.
- 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 CRM supports mobile applications downloaded from *Apple App Store* or *Google Play*. If you are using an unsupported version of your Deltek CRM core product (compatibility mode), you can use your device's native browser to enter your organization's Touch CRM URL but with some limitations.

Note:

- Starting with 1.7.7, Windows Phone is no longer supported.
- The Touch CRM URL has the format https://<server>/deltektouch/<crm product>/crm, where <server> refers to the host name of your Touch Server. Your administrator sends you an email message containing a link that either directs you to the appropriate app store (if the Touch application is not yet installed) or populates the **Touch Server URL** field on the **Server URL** screen with your company URL.
- If you are on iOS 10.0 or lower, Touch CRM would not be available from *Apple App Store*. In this case, you would not be able to download or update it.
- In addition, Touch Server 1.3 and lower are already incompatible because the Chrome browser does not work with these versions any more due to a major change on Chrome.

- Touch CRM installer installs PHP 8.4.27 in this release.

Note: *This only applies to initial installation.*

If PHP has already been installed on the Touch Server, the Touch installer does not overwrite the existing installation as it may break existing installed products. Deltek strongly recommends that you install on a Touch Server without PHP. In addition, Deltek makes every effort to update to the most recent version of PHP in every release.

Attention: Apple's iOS blocks connections to servers with deprecated secure transport layers.

Starting with iOS 9, Apple's iOS mobile operating system started blocking deprecated transport layers. As of iOS version 10, iOS blocks connections to servers that have either TLS 1.0, SSL 3 (or lower) enabled or any older protocols. Only TLS 1.1 and/or TLS 1.2 may be enabled for connections to be successful. If you try to connect to IIS servers running Touch CRM, an error message displays, such as "invalid server URL" if any of the deprecated protocols are enabled.

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

- Deprecated transport layers disabled
- Supported transport layers enabled (if not already) – TLS 1.1 and/or TLS 1.2
- Restart the server

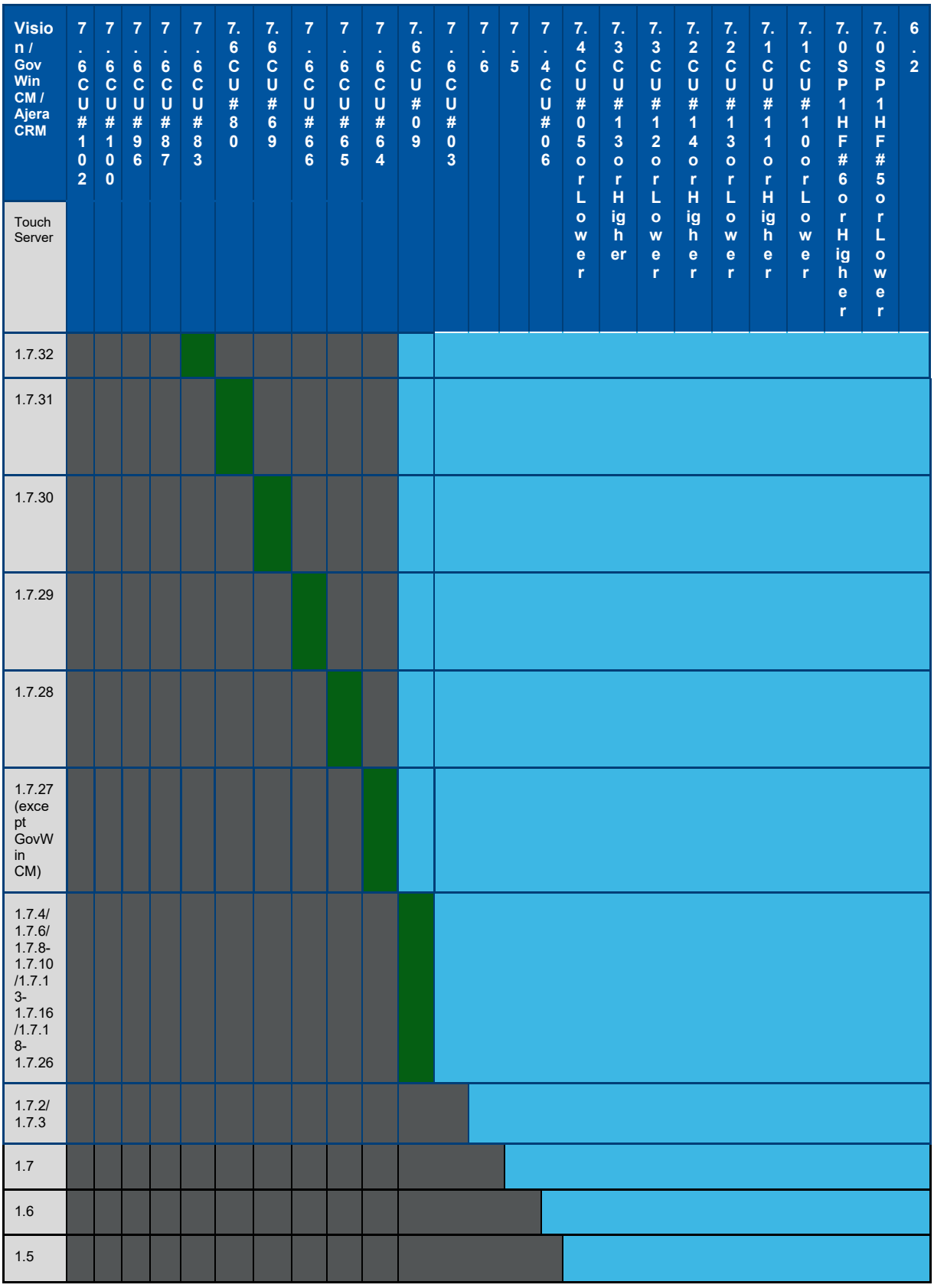
For more information on how to disable the deprecated transport layers, see the following support article from Microsoft: *How to disable PCT 1.0, SSL 2.0, SSL 3.0, or TLS 1.0 in Internet Information Services* at https://support.microsoft.com/en-us/kb/187498.

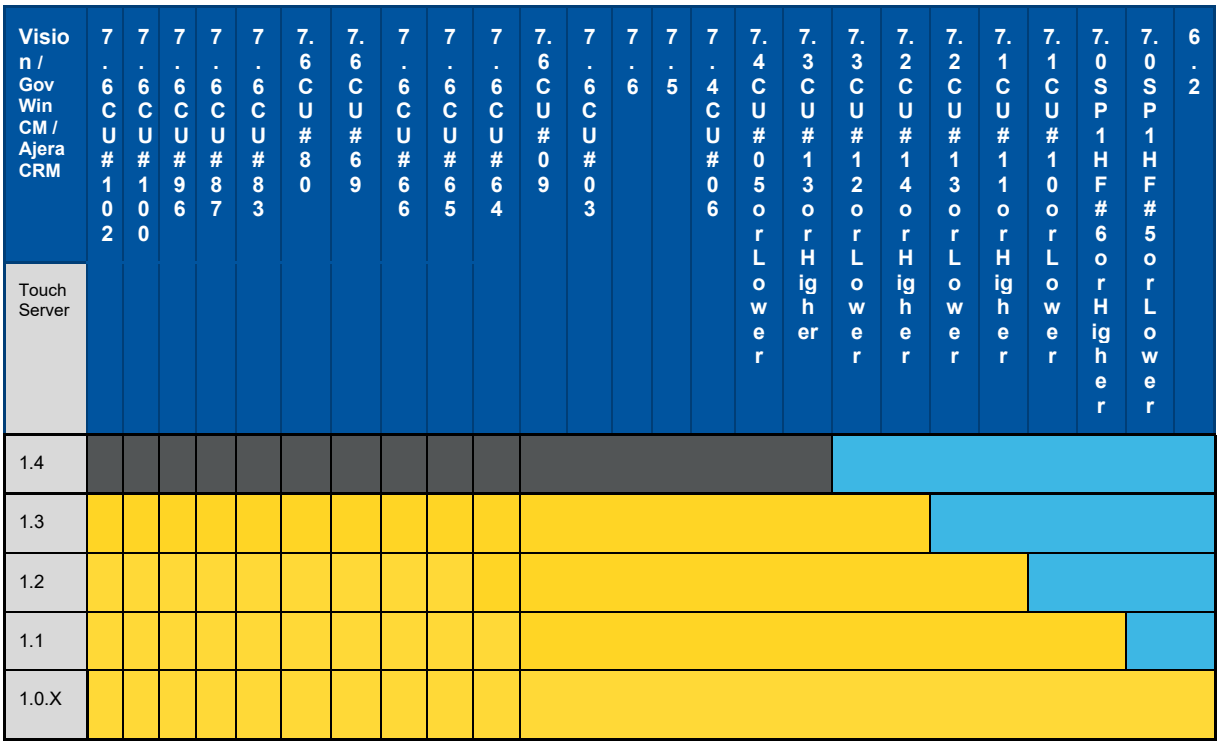
Compatibility Mode Definitions

Compatibility Mode	Description
Fully Compatible with Vision, GovWin Capture Management, or Ajera CRM	You must be on the latest version of each component (Touch CRM, Touch Server, and API). All features and functions in the application are available to you.
Partially Compatible with Vision, GovWin Capture Management, or Ajera CRM	You can use Touch CRM in this environment, but new functionality will be hidden until Touch Server and your Vision/GovWin CM/Ajera CRM is updated.
Potentially Compatible with Vision, GovWin Capture Management, or Ajera CRM	The Touch CRM application may be compatible with Vision/GovWin CM/Ajera CRM, but this combination is no longer tested or supported by Deltek.
Incompatible	You cannot use both the Touch CRM application (native application) and its browser version.

Touch CRM 1.7.38 (Native Application) Version Compatibility

Vision / GovWin CM / Ajera CRM	7.6 CU#102	7.6 CU#100	7.6 CU#96	7.6 CU#87	7.6 CU#83	7.6 CU#80	7.6 CU#69	7.6 CU#66	7.6 CU#65	7.6 CU#64	7.6 CU#09	7.6 CU#03	7.6	7.5	7.4 CU#06	7.4 CU#05 or Lower	7.3 CU#13 or Higher	7.3 CU#12 or Lower	7.2 CU#14 or Higher	7.2 CU#13 or Lower	7.1 CU#11 or Higher	7.1 CU#10 or Lower	7.0 SP1 HF#6 or Higher	7.0 SP1 HF#5 or Lower	6.2
Touch Server																									
1.7.38	■																								
1.7.36		■																							
1.7.35			■																						
1.7.33				■																					


Version / Gov Win CM / Ajera CRM
7.6 CU#102
7.6 CU#100
7.6 CU#96
7.6 CU#87
7.6 CU#83
7.6 CU#80
7.6 CU#69
7.6 CU#66
7.6 CU#65
7.6 CU#64
7.6 CU#09
7.6 CU#03
7.6
7.5
7.4 CU#06
7.4 CU#05 or Lower
7.3 CU#13 or Higher
7.3 CU#12 or Lower
7.2 CU#14 or Higher
7.2 CU#13 or Lower
7.1 CU#11 or Higher
7.1 CU#10 or Lower
7.0 SP1 HF#6 or Higher
7.0 SP1 HF#5 or Lower
6.2
Touch Server
1.7.32
1.7.31
1.7.30
1.7.29
1.7.28
1.7.27 (except GovWin CM)
1.7.4/ 1.7.6/ 1.7.8-1.7.10 /1.7.13-1.7.16 /1.7.18-1.7.26
1.7.2/ 1.7.3
1.7
1.6
1.5



Attention:

- For Vision Touch 1.7.34, there is no update in the version compatibility matrix since there are no required server-side changes.
- Starting version 1.7.27, Touch CRM is no longer releasing updates for GovWin CM.
- If you are using Azure authentication, you must upgrade your Touch Server to 1.7.34. For Touch CRM 1.7.19 (or earlier), see the Deltek Touch CRM Technical Installation Guide of that release.

Supported Mobile Operating Systems

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

- Apple iOS 17 and higher
- Android 11 and higher

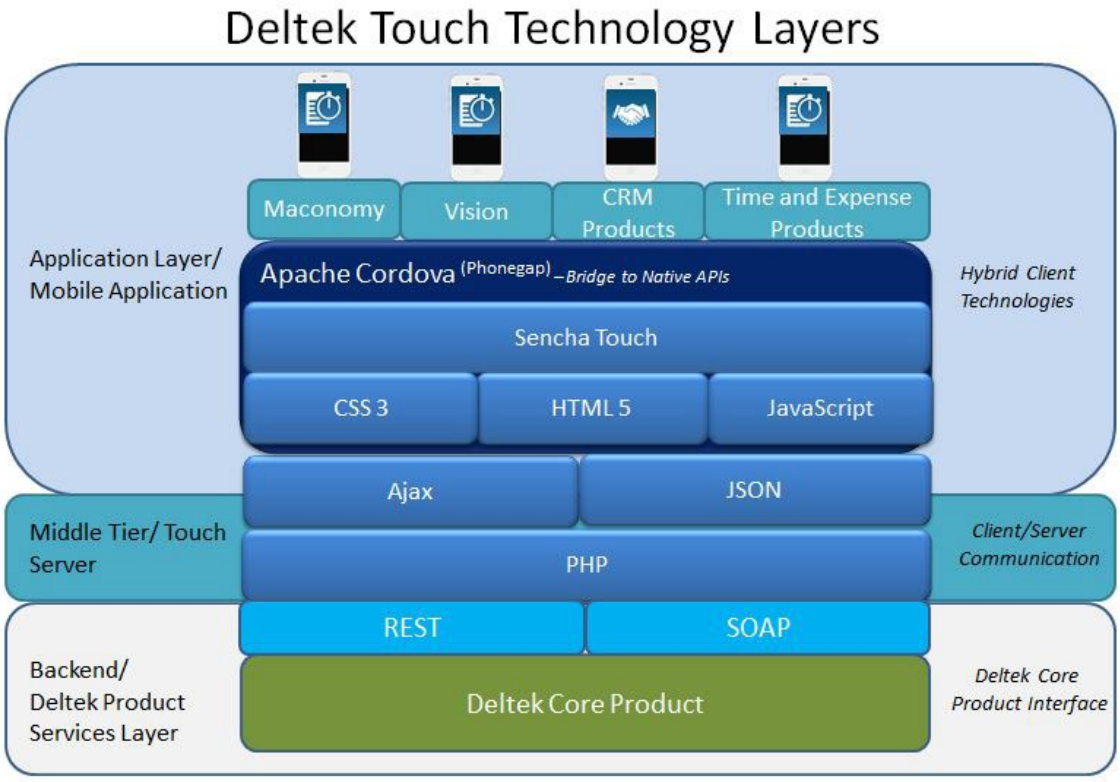
Deltek Touch Infrastructure

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.

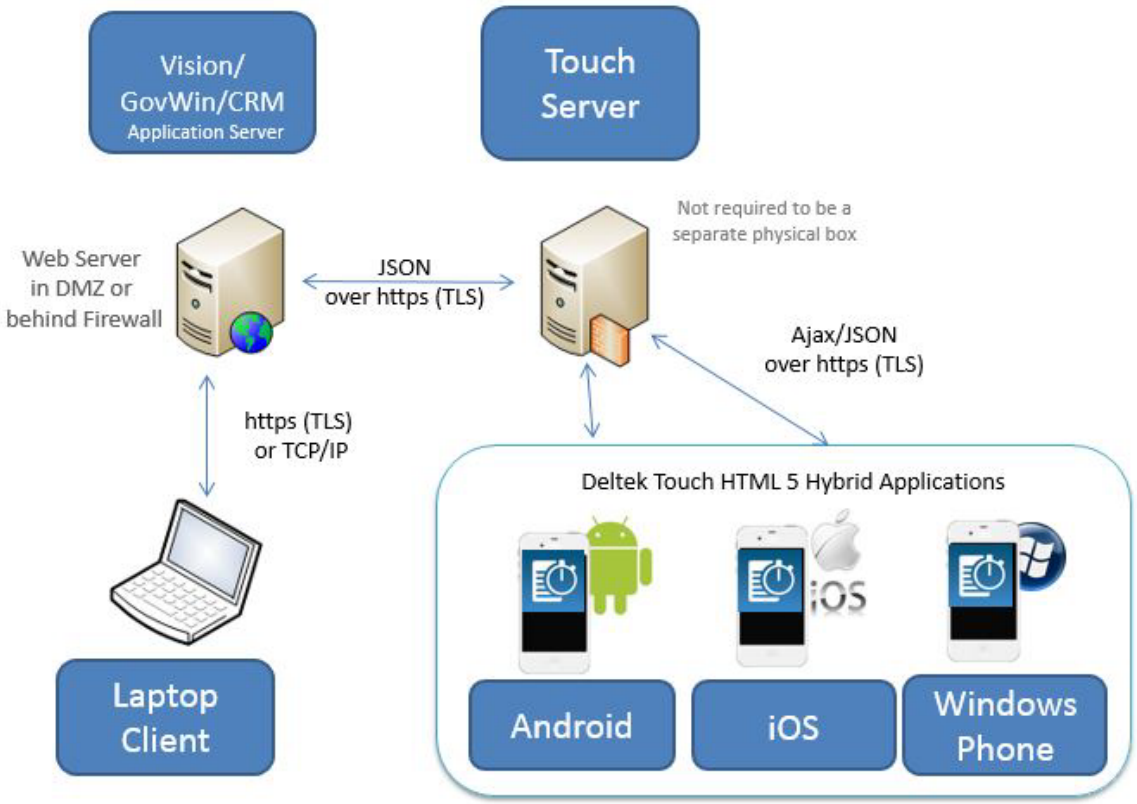
This infrastructure applies to Deltek Touch Time & Expense for Vision, Deltek Touch CRM, Deltek Touch for GovWin CM, and Deltek Touch CRM for Ajera.

Technical Platform



Supported Deployment Scenarios

The Deltek Touch for Vision application may be installed on another IIS server or as a separate directory on an existing Vision IIS server.



Deltek recommends the use of HTTPS protocol over HTTP when transmitting data over the Internet, unless you are using a VPN. HTTPS encrypts the data in transit. This is even more important when using Windows Authentication.

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.

> **Note:** 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**.

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

Touch CRM Installation on Windows Server

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 *Deltek Touch CRM* in *Apple App Store* and *Google Play*) on your mobile device.

> **Attention:** 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 **DeltekTouchCRM17381.exe** to launch the Deltek Touch installation program.

   > **Note:** 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 CRM Installation Wizard page, click **Next**.
3. 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.

   > **Note:** 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.

4. *This step only applies if your Deltek CRM core product 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**.
5. On the Deltek <CRM core product> Site page, enter your company's core product server and then click **Next**.

   > **Note:**
   > - The server of your Deltek CRM core product must end with VisionServices.asmx.
   > - When installing Touch CRM on a dedicated server, ensure that the Web service URL of your Deltek CRM core product can be accessed from the Touch Server

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

7. 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.

   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 then click **Install**. Wait until the Setup Successful message displays and then 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 then 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 to log into Touch CRM on your mobile device. Send this URL to all the users who will be using Touch CRM. Click **Finish**.

Appendix A: Touch Server URL in Email

Logging on for the first time no longer requires users to enter the complete URL of the Touch Server. You now send them an email message containing a link that directs them to a page that displays one link or two separate links, depending on their mobile operating system.

- *For iOS*: When users tap the first link, it directs them to the mobile application in the App Store, allowing them to download it into their device. When they tap the second link, the **Server URL** field in the downloaded application is automatically populated.
- *For Android*: When users tap the link, it either automatically populates the **Server URL** field (if the application is already installed) or directs them to download the application from Google Play (if the application is not yet installed).

> **Note:** This feature only supports Touch Server 1.6.3 and higher.

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

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

1. If Deltek Touch is not installed, it takes them to the appropriate app 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.

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/crm/visionshared/backend/visioncrmurl.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/crm/visionshared/backend/visioncrmurl.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**.

Example: You have been given access to Deltek Touch CRM. Click this link from your device to start using it: https://<yourdomain >/deltektouch/crm/visionshared/backend/visioncrmurl.php

- If you have not yet installed Touch CRM, 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: Enable or Disable Passcode in the configuration.ini File

Starting with 1.7.10, you (as the system administrator) can require users to have a passcode or lock screen on their mobile devices before they can use Touch CRM. This setting ensures that credential information is stored in the encrypted operating system keystore (for iOS) or keychain (for Android).

Note: The keychain and keystore are the operating system embedded encryption storage for the iOS and Android, respectively.

This can be done by the following setting in the configuration.ini file:

- **`REQUIREDDEVICEPASSCODE = 'true'`** – Use this setting if you want users to have a passcode (iOS) or lock screen (Android) on their devices.
- **`REQUIREDDEVICEPASSCODE = 'false'`** – Use this setting is you want Touch CRM to encrypt credential information in the local storage. This does not require users to have a passcode.

Note: For mobile devices running on iOS, set the passcode in the iOS settings application. For mobile devices running on Android, set the lock screen using the PIN or password method.

Appendix C: If You Need Assistance

If you need assistance installing, implementing, or using Deltek 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 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 CRM User Guide *The exact name of the user guide varies, depending on your Deltek CRM core product.*	This document contains detailed information and instructions on how to use various features of the application.
Deltek Touch CRM Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.

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