Deltek

Deltek Touch 3.7

App Pre-Release Notes

Note: These pre-release notes are presented in DRAFT form and are subject to change. Final Release Notes for Touch 3.7 will be released to coincide with the product release, May 14, 2021.

April 9, 2021

Contents

Touch App Version 3.7

Mobile Operating System: Android 9 (or higher) and iOS 13 (or higher)

Supported Versions

Deltek Touch supports the following versions:

- Android 9 (or higher) and iOS 13 (or higher)
- Maconomy 2.4 (or higher) and 2.5 (or higher)
- Touch Backend 2.3 and 3.1 (or higher)
- Windows Server 2012 (or higher)

De-Supported Versions

There are no de-supported versions for this release.

Note: To check if your version is supported, tap ☰ **» Settings » About** in the app.

Enhancements

Touch App Enhancements

The following enhancements are available when you upgrade to the Touch app version 3.7:

Improved Loading Spinner on Login

Deltek Tracking: 1400582

A new spinner message is added to the **Login**, **PIN,** and **Biometrics** screens, and is displayed until you reach your default screen. The loading spinner indicates the log in request is processing. This enhancement is available in REST Touch with no additional setup needed.

Pull-to-Refresh List Screens

Deltek Tracking: 1380687

The pull-to-refresh functionality is introduced on the **Timesheet** screen in Touch 3.6, which allows you to manually refresh timesheet data at any time by pressing the top of the screen and pulling downward. You can now utilize this functionality on the **Expense Sheets**, **Mileage Sheets**, **Purchase Orders**, **Absence Requests**, and **Allowance Requests** screens. A time stamp displays at the bottom of the screen once you refresh. By default, this feature is available for all REST Touch users and does not require setup modifications.

Missing Receipt Error in Archives

Deltek Tracking: 1323873

You can attach a receipt to your expense reports by taking a photo of the receipt or selecting a photo of the receipt either from your device's gallery or the Archives folder. The Archives folder contains all the receipts you already attached to your expense sheet lines. Previously, when you

tap **Pick from Archive** on the **Attach Receipt** screen prior to attaching any receipts to other expenses, "The record was not found." error message appears. The message erroneously indicated there is a receipt in the Archives folder but you cannot retrieve it. With this enhancement, the error message is changed to "There are no available receipts."

Minor Expenses UI Enhancements

Deltek Tracking: 1323873

Receipts are regularly attached to expense sheets. Previously, it is difficult to identify if a receipt is attached to an expense sheet line on the **Approvals** screen, and to view or edit the details of a receipt on the **Expense Sheet Line** screen. To address these concerns, a **Paperclip** icon and a **View Details** icon are added.

A **Paperclip** icon is now visible next to an expense sheet line with a receipt on the **Approvals** screen, whereas the **View Details** icon is added to the **Receipt** field in the **Expense Sheet Line** screen which allows you to view the attached receipt. In addition, the **Paperclip** icon on the expense sheet lines are now center aligned and positioned next to the expense value.

Quick Capture with ICR Enhancements

Deltek Tracking: 1400564, 1400544, 1392185

Quick Capture with intelligent character recognition (ICR) is introduced with the Touch app version 3.6 and Maconomy 2.5.2. The feature essentially made expense entry automation possible through capturing photos of your receipts and converting these to machine-readable data for your expense sheets. To further enhance the feature, application performance monitor (APM) logging and the capability to browse local and cloud files on iOS devices are now added functionalities with Touch 3.7.

APM logging is integral in monitoring user interface performance. By extending the feature to Quick Capture with ICR, you can track some of the most time-consuming tasks in Touch like the ICR scanning of receipts and the creation of expense sheets with newly attached receipts. Furthermore, if you are using Touch on an iOS device, you can now upload photos and PDF files either from your phone storage or iCloud. You can access and manage your files in real time and simply attach these to your expense sheets as needed. Photos with JPG, PNG, or BMP formats are allowed, and these are automatically converted to JPG when uploaded to the Touch server. On the **Quick Capture** screen, tap the **More** button on the upper right corner and tap **Browse**. When you select a photo or PDF file, the ICR process is initiated and some of the fields in your expense sheets may be automatically filled in. It is recommended to review the expense information before saving.

Customizable Actions in REST

Deltek Tracking: 1323885

Consultants can now tailor actions according to specific customer needs, which offers function and task flexibility in Deltek Touch. You can now modify an existing action, add a new action, and even combine actions on the action menu of all Touch screens, excluding Approvals. Customizing actions require Java extension, and in some cases, changing the Touch layouts.

Modify an Existing Action

There are various default actions already available in Maconomy. However, if you want to tweak the functionality of a specific default action, you can make modifications in Java extension with no additional changes needed in the Touch layouts. It is important to consider that any changes you make also impact the functionality of the action in the Workspace Client and iAccess.

Add a New Action

Consider creating a new action when there is no existing Maconomy action that matches the customer requirements or when there is an existing Maconomy action but you prefer the action to perform differently in Touch. Unlike modifying default actions, you can specify if the action applies in the Workspace Client, iAccess, Touch, or all these applications. If you prefer to use the action in Touch, the Java extension must be on the container used in Touch and you must add the action in the Touch layout.

Combine Actions

There are some instances when the customer requires an action to have dual functionality. For example, the customer wants to be able to submit a timesheet and release it at the same time. You can either modify an existing action to have both functionalities or create a new action that includes both. You should combine actions using Java extension.

> **Note:** For more information on using Java extension and changing Touch layouts to customize actions, see the Customize Actions section in the *Deltek Touch 3.7 for Maconomy 2.5.3 Layout Configuration Guide.*

Updated Calendar Widget in Daily Timesheets

Deltek Tracking: 1420186

When you are on the Daily submit mode setting, you can view your daily timesheets from the **Calendar** screen, which now features an updated calendar widget. You can swipe left on the calendar widget to view the next month or swipe right to navigate to the previous month. The swiping functionality works similarly to the single arrows on the calendar widget, but enables a smoother switch between months.

Maconomy Enhancements

The following enhancements are available when you upgrade to the Touch app version 3.7 and Maconomy 2.5.3:

Access Token for 2FA Enrollment

Deltek Tracking: 1351331, 1345228

Two-factor authentication (2FA) already offers access security by requiring users to provide two types of information, specifically their account credentials and a verification code, to confirm their identity prior to logging on to Deltek Touch. With Touch 3.7, users can also be required to provide an access token before 2FA enrollment for an added layer of account security. The **2FA Account Setup** screen is updated to support this enhancement.

On the **2FA Account Setup** screen, two new steps are added to the previously three-step 2FA app registration process. You no longer have to go through the **Enter Token** screen, and instead you can directly request for an access token on the **2FA Account Setup** screen. The token is sent to your registered email address and is valid for five minutes.

> **Note:** For more information on logging in with 2FA, see the Two-Factor Authentication (2FA) section in the *Deltek Touch 3.7 for Maconomy 2.5.3 User Guide.*

Detaching Receipts from Expenses

Deltek Tracking: 1323873

You can now remove receipts from an expense sheet line without deleting the document from the Archives folder through the new **Detach Receipt** action. This action is added to the action menu on the **Expense Sheet Line** screen. You can remove a receipt from submitted expense sheets if you have permission to make modifications.

Customizing Receipt Image and PDF Settings

Deltek Tracking: 1400564, 1400540

One of the best ways you can optimize Quick Capture is by enabling the intelligent character recognition (ICR) functionality. With ICR you can easily retrieve expense information through taking photos of the receipts. You also have the option to combine receipts into a PDF and attach the file to your expenses. However, when you utilize this feature, it is common to obtain large photos, which consequently lead to a large PDF if combined. Uploading large files to the Maconomy server takes more time.

With this release, consultants can now modify the default image size and PDF quality settings according to the device through new server side configuration settings. Previously, the maximum image size is 1.5 MB and the PDF quality is 2.0 by default. Modifying the file settings allows users to save expense sheet information faster without compromising the readability function of ICR.

The following are the six new server settings you can modify:

- **ICRPictureMaxFileSizeAndroid**, **ICRAllowStitchingAndroid**, and **ICRPDFQualityAndroid** – These settings are used for Android devices.
- **ICRPictureMaxFileSizeiOS**, **ICRPDFQualityiOS**, and **ICRAllowStitchingiOS** – These settings are used for iOS devices.

ICRPictureMaxFileSizeAndroid and **ICRPictureMaxFileSizeiOS** are the new server settings which allow you to control the maximum file size of the receipts you capture. The default size of images captured using an Android device is 1 MB, whereas for an iOS device it is 1.5 MB. You can set the size as low as 200 or as high as 2.5 MB.

In addition, you can now enable or disable the stitching functionality, which allows users to combine two to four receipt images into a PDF. Update the **ICRAllowStitchingAndroid** or **ICRAllowStitchingiOS** setting to modify this functionality.

Finally, with the **ICRPDFQualityAndroid** and **ICRPDFQualityiOS** server settings you can control the quality of photos to be stitched into a PDF, which effectively reduces the PDF file size. The default quality is 1.5 for Android and iOS devices. You can standardize the quality from 1.0 to 5.0.

> **Note:** This functionality is turned on by default, and requires Maconomy 2.5.3 (or later). When you upgrade your Maconomy version, review the values of your server settings. For more information, see the Server Side Configuration Settings section of the *Deltek Touch 3.7 for Maconomy 2.5.3 Installation Guide*.

Software Issues Resolved

Defect 1217142

Capability to Delete Check-in Information from Submitted Daily Timesheets

Previously, you can delete and modify check-in entries even after submitting your daily timesheets on the **Timesheet** screen. Deletions or modifications should not be possible after submission. This defect affected Workspace Client and REST Touch users. This error is corrected when you upgrade to Maconomy 2.5.3 (or higher).

Defect 1237982

Rejection Reason Appears on Approved Expenses

As an Approver, you are required to include an explanation for rejecting any filed requests. If you reject a request, reverse the rejection, and finally approve the request, the rejection reason should not display anywhere. However, when you approve previously rejected expenses, the expense sheet status changes to **Approved** but the rejection reason still appears on the submitter's side. This error is corrected when you upgrade to Maconomy 2.5.3 (or higher).

Defect 1256193

Loading Spinner Disappears When Attaching Receipts

Loading spinners are essential in determining the progress of an action you took within the application. For example, if you attach a receipt to your expense sheet and save your changes, a loading spinner displays to indicate the receipt is being uploaded to the Maconomy server and it should appear until the receipt is attached. Previously, when you attempt to attach a receipt, the loading spinner disappears and reappears in a matter of seconds without completing the action. If you repeatedly tap the **Done** button while waiting, you will also encounter an error that prohibits you from saving your changes. These errors are corrected.

Defect 1396875

Unable to View the Same Attachment Consecutively

Previously, you cannot view the same attachment in succession on the **Expense Sheet**, **Purchase Order**, and **Approvals** screens. For example, if you view the attachment of your first expense sheet line but return to the **Expense Sheet** screen, and try to tap the same attachment again, the attachment does not load properly. This defect affected Deltek Touch for Maconomy users on iOS devices. This error is corrected.

Defect 739573

Missing Week Calendar Prevents Logging In on REST

If there is a missing week calendar and you try to log on the application, an error message displays. This defect affects Deltek Touch for Maconomy users who are using REST. This error is corrected.

Defect 1403644

Unmodifiable Touch URL

When the Touch URL becomes invalid, previously you cannot return to the **Touch URL** screen to make modifications. This defect affected Deltek Touch for Maconomy users on Android and iOS devices. A new window now appears which prompts you to change the URL as needed. This error is corrected.

Defect 1428001

Okta Login Error on Android Devices

Previously, if your Deltek Touch login setup includes Okta credentials and a verification code is sent to your registered email, you also have to tap "Do not challenge me on this device for the next 7 days." on the application before completing your authentication. Otherwise, you cannot log in again. This defect affected Deltek Touch for Maconomy users on Android devices. This error is corrected.

Defect 1434316

Timesheet Actions on REST Calls MScript Function

When you save a timesheet line or submit a timesheet on a system using the RESTful web service, the "getNotificationOverview" MScript operation is performed. This defect affected Deltek Touch for Maconomy users on REST. This error is corrected.

Defect 1438631

Disabled Touch APM Logging for Multitenant Systems

Previously, Touch APM logging for IIS with multitenant systems is disabled, which caused entries requests not to be logged. This error is corrected.

Defect 1442639

Unable to Calculate Distance for Mileage Sheets

Distance is not calculated when you previously enter addresses in the **From** and **To** fields on your mileage sheet lines. This error is corrected.

Defect 1443403

No Missing Receipt Error Message in Archives

One of the Touch 3.7 enhancements is the modification of an error message on the **Attach Receipt** screen, which appears when you attempt to select a photo of your expense receipt from an empty Archives folder. The updated error message previously did not display on the screen. This error is corrected.

Defect 1419062

Google Analytics Not Tracking Real Time Data

Previously, active screens are not tracked in real time on Google Analytics. The defect affected usage tracking on Deltek Touch 3.5 and higher. This error is corrected.

About Deltek

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