




Deltek

Deltek GovWin®

Configuration Guide for GovWin
Vantagepoint Connector 2020

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Overview

This configuration guide is for Deltek GovWin IQ and Vantagepoint users. It contains instructions for configuring the GovWin Vantagepoint Connector 2020. This configuration procedure supersedes previous configuration procedures.

The Connector enables GovWin users to:

- Easily import GovWin Opportunities and associated government contacts and buying organizations into Vantagepoint as Projects, Contacts, and Firms
- Map Vantagepoint Firms to GovWin Buying Organizations, as a pre-import step, simplifying opportunity import since the opportunities may be assigned to previously mapped firms.

Requirements

Vantagepoint Requirements

The Connector supports:

- Vantagepoint 2.0.10 and above
- Vantagepoint 3.x all versions
- Vantagepoint 4.x all versions

GovWin IQ Requirements

To enable the integration, you must contact your Deltek GovWin Client Success Manager at (571) 521-7062 or ClientServices@govwin.com and ask them to:

- Enable your GovWin IQ login as a **Vantagepoint Connector Administrator** in MPS. You must be logged in to GovWin IQ as a Vantagepoint Administrator to access the Vantagepoint Connector V4 configuration page in GovWin IQ.
- Confirm that your CRM Connector configuration is set to **This org is enabled for integration with Deltek Vantagepoint (2020 Connector)** on your organization record in MPS.

Configure Your Vantagepoint Instance for the Connector

To perform the steps outlined in this section, you must be a Vantagepoint administrator.

Authorize API Integration in Vantagepoint

You must authorize API Integration in Vantagepoint to be able to authenticate your Connector users.

To authorize API Integration:

1. In Vantagepoint, navigate to **Utilities » Integrations » API Authorization**.
2. On the API Authorization page, click **Generate Secret** to generate a CLIENT ID / CLIENT SECRET pair for your DATABASE.
3. In the next configuration step, you will need to copy the values generated here, and paste them in GovWin IQ.

Configure the Connector in GovWin IQ

Use GovWin IQ Environment Administration to Configure the Connector

Before you can configure the connector, make sure that your Deltek GovWin Client Success Manager has performed these steps in MPS, the GovWin IQ provisioning system:

- Your GovWin IQ login is enabled as **Vantagepoint Connector Administrator**.
- Your organization's CRM Connector configuration is set to **This org is enabled for integration with Deltek Vantagepoint (2020 Connector)**.

Attention: Contact your Deltek GovWin Client Success Manager at (571) 521-7062 or ClientServices@govwin.com.

After you log in to GovWin IQ, navigate to the Vantagepoint Connector Admin / Environment Administration page, which is available from the **Vantagepoint Connector Administration** link on the GovWin IQ Support tab.

Some of the configuration steps that Vantagepoint Connector Administrators uses to configure the operation of the Connector are required and some are optional, as described below.

Initialize an Environment for Access to Your Vantagepoint Instance

You can define multiple Environments—one per Vantagepoint instance that you wish to connect to GovWin IQ.

This is a **required** step.

To define an environment:

1. On the Environment Administration page, click the **Add New Environment** link.
2. On the Environment Settings page, enter the following information.

Field/Option	Description
Environment Name	The name used to identify your Vantagepoint environment. You can have multiple environments configured, so choose a name that you'll recognize as belonging to the Vantagepoint instance to which you are connecting.
Environment Host Name	The host name that you use to access your Vantagepoint instance. It must be a valid URL.
Default Database	The database in which your Vantagepoint instance is defined.
Client ID	Copy the Client ID value defined in the API Authorization section of your Vantagepoint instance, and paste it here.

Field/Option	Description
Client Secret	Copy the Client Secret value defined in the API Authorization section of your Vantagepoint instance, and paste it here.

- Click **Save Changes**.

Three tabs in the Environment Administration section become available for configuration:

- Contact Mappings
- Project Mappings
- Configuration Settings

Assign Default Vantagepoint Environments to your Connector Users

If you have more than one Vantagepoint environment defined, you need to assign a default environment for your users, and individually, one for you. However, if only a single Vantagepoint environment is defined, this step does not apply since that environment is automatically the default for everyone.

This is a **required** step when multiple Vantagepoint environments are defined.

To assign a default Vantagepoint environment:

- Take one of the following actions:
 - For Yourself:** On the Environment Administration page, select the **My Current Environment** option next to the environment that you want the Connector to use when you use the Connector to import opportunities into Vantagepoint.
 - For All Users:** On the Environment Administration page, select the **Default for All Users** option next to the environment that you want to be the default for your users. Any user may override the default by selecting their own current environment.
- Click **Save Settings**.

Vantagepoint Connector Admin

Download Connector Installation Guide

Environment Administration

Assign Firms in My Current Environment

Create and manage GovWin IQ access to your Vantagepoint.com environments. "Default for All Users" defines the default environment for all of your users, which they may individually change to assign their active environment for Connector access. Use "My Current Environment" to assign your individual active environment. You may click on the **Environment Name** to further define settings and mappings for that specific environment.

Default for All Users	My Current Environment	Environment Name	Environment URL	Revoke My Connection	Remove
<input checked="" type="radio"/>	<input type="radio"/>	VantagepointTwoOnPremGLDemo	https://vantagepointse.deltek.com/vantagepoint/api	Revoke	X

Save Settings

★ Required field

Manage Configuration Settings

This step is **optional**.

The Connector applies the values defined in the Configuration Settings section to opportunities, contacts, and buying organizations that you import into Vantagepoint as projects, contacts, and firms.

You must connect to Vantagepoint to manage settings because the Connector must make API calls to Vantagepoint to display the information on the Configuration Settings page.

To manage Configuration Settings:

1. On the Environment Administration page, click the **Environment Name**.
2. On the Environment Settings page, click **Configuration Settings** from the left navigation pane.

Vantagepoint Connector Admin > VantagepointTwoOnPremGLDemo
[Return to Environment Administration](#)

Environment Settings
Contact Mappings
Project Mappings
Configuration Settings

Configuration Settings

Configure default values and records for this Vantagepoint environment.

Configuration Settings

Vantagepoint Version: *
Vantagepoint version 2
The version of your Vantagepoint instance

Default Stage: *
Pending
The default stage applied to Projects

Source: *
GovWin IQ Sourced
The "Source" value applied to Projects

Project Label: *
Project
In Vantagepoint, if you have changed the label from "Project" to something else, then enter it here as well so that the Connector labeling is accurate.

Project Auto-Numbering: *
Yes
To ensure valid import of Projects by the Connector, if the auto-numbering for projects setting is enabled in Vantagepoint, it should be enabled here as well.

Firm Auto-Numbering: *
Yes
To ensure valid import of Firms by the Connector, if the auto-numbering for firms setting is enabled in Vantagepoint, it should be enabled here as well.

Vantagepoint Contact Record:
Start typing or select...
If Contacts in your Vantagepoint instance are defined to have custom required fields, then select a Vantagepoint Contact Record here. The Connector will use this to apply default values for those fields when importing contacts

Vantagepoint Project Record:
Start typing or select...
If Projects in your Vantagepoint instance are defined to have custom required fields, then select a Vantagepoint Project Record here. The Connector will use this to apply default values for those fields when importing projects.

Vantagepoint Firm Record:
Start typing or select...
If Firms in your Vantagepoint instance are defined to have custom required fields, then select a Vantagepoint Firm Record here. The Connector will use this to apply default values for those fields when importing firms.

Vantagepoint Credentials

Vantagepoint Username:
The Vantagepoint username to be used by the scheduled update process

Vantagepoint Password:
The Vantagepoint password to be used by the scheduled update process

Save Changes
Cancel

* Required field

3. Review and, if necessary, update the following fields.

Field	Description	Default Value
Vantagepoint Version	The version of your Vantagepoint instance.	Vantagepoint version 3.
Default Stage	This is the stage applied to opportunities that the Connector imports into Vantagepoint as projects.	Pending , if available as a Stage value for this Vantagepoint instance; otherwise, the first value in the drop-down list of available stages.
Source	This is the Source value applied to opportunities that the Connector imports into Vantagepoint as projects.	GovWin IQ Sourced
Project Label	If your Vantagepoint instance has been configured to have Project labeled as something else (for example, Contract), then define it here so that the labeling the Connector applies is accurate.	Project
Project Auto-Numbering	Whatever the Project Auto-Numbering configuration is in your Vantagepoint instance should be reflected here to ensure valid import of Projects by the Connector.	Yes
Firm Auto-Numbering	Whatever the Firm Auto-Numbering configuration is in your Vantagepoint instance should be reflected here to ensure valid import of Firms by the Connector.	Yes
Vantagepoint Username / Password	The Vantagepoint credentials to be used by the scheduled update process. Note that this should be a separate set of Vantagepoint credentials, distinct from your own or any other users' credentials, and will only be used in the context of the scheduled update.	

4. Use the records below to prevent errors from occurring during an import when required fields are empty.

Use these fields to supply default values for the Connector to use when data values for contact, project, or firm fields are missing during an import. You need only supply these records if your Vantagepoint instance is configured with non-standard required fields.

Option	Description
Vantagepoint Contact Record	Use this record as a template to define default values for required contact fields that the Connector is not otherwise able to populate. In Vantagepoint, create a dummy contact record and define values for the missing fields. Then select that contact here.
Vantagepoint Project Record	Use this template to define default values for required project fields that the Connector is not otherwise able to populate. In Vantagepoint, create a dummy project record and define values for the missing fields. Then select that project here.
Vantagepoint Firm Record	Use this template to define default values for required firm fields that the Connector is not otherwise able to populate. In Vantagepoint, create a dummy firm record and define values for the missing fields. Then select that firm here.

5. Click **Save Changes**.

Manage Project Mappings

This step is **optional**.

Default GovWin Opportunity to Vantagepoint Project field mappings are pre-configured. This step is needed only if you need to customize the default mappings.

An example would be if you want to assign mappings to some of the fields that are pre-configured as **Do not import this field**.

Warning: If a project field is a required field in your Vantagepoint instance, you should be cautious about remapping it, as this may cause Connector imports to fail.

To manage project mappings:

1. On the Environment Administration page, click the **Environment Name**.
2. On the Environment Settings page, click **Project Mappings** from the left navigation pane.

Vantagepoint Connector Admin > VantagepointTwoOnPremGLDemo
[Return to Environment Administration](#)

Environment Settings
Contact Mappings
Project Mappings
Configuration Settings

Project Field Mappings

Exercise caution when modifying GovWin IQ mappings to Vantagepoint **required** fields. You should avoid modifying those mappings where the default maps to a Vantagepoint project **required** field, as this may cause the import of GovWin IQ opportunities to fail.

GovWin IQ Field Name	Vantagepoint Project Field Name	Overwrite with Updates
Title	Name	<input checked="" type="checkbox"/>
Title	Long Name	<input checked="" type="checkbox"/>
Description	Additional Details	<input checked="" type="checkbox"/>
GovEntity	Primary Company	<input checked="" type="checkbox"/>
Duration	Duration	<input checked="" type="checkbox"/>
Type of Award	Government Award Type	<input checked="" type="checkbox"/>
Contract Type	Government Contract Type	<input checked="" type="checkbox"/>
Competition Type	Government Competition Type	<input checked="" type="checkbox"/>
Solicitation Number	Solicitation #	<input checked="" type="checkbox"/>
NAICS	NAICS	<input checked="" type="checkbox"/>
Total Contract Value	Owner Value	<input checked="" type="checkbox"/>
Competitors	Firms	<input checked="" type="checkbox"/>
Milestones	Milestones	<input checked="" type="checkbox"/>
Analyst Updates	Activity	<input type="checkbox"/>
Related Document Links	Links	<input checked="" type="checkbox"/>
Contract Vehicles	IQ Contract Vehicle	<input type="checkbox"/>
IQ Opportunity URL	IQ Opportunity Link	<input type="checkbox"/>
City	Do not import this field	<input type="checkbox"/>
State	Do not import this field	<input type="checkbox"/>
Country	Do not import this field	<input type="checkbox"/>
Zip	Do not import this field	<input type="checkbox"/>

Save Changes
Cancel
[Reset to Default](#)

3. Perform the following to change the settings:

- To override the default mapping for a **Project** field, assign it to a different Vantagepoint Project field of the same data type.

Note: This option is not always available. All the fields that are deemed to have standard mappings can only be switched between **Do not import** and the standard mapping.

The list of available Vantagepoint Project fields includes those custom fields that you may have defined via Screen Designer, in Vantagepoint.

- To specify that a field not be imported, select **Do not import**.
- To specify that a field should be updated when you update content from GovWin IQ, select **Overwrite with Updates**.

4. Click **Save Changes**.

Manage Contact Mappings

This step is **optional**.

Default GovWin Opportunity to Vantagepoint Contact field mappings are pre-configured. This step is needed only if you need to customize the default mappings.

An example would be if you want to assign mappings to some of the fields that are pre-configured as **Do not import this field**.

To manage contact mappings:

1. On the Environment Administration page, click the **Environment Name** to display the Environment Settings page.
2. On the Environment Settings page, click **Contact Mappings** from the left navigation pane.

Vantagepoint Connector Admin > VantagepointTwoOnPremGLDemo
[Return to Environment Administration](#)

Environment Settings
Contact Mappings
Project Mappings
Configuration Settings

Contact Field Mappings

Exercise caution when modifying GovWin IQ mappings to Vantagepoint **required** fields. You should avoid modifying those mappings where the default maps to a Vantagepoint contact **required** field, as this may cause the import of GovWin IQ contacts to fail.

GovWin IQ Field Name	Vantagepoint Contact Field Name	Overwrite with Updates
First Name	First	<input type="checkbox"/>
Last Name	Last	<input type="checkbox"/>
Title	Title	<input type="checkbox"/>
Business Phone	Firm Business Phone	<input type="checkbox"/>
Mobile Phone	Mobile	<input type="checkbox"/>
Fax	Fax	<input type="checkbox"/>
Email	Email	<input type="checkbox"/>
Street 1	Firm Business Address 1	<input type="checkbox"/>
Street 2	Firm Business Address 2	<input type="checkbox"/>
City	Firm Business City	<input type="checkbox"/>
State / Province (2 character codes)	Do not import this field	<input type="checkbox"/>
State / Province (full name)	Firm Business State/Province	<input type="checkbox"/>
Zip / Postal Code	Firm Business Zip/Postcode	<input type="checkbox"/>
Country	Firm Business Country	<input type="checkbox"/>

Save Changes
Cancel
Reset to Default

3. Perform the following to change the settings:
 - To override the default mapping for a contact field, assign it to a different Vantagepoint contact field of the same data type.

Note: The list of available Vantagepoint Contact fields, includes those custom fields that you may have defined via Screen Designer, in Vantagepoint.

- To specify that a field not be imported, select **Do not import**.

- To specify that a field should be updated when you update content from GovWin IQ, select **Overwrite with Updates**.

4. Click **Save Changes**.

You are now ready to start using the Connector to import GovWin IQ content into Vantagepoint.

Get Started: Import GovWin IQ Opportunities into Vantagepoint

After you install and configure the Connector, start using the Connector to import opportunities and related contacts into Vantagepoint.

To import opportunities and key contacts:

1. In GovWin IQ, use the **Add to Vantagepoint** button that displays on GovWin opportunities to import the opportunity and related contacts into Vantagepoint.

Federal Opportunity Details

Fort Sill Post Wide Refuse Services

Opportunity ID: 149167

Buying Organization: ARMY > ARMY INSTALLATION MANAGEMENT COMMAND
[View Org Chart](#)

Organization Type: Public Safety

At a Glance

Status:	Source Selection
Solicitation Date:	12/05/2019
Award Date:	03/2020 (Deltek Estimate)
Value(\$K):	2,227
Competition Type:	HUBZone Set-Aside

Program Summary

The Department of the Army, Army Installation Management Command, has a requirement for post-wide refuse collection services for the Fort Sill, Oklahoma Army Post.

Opportunity Summary

Status	Source Selection
Solicitation Date	12/05/2019
Award Date	03/2020 (Deltek Estimate)
Solicitation Number	W9124L19R0023
Value (\$K)	2,227 (Deltek Estimate) (More info)
Competition Type	HUBZone Set-Aside
Type of Award	Other
Primary Requirement	Operations & Maintenance
Duration	1 year(s) base plus 4 x 1 year(s) option(s)
Contract Type	Firm Fixed Price

Latest Analyst Update

01/13/2020

The Contracting Office has not publicly released any Modifications or Amendments extending the Bids due date. Bids were to have been submitted no later than January 10, 2020. Deltek will now place this effort in the Source Selection phase and will provide Award details as they become available.

[View All Analyst Updates](#)

Contacts

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Addam Tate

2. Use the **Update My Vantagepoint Projects** link on the Quick Links panel of the **My GovWin** home page to navigate to the Update Project page to update your Vantagepoint projects sourced from GovWin:
 - The Update Projects panel lists the Vantagepoint Projects created or modified by you, and from which you are able to select Projects to update immediately.
 - In addition, if you are configured as a **Vantagepoint Connector Administrator**, then you are also able to schedule updates.
 - Updates can be scheduled with daily or weekly frequency.
 - All accessible Vantagepoint Projects sourced from GovWin are available for scheduled updates, not only the ones that you individually created or modified.

Vantagepoint Connector
Return to My GovWin IQ Home

Update Project
VantagepointTwoOnPremGLDemo

Update Project

Update History

All Projects, created/modified by you in Vantagepoint, are available here. Select Projects that you would like to update now.

Scheduled Updates

Define schedule frequency of automated updates.

- As a Vantagepoint Connector administrator you may schedule updates to all the Projects in your Vantagepoint system that are GovWin IQ sourced; not only the ones that you individually created.
- You may limit the maximum number of your Projects to be updated at one time. If your total set of updatable opportunities exceeds the update limit, the most relevant Projects are updated, based on the time difference between when they were last updated in Vantagepoint and when they were last updated by GovWin IQ analysts.
- Only Projects for which there are IQ analyst updates available are subject to scheduled update.

Scheduled Update Frequency:
Please select...

Scheduled Update Project Limit:
Please select...

Save

The available results are capped at 5,000 records.

Update Projects

Showing 1 to 20 of 20 entries

	Opportunity Name	IQ Opportunity ID	Opportunity Type	Most Recent Connector Update	Most Recent IQ Analyst Update	IQ Updates Available
<input checked="" type="checkbox"/>	AIR FORCE DEFENSE AERONAUTICAL INFORMATI	151929	Tracked Opportunity	01/10/2020 04:36 PM	07/25/2019 12:32 PM	
<input type="checkbox"/>	OPERATION OF THE TREASURE ISLAND JOB COR	142423	Tracked Opportunity	01/10/2020 04:34 PM	01/10/2020 04:29 PM	
<input type="checkbox"/>	COMMON MUNITION BIT REPROGRAMMABLE EQUIP	177045	Tracked Opportunity	01/10/2020 01:43 PM	12/10/2019 05:29 PM	

Update Selected

Clear Selections



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