Deltek

Deltek Vantagepoint® 6.0

Vantagepoint Connect Integration Guide for Outlook

April 17, 2023

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Contents

Vantagepoint Connect Add-In

Use the Vantagepoint Connect add-in with Vantagepoint CRM to set up two-way synchronization of your contacts and calendar items with your email application.

Videos: See related videos below.

Email Applications

Integrating with Outlook and Gmail, Vantagepoint Connect provides a single point of entry for collaborating and sharing your contacts and calendar items with clients to nurture your client relationships.

While using Outlook, you can also create records directly from an email and access a scheduling assistant so you can share your availability with clients and quickly and efficiently set up appointments.

Vantagepoint Connect Set Up

System administrators configure the Vantagepoint Connect Add-in in the Connect Administration Integration Utility in **Utilities** » **Integrations**. Use this utility to set up the users and associated profiles that will allow synchronization of contacts and calendar items via the email application to Vantagepoint.

Integration Utilities also includes a Connect Sync Options Integration Utility that serves as a dashboard for synchronizing data between Vantagepoint and the Connect Add-in. You can schedule or manually force the synchronization process to occur.

Videos

Title	Description
Introduction to Vantagepoint Connect for Outlook	The Vantagepoint Connect add-in with Vantagepoint CRM provides two-way synchronization of your contacts and calendar items with your email application. This tutorial includes videos of the key features of Vantagepoint Connect when used with Outlook.
Adding New Users in Vantagepoint Connect for Outlook	Learn about the different user and installation scenarios to set up the Connect add-in with Outlook.
Vantagepoint Connect for GMAIL: Introduction	Within this tutorial, watch short videos to learn about the key features of Vantagepoint Connect for Gmail. The videos are: ▪ Launch the Contextual Pane ▪ Contextual Pane Options ▪ Contextual Pane Search Feature ▪ Display Records ▪ Create an Activity from an Email

Title	Description
	▪ Create a Contact from an Email ▪ Create a New Contact ▪ Create a Firm ▪ Sync the Calendar ▪ Sync Contacts

Checklist: Basic Steps to Provision Vantagepoint Connect for Outlook

You complete several steps to provision, or activate, the Vantagepoint Connect for Outlook application. You must complete the steps listed in the checklist before you use Connect; under each step, use the links provided to access the individual procedures that you must complete.

Before You Begin

- To use Connect, the Vantagepoint application must be exposed to the internet via a publicly facing URL. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, it will be necessary to add Connect IP addresses to the **Allow** list. See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail or Troubleshoot Synchronization and Connect Add-in Issues for Outlook help topics for the list of IP addresses.
- The security role for the individual who is responsible for configuring Connect must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect Administration** is selected under **Utilities** » **Integrations**.
- The individual who is responsible for configuring Connect (selecting the **Connect Administration** option in **Utilities** » **Integrations**) must have an employee record associated with their user record in **Settings** » **Security** » **Users**. The employee record must also have a valid email address.
- Each employee who will use Connect must have an employee record that includes an email address and that is associated with a user record in **Settings** » **Security** » **Users**.
- You must create a **Client ID** and **Secret** in API Authorization in **Utilities** » **Integrations** that is specific to Connect. You only need to generate the secret one time for each integration.
- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

Step 1: Set Up Integration Configuration

Use the Connect Administration utility to record your Vantagepoint username and password and to log in to the application.

See the Set Up Integration Configuration help topic for more information.

Step 2: Optional - Set Up Connect Groups

If you will have multiple Connect users with the same roles and requirements, you can create groups to organize them, set up the users, and then assign multiple users to each group.

Review the Set Up Connect Users and Installation Scenarios help topic for more information on setting up users and the different installation scenarios.

See the Work with Connect Groups help topic for more information.

Step 3: Set Up Connect Users

Use the Provisioning and Email tabs in the Connect Administration utility to set up the users who will have access to Vantagepoint Connect.

There are different methods for creating users, depending on your type of installation:

- Individual
- Mass Deployment
- Exchange Impersonation

Review the Set Up Connect Users and Installation Scenarios help topic for more information on setting up users and the different installation scenarios.

Step 4: Install Vantagepoint Connect Add-in

Install the Connect Add-in, in both Vantagepoint and Outlook.

See the Install Vantagepoint Connect Add-in help topic for more information.

Step 5: Open and Pin the Vantagepoint Connect Context Pane

Open and pin the Context Pane so that it remains visible in Outlook.
See the Open the Vantagepoint Connect Context Pane in Outlook help topic for more information.

Connect Administration Basics for Outlook

Review the Vantagepoint Connect add-in tabs, grids, tools, and grid options.

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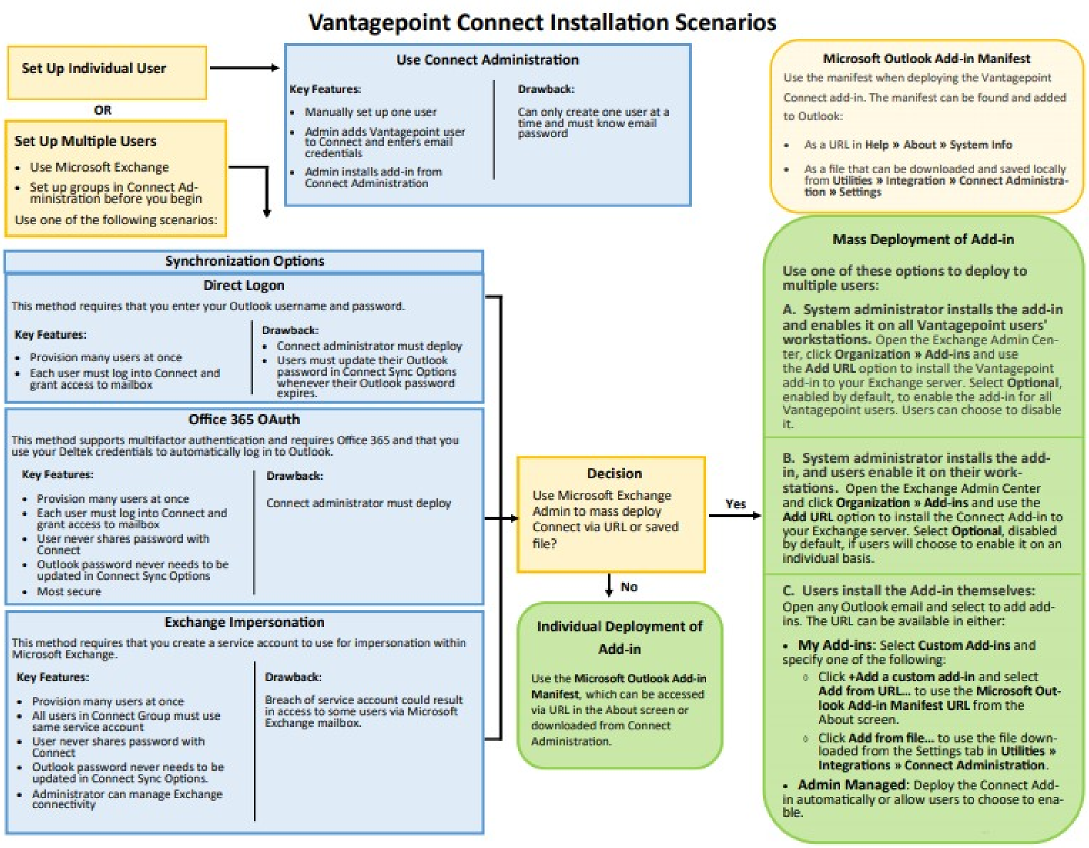
- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

Connect Users and Installation Scenarios for Outlook

In the Connect Administration utility you must set up and provision, or activate, users who will have access to the application. After you activate a user, you can also edit their configuration information, track synchronization status, and review overall statistics and other important data related to their profile.

Videos: See related videos below.

There are different methods for adding one or more new users to Connect Administration. The approach that is best for you depends on the configuration of your application and the preferences or requirements of your IT department.



Review the Checklist: Basic Steps to Provision Vantagepoint help topic for more information.

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Quick Reference Topics

Review quick reference topics that provide instructions for completing basic tasks while working in Vantagepoint Connect.

Context Pane Quick Reference

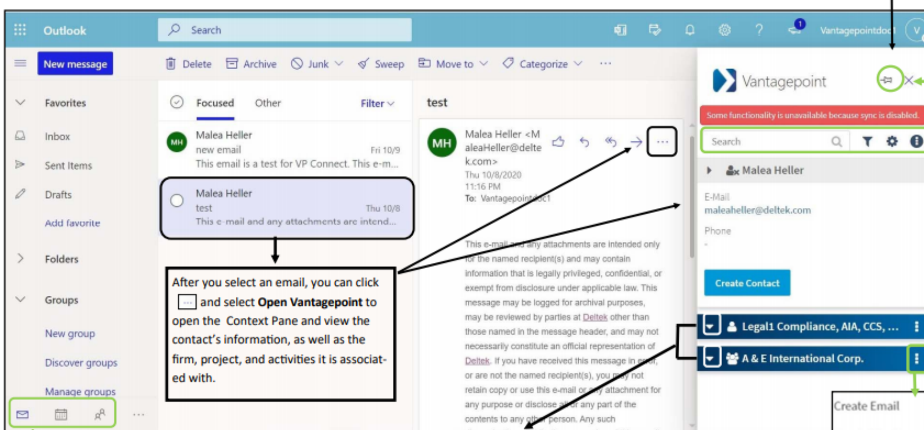
This quick reference provides an overview of Vantagepoint Connect's context pane in Outlook, and how to use it with email, contacts, and the calendar.

When you open the Context Pane, the Vantagepoint information is shown for the sender and recipients of the email message, if they exist in Vantagepoint as contacts or employees. If the sender or recipients are not recognized as Vantagepoint contacts, you have the option to create a contact record. Based on the selected email, the contact and/or employee's email address and associated firm (if available) are added to the respective fields on the Context Pane.

Deltek Vantagepoint Connect Context Pane

Vantagepoint Connect provides a single point of entry for collaborating with colleagues by sharing contacts and calendar items, in addition to nurturing your client relationships. It also provides access to a scheduling assistant so you can share your availability with clients and quickly and efficiently set up appointments. Use the Context Pane to quickly access your Vantagepoint information, including related contacts, firms, activities, and projects.

Connect Context Pane



Pin: Pins the Context Pane to remain open in Outlook.

Context Pane Toolbar

- **Search and Filter:** Enter search details and use the filter option to further specify criteria for locating records.
- **Settings:** View or change synchronization and configuration settings.
- **Menu Options:** Add or update records, specify availability, and open Vantagepoint.

After you select an email, you can click ⋯ and select **Open Vantagepoint** to open the Context Pane and view the contact's information, as well as the firm, project, and activities it is associated with.

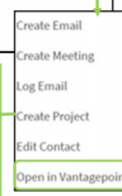
Select the options on the Outlook menu to open:

- **Email:** Connect uses the email addresses to display related contacts, firms, activities, and projects.
- **Calendar:** Use the calendar features to share your calendar and schedule meetings with clients based on your availability.
- **Contacts:** Enter and update contact records in both Outlook and Vantagepoint. Two-way synchronization updates the records in both applications.

Click ⌄ to expand the fields for each area of the Context Pane.

Click ⋮ to open additional menu options for each area of the Context Pane. Options that display depend on the context area. Some of the options include:

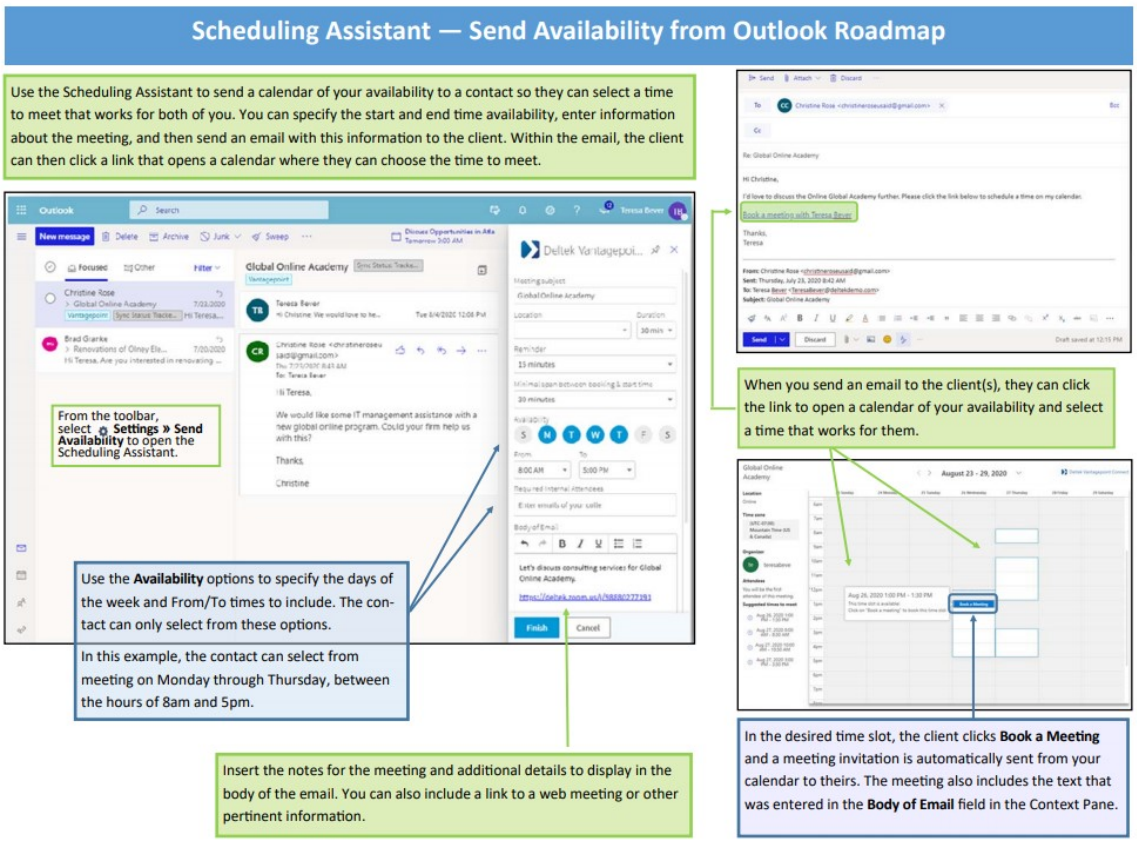
- **Create Email/Meeting:** Create a new email or meeting on the fly.
- **Create and/or Edit [Record]:** Create or edit project, contact, and activity records.
- **Log Email:** Save all information related to an email.



Open in Vantagepoint: Open the record in the Vantagepoint application.

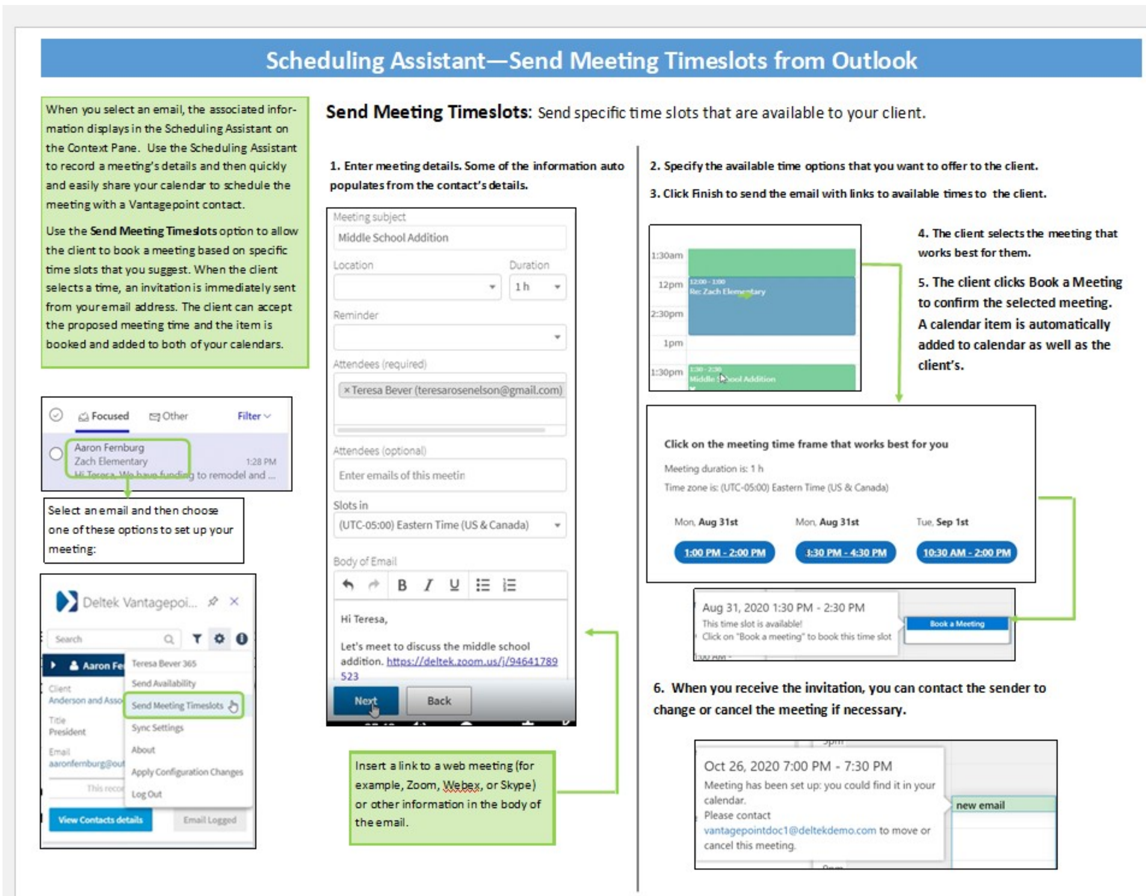
Send Availability from Outlook Quick Reference

This quick reference provides an overview of how to use the Scheduling Assistant to send your availability to clients so they can schedule a time to meet.



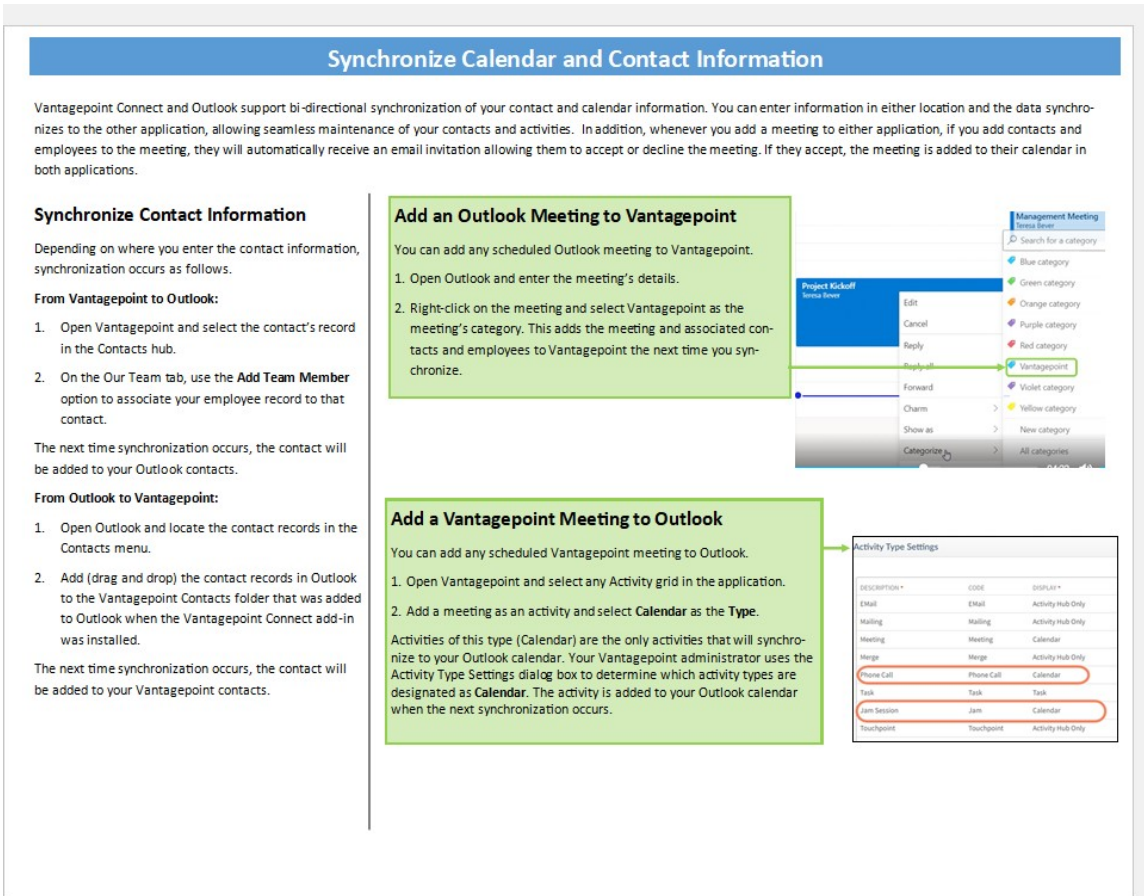
Send Meeting Timeslots from Outlook Quick Reference

This quick reference provides an overview of how to use the Scheduling Assistant to send potential meeting times to your clients. When they book a time, the meeting is added to both of your calendars.



Sync Calendar and Contact Information Quick Reference

This quick reference provides an overview of how to use the Scheduling Assistant to send your availability to clients so they can book a specific time that you are able to meet.



Synchronize Calendar and Contact Information

Vantagepoint Connect and Outlook support bi-directional synchronization of your contact and calendar information. You can enter information in either location and the data synchronizes to the other application, allowing seamless maintenance of your contacts and activities. In addition, whenever you add a meeting to either application, if you add contacts and employees to the meeting, they will automatically receive an email invitation allowing them to accept or decline the meeting. If they accept, the meeting is added to their calendar in both applications.

Synchronize Contact Information

Depending on where you enter the contact information, synchronization occurs as follows.

From Vantagepoint to Outlook:

1. Open Vantagepoint and select the contact's record in the Contacts hub.
2. On the Our Team tab, use the **Add Team Member** option to associate your employee record to that contact.

The next time synchronization occurs, the contact will be added to your Outlook contacts.

From Outlook to Vantagepoint:

1. Open Outlook and locate the contact records in the Contacts menu.
2. Add (drag and drop) the contact records in Outlook to the Vantagepoint Contacts folder that was added to Outlook when the Vantagepoint Connect add-in was installed.

The next time synchronization occurs, the contact will be added to your Vantagepoint contacts.

Add an Outlook Meeting to Vantagepoint

You can add any scheduled Outlook meeting to Vantagepoint.

1. Open Outlook and enter the meeting's details.
2. Right-click on the meeting and select Vantagepoint as the meeting's category. This adds the meeting and associated contacts and employees to Vantagepoint the next time you synchronize.

Add a Vantagepoint Meeting to Outlook

You can add any scheduled Vantagepoint meeting to Outlook.

1. Open Vantagepoint and select any Activity grid in the application.
2. Add a meeting as an activity and select **Calendar** as the **Type**.

Activities of this type (Calendar) are the only activities that will synchronize to your Outlook calendar. Your Vantagepoint administrator uses the Activity Type Settings dialog box to determine which activity types are designated as **Calendar**. The activity is added to your Outlook calendar when the next synchronization occurs.

How to...

As part of setting up the integration between Vantagepoint Connect and Vantagepoint CRM, you provision users and assign groups, as well as specify email and synchronization settings.

Set Up Connect Integration for Outlook

Use the Connect Administration utility to configure Connect to integrate with your Vantagepoint installation.

Prerequisites:

- To use Connect, the Vantagepoint application must be exposed to the internet via a publicly facing URL. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, it will be necessary to add Connect IP addresses to the **Allow** list. See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail or Troubleshoot Synchronization and Connect Add-in Issues for Outlook help topics for the list of IP addresses.

- The security role for the individual who is responsible for configuring Connect must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect Administration** is selected under **Utilities** » **Integrations**.
- The individual who is responsible for configuring Connect (selecting the **Connect Administration** option in **Utilities** » **Integrations**) must have an employee record associated with their user record in **Settings** » **Security** » **Users**. The employee record must also have a valid email address.
- Each employee who will use Connect must have an employee record that includes an email address and that is associated with a user record in **Settings** » **Security** » **Users**.
- You must create a **Client ID** and **Secret** in API Authorization in **Utilities** » **Integrations** that is specific to Connect. You only need to generate the secret one time for each integration.
- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

To set up integration configuration:

1. In the Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.
2. On the Connect Administration form, click the **Configure Connect** button.
3. On the Vantagepoint login dialog box, enter your Vantagepoint username and password and then click **Log In**.
   Your record is now provisioned for Connect.

Post-requisite: Set Up Users

Set Up Individual Connect Users for Outlook Integration

For small installations, the Vantagepoint administrator can enter a user's credentials to set up one Connect user at a time. This is useful for testing purposes or in situations where you only need to set up a small number of Connect users for which you know the Outlook credentials. You can set up individual users without Exchange Administration.

Videos: See related videos below
Prerequisites:

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- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.
- If you haven't used a client secret for another integration, you need to generate one in API Authorization (if there are values on that screen you shouldn't generate a new one because that might break other integrations).

To set up an individual Connect user:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.
   If you are logged in as the user that you are provisioning, skip to Step 5.
2. On the Connect Administration form, click the Provisioning tab.
3. Locate the user that you want to provision and click **+** to provision (activate) the account.
4. Complete the User Provisioning fields on the form and click the **Provisioning** button.
5. In the Provision Result grid, click the user name.
   The Users tab opens and displays the selected user.
6. Click the Email Configuration tab and select the **Mailbox Access Type**.
   This is the method that is used to log in to the email account:
   - **Password**: This option requires that the user enter their Outlook password. When you select this option, the **Exchange Web Services (EWS) URL**, **Username**, and **Password** fields display.
   - **OAuth**: This method supports multifactor authentication. This method requires Office 365. The user must enter their Deltek credentials to automatically log in to Outlook.

   Based on your selection, the email address automatically populates in the **Email** field.
7. Enter the user name for the mailbox or copy the email address into the **User Name** field if it is the same.
   This might be your email address but could be your **Domain/User Name**.
8. Depending on whether or not your user account is set up for two-factor authentication, select one of these actions:

- If you do not use two-factor authentication, enter the password for your email account.
- If you use two-factor authentication, enter the App Password.

  To set up the App Password, go to Settings for your email box. See the following article for additional information: https://docs.microsoft.com/en-us/azure/active-director/user-help/multi-factor-authentication-end-user-app-passwords.

9. Click the next to the **Exchange Web Services (EWS) URL** field.
   The EWS URL is located and populated automatically. If the EWS URL is not auto-populated, contact your Microsoft Exchange administrator for the URL and to ensure EWS is enabled in Exchange.
10. Click **Save**.
    The user and email are configured.
11. If you have not yet done so, Install the VantagepointConnect Add-in via the Microsoft Exchange Admin Center or from Connect Administration.
12. The user logs in to Vantagepoint from the Outlook add-in.
13. From the **Settings** menu, select **Force Synchronization**.

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Title	Description
	▪ Sync Contacts

Use Groups to Set Up Multiple Connect Users for Gmail Integration

Use the Groups tab to set up multiple users in a department or business unit at the same time. Deploying to a large group allows you to apply the same business rules to multiple employees.

(Optional) Enter the prerequisites here. This should be relatively brief. If you need to write extensive prereq info, create a reference topic for it and combine the topics using a small ditamap. Be sure to keep the first sentence in the <p> element.

To [insert task]:

Enter your first step here.
Enter the result of your step here (optional).

Install the Vantagepoint Connect Add-in for Outlook

After you set up the integration and enable users and synchronization, you install the Connect add-in, in both Vantagepoint and Outlook.

Installation Pre-requisites:

- To use Connect, the Vantagepoint application must be exposed to the internet via a publicly facing URL. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, it will be necessary to add Connect IP addresses to the **Allow** list. See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail or Troubleshoot Synchronization and Connect Add-in Issues for Outlook help topics for the list of IP addresses.
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- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

- If you have not used a client secret for Connect, you need to generate one in API Authorization. If there are values on that screen, do not generate a new one; doing so could break the integration.

Installation options include:

- The user can install the add-in from the manifest URL found in the Help About screen.
- The Vantagepoint administrator can save the manifest as a file on their network and users can then install the add-in from that file.
- An Exchange administrator can push out the add-in via the Exchange Admin Console.

To install the Vantagepoint **Connect Add-in from Connect Administration:**

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.
2. On the Users tab, select the user for which you are installing the add-in.
3. On the Connect Administration form, click **Settings** and then select **Install** Vantagepoint **Connect for Microsoft Outlook**.
4. On the email menu ··· or ribbon, select **Open** Vantagepoint.
5. On the Context Pane, use your Vantagepoint username and password to log in to the Vantagepoint application.
6. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.
7. On the Users tab of the Connect Administration form, select your user record.
8. From the **Settings** menu, select **Enable Synchronization** and then select **Force Synchronization**.
   If the **Enable Synchronization** option is not available, click **Force Synchronization** to manually force the synchronization.
9. On the Users tab, click the Statistics sub-tab to check the synchronization status.

   It might take a few moments for the synchronization to complete and the status to update in the list. Use the **Refresh** icon to refresh the list as needed.

   A black status indicates successful synchronization; a red status indicates a synchronization error. If there is an error, see Troubleshoot Synchronization Issues for more information.

View Synchronization Status for Connect Integration for Outlook

The synchronization status for both users and groups displays on the Dashboard, Users, and Groups tabs in the Connect Administration utility. This information can help you understand the data shared between the two applications.

Prerequisites:

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- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

To view the synchronization status:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.
2. On the Dashboard tab of the Connect Administration form, scroll to the Synchronization Status section to view a summary of the synchronization process:
    - **Active**: Current, or active synchronization batches
    - **With Issues**: Synchronization batches that contained issues
    - **Suspended by Error**: Batches that were suspended due to errors in the files
    - **Not Configured**: Users with a **Mailbox Status** of **Not initialized**
3. To view a detailed list of the users who meet the criteria for the selected synchronization status, click the number of items to open the Users tab.
4. On the Groups tab and the Edit Users form, review information displayed in the **Synchronization Status** column:
    - **Enabled**: Synchronization is enabled for the group or user.
    - **Disabled**: Synchronization is disabled for the group or user. Select this status to disable synchronization in situations where there is an emergency, or you want to prohibit some users from enable synchronization by moving them to separate group with sync disabled. Those users cannot then re-enable synchronization for themselves.
    - **Delete**: This status deletes the selected user from the application. When a user is deleted they cannot use the application or synchronize data. This option will not work if any data remains in the user's mailbox. The administrator must un-initialize and disable synchronization to remove business data from the user mailbox before

completing the synchronization process. If you are using Outlook and connectivity to the Exchange mailbox is lost and synchronization cannot occur, the administrator must use the **Force Delete** option to remove the user and all data that is remaining in the mailbox.

- **Force Delete**: Select this status to force deletion of data in a user's mailbox. This is necessary when you are using Outlook and connectivity to the Exchange mailbox is lost.

5. In the Navigation pane, select **Utilities** » **Integrations** » **Connect Sync Options** and then use the Connect Sync Options form to review synchronization status, mail server connection status, and other synchronization statistics.

Delete Connect for Outlook Configuration

You delete the Connect configuration in these situations: when there was an error during initial configuration, when you need to re-configure Connect for Gmail, or when you finish testing the integration in a preview or sandbox environment and now want to configure it in a production environment.

When you delete Connect Configuration, all Connect users are deleted. You must subsequently reconfigure the users so that they can continue to use Connect.

To delete Connect for Outlook Configuration:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.
2. On the Connect Administration form, on the Actions bar, click **Actions** » **Delete All Connect Configuration**.
3. In response to the confirmation message, click **Delete All Connect Configuration**. The Connect Configuration is deleted and you are returned to the Connect Administration form.

Next step: To configure Connect Administration again, click **Configure Connect** and complete the steps in the Set Up Connect Configuration for Outlook topic.

Troubleshoot Synchronization and Connect Add-in Issues for Outlook Integration

Review troubleshooting tips for synchronization issues and other issues you encounter in using the Connect Add-in for Outlook Integration.

Vantagepoint Authentication Failure

For Exchange Direct mode this notification is sent when:

- The user is connected to Microsoft Exchange or Office 365 with their login/password, and the user's password is expired so that Vantagepoint Connect cannot use it to connect to the user's mailbox.
- The user is connected to Office 365 with OAUTH2 token authorization, and the token is expired (because it has been used for more than 90 days, the user recently changed their

password to Office 365, or the user explicitly revoked Vantagepoint Connect from accessing their Office 365 data).

The Office 365 token lifetime depends on Office 365 configuration, and may be changed in the future by Microsoft.

Microsoft Exchange Authentication Failure (Includes Office 365)

The Exchange Service Account credentials that are used for Impersonated Access have expired.

Microsoft Exchange configuration does not allow you to connect to the mailbox of the user with the Exchange Service Account. On the Groups tab in **Utilities** » **Integrations** » **Connect Administration**, update the group's credentials on the Email Configuration sub-tab.

Sync Cannot be Configured for Any Users

1. Use the Microsoft Remote Connectivity Analyzer (https://testconnectivity.microsoft.com/tests/o365) to test connectivity to your Exchange Server. Following are direct links for specific tests:
    1. O365 (Direct or OAuth Authentication): https://testconnectivity.microsoft.com/tests/O365EwsTask/input)
    2. O365 Impersonation: https://testconnectivity.microsoft.com/tests/O365EwsAccess/input
    3. Exchange On-premises Direct Authentication: https://testconnectivity.microsoft.com/tests/EwsTask/input
    4. Exchange On Premises Impersonation: https://testconnectivity.microsoft.com/tests/EwsAccess/input
2. Your instance of Vantagepoint must be exposed to the internet via a publicly facing URL in order to use Connect; if your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, you need to add these Connect IP Addresses to the **Allow** list for inbound and outbound connections:
    - **Addin WebApp**: 13.89.172.1, 52.165.169.176, 40.122.30.123, 40.122.119.94, 40.122.117.110, 52.165.170.146, 52.165.169.181, 40.122.36.80
    - **Sync WebApp**: 104.43.254.102, 23.99.191.39, 104.43.218.218, 23.99.178.238, 104.43.209.26, 23.99.176.189, 23.99.177.6, 23.99.180.234
    - **Sync VMSS**: 52.154.221.254/31
3. Connect uses Exchange Web Services (EWS) and your Exchange server must accept incoming EWS calls from Connect; this means that you may need to set up AutoDiscover in Exchange.
4. Connect uses the Client ID and Client Secret that are generated in API Authorization in the Integrations utility. If no secret has been generated, or a new secret was generated in that utility, update the Vantagepoint Authorization Settings fields on the Settings tab of **Utilities** » **Integrations** » **Connect Administration**.

User Generates New Secret in the API Authorization Screen

When the client ID and secret are changed in **Utilities** » **Integrations** » **API Authorization**, they must also be updated on the Settings tab in **Utilities** » **Integrations** » **Connect Administration**, or the Connect Add-in will not work.

The Contextual Pane Will Not Open Automatically When Switching Between Emails

To pin the Context Pane for emails, use the pin icon in the upper right corner of the pane. If you cannot pin the Context Pane for meetings in your calendar, the cause may be a limitation with Microsoft add-ins. The pinning feature requires Office 365 C2R (Click-to-Run), Outlook 2016 or later for Windows (build 7668.2000) or later for users in the Current or Office Insider Channels, build (7900.xxxx or later for users in Deferred channels).

Connect User Cannot be Deleted

When a Connect user is deleted, all Vantagepoint information, including contacts and activities, is removed from their mailbox. Use the **Reset Mailbox** action in the menu to remove all Vantagepoint information from the user's mailbox before deleting the Connect user.

If connectivity to Exchange is lost, you cannot remove this information. In this case, use the **Force Delete** option to delete the Connect user and stop synchronization. Information that was previously synced to Outlook for this user will remain in their mailbox.

Connect users are automatically deleted when either of the following occurs:

- The Connect user's status on their employee record changes to **Terminated** or **Terminated (do not reactivate)** and there are no other employee records with the same email address. The Connect user is retained if the employee's status is changed to Inactive.
- The status of the Vantagepoint user associated to the Connect user has changed to **Inactive**. The Vantagepoint user can be disabled without affecting the Connect user.

Foreign Customization Detected Error Message

This message appears if you try to synchronize a mailbox with more than one Vantagepoint user or database. One mailbox can only be synchronized with a single Vantagepoint user and database. If you receive this message, use the **Re-initialize User's Mailbox** option for the user in **Utilities** » **Integrations** » **Connect Administration** to synchronize the Vantagepoint Connect with the correct mailbox.

Vantagepoint Error Category Appears on a Contact or Meeting in Outlook

There was an error synchronizing this contact or meeting to Vantagepoint. Review the error in **Utilities** » **Integrations** » **Connect Sync Options** in Vantagepoint.

Connect Add-in Doesn't Display in Outlook Ribbon After Installation

1. Restart Outlook.
2. Verify that the add-in is installed by opening **File** » **Manage Add-ins** in Outlook.
3. Select a user and check the add-in installation status on the Users tab in **Utilities** » **Integrations** » **Connect Administration**.

4. Check if the add-in is accessible from Outlook Web Interface (OWA). If the add-in works in OWA, but is not available in Outlook, you might have a group policy enabled that restricts usage of cloud add-ins in Outlook. Contact your system administrator.

Cannot Install the Connect Add-in in Outlook

Your Exchange administrator defines whether you can install add-ins and which add-ins can be installed. Check that Exchange settings have been configured to allow you to use Connect.

Connect Add-in Opens but the Sidebar Displays a Blank Screen on Hangs on Loading

Make sure the add-in endpoint IP addresses and required resources are not blocked by firewall or proxy. Your instance of Vantagepoint must be exposed to the internet via a publicly facing URL in order to use Connect. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, you will need to add these Connect IP Addresses to the **Allow** list for inbound and outbound connections:

- **Addin WebApp**: 13.89.172.1, 52.165.169.176, 40.122.30.123, 40.122.119.94, 40.122.117.110, 52.165.170.146, 52.165.169.181, 40.122.36.80
- **Sync WebApp**: 104.43.254.102, 23.99.191.39, 104.43.218.218, 23.99.178.238, 104.43.209.26, 23.99.176.189, 23.99.177.6, 23.99.180.234
- **Sync VMSS**: 52.154.221.254/31

Connect Add-in Fails to Load with "Token validation failed" or "Session expired" Errors

If the Exchange server on premises is used, make sure the URL is accessible from the internet or accepted on firewall for Connect resources. The URL (for example, %exchangeserverhost.com%) is unique for each customer and depends on the domain name and Exchange server address. Refer to the following for a sample URL: https://exchangeserverhost.com:443/autodiscover/metadata/json/1

Sync Has Stopped or You See a Red Message "Some functionality is unavailable because sync is disabled" in the Contextual Pane in Outlook

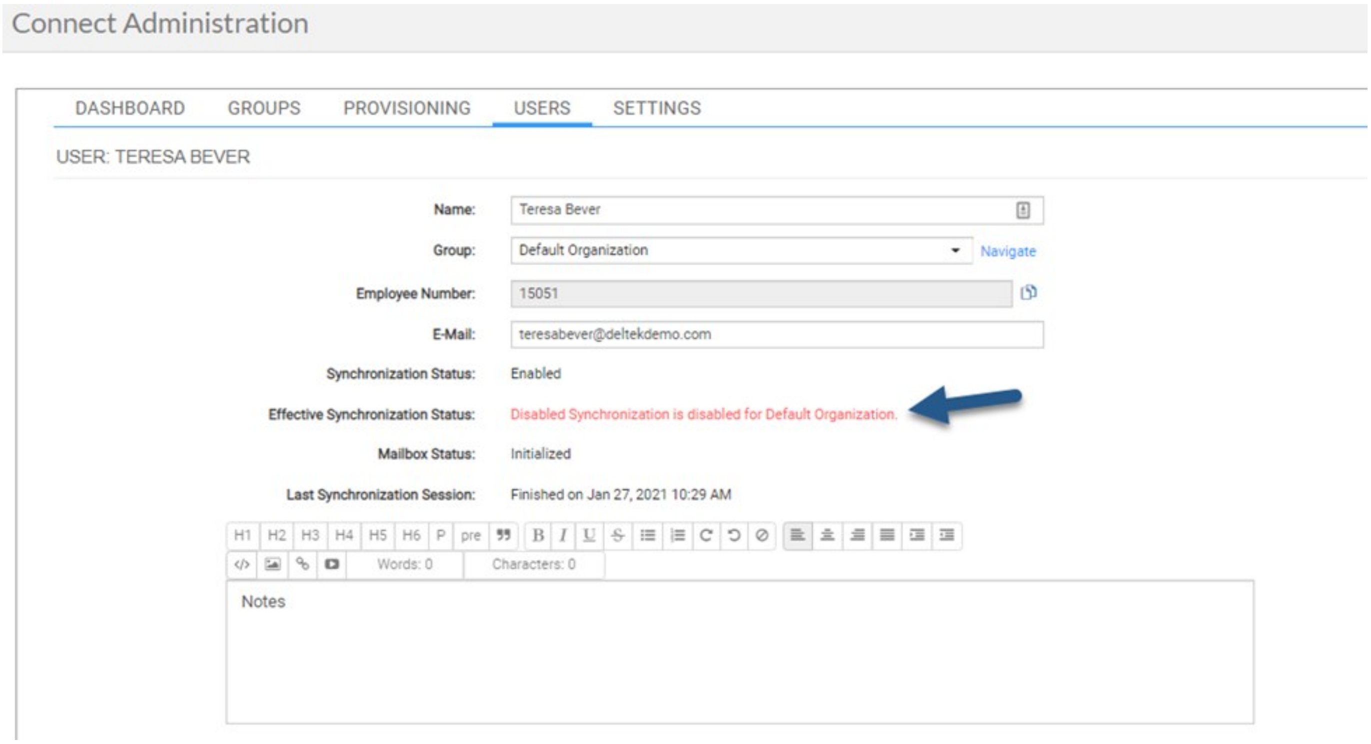
Synchronization can stop because of one of the following situations:

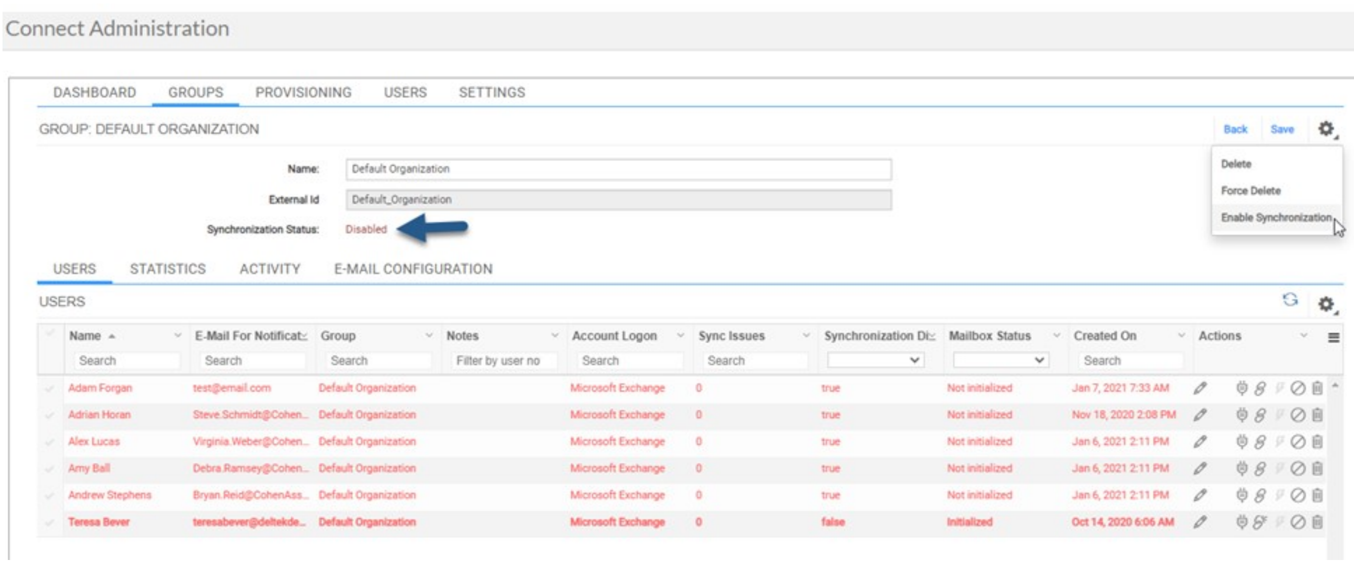
- An admin has disabled synchronization for a group or a user in **Utilities** » **Integrations** » **Connect Administration**.
- Credentials to Exchange or Vantagepoint have expired and need to be updated in Connect.
- Synchronization has failed 10 times in a row due to an error.

When these situations occur, the user receives an email and a red message appears in the Context Pane, informing them that sync has stopped. System administrators can also receive email notifications by entering their email addresses in **E-Mails for Notifications** on the Settings tab of Connect Administration.

1. In the Context Pane in Outlook, select **Settings** and then select **Force Sync**. You will receive a message that synchronization has been scheduled. If you have a red message about the sync being disabled, it should go away when you close the Context Pane and then re-open it.

2. If the sync is still not working, check the user in **Utilities** » **Integrations** » **Connect Administration**. If an administrator has disabled synchronization for this user's group, you will see a message in the **Effective Synchronization Status** field. In this case, you must enable synchronization for the group. To do this, open the group in **Utilities** » **Integrations** » **Connect Administration** and select **Enable Synchronization**.





If sync is enabled for this user's group, but the **Synchronization Status** fields contains **Disabled**, select **Enable Synchronization** from the menu for this user. Select **Force Synchronization** to run a synchronization immediately and confirm that it is working. The sync may take a few minutes. Refresh the Statistics grid to see if the sync was successful. If the sync appears in the list as red, click the iButton in the Message for the error.

Check that Connect has valid credentials for Exchange by selecting **Check Mailbox Connectivity** from the settings menu for the user in **Utilities** » **Integrations** » **Connect Administration**. If there is an error, you can enter the credentials on the E-mail Configuration sub tab of Users in Connect Administration. Alternatively, have the user enter their credentials on the **Sync Settings** » **E-mail Configuration** tab of **Utilities** » **Integrations** » **Connect Sync Options**.

Check that Connect has valid credentials for Vantagepoint for this user by selecting **Check CRM Connectivity** from the settings menu for this user in **Utilities** » **Integrations** » **Connect Administration**. If there is an error, the user should log into Vantagepoint using the contextual pane in Outlook.

Microsoft Outlook Add-in Manifest URL is blank on the System Info tab of the About screen

The Manifest URL is populated after the system administrator configures Vantagepoint Connect by clicking the **Configure Connect** button in **Utilities** » **Integrations** » **Connect Administration**.

The error "ISA-059 - The request is invalid." is displayed when saving email configuration using OAuth

The **Utilities** » **Integrations** » **Connect Administration** screen is populated as well as the Manifest URL. When navigating through the page and making a change in the **Set Mailbox Type** field on the Email Configuration sub-tab to **Office 365 OAuth**, upon clicking **Save** the following error displayed: **ISA-059. The request is invalid.**

The fix for this issue depends on the type of user:

- **System Administrator**: Go to the Settings tab in **Utilities** » **Integrations** » **Connect Sync Options** and ensure that the EWL URL is completed correctly (manually, not using autodiscover). In this situation, all regular users will already be populated with the correct EWL URL.
- **User**: The error happened because the Exchange EWL URL is missing and the settings cannot be saved until this field is completed. You can switch to password mode, specify the username and password, and then use the **Autodiscover** button in the **EWL URL** field to complete it. After the field is filled, click **Save** and then switch to OAuth mode and save again.

Connect Administration Form for Outlook Integration

Use this utility to set up users and associated profiles that allow synchronization of contacts and calendar items from an email application, such as Exchange or Office 365, to Vantagepoint.

Prerequisites:

- To use Connect, the Vantagepoint application must be exposed to the internet via a publicly facing URL. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, it will be necessary to add Connect IP addresses to the **Allow** list. See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail or Troubleshoot Synchronization and Connect Add-in Issues for Outlook help topics for the list of IP addresses.

- The security role for the individual who is responsible for configuring Connect must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect Administration** is selected under **Utilities** » **Integrations**.
- The individual who is responsible for configuring Connect (selecting the **Connect Administration** option in **Utilities** » **Integrations**) must have an employee record associated with their user record in **Settings** » **Security** » **Users**. The employee record must also have a valid email address.
- Each employee who will use Connect must have an employee record that includes an email address and that is associated with a user record in **Settings** » **Security** » **Users**.
- You must create a **Client ID** and **Secret** in API Authorization in **Utilities** » **Integrations** that is specific to Connect. You only need to generate the secret one time for each integration.
- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

Display the Connect Administration Form for Outlook Integration

You display the Connect Administration form in Integrations.

Prerequisites:

- To use Connect, the Vantagepoint application must be exposed to the internet via a publicly facing URL. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, it will be necessary to add Connect IP addresses to the **Allow** list. See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail or Troubleshoot Synchronization and Connect Add-in Issues for Outlook help topics for the list of IP addresses.
- The security role for the individual who is responsible for configuring Connect must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect Administration** is selected under **Utilities** » **Integrations**.
- The individual who is responsible for configuring Connect (selecting the **Connect Administration** option in **Utilities** » **Integrations**) must have an employee record associated with their user record in **Settings** » **Security** » **Users**. The employee record must also have a valid email address.
- Each employee who will use Connect must have an employee record that includes an email address and that is associated with a user record in **Settings** » **Security** » **Users**.
- You must create a **Client ID** and **Secret** in API Authorization in **Utilities** » **Integrations** that is specific to Connect. You only need to generate the secret one time for each integration.
- Windows authentication for the on-premises application requires the use of Vantagepoint OAuth with Vantagepoint Connect.

To display the Vantagepoint **Connect Administration form:**

In the Navigation pane, select **Utilities** » **Integrations** » **Connect Administration**.

Dashboard Tab of the Connect Administration Form for Outlook Integration

The Connect Dashboard is your portal into the Vantagepoint Connect data. Use the Dashboard tab to view the user provisioning details, the status of synchronization, percentage of add-in use, and overall usage statistics of the Connect application.

Contents

Field	Description
Configure Connect	This field displays upon initial use only. Click the **Configure Connect** button to enable Vantagepoint CRM and Vantagepoint Connect to synchronize activity, contact, firm, and project information. When you select this option, the Vantagepoint Login dialog displays. Enter your Vantagepoint username and password and click **Log In** to provision the Connect Add-in utility. After you log in, the Connect Administration Dashboard displays.
Provisioning (Users)	Refer to these fields for the total number and status of users provisioned to use Vantagepoint Connect as well as the number of users who are not yet provisioned. When you click the **Provision** button, you automatically select those users who are not yet provisioned. This allows you to access the Provisioning Multiple Users fields so that you can provision multiple users for a group. See the Set Up Multiple Connect Users at One Time help topic for details. De-provisioned users do not display in the total number of users.
Provisioning (New Users)	Refer to these fields for the total number and status of users who were provisioned to use Vantagepoint Connect **within the past two weeks**. You can also view the number users who are not yet provisioned. When you click the **Provision** button, you automatically select those users who are not yet provisioned. This allows you to access the Provisioning Multiple Users fields so that you can provision multiple users for a group. See the Set Up Multiple Connect Users at One Time help topic for details. De-provisioned users do not display in the total number of users.
Synchronization Status	These fields display the number of synchronization attempts that meet the following criteria: ▪ **Active**: Current, or active synchronizations ▪ **With Issues**: Synchronization batches that contained issues ▪ **Suspended by Error**: Batches that were suspended due to errors in the files ▪ **Not Configured**: Users with the **Mailbox Status** option set to **Not initialized** Click the number of items to open the Users tab and view a detailed list of the users who meet the criteria for selected synchronization status.

Field	Description
Add-in Use	This field displays the percentage of the Connect Add-in that is used as well as the percent that is not used. Click on the number of items to view a detailed list of the users who meet the criteria for the selected add-in.
Usage	These fields display the usage statistics for the application over the past 30 days. The graphs provide a visual representation of the records that were created in the past 30 days, as well as the records that were updated in the past 30 days. Both graphs include data about the records, including the type of record and overall number that were synchronized, as well as the dates on which each synchronization process occurred. Use the **Application** and **Record Type** drop-down lists to further refine the results that display on the graphs.
Delete All Connect Configuration	Click the button to delete a Connect configuration, including the settings for all Connect users. Vantagepoint prompts you to confirm the deletion. Click **Cancel** to cancel the delete process.

Groups Tab of Connect Administration Form for Outlook Integration

This tab displays the groups that have been created and authorized to use Vantagepoint Connect. Groups are used to configure and manage several Connect users together.

The Groups tab lists the names of each group, their associated mailbox access type, and the group's synchronization status. While using this tab, you can also create groups, edit their associated information, and assign users to groups. See the Use Groups with Connect online help topics for details on creating groups, assigning users to groups, and other information.

The Groups tab includes the Users, Statistics, Activity, and E-Mail Configuration sub-tabs.

When you make changes to an employee record in the Vantagepoint CRM Employees hub, if you change an employee's **Status** to **Terminated** or **Terminated (cannot reactivate)**, they are automatically removed as a Vantagepoint Connect user and their mailbox will no longer synchronize with Vantagepoint.

Contents

Much of the information for Vantagepoint Connect is entered using the tools and grid options on the form. For more information, see Connect Administration Tools and Connect Administration Grid Options.

Field	Description
Name	This field displays the **Name** and an **External ID** for the group. If you are entering a new group, an **ID** field also displays. Once you enter and save the name and ID, the ID cannot be changed.
Mailbox Access Type	This field displays the **Mailbox Access Type** as specified on the E-Mail Configuration sub-tab when you create the group. Options include:

Field	Description
	▪ **Microsoft Exchange Direct Logon**: Use the **Exchange Web Services (EWS) URL** to provision a group of Vantagepoint Connect users at one time. This method requires deployment by the system administrator and for each user to enter their Outlook username and password when logging into Connect. ▪ **Microsoft Exchange Impersonation**: Use Microsoft Exchange Impersonation to create a service account to manage Exchange connectivity. When using Exchange Impersonation, the user never shares their password with Connect and their Outlook password never needs to be updated in Connect Sync Options, unless the Microsoft token expires (which is rare because of the length of time specified for the token). ▪ **Office 365 OAuth**: Use multi-factor authentication to provision many users at one time who can use their Microsoft Office 365 credentials to automatically log into Outlook.
Synchronization Status	This field displays the synchronization status, either enabled or disabled, for the selected group.
Actions	Use the Actions options to complete various tasks related to the selected group. See the Connect Administration Grid Options help topic for more information.

Provisioning Tab of Connect Administration for Outlook Integration

Use the Provisioning tab of Connect Administration to activate one or more employee records to use with Vantagepoint Connect. The user records that display on this form come from the Employees hub in Vantagepoint.

When you provision a user, you specify the Group to which you want to assign the user. The selected group determines the business rules and access rights for the user. See the Set Up Individual Connect Users and Use Groups to Set Up Multiple Connect Users online help topics for details.

After you provision a user, their record is added to the list on the Users tab of Connect Administration.

When you make changes to an employee record in the Vantagepoint CRM Employees hub, if you change an employee's **Status** to **Terminated** or **Terminated (cannot reactivate)**, they are automatically removed as a Vantagepoint Connect user and their mailbox will no longer synchronize with Vantagepoint.

Contents

Field	Description
Employee Number	This field displays the assigned employee number.
User Name	This field displays the assigned user name.
Email	This field displays the email address associated with the employee.
+	Click this button to provision (activate) the user account. The User Provisioning fields display.
Group	Select the group to which you want to assign the user. The group determines the business rules and access rights for the user. See the Use Groups to Set Up Multiple Connect Users and Assign Users to a Group online help topics for details on assigning users to groups.
Mailbox Access Type	The mailbox access type depends on the selected group: ▪ **Microsoft Exchange Direct Logon:** Use the **Exchange Web Services (EWS) URL** to provision a group of Vantagepoint Connect users at one time. This method requires deployment by the system administrator and for each user to enter their Outlook username and password when logging into Connect. ▪ **Microsoft Exchange Impersonation:** Use Microsoft Exchange Impersonation to create a service account to manage Exchange connectivity. When using Exchange Impersonation, the user never shares their password with Connect and their Outlook password never needs to be updated in Connect Sync Options, unless the Microsoft token expires (which is rare because of length of time for the token). ▪ **Office 365 OAuth:** Use multi-factor authentication to provision many users at one time who can use their Microsoft Office 365 credentials to automatically log into Outlook.
Send Welcome Email	Select this option to send a welcome message to the user to alert them when they are provisioned.
Actions	Use the Actions options to complete various tasks related to the selected user. See the Connect Administration Grid Options help topic for more information.

Settings Tab of Connect Administration for Outlook Integration

Use the Settings tab to configure the email settings for notifications, the Vantagepoint tenants, and Vantagepoint authorizations.

Contents

You specify much of the information for Vantagepoint Connect using the tools and grid options on the form. For more information, see Connect Administration Tools and Connect Administration Grid Options.

Email Configuration

Use these fields to establish the default email settings for notifications related to expired credentials or synchronization issues.

Field	Description
Emails for Notifications	Enter the email addresses to which notifications will be sent in addition to emails to individual users. Notifications are sent to the user and to the email addresses when synchronization is stopped due to any of the following: ▪ Credentials to Exchange expired ▪ Credentials to Vantagepoint expired ▪ Unknown sync error ▪ 10 consecutive failed synchronizations

Vantagepoint Connect for Microsoft Outlook and Gmail

Use these fields to define and configure the URL and manifest file content.

Field	Description
Vantagepoint **Tenant**	Enter the URL for the Vantagepoint Connect Tenant. To see this URL, click **Help** » **About** and check the System Info tab.
Show Manifest	Click this button to copy the Microsoft Outlook Add-in Manifest file content and save it as an .xml file. This file is useful for clients who are not allowed to install add-ins from hyperlinks into third party resources in their system. See the Deploy Connect help topics for information on deployment options.

Vantagepoint Authorization Settings

Field	Description
Client ID	After you click **Generate Secret**, this field displays your client ID for authorization to access Vantagepoint Connect through the API. If you generate a new client ID on the API Authorization form in **Utilities** » **Integrations** » **API Authorization**, you must update that information on this form as well.

Field	Description
Client Secret	After you click **Generate Secret**, this field displays your client secret for authorization to access Vantagepoint Connect through the API. If you generate a new secret on the API Authorization form in **Utilities** » **Integrations** » **API Authorization**, you must update that information on this form as well.

Users Tab of Connect Administration Form for Outlook Integration

This tab lists the users who are provisioned to use Vantagepoint Connect. Users are entered as employee records in the Employees hub and then provisioned, or activated, on the Provisioning tab to use Vantagepoint Connect.

In addition to the user names, this grid lists access rights for completing various functions including synchronization, configuring email, setting up mailboxes, and installing Vantagepoint Connect. Click **New** to create a new user or select a user's name to open the Edit User form and change the information as needed.

The Edit User form includes the Statistics, Issues, Activity, and E-Mail Configuration sub-tabs.

When you make changes to an employee record in the Vantagepoint CRM Employees hub, if you change an employee's **Status** to **Terminated** or **Terminated (cannot reactivate)**, they are automatically removed as a Vantagepoint Connect user and their mailbox will no longer synchronize with Vantagepoint.

Contents

Much of the information for Vantagepoint Connect is entered using the tools and grid options on the form. For more information, see Connect Administration Tools and Connect Administration Grid Options.

Field	Description
Name	This field displays the user name.
Group	This field displays the user group. Groups are composed of several users who have similar configurations, and are defined on the Groups tab of Connect Administration. The grid on this tab displays the groups of users that have been created and authorized to use Vantagepoint Connect. This grid lists the names of each group, their associated mailbox access type, and the synchronization status for each group.
Employee Number	This field displays the user's assigned employee number.
Email for Notifications	This field displays the user email where notifications are sent.
Notes	Enter any notes or important information about the user.

Field	Description
Accounts	This field displays the type of mail server used to log on to your email.
Sync Issues	This field displays the total number of synchronization issues. If there are issues for a user, select the user and click the Issues sub-tab to view details about the issues.
Synchronization Disabled	This field lists the synchronization status for the selected user: ▪ **False**: Synchronization is enabled. ▪ **True**: Synchronization is disabled. Click to enable or click to disable synchronization for the user.
Mailbox	This field displays the mailbox's initialization status: ▪ **Initialized** ▪ **Not Initialized** The mailbox must be initialized if you switched Vantagepoint databases, or it must be re-initialized to remove all business data from the mailbox.
Created	This field displays the date on which the user was created.
Actions	Use the Actions options to complete various tasks related to the user. See the Connect Administration Grid Options help topic for more information.

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