Deltek

Deltek Vantagepoint® 7.0

Connect Administration Utility for Outlook

April 15, 2024

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Contents

Connect Integration Utility for Outlook

System administrators use the Connect Administration Integration utility to configure two-way synchronization of contacts and calendar items between Vantagepoint CRM and Outlook. Use this utility to set up the users and associated profiles that make this synchronization possible.

Videos: See related videos below.

Requirements

This add-in requires:

- Vantagepoint CRM
- Microsoft Exchange 2016 or higher
- Outlook 2016 or higher

Office 365 OAuth is supported but not required.

The Connect Administration integration utility works in conjunction with the Connect Sync Options Integration utility, which serves as a dashboard for synchronizing data between Vantagepoint and your email application. You can schedule synchronization or manually force the process to occur. See the View Synchronization Status online help topics for related information.

Vantagepoint Connect Add-in End-User Online Help

For details on how to use the Connect Add-in as a single point of entry for collaborating and for sharing your contacts and calendar items with clients, see the Vantagepoint Connect Add-in end-user help. This section of the help system also explains how to use the Scheduling Assistant, which enables users to share their availability with clients and efficiently set up appointments.

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.

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 view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

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 Profiles

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

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 Set Up Connect Profiles 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 prerequisites, as well as the tabs, grids, tools, and grid options.

Before You Begin

To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

Connect for Outlook Prerequisites and Required Settings

Before you begin to use the Vantagepoint Connect for Outlook add-in, it is important to review the following prerequisites and required settings.

- 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 allow only certain IP addresses to access Vantagepoint, it will be necessary to add Connect IP addresses to the **Allow** list. For a list of IP addresses, see the Exposed IP Addresses or the Troubleshoot Synchronization and Connect Add-in Issues for Outlook help topics.
- The security role for the individual who is responsible for configuring Connect must have access to Connect. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect** is selected under **Utilities** » **Integrations**.
- The individual who is responsible for configuring Connect (selecting the **Connect** 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**.
- If this is your first use of Vantagepoint Connect, an API Authorization with a Client ID (or consumer key) and Secret are automatically generated for Connect. You can confirm this on the API Authorization screen in **Utilities** » **Integrations**. Note that there may be other API Authorizations on that screen that are unrelated to Vantagepoint Connect. Deleting or altering those could break other integrations.
- For on-premise deployments of Vantagepoint, using Local Active Directory for Integrated Login is supported and uses the Vantagepoint OAuth flow. Using Microsoft Entra ID is also supported.

Work With Connect Administration Tabs and Grids

You specify and review the profiles, users, and provisioning information for the Connect Administration utility on different tabs and grids. These tabs and grids consist of fields, options, columns, and rows that you use to enter, change, and view data for a record. Different functions are available for each tab and grid.

Automatic Saving of Your Work in a Grid

When you add a row to a grid, or change the information in an existing row, your work is saved automatically when you tab or click off that row.

Connect Administration Tools and Options

Use the Connect Administration grid tools and options to work with the different aspects of the Vantagepoint Connect form, including creating profiles, provisioning and activating users, and performing tasks related to the configuration and synchronizing of records. The tools and options vary, depending on the mail configuration and tab that you are using.

Field	Description
Actions Menu	Select this option to **Delete All Connect Configuration**. Complete the prompts to confirm the deletion.

Grid Header Options

Field	Description
Filter by:	When the grid displays a large number of records, you can use the **Filter by:** field to refine the list of records. Click in the field and then select from the drop-down list the value that you want to locate. You can also enter text in this field, and matching results will display. The grid updates to display the records that fit the criteria that you specify. To remove the filter criteria for a grid column, click the **x** at the right in the field.
Search	When the **Name** column in the grid displays a large number of records, you can use the **Search** field to enter specific criteria to quickly locate the name of the record you want to locate. As you enter text in this field, matching results will display. Note that this field searches only the Name column.
✔	Click this option next to a grid row on the Provisioning and Users tabs to select the entire row. Or, you can select this option at the top of the grid to select all grid rows.

Grid Toolbar

Field	Description
Refresh	This option is available on the Provisioning, Profiles, and Users tabs of the Connect Administration form. Click this icon to refresh the screen and to retrieve and display the most current information.
(Column Options)	Click this option in the top right corner of the Provisioning, Profiles, and Users grids to display options related to the grid columns. Use these options to clear the grid filters and to specify the columns that are displayed or hidden on the grid.

Field	Description
Export to CSV	You can download user information in a comma-separated values (CSV) file. You can then use Microsoft® Excel® or another spreadsheet application that supports CSV files to filter and format the data as needed.
Create Profile	Click this option on the Profiles tab to open the **Create Profile** fields. Use these options to define the profiles or groups of users that are authorized to use Connect.
Activate Selected	Click this button on the Provisioning tab to activate the selected employee record(s) to use Vantagepoint Connect. After you provision a user, their record is added to the list on the Users tab of Connect Administration. Note that you cannot provision users with a status of **Terminated** or **Terminated (cannot reactivate)**. See the Summary Pane of the Employees Hub topic for more information on employee status settings.
Settings	This option displays on the Connect toolbar, grids, and some of the subtabs. Click this option to access a list of functions that are available for the respective area. Options may include one or more of the following functions: ▪ **Delete**: Select this option to delete the selected user from Connect. Vantagepoint asks you to confirm the deletion. All Vantagepoint data will be removed from the user's mailbox. ▪ **Force Delete**: Select this option to delete the user without resetting the user's mailbox. Vantagepoint data will remain in the user's mailbox. ▪ **Reset Mailbox**: Select this option to return the user's mailbox to its original state, before Vantagepoint Connect was installed. This removes all previously synchronized contacts, appointments, and meetings. After you reset a mailbox, you can select the **Delete** option for the user. ▪ **Re-initialize Mailbox**: Select this option after you switch Vantagepoint databases, or if you need to remove all business data from the mailbox before you create a new mailbox. ▪ **Check Settings**: Select this option to check that settings in Vantagepoint Connect are completed and that you can start synchronization. ▪ **Check CRM Connectivity**: Select this option to confirm that Connect and Vantagepoint CRM are connected. This check confirms that the user has valid credentials stored and that the Connect synchronization process can connect to the user's Vantagepoint account. ▪ **Check Mailbox Connectivity**: Select this option to confirm that Connect and the mail application are connected. This check confirms that the user has valid credentials stored and Connect can synchronize to the user's Vantagepoint account. ▪ **Force Synchronization**: Select this option to manually force synchronization between Vantagepoint and the mail application.

Field	Description
	▪ **Enable Synchronization**: Select this option to enable synchronization between Vantagepoint and the mail application. After you enable synchronization, Connect automatically synchronizes the mailbox every 15-20 minutes. ▪ **Check Sidebar Status**: Select this option to confirm that the Connect Add-in is installed in the user's mailbox. This option requires that the mailbox is already connected to the mail application. ▪ **Install Sidebar**: Select this option to install the Connect Add-in. ▪ **Remove Sidebar**: Select this option to remove the Connect Add-in.

Hide or Display Columns in a Connect Administration Grid

You can select the columns that are displayed in a Connect Administration grid.

To hide or display columns for a grid:

1. Click on the top right corner of the Connect Administration grid.
2. In the **Columns** list, use the indicator next to a column name to select or hide that column:
   - A checkmark indicates a selected column.
   - An **X** indicates a hidden column.

     To hide an individual column, click at the upper-right corner of the grid column and then select **Hide Column**.

Filter the Connect Administration Grid Results

When a grid displays a large number of records, you can filter the results to refine the list of records.

To filter the results that display for a grid:

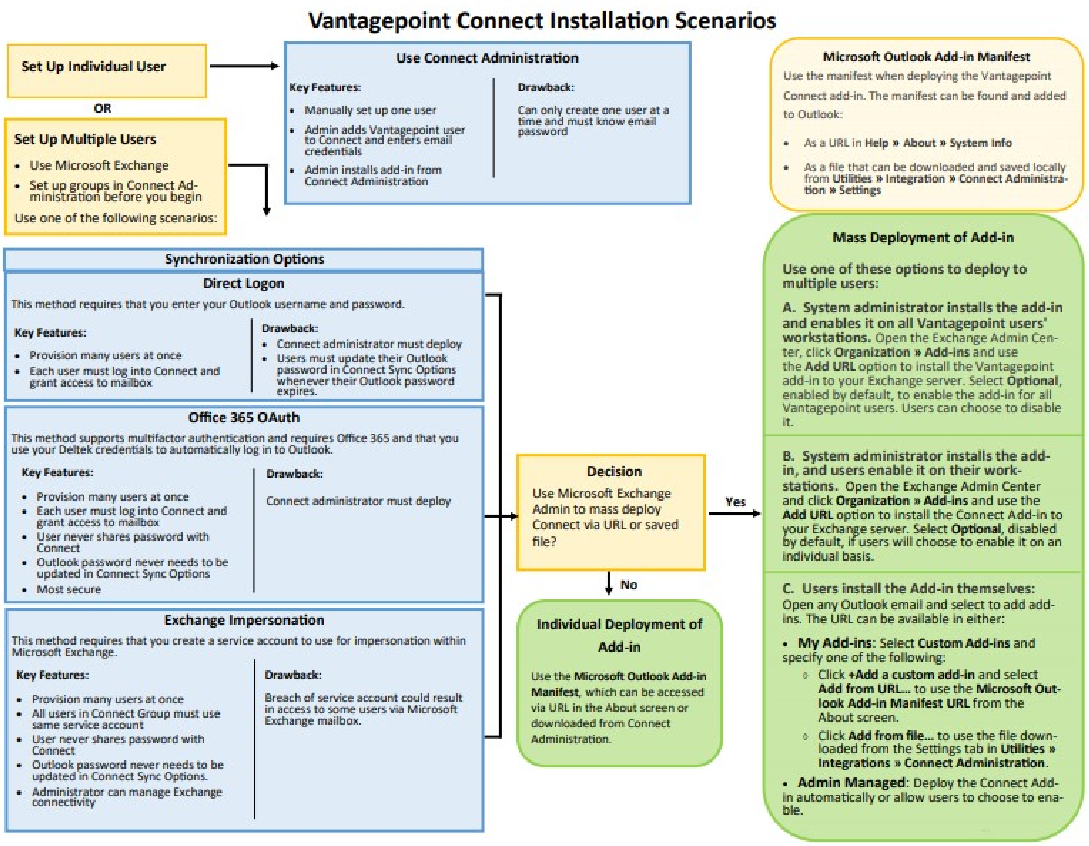
1. Select a grid column and then enter a filter value in the blank field above the column. The grid updates to display the records that fit the criteria that you enter.
2. To clear the grid filter values, select the values in the blank field above each column and click **Delete** or select and then click **X** next to the name of the column that you want to hide.
   This clears all filters and updates the grid to display the unfiltered contents.

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.

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.
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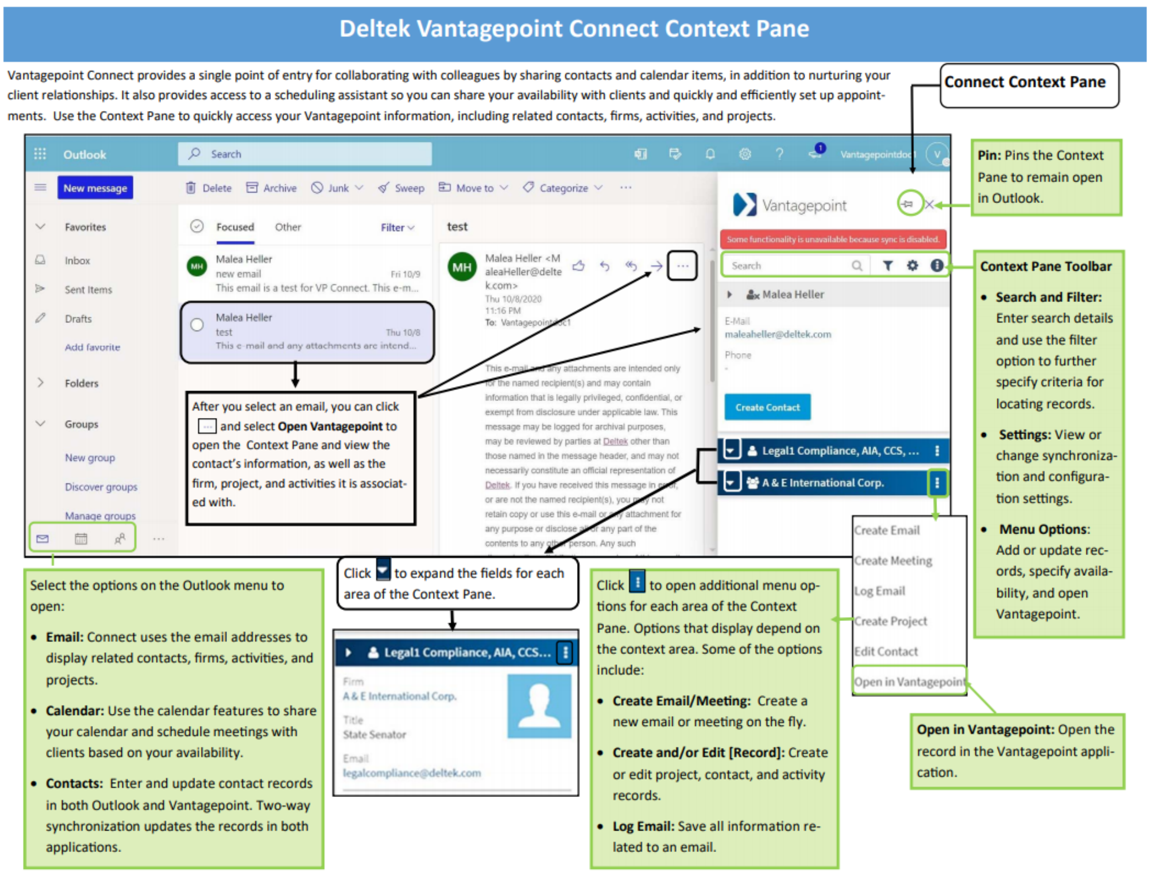
Quick Reference Topics

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

Context Pane Quick Reference

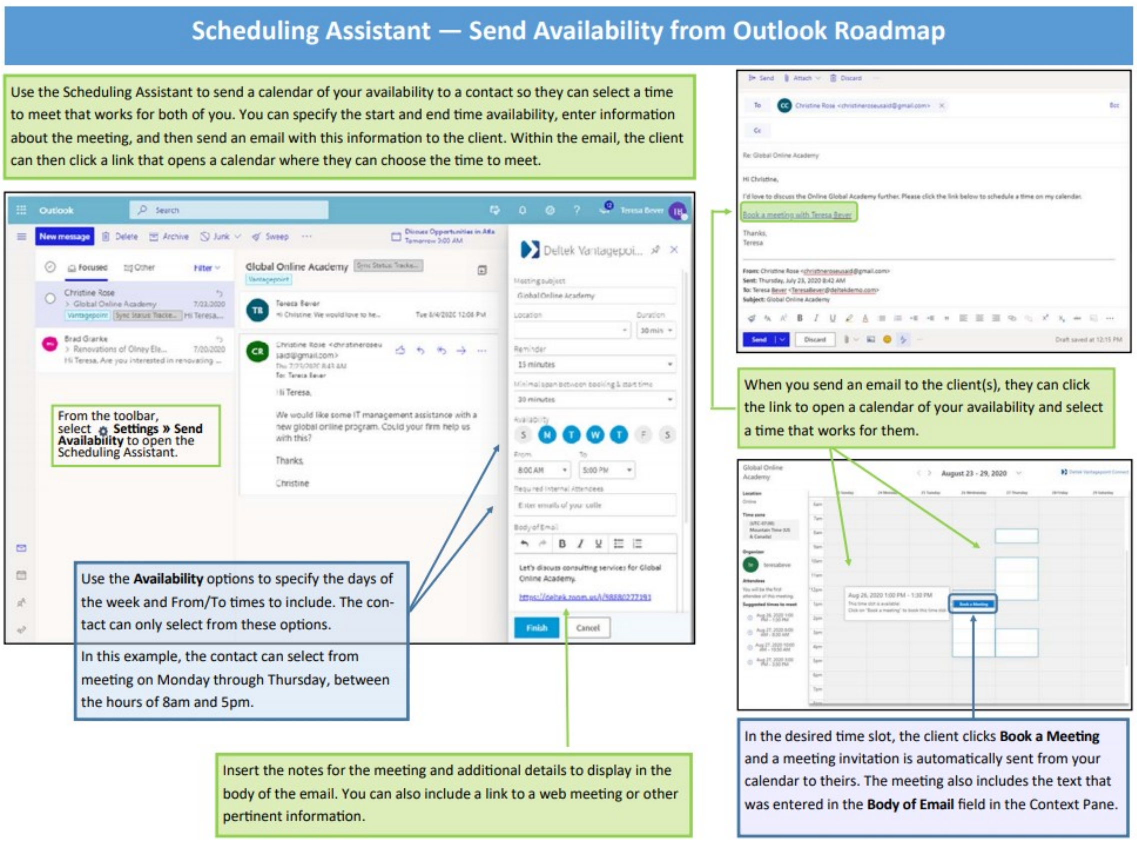
This quick reference provides an overview of Vantagepoint Connect's context pane in Outlook, and how to use it with email, contacts, and the calendar.

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.



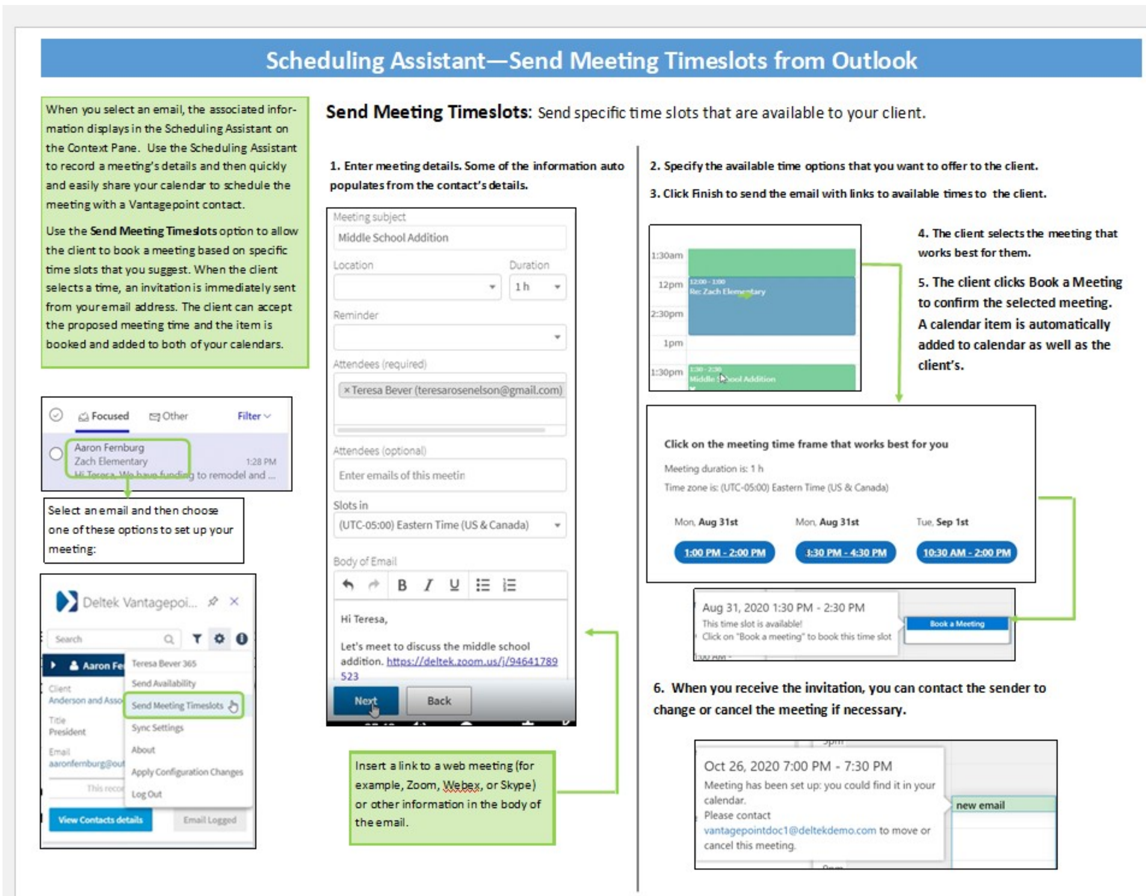
Send Availability from Outlook Quick Reference

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.



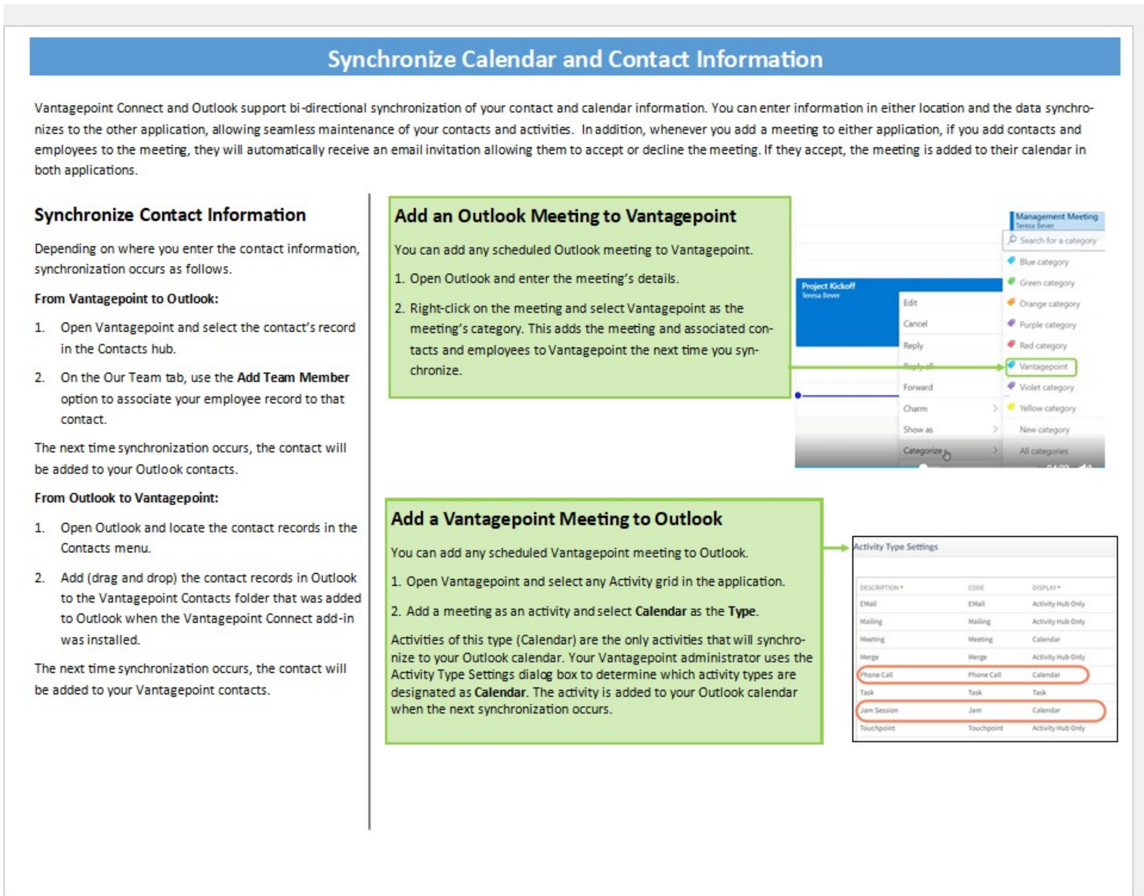
Send Meeting Timeslots from Outlook Quick Reference

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.

Activity Type Settings

DESCRIPTION	CODE	DISPLAY
EMail	EMail	Activity Hub Only
Mailing	Mailing	Activity Hub Only
Meeting	Meeting	Calendar
Merge	Merge	Activity Hub Only
Phone Call	Phone Call	Calendar
Task	Task	Task
Jam Session	Jam	Calendar
Touchpoint	Touchpoint	Activity Hub Only

How to...

As part of setting up the integration between Vantagepoint Connect and Vantagepoint CRM, you provision users and assign profiles, 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 view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

To set up integration configuration:

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

Exposed IP Addresses

Vantagepoint must be exposed to the internet via a publicly facing URL in order to use Connect.

Make sure that the add-in endpoint IP addresses and required resources are not blocked by firewall or proxy. 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:

- 20.37.134.116/31
- 52.232.229.94/31
- 52.154.221.254/31
- 52.254.41.108/31
- 20.112.250.24/31
- 20.112.250.24
- 20.112.250.25
- 20.72.120.64/31
- 20.72.120.64
- 20.72.120.65

Set Up and Work With Users and Profiles for Connect for Outlook

While working with Connect for Outlook Integration, you must set up users and can then use the Profiles tab to provision multiple users in a department or business unit at the same time.

Deploying to a profile (group of users) enables you to apply the same business rules to multiple employees. You can also add users to, and remove them from, specific profiles, as well as configure synchronization or remove profiles from Connect when necessary.

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 need to set up only 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:

To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

To set up an individual Connect user:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
   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 **+Provisioning** on the grid row to provision (activate) the account.
4. In the Provision Result grid, click the user name.
   The Users subtab opens and displays the selected user.
5. Click the Connectivity 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 multi-factor authentication. This method requires Office 365. The user must enter their Vantagepoint credentials to automatically log in to Outlook.

   Based on your selection, the email address automatically populates in the **Email** field.
6. 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 it could be your **Domain/User Name**.
7. 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, use 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.
8. Click 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.
9. Click **Save**.
   The user and email are configured.

10. If you have not yet done so, Install the VantagepointConnect Add-in for Outlook via the Microsoft Exchange Admin Center or from Connect Administration.
11. The user logs in to Vantagepoint from the Outlook add-in.
12. Select **Force Synchronization**.

Videos

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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.

Manage Individual Connect Users

After setting up individual Connect users, you can edit their settings, configuration synchronization, or delete the Connect user record if needed.

Edit a Provisioned Connect User

You can edit a provisioned Connect user's record to update their name, profile, employee number, and email. You can also view their synchronization information.

Prerequisite: Your security role must have access to Connect Administration to complete this process. Open **Settings** » **Security** » **Roles** and on the Overview tab, make sure that **Connect Administration** is selected under **Utilities** » **Integrations** in the Navigation Menu.

To edit a provisioned user:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Users tab and select a user record from the grid.
   The Edit User fields display.
3. Edit the **Name**, **Profile**, and **Email** information as needed.
   You cannot edit the **User ID**field.
4. Refer to the **Synchronization Status** and **Mailbox Status** fields for details on the synchronization process for the user.
   You cannot edit these fields.
5. Use the text editor to record any additional notes about the user.
6. Click the **Connectivity** subtab to edit the employee's email settings.
   Update any of the following fields as needed:

- In the **Mobile Access Type** field, select **Password** or **OAuth** depending on how you log in to email account. Your email address automatically populates in the Email field.
- Enter your **User Name** for the mailbox. This might be your email address but could also be your **Domain\User Name**.
- Depending on how your user account is set up, you will either:
  - Enter the password for your email account if you do not use two-factor authentication. Users can also update their own email password in Connect Sync Options.
  - Enter an App Password if you use two-factor authentication. 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-directory/user-help/multi-factor-authentication-end-user-app-passwords
- Click the pencil icon next to the **Exchange Web Services (EWS) URL** field; the URL is located and populated for you. If the field is not auto-populated, contact your Microsoft Exchange admin for the URL and to ensure EWS is enabled in Exchange.

Enable or Disable Synchronization for a User

You can enable or disable synchronization for a user. This enables you to quickly start or stop data sharing between the applications for the user. Users can also enable or disable their own synchronization through the settings in the add-in within Outlook.

Prerequisites:

- Your security role must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect** is selected under **Utilities** » **Integrations**.
- The employee record must include an email address and must be associated with a user record in Security settings.

To enable or disable synchronization for a user:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Users tab.
3. Select the name of the user for which you want to enable or disable synchronization. Use the filter to locate it in the grid.
4. Click **Enable Synchronization** or **Disable Synchronization** on the grid row containing the user name.

Delete a User

You can delete a provisioned user from the Vantagepoint Connect Add-in. This only affects the Connect user and does not affect their Vantagepoint user record for accessing Vantagepoint.

Prerequisite: Your security role must have access to Connect Administration to complete this process. Open **Settings** » **Security** » **Roles** and on the Overview tab, make sure that **Connect** is selected under **Utilities** » **Integrations** in the Navigation Menu Tree.

To delete a provisioned user:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Users tab and select a user record from the grid.
3. Click the **Delete** option to delete the user from the Connect Add-in.
4. Click **Delete** to confirm the delete.
5. Click **Save** to delete the user.

Set Up Connect Profiles

Profiles are groups of users that are created and authorized to use Vantagepoint Connect. Profiles enable you to configure and manage several Connect users together. When you select the Profiles tab, it lists the names of each established profile, the associated mailbox access type, and the profile's synchronization status. While using this tab, you can also create profiles, edit the associated information, and assign users to profiles.

To set up a Connect profile:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Profiles tab.
3. Click **Create Profile**.
4. Enter a **Name** and an **External ID** for the profile.
   Once you enter and save the name and ID, the ID cannot be changed.
5. The current **Synchronization Status** displays. You cannot change this status.
6. Click **Save**.
   The Profiles subtabs display. Use these subtabs to enter the profile's relevant information: Details, Users, Sync Issues, Statistics, Activity, and Connectivity .

Types of User Profiles for Connect for Outlook Integration

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

Video: See related video below

The methods for setting up groups include:

- Direct Logon
- Office 365 OAuth
- Exchange Impersonation

Refer to the following table for a description of how each method is used and why they are beneficial.

<table>
<tr><th colspan="2">Direct Login: This method requires that you enter your Outlook username and password.</th></tr>
<tr><th>Pros</th><th>Cons</th></tr>
<tr><td>Provision many users at once
Each user must log into Connect and grant access to their mailbox</td><td>Connect Administrator must deploy
Users must update their Outlook password in Connect Sync Options whenever their Outlook password expires</td></tr>
<tr><th colspan="2">Office 365 OAuth: This method supports multi-factor authentication and requires Office 365.</th></tr>
<tr><th>Pros</th><th>Cons</th></tr>
<tr><td>Provision many users at once
Each user must log into Connect and grant access to mailbox
User never shares password with Connect
Outlook password never needs to be updated in Connect Sync Options
Most secure</td><td>Connect Administrator must deploy</td></tr>
<tr><th colspan="2">Exchange Impersonation: This method requires that you create a service account to use for impersonation within Microsoft Exchange.</th></tr>
<tr><th>Pros</th><th>Cons</th></tr>
<tr><td>Provision many users at once
All users in Connect Group must use same service account
User never shares password with Connect
Outlook password never needs to be updated in Connect Sync Options
Administrator can manage Exchange connectivity</td><td>Breach of service account could result in access to Connect users' Microsoft Exchange mailbox</td></tr>
</table>

Videos

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Assign Users to a Profile for Outlook Integration

Use the Profiles tab to create groups of Connect users who have similar requirements. You can assign rights to each profile.

Prerequisites:
To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

- Profiles must be created on the Profiles tab. See the Set Up Connect Profiles help topic for more information.

To assign users to a profile:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Provisioning tab.
3. From the **Profile** drop-down list, select the name of the profile to which you will assign the user(s).
4. Select the name(s) of the user that you want to add to the profile.
   You can use the filter to locate names in the grid.
5. To provision users, complete one of these actions:
   - For a single user, click **+ Provisioning** on the grid row containing the user name. The User Provisioning fields display. Click **Activate Selected** to complete the activation.
   - For multiple users, click the check box next to the rows containing the user names. After all users are selected, click **Activate Selected** to complete the activation and display the Provisioning Multiple Users fields.
6. When the Provision Result grid displays, check the **Provisioning Results** column to verify the success of the user activation.
   - If the process was successful, the user names display on the Users list on the Profiles tab when this profile is selected.
   - If the process was not successful, review the details provided in the **Message** column to determine the reason.

Remove Users from a Profile for Outlook Integration

You can remove a user that was assigned to a Connect profile without removing the user from the Vantagepoint database.

Prerequisites:
To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

To remove a user from a profile:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Profiles tab.
3. In the Profiles grid, click the name of the profile that contains the user that you want to delete.
4. On the Edit Profiles form, click the Users subtab and locate the user that you want to remove from the profile.
5. On the Users grid toolbar, click the ⋮ **Delete** option to remove the user from the profile.
6. When prompted, confirm the deletion.
   The user is removed from the Connect profile but not from the Vantagepoint database.

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 Prerequisites:
To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.
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** .
2. On the Users tab, select the user for which you are installing the add-in.
3. Click the Actions menu and then select **Sidebar**.
4. In Outlook, on the email menu or ribbon, select Vantagepoint and then click **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** .
7. On the Users tab of the Connect Administration form, select your user record.
8. Click ⋮, 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.

Using Connect with Multiple Web Servers

You must complete the following additional steps if you have more than one Web server in your Connect setup (regardless of your load-balanced status).

To use Connect with more than one web server:

1. In Weblink > System Settings tab, the Session state must be set to *'Store Session State in SQL Server'* on all web servers. They must all be pointing to the same database where the session state will be stored.

   The instructions for this can be found in the *Deltek Vantagepoint Installation and Maintenance Guide*, in the chapter named *'Configure Database Session State for Vantagepoint'*.
2. Generate a machine key and set the same key on all web servers.

   The instructions for this can be found in the *Deltek Vantagepoint Installation and Maintenance Guide*, in the section named '*GenerateMachineKey Switch'*.

View Synchronization Status for Connect Integration for Outlook

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

Prerequisites:

To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

To view the synchronization status:

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

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 Users form, review information displayed in the **Synchronization Status** column:
   - **Enabled**: Synchronization is enabled for the profile or user.
   - **Disabled**: Synchronization is disabled for the profile or user. Select this status to disable synchronization in situations where there is an emergency, or you want to prohibit some users from enabling synchronization by moving them to a separate profile 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. Use the Sync Status form to review synchronization status, mail server connection status, and other synchronization statistics.

Force Synchronization in the Connect Integration Utility

You can force a synchronization of data between the mail application and Vantagepoint.

To force synchronization:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. Under Personal Settings, select **My Sync Status**.
   The Connectivity and Issues tabs display.
3. Select the **Connectivity** tab to view a summary of the synchronization process.
4. Click **Force Synchronization** to manually force synchronization between Vantagepoint and your mail application.

   Use the other synchronization buttons to complete associated actions:
   - **Start**: Select this option to start the synchronization process.

- **Resume**: When the synchronization process has been paused, select this option to resume the synchronization process.
- **Pause**: When synchronization is enabled, select this option to pause the process until it is re-enabled.

5. View the Sync Status form to review synchronization status, mail server connection status, and other synchronization statistics.

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** , update the group's credentials on the Email Configuration subtab.

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. Make sure that the add-in endpoint IP addresses and required resources are not blocked by firewall or proxy. If your network or firewall is configured to allow only certain IP addresses to access Vantagepoint, you will need to add these Connect IP Addresses to the **Allow** list for inbound and outbound connections:
   - 20.37.134.116/31
   - 52.232.229.94/31
   - 52.154.221.254/31
   - 52.254.41.108/31
   - 20.112.250.24/31
   - 20.112.250.24
   - 20.112.250.25
   - 20.72.120.64/31
   - 20.72.120.64
   - 20.72.120.65
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** .

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 My Connectivity tab of Connect Administration for Outlook Integration in **Utilities** » **Integrations** » **Connect** , 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 with 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. Only one mailbox can 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** 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 Sync Status in **Utilities** » **Integrations** » **Connect** in Vantagepoint.

Connect Add-in Does Not 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** .
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 profile 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 or Hangs on Loading

Make sure that the add-in endpoint IP addresses and required resources are not blocked by firewall or proxy. If your network or firewall is configured to allow only certain IP addresses to access Vantagepoint, you will need to add these Connect IP Addresses to the **Allow** list for inbound and outbound connections:

- 20.37.134.116/31
- 52.232.229.94/31
- 52.154.221.254/31
- 52.254.41.108/31
- 20.112.250.24/31

- 20.112.250.24
- 20.112.250.25
- 20.72.120.64/31
- 20.72.120.64
- 20.72.120.65

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

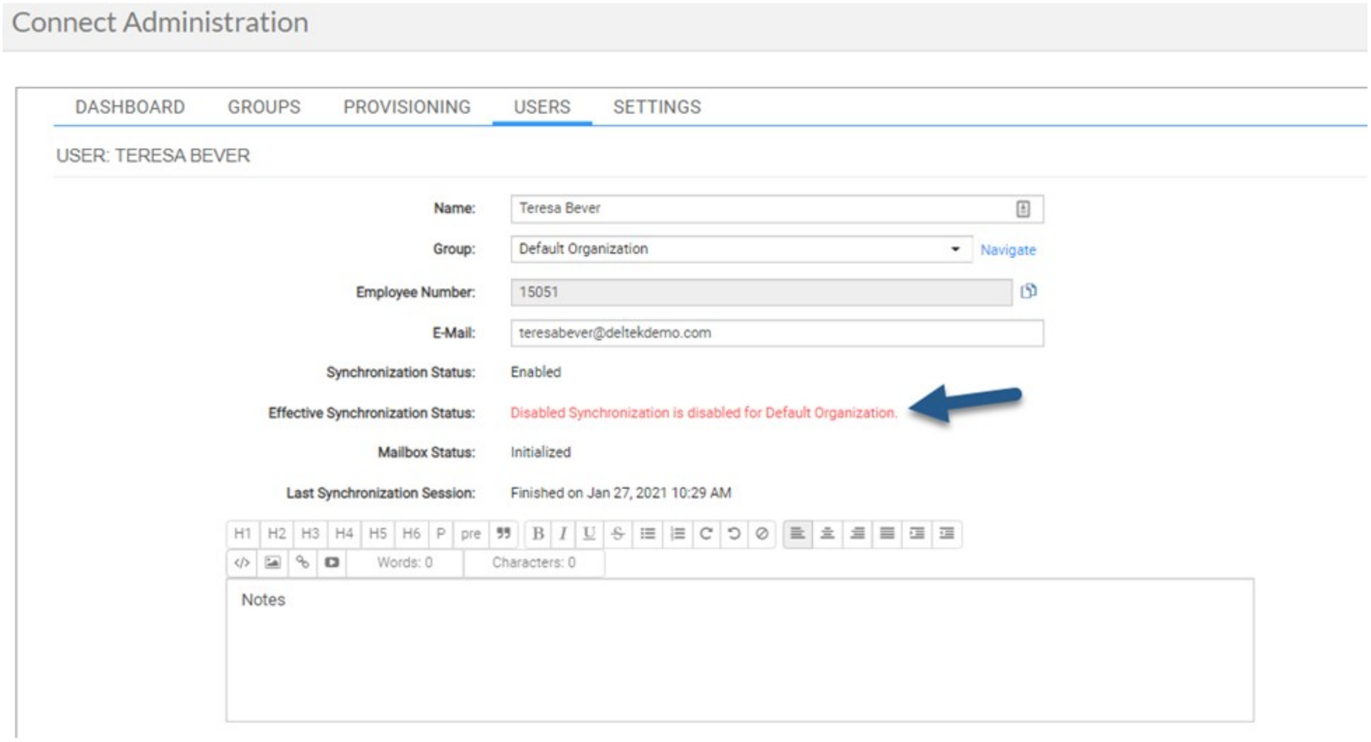
Sync Has Stopped or You See a Red Message "Some functionality is unavailable because sync is disabled" in the Contextual Pane in Outlook

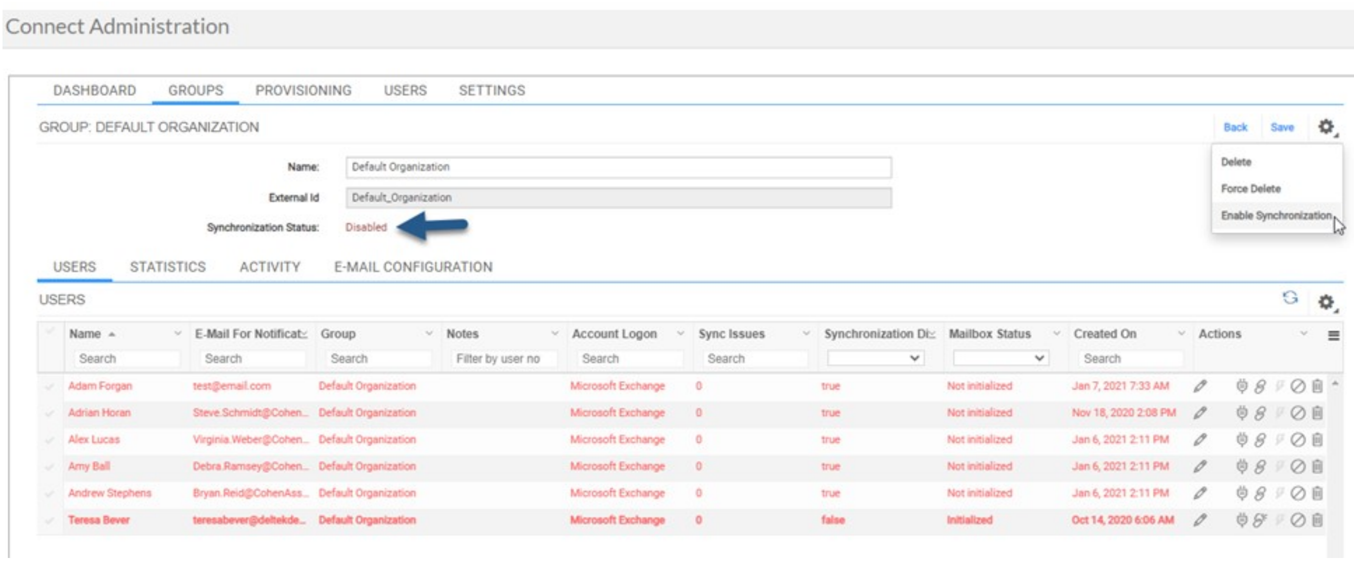
Synchronization can stop because of one of the following situations:

- An admin has disabled synchronization for a profile or a user in **Utilities** » **Integrations** » **Connect** .
- 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 My Connectivity tab of Connect Administration for Outlook Integration.

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 receive a red message about the sync being disabled, the message should disappear when you close the Context Pane and then re-open it.
2. If the sync is still not working, check the user's status in **Utilities** » **Integrations** » **Connect** . If an administrator has disabled synchronization for this user's profile, you will see a message in the **Effective Synchronization Status** field. In this case, you must enable synchronization for the profile. To do this, open the profile in **Utilities** » **Integrations** » **Connect** and select **Enable Synchronization**.





If sync is enabled for this user's profile, but the **Synchronization Status** field 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 to see 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** . If there is an error, you can enter the credentials on the Connectivity subtab of Users in Connect

Administration. Alternatively, have the user enter their credentials on the **Sync Settings** » **E-mail Configuration** tab of **Utilities** » **Integrations** » **Connect** .

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** . 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** .

The Error "ISA-059 - The request is invalid." Displays When Saving Email Configuration Using OAuth

The **Utilities** » **Integrations** » **Connect Administration** screen is populated as well as the Manifest URL. When a user navigates through the page and makes a change in the **Set Mailbox Type** field on the Email Configuration subtab to **Microsoft Exchange Direct Logon**, upon clicking **Save**, the following error displays: **ISA-059. The request is invalid.**

The fix for this issue can be applied by each user or globally for every user by the System Administrator:

- **System Administrator**: On the Profiles tab in **Utilities** » **Integrations** » **Connect Administration**, select the affected profile, and ensure that the EWL URL is completed correctly (manually, not using autodiscover). This will ensure that all regular users are pre-populated with the correct EWL URL.
- **User**: The error occurred because the Exchange EWL URL is missing, and the settings cannot be saved until this field is completed. In **Utilities** » **Integrations** » **Connect** , you can select **Sync Settings** » **E-mail Configuration**. Click **Configuration**, click on **Change**, and specify the username and password. Then, use the **Autodiscover** button in the **EWL URL** field to complete it. After the field is filled, click **Save**.

Multiple Web Servers

For Connect instances that use more than one web server, follow the instructions provided in the Use Connect with Multiple Web Servers procedure.

Delete Connect for Outlook Configuration

You delete the Connect configuration in the following situations: when there was an error during initial configuration, when you need to reconfigure Connect for Outlook, 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.

You must also have Administrator access rights on the Overview tab of **Settings** » **Security** » **Roles**.

To delete Connect for Outlook Configuration:

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

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 view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

Display the Connect Administration Form for Outlook Integration

You display the Connect Administration form in Integrations.

Prerequisites:

To view the prerequisites and required settings for the Connect for Outlook add-in, see Connect for Outlook Prerequisites and Required Settings.

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

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

Personal Settings

Use Personal Settings to configure connectivity and synchronization information.

My Connectivity Tab of Connect Administration for Outlook Integration

Use the My Connectivity 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 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

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.

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.
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.

Sync Tab of Connect Administration Form for Outlook Integration

Use this tab to view an overview of synchronization information.

Contents

Field	Description
Synchronization Statistics	Refer to the graphical indicators at the top of the form for a quick view of the synchronization status and the number of records for each: ▪ General ▪ Issues ▪ Blocklist
Synchronization Status	Use these options to trigger the synchronization process: ▪ **Start**: Select this option to start the synchronization process. ▪ **Resume**: When the synchronization process has been paused, select this option to resume the synchronization process. ▪ **Pause**: When synchronization is enabled, select this option to pause the process until it is re-enabled. ▪ **Force Sync**: Select this option to manually force the synchronization between Vantagepoint and Connect.
Last Session Details	This field displays the date and status of the last synchronization.

Platform Settings

Use Platform Settings to access information on synchronization issues.

Sync Issues Tab of Connect Administration for Outlook Integration

Select this tab to view any issues related to synchronization. The number of issues displays for all issues, contacts, appointments, and emails.

Contents

Field	Description
Export to CSV	Click this option to download a log of the synchronization issues.

See the Troubleshoot Synchronization and Connect Add-in Issues for Outlook Integration help topic for troubleshooting information.

Administration

Use the Administration area to access the Dashboard, Provisioning, Profiles, and Users tabs in Connect for Outlook.

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 button displays upon initial use only. Click this 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 box 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 enables you to access the Provisioning Multiple Users fields so that you can provision multiple users for a profile. 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 of users who are not yet provisioned. When you click the **Provision** button, you automatically select those users who are not yet provisioned. This enables you to access the Provisioning Multiple Users fields so that you can provision multiple users for a profile. 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

Field	Description
	■ **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.
Add-in Use	This field displays the percentage of the Connect Add-in that is used as well as the percentage 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 this 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 deletion process.

Provisioning Tab of the Connect Administration Form 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 profile to which you want to assign the user. The selected profile determines the business rules and access rights for the user. See the Set Up Connect Users and Profiles 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
Profile	Select the profile to which you want to assign the user. The profile determines the business rules and access rights for the user. See the Use Profiles to Set Up Multiple Connect Users and Assign Users to a Profile online help topics for details on assigning users to profiles.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Mailbox Access Type</td><td>The mailbox access type depends on the selected profile:

Microsoft Exchange Direct Logon: Use the Exchange Web Services (EWS) URL to provision a profile 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.
</td></tr>
<tr><td>Send Welcome Email</td><td>Select this option to send a welcome message to the user to alert them when they are provisioned.</td></tr>
<tr><td>Employee Number</td><td>This field displays the assigned employee number.</td></tr>
<tr><td>User Name</td><td>This field displays the assigned user name.</td></tr>
<tr><td>Email</td><td>This field displays the email address associated with the employee.</td></tr>
<tr><td>+ Provision</td><td>Use this button to provision (activate) the user account.

For a single user, click + Provisioning on the grid row containing the user name. The User Provisioning fields display. Click Activate Selected to complete the activation.
For multiple users, click the checkbox next to the rows containing the user names. After all users are selected, click Activate Selected to complete the activation and display the Provisioning Multiple Users fields.

The Provision Result grid displays. Refer to the Provisioning Results column of this grid to confirm the success of the user activation.

If successful, the user names display on the Users list on the Profiles tab when this profile is selected.
If not successful, review the details provided in the Message column to determine the reason it was activated.
</td></tr>
</table>

Field	Description
⋮ **Actions**	Use the Actions options to complete various tasks related to the selected user. See the Connect Administration Tools and Grid Options help topic for more information.

Profiles Tab of the Connect Administration Form for Outlook Integration

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

The Profiles tab lists the names of each profile, their associated mailbox access type, and the profile's synchronization status. While using this tab, you can also create profiles, edit their associated information, and assign users to profiles. See the Set Up Connect Profiles help topic for details on creating profiles, assigning users to profiles, and other information.

The Profiles tab includes the Details, Users, Sync Issues, Statistics, Activity, and Connectivity subtabs.

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 profile. If you are entering a new profile, 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 subtab when you create the profile. The options are: ▪ **Microsoft Exchange Direct Logon**: Use the **Exchange Web Services (EWS) URL** to provision a profile 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).

Field	Description
	▪ **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 profile.
Actions	Use the Actions options to complete various tasks related to the selected profile. See the Connect Administration Tools and Options help topic for more information.

Details Subtab of Profiles

Select this subtab to view detailed information about the selected profile.

Contents

Field	Description
Name	This field displays the **Name** for the profile. If you are entering a new profile, an **ID** field also displays. Once you enter and save the name and ID, the ID cannot be changed.
External ID	This field displays the **External ID** for the profile. Once you enter and save the ID, the ID cannot be changed.
Synchronization Status	This field displays the synchronization status, either enabled or disabled, for the selected profile.

Users Subtab of Profiles

Select this subtab to view detailed information about the users associated with the selected profile.

Contents

Field	Description
Name	This field displays the user name.
Email for Notifications	This field displays the user email address to which notifications are sent.
Profile	This field displays the user profile. 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

Field	Description
	Connect. This grid lists the names of each profile, their associated mailbox access type, and the synchronization status for each profile.
Notes	Enter any notes or important information about the user.
Account Logon	This field displays the type of mail server used to log on to your email.

Field	Description
Sync Issues	This field displays the total number of synchronization issues. If there are issues for a user, select that user and click the Issues subtab to view details about the issues.
Synchronization Disabled	This true/false 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 Status	This field displays the mailbox's initialization status: **Initialized** or **Not Initialized**. The mailbox must be initialized after you switch Vantagepoint databases, or it must be re-initialized to remove all business data from the mailbox before you create a new mailbox.
Created On	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.

Statistics Subtab of Profiles

Select this subtab to view the synchronization statistics for the selected profile. For detailed information about a specific statistic, select the statistic's grid row.

Sync Issues Subtab for Profiles in Connect for Outlook

Select this subtab to view any issues related to synchronization. The number of issues displays for all issues, contacts, appointments, and emails.

Contents

Field	Description
Export to CSV	Click this option to download a log of the synchronization issues.

See the Troubleshoot Synchronization and Connect Add-in Issues for Outlook Integration help topic for troubleshooting information.

Activity Subtab of Profiles

Select this subtab to view a detailed activity log of changes and actions related to the selected profile.

This includes the date of the change, who was responsible, the type of change, and any associated details.

Connectivity Subtab of Profiles

Select this subtab to view or edit the email information for the selected user.

Contents

Field	Description
Mailbox Access Type	This field displays the **Mailbox Access Type** as specified on the E-Mail Configuration subtab when you create the profile. Options include: ▪ **Microsoft Exchange Direct Logon**: Use the **Exchange Web Services (EWS) URL** to provision a profile 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 in to Connect. When you select this option, the **Exchange Web Services (EWS) URL** field displays. ▪ **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 that is specified for the token). When you select this option, the **Account Logon**, **Password**, and **Exchange Web Services (EWS) URL** fields display. ▪ **Office 365 OAuth**: Use multi-factor authentication to provision many users at one time who can use their Vantagepoint credentials to automatically log into Outlook.

Additional Fields

Depending on the **Mailbox Access Type** that is selected, a combination of the following fields may display and require completion.

Field	Description
Exchange Web Services (EWS) URL:	When you set the **Mailbox Access Type** option to **Microsoft Direct Logon**, this field displays the Exchange Web Services URL for the user. This option requires the user to enter their email password in Outlook when logging into Connect. If the EWS URL is not auto-populated, contact your Microsoft Exchange administrator for the URL and to ensure EWS is enabled in Exchange.
User Name (May be Domain\User Name):	This field displays the user name/email address or domain URL for the mailbox.
Password:	This field displays the user's password.

Additional Buttons

When you set the **Mailbox Access Type** option to **Microsoft Exchange Impersonation**, these buttons display.

Field	Description
Check Users' Exchange Impersonated Access	Select this button to confirm user access for Exchange Impersonation. A prompt displays that either confirms access or that suggests changes that you can make so that access is correctly set.
Discard Changes	Click this button to cancel the Exchange Impersonation access.

Users Tab of the 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 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 Connectivity subtabs.

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.
Profile	This field displays the user profile. Profiles are composed of several users who have similar configurations and are defined on the Profiles tab of Connect Administration. The grid on this tab displays the profiles, or groups, of users that have been created and authorized to use Vantagepoint Connect. This grid lists the names of each profile, their associated mailbox access type, and the synchronization status for each profile.
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.
Accounts	This field displays the type of mail server used to log on to the user 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 subtab 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.

Field	Description
⋮ **Actions**	Use the Actions options to complete various tasks related to the user. See the Connect Administration Tools and Options help topic for more information.

Details Subtab for Users in Connect for Outlook

Select this subtab to view detailed information about the selected user.

Contents

Field	Description
Name	This field displays the user name.
Email	This field displays the user email where notifications are sent.
Profile	This field displays the user profile. Profiles are composed of several users who have similar configurations, and are defined on the Profiles 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 profile, their associated mailbox access type, and the synchronization status for each profile. Click **Navigate** to open the profile that is associated with the user.
User ID	This field displays the **External ID** for the profile. Once you enter and save the ID, the ID cannot be changed.

Connectivity Subtab of Users

Select this subtab to view or edit the email information for the selected user.

Contents

Field	Description
Group Type	This field displays the type of group to which the user is assigned: ▪ **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).

Field	Description
	▪ **Office 365 OAuth**: Use multi-factor authentication to provision many users at one time who can use their Vantagepoint credentials to automatically log in to Outlook.
Account Logon	This field displays the type of account logon.
Mailbox Access Type	This field displays how the mailbox/email account is accessed: ▪ **Password**: This option requires 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 multi-factor authentication and requires Office 365 and that the user uses their Vantagepoint credentials to automatically log in to Outlook.
E-Mail:	This field displays the user's email address.

Additional Fields

When you set the **Mailbox Access Type** option to **Password**, a combination of the following fields may display and require completion.

Field	Description
Exchange Web Services (EWS) URL:	Click the pencil 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. This option requires the user to enter their email password in Outlook when logging into Connect.
User Name (May be Domain\User Name):	This field displays the user name/email address or domain URL for the mailbox.
Password:	This field displays the user's password.

Additional Buttons

Depending on the **Mailbox Access Type** that is selected, additional buttons may display:

Field	Description
Invalidate Password	This option displays if you set the **Mailbox Access Type** option to **Password**. Click this button to invalidate the specified user password.

Field	Description
Discard Changes	This option displays if you set the **Mailbox Access Type** option to **Password** or **OAuth**. Click this button to discard the changes.
Invalidate OAuth Token	This option displays if you set the **Mailbox Access Type** option to **OAuth**. Click this button to invalidate the authentication token.

Statistics Subtab

Select this subtab to view the synchronization statistics for the selected user. For detailed information about a specific statistic, select the statistic's grid row.

Activity Subtab of Users

Select this subtab to view a detailed activity log of changes and actions related to the selected user.

This includes the date of the change, who was responsible, the type of change, and any associated details.

Sync Issues Subtab for Users in Connect for Outlook

Select this subtab to view any issues related to synchronization. The number of issues displays for all issues, contacts, appointments, and emails.

Contents

Field	Description
Export to CSV	Click this option to download a log of the synchronization issues.

See the Troubleshoot Synchronization and Connect Add-in Issues for Outlook Integration help topic for troubleshooting information.

Learn More About

Learn more about the additional features and requirements for the Vantagepoint Connect Add-in.

Required Fields for Vantagepoint Connect

These fields are essential for Vantagepoint Connect functionality.

Activity

To create activities from Outlook and synchronize activities between Outlook and Vantagepoint, you must have edit rights to the following fields in activities:

- Name

- Attendees
- All Day Event checkbox
- Priority
- Location
- Private
- Start/End Date
- Timezone Offset

Contact

To view contacts in Outlook, edit contacts from Outlook, and synchronize contacts between Outlook and Vantagepoint, you must have rights to the following fields in contacts:

- First Name
- Last Name
- Middle Name
- Owner
- Email
- Phone
- Fax
- Cell Phone
- Home Phone
- Pager
- Website
- Description/Memo
- Title
- Prefix
- Suffix
- Firm

Project

To associate activities or contacts with projects, you must have view access to the Projects hub. You must also have view access to the following fields in projects:

- Number
- Long Name
- Primary Client
- Primary Contact

Firm

To view and edit firms in Outlook, you must have access to the following firm fields:

- Name
- Type
- Address Grid

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue.

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