Deltek

Deltek Vantagepoint Connect 3.5.x

Integration Technical Guide

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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.

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

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

Note that Office 365 OAuth is also supported but not required.

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.

Refer to the **Checklist: Basic Steps to Provision Vantagepoint Connect** and **Set Up Connect Users and Installation Scenarios** topics for an overview of the different aspects of the setup process.

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.

Checklist: Basic Steps to Provision Vantagepoint Connect

There are several steps that are required to provision, or activate, the Vantagepoint Connect application. Review and complete all steps before using Connect. For detailed information, use the links to open the associated procedures.

Before You Begin

Before provisioning Connect, you must complete the following requirements:

- 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 help topic for the list of IP addresses.
- The security role of the individual who is responsible for configuring Conect 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 » Roles**. The employee record must also have a valid email address.
- Each employee that will use Connect must have an employee record that includes an email address and is associated with a user record in **Settings** » **Security** » **Users.**
- Windows Authentication for on-premises is not supported with Vantagepoint Connect.

Step 1: Set Up Integration Configuration

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

See the Set Up Integration Configuration topic for more information.

Step 2: Optional - Set Up Connect Groups

If you will have multiple Connect users that have the same roles and requirements, you can create groups to organize these sets of users.

After you set up groups, you can set up users and assign multiple users to each group.

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

See the Work with Connect Groups 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 topic for more information on setting up users and the different types of installation scenarios.

Step 4: Install Vantagepoint Connect Add-in

Install the add-in, in both Vantagepoint and Outlook.

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

Step 5: Open and Pin the Vantagepoint Connect Pane

Open and pin the contextual pane so that it remains visible in Outlook.

See the Open Vantagepoint Connect Context Pane in Outlook topic for more information.

Set Up Connect Integration

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

Prerequisites:

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

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

Exposed IP Addresses

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

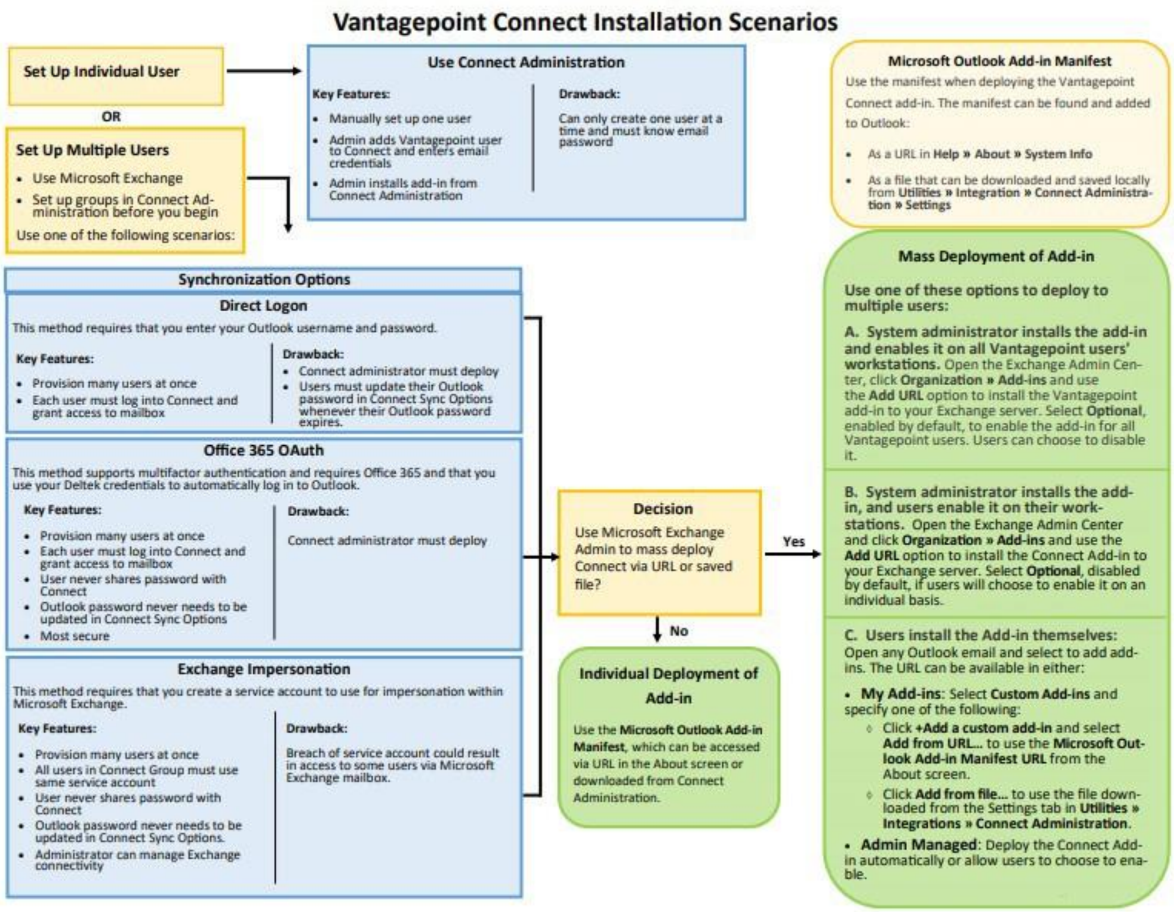
Make sure the add-in endpoint IP addresses and required resources are not blocked by firewall or proxy. If your network or firewall is configured to only allow certain IP addresses to access Vantagepoint, you will need to add these Connect IP Addresses to the **Allow** list for inbound and outbound connections:

Application Service	Outbound Public IPs
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

Set Up Connect Users and Installation Scenarios

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

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



Review the [Checklist: Basic Steps to Provision Vantagepoint](#) topic for more information.

Video

Title	Description
Setting up and Deploying Connect	Learn about the different user and installation scenarios to set up the Connect add-in.

Set Up Individual Connect Users

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

Prerequisites:

- Your security role must have access to Connect Administration to complete this process. Open **Settings** » **Security** » **Roles** and on the Overview tab, make sure **Connect Administration** is selected under **Utilities** » **Integrations** in the Navigation Menu Tree.
- The employee records must include email addresses and must be associated with a user record in Security Settings.
- 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. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**. If you are logged in as the user 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, or activate, the account.

   The User Provisioning fields display.
4. Complete the fields on the form and click the **Provisioning** button. The Provision Result grid displays.
5. Click the user name.

   The Users tab opens and displays the selected user.
6. Select 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 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 and requires Office 365 and that the user uses 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 if 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 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.
10. Click **Save**. The user and email are configured.
11. If not yet completed, Install the Vantagepoint Connect Add-in via the Microsoft Exchange Admin Center or from Connect Administration.
12. User logs into Vantagepoint from the Outlook add-in.
13. From the Settings menu, select Force Synchronization. Video

Title	Description
Setting up and Deploying Connect	Learn about the different user and installation scenarios to set up the Connect add-in.

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, group, 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 **Connect Administration** is selected under **Utilities** » **Integrations** in the Navigation Menu Tree.

To edit a provisioned user:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Click the User's tab and select a user record from the grid.
3. Click the **Edit User** icon on the grid row that you want to edit. The Edit User fields display.
4. Edit the **Name**, **Group**, and **Email** information as needed. You cannot edit the **Employee Number** field.
5. Refer to the **Synchronization Status** fields for details on the synchronization process for the user. You cannot edit these fields.
6. Use the text editor to record any additional notes about the user.
7. Click the **Email Configuration** tab at the bottom of the form 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 pencil next to the **Exchange Web Services (EWS) URL** field and the system will locate and populate the URL for you. If the **EWS URL** is not auto-populated, contact your Microsoft Exchange admin for the URL and to ensure EWS is enabled in Exchange.

8. Click **Save** to save the user. The user and email are configured.

Enable or Disable Synchronization for a User

You can enable or disable synchronization for a user. This allows you to quickly start or stop data sharing between the applications for the user. Users can also enable or disable their own synchronization through Connect Sync Options or by using 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 Administration 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. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
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 **Connect Administration** is selected under **Utilities » Integrations** in the Navigation Menu Tree.

To delete a provisioned user:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Click the User's 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. The user is deleted.

Use Groups to Set Up Multiple Connect Users

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.

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.

Direct Logon: This method requires that you enter your Outlook username and password.	
Pros	**Cons**
▪ Provision many users at once ▪ Each user must log into Connect and grant access to their mailbox	▪ Connect Administrator must deploy ▪ Users must update their Outlook password in Connect Sync Options whenever their Outlook password expires
Office 365 OAuth: This method supports multifactor authentication and requires Office 365.	
Pros	**Cons**
▪ 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	Connect Administrator must deploy
Exchange Impersonation: This method requires that you create a service account to use for impersonation within Microsoft Exchange.	
Pros	**Cons**

Direct Logon: This method requires that you enter your Outlook username and password.	
▪ 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	Breach of service account could result in access to Connect users' Microsoft Exchange mailbox

Video

Title	Description
Setting up and Deploying Connect	Learn about the different user and installation scenarios to set up the Connect add-in.

Use Direct Logon

Use Microsoft Exchange Direct Logon to 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 in Connect Sync Options and update that password in Vantagepoint whenever their Outlook password changes.

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 **Connect Administration** is selected under **Utilities » Integrations** in the Navigation Menu Tree.

To use Direct Logon for a group:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Select the Groups tab and click the **New** button. The Create Group form displays.
3. Enter a **Name** and an **External ID** for the group. The ID is read-only and cannot be changed after creation.
4. Select Microsoft Exchange Direct Logon as the Mailbox Access Type.
5. Enter the **Exchange Web Services (EWS) URL** for the group. The **EWS URL** typically auto populates; if it does not, contact the Microsoft Exchange administrator for the URL and to ensure EWS is enabled in Microsoft Exchange.

   Direct Logon also requires that the user share their password with the administrator (or is sitting with the administrator to enter it) and that the user update their Outlook password in Connect Sync Options whenever the Outlook password expires or it is changed.

Post-requisites:

- Assign Users to a Group

- [Deploy Vantagepoint Connect]

Use Exchange Impersonation

Use Microsoft Exchange Impersonation with 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).

Pre-requisite:

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

To use Exchange Impersonation for a group:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Select the Groups tab and click the **New** button. The Create Group form displays.
3. Enter a **Name** and an **External ID** for the group. The ID is read-only and cannot be changed.
4. Select **Microsoft Exchange Impersonation** as the **Mailbox Access Type**. This requires all users in the Connect group to use the same service account and allows the system administrator to provision many users at once.
5. Enter the service account logon, password, and EWS URL.

Post-requisites:

- Assign Users to a Group
- Deploy Vantagepoint Connect

Use Office 365 OAuth

Use Office 365 OAuth multi-factor authentication to provision many users at one time who can use their Outlook credentials to synchronize with Deltek.

Deployed by the system administrator, this highly secure method requires each user to log into Connect and grant access to their mailbox. 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).

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

To use Office 365 OAuth for a group:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Select the Groups tab and click the **New** button. The Create Group form displays.
3. Enter a **Name** and an **External ID** for the group. The ID is read-only and cannot be changed.
4. Select **Office 365 OAuth** as the **Mailbox Access Type**.

Post-requisites:

- Assign Users to a Group

- Deploy Vantagepoint Connect

Manage Connect Groups

While working with Connect groups you can add users to and remove them from specific groups, configure synchronization for each group, and remove groups from Connect if needed.

Assign Users to a Group

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

Prerequisites:

- Your security role must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect Administration** is selected under **Utilities** » **Integrations**.
- Your employee record must include your email address and must be associated with your user record in Security settings.
- Groups must be created on the Groups tab. See the Create a Group topic for more information.

To assign users to a group:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. On the Connect Administration form, click the Provisioning tab.
3. Select the name(s) of the user that you want to activate/provision. You can use the filter to locate it in the grid.
4. To provision users:
   - For one user, click the **+** on the grid row containing the user name. The User Provisioning fields display.
   - For multiple users, click the ✔ (s) next to each row containing the user name, or click the ✔ at the top of the grid to select all users. Click **Activate Selected** for the Provisioning Multiple Users fields to display.
5. From the **Group** drop-down list, select the name of the group to which you will assign the user. The **Mailbox Access Type** displays based on the group's configuration: Microsoft Exchange Direct Logon, Microsoft Exchange Impersonation, or Office 365 OAuth.
6. Select the **Send Welcome Email** checkbox to send a welcome message to the user to alert them when they are provisioned.
7. Click the **Provisioning** button to activate the user. The Provision Result grid displays. Refer to the **Provisioning Results** column on this grid to confirm the success of the user activation. If successful, the user names display on the Users list on the Groups tab when this group is selected. If not successful, review the details provided in the **Message** column to determine the reason it was activated.

Postrequisites:

- User enters their Outlook credentials in Connect Sync Options
- Administrator enables synchronization
- Add-in must be added to Outlook

Remove a User from a Group

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

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

To remove a user from a group:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Select the Groups tab and on the Groups grid, click the name of the group that contains the user that you want to delete. The Edit Groups form displays.
3. Select the Users tab on the Groups form, and locate the user you want to remove from the group.
4. Click the option on the Users Grid to remove the user from the group. Confirm the delete.

Enable or Disable Synchronization for a Group

When you create a group of users, you can enable or disable synchronization for the entire group at the same time. This allows you to quickly start or stop data sharing between the applications for the users within the group.

Prerequisites:

- Your security role must have access to Connect Administration. In **Settings » Security » Roles**, on the Overview tab, make sure that **Connect Administration** is selected under **Utilities » Integrations**.
- Your employee record must include your email address and must be associated with your user record in Security settings.
- Groups must be created on the Groups tab. See the Create a Group help topic for more information.

To enable or disable synchronization for a group:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. On the Connect Administration form, click the Groups tab.
3. Select the name of the group 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 group name. The Group fields display.
5. Click and select either Enable Synchronization or Disable Synchronization.

Remove a Group from Connect

Use the following procedure to remove a group from Connect. This does not delete the users from Connect; only the groups.

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

To remove a group from Connect:

1. Open Vantagepoint and go to **Utilities » Integrations » Connect Administration**.
2. Select the Groups tab and on the Groups grid, click the name of the group you want to delete.
3. Click the option on the Users Grid to remove the group from Connect. Confirm the delete.

Deploy Connect to Groups

After setting up groups, you can push out the add-in to groups either individually or through mass deployment in the Exchange Admin Center.

When you deploy the add-in, it is necessary to use the Microsoft Outlook Add-in Manifest. The manifest can be found and added to Outlook:

- As a URL in **Help » About » System Info**
- As a file that can be downloaded and saved locally from **Utilities » Integration » Connect Administration » Settings**

Video

Title	Description
[Setting up and Deploying Connect]()	Learn about the different user and installation scenarios to set up the Connect add-in.

Deploy Individually

Use the Microsoft Outlook Add-in Manifest to deploy Connect individually or push it out to multiple people via the Exchange Center.

To install the Outlook add-in, you must have the Vantagepoint CRM module activated.

Microsoft Outlook and Exchange Supported Versions

The following Microsoft software is supported for the Outlook add-in:

- Microsoft Exchange 2016 with CU 5 or later installed
- Microsoft Outlook 2016 for Windows Desktop
- Microsoft Outlook 2016 Web App (OWA)
- Microsoft Outlook 2016 for Mac
- Microsoft Office 365

To deploy Connect individually:

1. Install the **Microsoft Outlook Add-in Manifest**, which can be found and added to Outlook:
    - As a URL in **Help » About » System Info**
    - As a file that can be downloaded and saved locally from **Utilities » Integration » Connect Administration » Settings**
2. From within Outlook, select to get an add-in. Depending on how you access Outlook, the button may be labeled **Store** in the ribbon or it might be a **Get Add-ins** menu on the email.
3. Select **My Add-ins** and **Add Custom Add-in**. Select **Add from URL** or **Add from file** depending on how you are getting the manifest file.

Mass Deploy Using Microsoft Exchange Admin Center

Use Microsoft Exchange Admin Center to mass deploy the Connect Add-in to a group using Office 365 or the on-premise Exchange Server. This can be automated through Exchange Management Powershell scripts.

Prerequisites: To install the add-in, you must have the Vantagepoint CRM module activated.

Microsoft Outlook and Exchange Supported Versions

The following Microsoft software is supported for the Outlook add-in:

- Microsoft Exchange 2016 with CU 5 or later installed
- Microsoft Outlook 2016 for Windows Desktop
- Microsoft Outlook 2016 Web App (OWA)
- Microsoft Outlook 2016 for Mac
- Microsoft Office 365

Options for Installing the Connect Add-in

The different ways to install the Connect add-in for Vantagepoint users are outlined below.

Installation Method	Links to Related Microsoft Articles
Vantagepoint users install the add-in themselves	
Outlook for Windows or Outlook for Mac (Desktop client) In Outlook, click the Microsoft Office store icon or open any Outlook email, click and select **Get Add-ins**. The URL can be available in: **My Add-ins** : Under **Custom Add-ins**, specify one of the following: 1. Click **+Add a custom add-in** and select **Add from URL…** to use the **Microsoft Outlook Add-in Manifest URL** from the Vantagepoint About dialog box. To access this dialog box: On the main toolbar in Vantagepoint, click ? and then select **About**. On the About dialog box, click the System Info tab, and navigate to the **Microsoft Outlook Add-in Manifest URL** listing. Click **OK**. On the Warning dialog box, click **Install**. After the installation completes, you see Vantagepoint in the list of your add-ins in the Add-Ins screen. After you close the Add-Ins screen, the	▪ Get an Office Add-in for Outlook ▪ Installed Add-ins

Installation Method	Links to Related Microsoft Articles
Vantagepoint add-in is ready to use. In Outlook for Windows and Outlook for Mac, the Vantagepoint icons on the Outlook ribbon on the Home tab provide access to the Vantagepoint functionality. 2. Click **Add from file…** to use the file that was saved by the system administrator. This file is downloaded from the Settings tab in **Utilities » Integrations » Connect Administration**. **Admin Managed**: Deploy the Connect Add-in automatically or allow users to choose to enable. **Outlook for Web or Office 365** 1. In Outlook, click ⚙ to open the Settings menu, and select **Manage add-ins** or use the **Store** button in the ribbon. 2. In the Add-Ins screen, click the "Click here to add a custom add-in" text below the Add-Ins title on the screen. 3. In the short-cut menu, select **Add from URL**. In the **Enter the URL of the add-in's manifest file** field on the Add private add-in from URL dialog box, enter the URL that is identified for the Microsoft Outlook add-in manifest on the Vantagepoint About dialog box. To access this dialog box: On the main toolbar in Vantagepoint, click ? and then select **About**. On the About dialog box, click the System Info tab, and navigate to the **Microsoft Outlook Add-in Manifest URL** listing. 5. Click **OK**. 6. On the Warning dialog box, click **Install**. After the installation completes, you see Vantagepoint in the list of your add-ins in the Add-Ins screen. After you close the Add-Ins screen, the Vantagepoint add-in is ready to use. In Outlook for Web or Office 365, a Vantagepoint button in an email provides access to the Vantagepoint functionality. **Outlook Web Access (OWA) with Exchange 2016** 1. In Outlook, click ⚙ to open the Settings menu, and select **Manage integrations**.	

Installation Method	Links to Related Microsoft Articles
2. In the Add-Ins screen, click the **+** icon. 3. In the short-cut menu, select **Add from URL**. 4. In the **Enter the URL of the add-in's manifest file** field on the Add private add-in from URL dialog box, enter the URL that is identified for the Microsoft Outlook add-in manifest on the Vantagepoint About dialog box. To access this dialog box: On the main toolbar in Vantagepoint, click ? and then select **About**. On the About dialog box, click the System Info tab, and navigate to the **Microsoft Outlook Add-in Manifest URL** listing. 5. Click **OK**. 6. On the Warning dialog box, click **Install**. 7. On the You've added an add-in for Outlook dialog box, click **OK**. After the installation completes, you see Vantagepoint in the list of your add-ins in the Add-Ins screen. After you close the Add-Ins screen, the Vantagepoint add-in is ready to use. In OWA with Exchange 2016, a Vantagepoint button in an email provides access to the Vantagepoint functionality.	
A system administrator installs the add-in and enables it on all Vantagepoint users' workstations.	
Summary: In the Exchange Admin Center (EAC): 1. Click **Organization » Add-ins** and use the **Add URL** option to install the Vantagepoint add-in to your Exchange server. 2. Select **Optional**, enabled by default, to enable the add-in for all Vantagepoint users. Users can choose to disable it.	- Install or remove add-ins for Outlook for your organization - Manage User Access to Add-ins for Outlook
Vantagepoint **users install the add-in themselves**	
Summary: In the Exchange Admin Center (EAC): 1. Click **Organization » Add-ins** to install the Vantagepoint add-in from a URL to your Exchange server.	- Install or remove add-ins for Outlook for your organization - Manage User Access to Add-ins for Outlook

Installation Method	Links to Related Microsoft Articles
2. Select **Optional**, disabled by default, if users will choose to enable it on an individual basis. After you install the add-in to the Exchange server: Vantagepoint users enable the add-in on their workstations by selecting the **Turned on** check box on the Manage add-ins page in either of the following ways: ▪ In OWA 2016, click **Settings » Options » General » Manage Add-ins**. In Outlook 2016 for Windows, click the File tab, and then click **Manage Add-ins** on the Account Information page.	

Other related Microsoft articles that may be helpful are:

- Requirements for running Office Add-ins
- How to check if your Outlook client supports add-ins
- Add-ins for Outlook
- Specify the administrators and users who can install and manage add-ins for Outlook
- Installing Office Add-ins to your mailbox

Microsoft Office Store Icon in Outlook

The Microsoft Office store icon may be in different locations in Outlook based on your Outlook version and whether you are in Outlook for Windows, Outlook for Mac, or OWA. In Outlook 2016 for Windows, you see the Microsoft Office store icon in the Add-in group on the Home tab in the Outlook ribbon. When you click the icon, it takes you to the Add-ins for Outlook page at the Microsoft Office Store. On this page, enter **Vantagepoint** in the **Search** field to find the **Vantagepoint** add-in and install it on your workstation.

If the Microsoft Office Store icon does not display in Outlook, you may need to install the following Microsoft security updates:

- **May 12, 2015 update for Outlook 2013:** Update adds the Store button to the Home tab ribbon in Outlook 2013
- **June 13, 2017 update for Outlook 2013:** Description of the security update for Outlook 2013: June 13, 2017

Install the Vantagepoint Connect Add-in

After completing the steps for setting up the integration and enabling users and synchronization, you must install the Connect add-in, in both Vantagepoint and Outlook.

Installation Prerequisites:

- Your security role must have access to Connect Administration to complete this process. Open **Settings » Security » Roles** and on the Overview tab, make sure **Connect Administration** is selected under **Utilities** » **Integrations** in the Navigation Menu Tree.
- The employee records must include email addresses and must be associated with a user record in Security Settings.
- 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).

Installation options include:

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

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

1. Open Vantagepoint and in the Navigation pane, select **Utilities » Integrations » Connect Administration**.
2. Select the Users tab and select the user for which you will install the add-in from the list.
3. On the Connect Administration form, click ⚙ Settings and select Instll Vantagepoint Connect for Microsoft Outlook.
4. Select **Open Vantagepoint** from the email menuor ribbon.
5. Using your Vantagepoint username and password, log in to the Vantagepoint application on the context pane.
6. In the Vantagepoint Navigation pane, select **Utilities » Integrations » Connect Administration**.
7. On the Users tab, select your user record.
8. From the ⚙ Settings menu, select Enable Synchronization and then select Force Synchronization.

   If there is not an **Enable Synchronization** option, click **Force Synchronization** to manually force the synchronization.
9. On the Users tab, click the Statistics 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 additional information.

View Synchronization Status

The synchronization status for both users and groups displays on the Dashboard, Users, and Groups tabs within the Connect Administration Integration Utility. This information is useful for understanding the data that has been shared between the two applications.

To view synchronization status:

1. Open Vantagepoint and in the Navigation pane, select **Utilities » Integrations » Connect Administration.**
2. On the Dashboard tab, 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. Click on 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.
4. On the Groups tab and the Edit Users form, the **Synchronization Status** column displays:
   - **Enabled:** Synchronization is enabled for the group or user record.
   - **Disabled:** Synchronization is disabled for the group or user. Select to disable synchronization in situations where there is an emergency, or you want to prohibit some users to enable sync by moving them to separate group with sync disabled so they can't re-enable synchronization themselves.
   - **Delete:** Deletes the selected user from the application. When a user is deleted they cannot use the application and cannot synchronize. The delete option will not work if data remains in the user's mailbox. The administrator must uninitialize and disable synchronization to remove business data from the user mailbox prior to completing the synchronization process. If 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 to force deletion of data in a user's mailbox. This is necessary when connectivity to the Exchange mailbox is lost.
5. In **Utilities » Integrations » Connect Sync Options**, the Connect Sync Options form displays the synchronization status, mail server connection status, and other synchronization statistics.

Log In to Vantagepoint Connect

While using Vantagepoint with Outlook, you can log in to the Vantagepoint Connect Add-in. A context pane displays that allows you to access your Vantagepoint information from the context of client emails in Outlook.

When you select an Outlook email and open Connect, the context pane will display contacts and associated details, the contact's firm and associated details, and any projects related to the contact.

Prerequisite: Install the Vantagepoint Connect Add-In

To log in to Vantagepoint Connect:

1. Open the Outlook application and select an existing email or create a new draft email.

   Depending on your setup, these steps may differ slightly. This procedure describes using Office 365.

2. From within the email's preview window, click ••• and select **Vantagepoint » Open Vantagepoint** to open the context pane.
3. In the Deltek URL field, enter your Vantagepoint browser URL.

   For example: **https://Yourcompanyname.deltekfirst.com/Yourcompanyname**. Make sure that the URL does not end in "client" or "app."

4. Enter the user ID that you use to log in to Vantagepoint.
5. Enter the password that you use to log in to Vantagepoint.
6. The **Deltek Database** field displays if you have more than one Vantagepoint database for the URL that you entered in the **Deltek URL** field. Select the Vantagepoint database that you want Outlook to connect to.
7. If you want the Outlook add-in to use your Microsoft Windows username and password instead of your Vantagepoint credentials for logging in, select the **Windows Authentication** check box.

   This check box displays only if your user record in **Settings » Security » Users** has the **Windows Authentication** check box selected.

   The application version displays below the **Windows Authentication** check box.

8. Click **Sign In** to open the pane.

Post-requisite: Open and pin the Connect context pane.

Open and Pin the Vantagepoint Context Pane

While using Vantagepoint with Outlook, you can open and pin the context pane so that it remains visible in Outlook. This allows you to view your contacts and firms in the context of the active email addresses.

Prerequisite: Install the Vantagepoint Connect Add-In

To open Vantagepoint and pin the context pane:

1. If you are already logged into Connect, proceed to step 6.
2. Open the Outlook application and select an existing email or create a new draft email. Depending on your setup, these steps may differ slightly. This procedure describes using Office 365.
3. From within the email's preview window, click ••• and select **Vantagepoint » Open Vantagepoint** to open the context pane.

4. Using your Vantagepoint username and password, log into the Vantagepoint application on the context pane.
5. Click **Sign In** to open the pane.
6. At the top of the pane, click ✱ to pin the pane so that it remains visible In Outlook.

   Use the options on the pane to work with your Vantagepoint records. See the Context Pane Roadmap for details on using the pane with email, contacts, and the calendar.

   Note that you cannot pin the Context Pane when it is opened directly from Outlook.

Troubleshoot Synchronization and Connect Add-in Issues

Review this information for assistance with troubleshooting synchronization and other issues with the Connect Add-in.

Vantagepoint Authentication Failure

For Exchange Direct mode this notification is sent when:

- User is connected to Microsoft Exchange or Office 365 with their login/password, and user's password is expired so that Vantagepoint Connect cannot use it to connect to user's mailbox.
- User is connected to Office 365 with OAUTH2 token authorization, and token is expired (either because it's used for more than 90 days OR because user recently changed their password to Office 365 OR because user explicitly revoked Vantagepoint Connect from accessing their Office 365 data).

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

Microsoft Exchange Authentication Failure (Includes Office 365)

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

There's a change of Microsoft Exchange configuration which does not allow connecting to the mailbox of the user with the Exchange Service Account anymore. 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:
   a. O365 (Direct or OAuth Authentication) https://testconnectivity.microsoft.com/tests/O365EwsTask/input)
   b. O365 Impersonation: https://testconnectivity.microsoft.com/tests/O365EwsAccess/input
   c. Exchange On-premises Direct Authentication:https://testconnectivity.microsoft.com/tests/EwsTask/input
   d. 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 IP addresses to the **Allow** list for inbound and outbound connections:

Application Service	Outbound Public IPs
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

Application Service	Outbound Public IPs
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. AutoDiscover may need to be set up 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 is 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 were 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

You can pin the contextual pane for emails by using the pin icon in the upper right-hand corner of the pane. However, if the pane cannot be pinned for meetings in your calendar, it could be due to 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 is removed from their mailbox (contacts and activities). 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, this information cannot be removed from their mailbox. 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.

Note that 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. Note that 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**. Note that 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 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 add-in is accessible from Outlook Web Interface (OWA). If add-in works in OWA, but not available in Outlook, you might have a group policy enabled, which restricts usage of cloud add-in 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 need to add these IP addresses to the **Allow** list for inbound and outbound connections:

Application Service	Outbound Public IPs
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

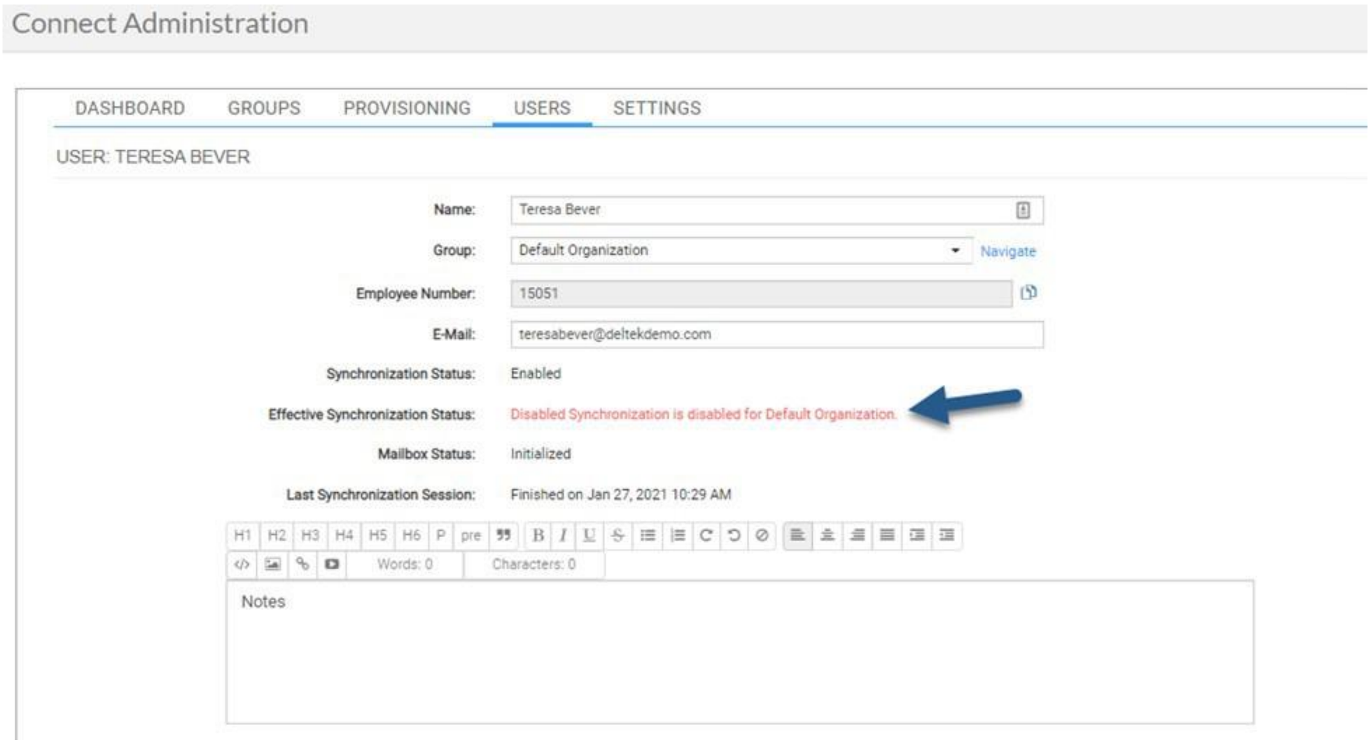
Sync Has Stopped or You See a Red Message "Some functionality is unavailable because sync is disabled" in the Contextual Pane in Outlook

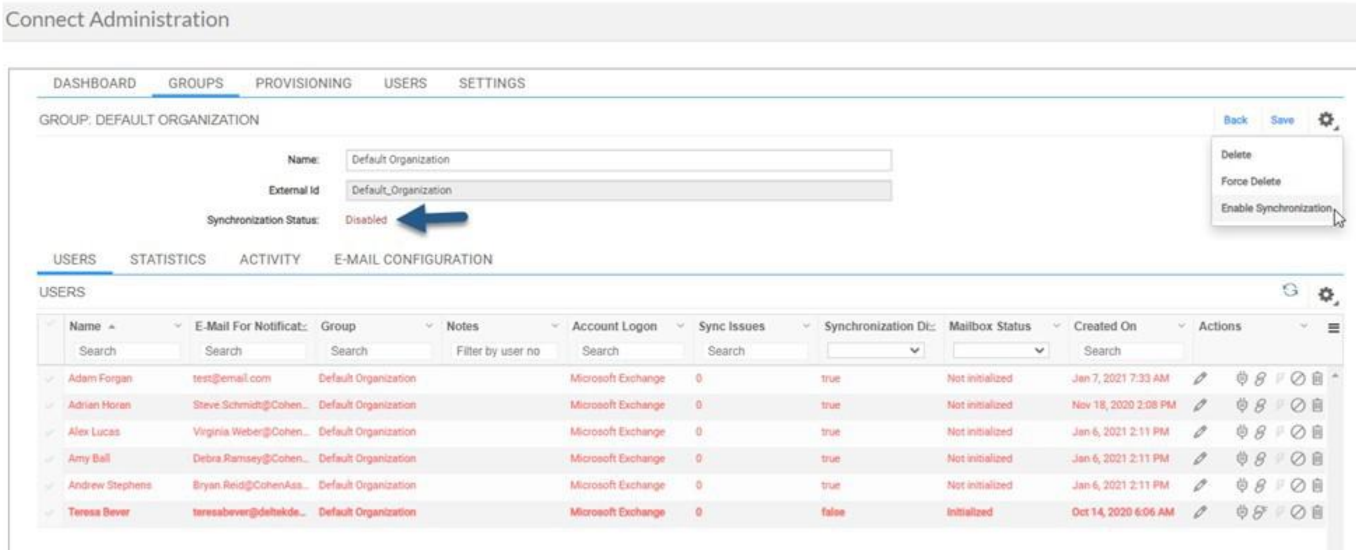
Synchronization can stop because of one of the following situations:

- 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 will receive an email and a red message will appear in the contextual pane informing them that sync has stopped. The 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 contextual pane in Outlook, select **Settings** and then select **Force Sync**. You will see a message that synchronization has been scheduled. If you have a red message about the sync being disabled, then it should go away when you close the contextual pane and re-open it.
2. If the sync is still not working, check the user in **Utilities » Integrations » Connect Administration**. If an admin has disabled synchronization for this user's group, you will see a message in the **Effective Synchronization Status** field. You must enable sync for the group in this case. You can do this by opening the group in **Utilities » Integrations » Connect Administration** and selecting **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 on 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, the credentials can be entered on the E-mail Configuration sub tab of Users in Connect Administration. Alternatively, have the user enter their credentials in 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 the EWL URL is completed correct (using manual, not autodiscover). In this situation, all regular users will already be populated with the correct EWL URL.

- **User:** The error is due to missing the Exchange EWL URL and that settings cannot be saved until this field is completed. You can switch to password mode, complete the username and password fields, use the autodiscover button in the EWL URL field to complete it. After it is filled, click **Save** and then switch to OAuth mode and save again.

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