Deltek

Deltek Vantagepoint® 7.0

Vantagepoint Connect Integration Utility for Gmail

April 15, 2024

This edition published April 15, 2024.

Contents

Connect Integration Utility for Gmail

Vantagepoint Connect for Gmail enables you to view Vantagepoint information in the context of your emails in Gmail and bi-directionally sync your contacts and calendar activities between Gmail and Vantagepoint.

Videos: See related videos below.

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

Vantagepoint Connect requires:

- Vantagepoint CRM
- A custom Google app in the Google Cloud platform
- Configuring Connect in Vantagepoint for your Google Workspace Account
- Installing a custom Google app in users' Gmail accounts

Vantagepoint Connect Set Up

System administrators configure the Connect Add-in in **Utilities** » **Integrations** » **Connect** . 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 for Gmail for a list of prerequisites and an overview of the different aspects of the setup process.

Utilities » **Integrations** also include Sync options that serve as a dashboard for synchronizing data between Vantagepoint and the Connect Add-in. You can schedule or manually force the synchronization process to occur.

Video

Title	Description
Vantagepoint Connect for GMAIL: Introduction	Within this tutorial, watch short videos to learn about the key features of Vantagepoint Connect for Gmail. The videos are: ▪ Launch the Contextual Pane ▪ Contextual Pane Options ▪ Contextual Pane Search Feature ▪ Display Records ▪ Create an Activity from an Email ▪ Create a Contact from an Email ▪ Create a New Contact ▪ Create a Firm

Title	Description
	▪ Sync the Calendar ▪ Sync Contacts

Checklist: Basic Steps to Provision Connect for Gmail

There are several steps required to provision, or activate, the Vantagepoint Connect for Gmail application. You must complete the steps shown in this checklist before using Connect. Under each step, use the links provided to access the individual procedures. These steps are completed by the system administrator with the exception of the last step, which must be completed by each Connect user.

Before You Begin

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

Administrator Steps to Provision Connect for Gmail

The Vantagepoint Connect administrator must complete these steps before an end user can log in to the application (detailed in step 6).

Step 1: Set Up Integration Configuration

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

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

Step 2: Optional - Download Connect for Gmail Logo

Download and save the custom Connect for Gmail logo that will be installed and used to open the application. You can skip this step if you will use a different logo (for example, your company logo) for the Connect button in Gmail.
See the Download and Save the Custom Connect for Gmail Logo help topic for more information.

Step 3: Create Custom Google App

Use the Google Cloud platform to create a project and enable APIs and Services.
See the Create Custom Google App in Google Cloud Platform help topic for more information.

Step 4: Configure Connect in Vantagepoint for Users' Google Workspace Accounts

Configure the employee email and security details.

See the Configure Connect in Vantagepoint for Your Google Workspace Account help topic for more information.

Step 5: Install the Custom Google App in Users' Gmail Accounts

Download and install the application from Google Marketplace.

See the Install the Custom Google App in Users' Gmail Accounts help topic for more information.

End User Step to Provision Connect for Gmail for Initial Use

After the system administrator sets up Connect and installs and configures the Google App and Workspace accounts, the users can use the context pane to log in to Connect.

Step 6: Log in to Vantagepoint Connect and Open the Context Pane

1. In **Utilities** » **Integrations** » **Connect** , click .
2. On the Email Configuration form, select **Authenticate Using Gmail**.
3. Enter your Gmail login credentials and click **Allow**. This gives Vantagepoint access to your Gmail account so that Connect can synchronize meetings and contacts.
4. Open Gmail and select the Deltek icon (or your custom uploaded icon) to open the context pane.
5. Use your Vantagepoint credentials (username, password, and database) to log in to Connect.

See the Log in to Vantagepoint Connect for Gmail help topic in the Vantagepoint Connect Add-in help for more information.

Connect Administration Basics for Gmail

Review the Vantagepoint Connect add-in prerequisites, as well as the tab and grid options.

Connect for Gmail Prerequisites and Required Settings

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

Before You Begin

- To use Vantagepoint Connect in your Gmail account, you must have a Google Workspace account (formally G Suite). You cannot use a personal gmail.com email with Vantagepoint Connect.
- You must use Chrome with Vantagepoint Connect for Gmail.
- 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, you must add Connect IP addresses to the **Allow** list. For a list of IP addresses, see the Exposed IP Addresses or Troubleshoot Synchronization and Connect Add-in Issues for Gmail help topics.
- The security role for the individual who is responsible for configuring Connect must have access to Connect Administration. In **Settings** » **Security** » **Roles**, on the Overview tab, make sure that **Connect** 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.

Field	Description
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.
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

Field	Description
	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. ■ **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.

Quick Reference Topics for Gmail

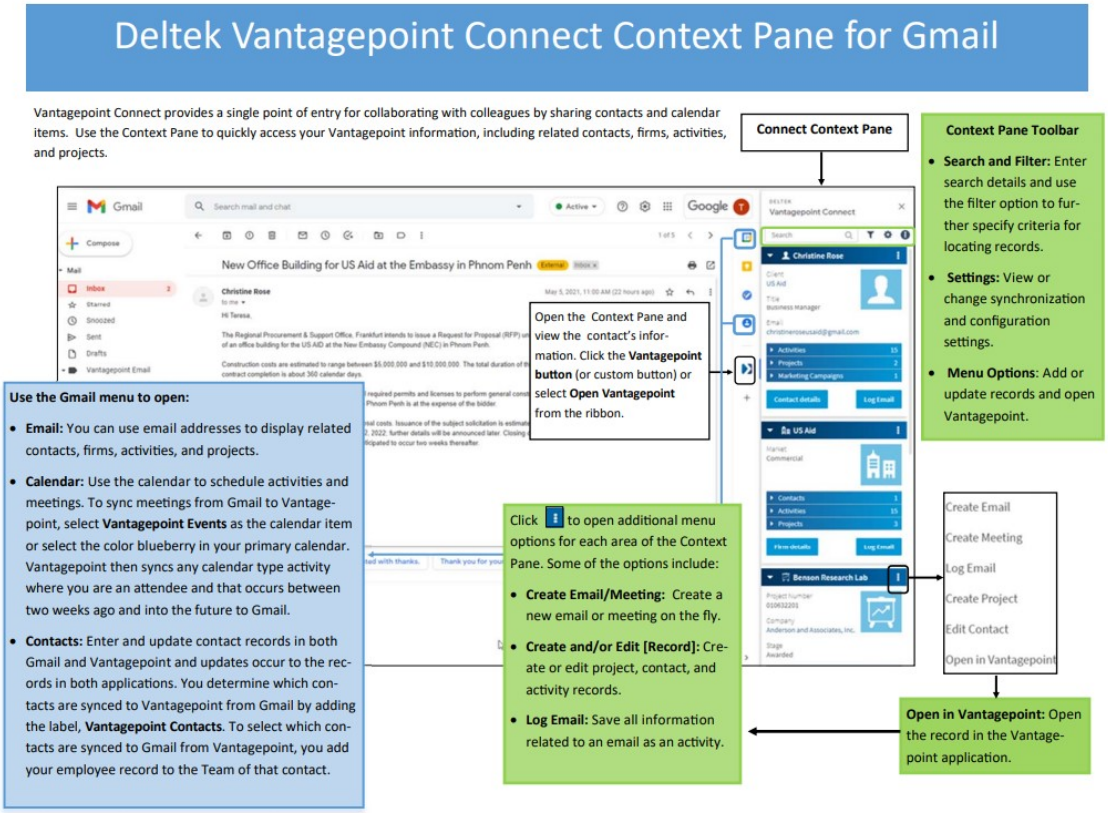
Review quick reference topics that provide instructions for completing basic tasks while working in Connect for Gmail.

Context Pane Quick Reference for Gmail

This quick reference provides an overview of how to use the Vantagepoint Connect Context Pane while using Gmail.

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.

Video: See related video below



Video

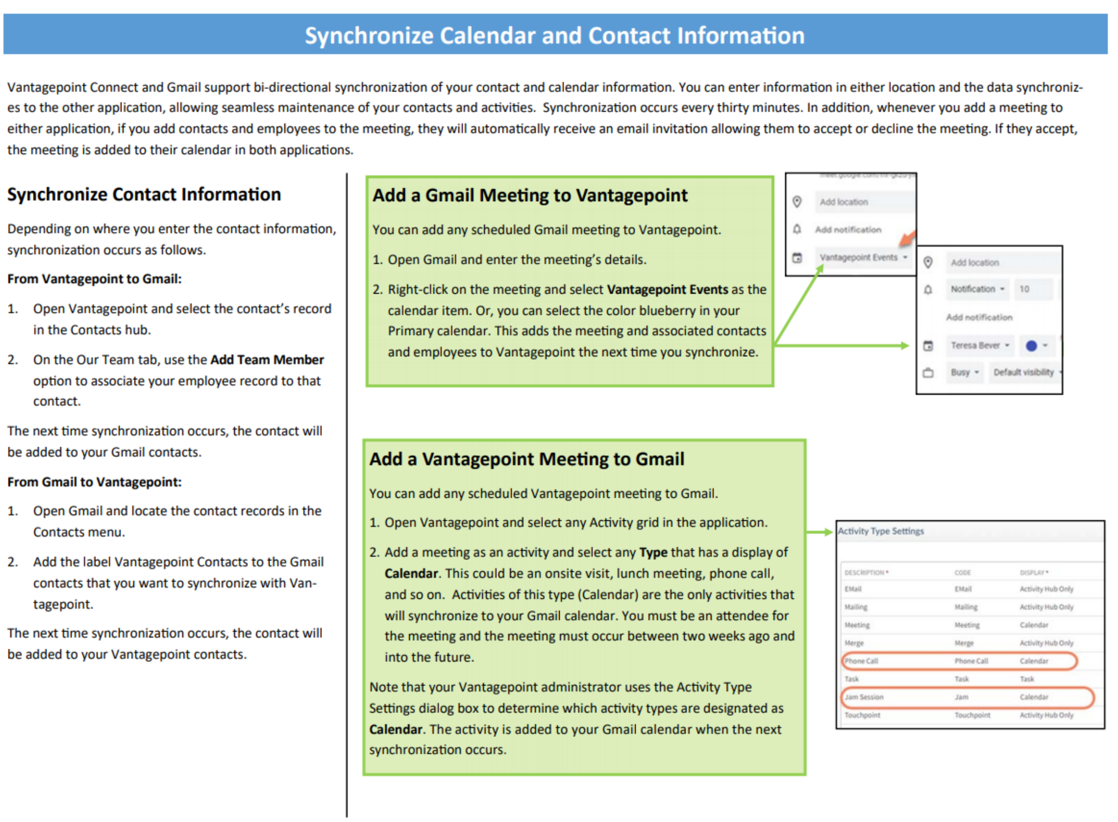
Title	Description
[Vantagepoint Connect for GMAIL: Introduction]()	Within this tutorial, watch short videos to learn about the key features of Vantagepoint Connect for Gmail. The videos are: ▪ Launch the Contextual Pane ▪ Contextual Pane Options ▪ Contextual Pane Search Feature ▪ Display Records ▪ Create an Activity from an Email ▪ Create a Contact from an Email ▪ Create a New Contact ▪ Create a Firm

Title	Description
	▪ Sync the Calendar ▪ Sync Contacts

Sync Calendar and Contact Information Quick Reference for Gmail

This quick reference provides an overview of how to synchronize contacts and calendar items while using Gmail.

Video: See related video below



Synchronize Calendar and Contact Information

Vantagepoint Connect and Gmail 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. Synchronization occurs every thirty minutes. 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 Gmail:

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 Gmail contacts.

From Gmail to Vantagepoint:

1. Open Gmail and locate the contact records in the Contacts menu.
2. Add the label Vantagepoint Contacts to the Gmail contacts that you want to synchronize with Vantagepoint.

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

Add a Gmail Meeting to Vantagepoint

You can add any scheduled Gmail meeting to Vantagepoint.

1. Open Gmail and enter the meeting's details.
2. Right-click on the meeting and select **Vantagepoint Events** as the calendar item. Or, you can select the color blueberry in your Primary calendar. This adds the meeting and associated contacts and employees to Vantagepoint the next time you synchronize.

Add a Vantagepoint Meeting to Gmail

You can add any scheduled Vantagepoint meeting to Gmail.

1. Open Vantagepoint and select any Activity grid in the application.
2. Add a meeting as an activity and select any **Type** that has a display of **Calendar**. This could be an onsite visit, lunch meeting, phone call, and so on. Activities of this type (Calendar) are the only activities that will synchronize to your Gmail calendar. You must be an attendee for the meeting and the meeting must occur between two weeks ago and into the future.

Note that 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 Gmail calendar when the next synchronization occurs.

Video

Title	Description
Vantagepoint Connect for GMAIL: Introduction	Within this tutorial, watch short videos to learn about the key features of Vantagepoint Connect for Gmail. The videos are:

Title	Description
	▪ Launch the Contextual Pane ▪ Contextual Pane Options ▪ Contextual Pane Search Feature ▪ Display Records ▪ Create an Activity from an Email ▪ Create a Contact from an Email ▪ Create a New Contact ▪ Create a Firm ▪ Sync the Calendar ▪ Sync Contacts

How to...

Use the Connect for Gmail Add-in to manage contacts and calendar items. You can also create records from email messages and create project, contact, activity, and firm records for Vantagepoint.

Set Up Connect Integration for Gmail

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

Prerequisites:

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

To set up integration configuration for use with Gmail:

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

Next steps:

1. Download and save the Connect for Gmail logo (if needed).
2. Create a custom Google app in the Google Cloud platform.

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

Download and Save the Custom Connect for Gmail Logo

Save the custom **Connect for Gmail** logo that will later be installed and used to open the application. You can download and save the logo directly from this help topic.

To download and save the custom Connect for Gmail logo:

1. While in this help topic, right-click on the **Deltek for Gmail** image and select **Save image as...**.
2. Enter a name for the image.
3. From the **Save as type** field, select one of these formats: **JPG**, **PNG**, or **BMP**.
4. Click **Save**.
   The logo is saved to your local drive. Logos should be square and 120px by 120px for the best results.
   You also have the option to save your own custom logo to use as the Connect for Gmail logo.

Next step: Create Custom Google App in Google Cloud Platform

Create a Custom Google App in the Google Cloud Platform

Use the Google Cloud platform to create a project and enable APIs and Services. These are required to use Gmail with Vantagepoint Connect.

Prerequisites:

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

You must also download the custom logo using the instructions in the following topic: Download and Save the Custom Connect for Gmail Logo.

To create a custom Google app in the Google Cloud platform:

1. In Chrome, go to the Google Cloud Platform (https://console.cloud.google.com/getting-started?pli=1) and select **API & Services** from the menu.
2. Create a project:
   - If this is your first custom app, click **New Project**.
   - If you have created an app in the past, use the **Select a project** drop-down field at the top to create another project.
3. Enter a name for the project (for example, Vantagepoint **Connect**).
   A notification displays to tell you that the project was created.
4. Click **Select Project**.
5. Leave the defaults for the organization and location for your organization's instance of Gmail and click **Create Project**.
6. Click **Enable APIs and Services**.
7. Search for Contacts and select the **Google People API**.
8. Click **Enable**.
9. Repeat steps 6-8 for the following APIs: **Gmail**, **Google Calendar**, **Google Drive**, and **Tasks**.

   You must enable all of these APIs before proceeding.
10. Return to the main menu and select **APIs & Services** again.
11. Select **OAuth Consent Screen**.
12. For the **User Type**, select **Internal** and then click **Create**.
13. On the Edit App Registration page, enter the following information:

Option	Description
App Name	Vantagepoint Connect
Support Email	Select the email address in your organization that users should contact for help with the add-in. This is typically your Vantagepoint administrator or an IT email.

Option	Description
Logo	Upload the Connect for Gmail logo that was saved as the pre-requisite step to this procedure. See Download and Save the Custom Connect for Gmail Logo for more information.
Application Home Page	https://www.deltek.com/
Application Privacy Policy Link	https://www.deltek.com/en/legal
Application Terms of Service Link	https://www.deltek.com/en/legal/terms

14. Under **Authorized Domains**, click **Add Domain** and add the following:
    - **deltek.com**
    - **vpconnect.io**
    - **Your own company's domain** (for example, XYZ Company could have a domain of xyzcompany.com)
15. In **Developer Contact Information**, enter an email address that Google can contact if there are any changes to the project in Google Cloud Platform.
    This is likely the same as the support email that was entered on the Edit App Registration page (step 13).
16. Click **Save and Continue**.
17. Click **Add or Remove Scopes**.
18. On the Manually Add Scopes dialog box, copy and paste the following URLs into the **Manually Add Scopes** box:
    https://www.googleapis.com/auth/drive
    https://www.googleapis.com/auth/drive.appdata
    https://www.googleapis.com/auth/userinfo.email
    https://www.googleapis.com/auth/gmail.labels
    https://www.googleapis.com/auth/gmail.modify
    https://www.googleapis.com/auth/tasks
    https://www.google.com/m8/feeds
    https://www.googleapis.com/auth/calendar
    https://www.googleapis.com/auth/admin.directory.resource.calendar.readonly
19. Click **Add to Table**.
20. Click **Update**.
21. Scroll to the bottom and select **Save and Continue**.

22. Click **Credentials** in the menu.
23. Click **+ Create Credentials** and select **OAuth client ID** from the menu.
    The OAuth Client ID fields display.
24. Complete the following:

Option	Description
Application type	Web Application
Name	Give this app a name to identify it in the console in the future (for example, Vantagepoint **Connect Web Client**).

25. Under **Authorized Redirect URIs**, click **Add URI** and add https://vpc-deltek-prod-sync.vpconnect.io/ui/redirect.html .
26. Click **Create** at the bottom of the form.
27. Click **OK** in response to the pop-up giving you a **Client ID** and **Secret**.
28. Click the **Download** icon for the **OAuth Client ID** that you just created.
    This file will be uploaded to Vantagepoint.

Next Step: Configure Connect in Vantagepoint for your Google Workspace account.

Configure Connect in Vantagepoint for Your Google Workspace Account

After configuring the Google app, you must configure Connect for your Google Workspace account.

Prerequisites:

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

You must also complete the steps to Create Custom Google App in Google Cloud Platform.

To configure Connect for each employee's Google Workspace account:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. Click **Configure Connect**.
   This will send a request to set up (provision) Connect for your instance of Vantagepoint.
3. If prompted, enter your Vantagepoint username and password and click **Log in**.
4. Click the Profiles tab.
   A default profile called **Default Organization** is automatically created.
5. Click the **Default Organization** profile to open it.
6. Click the Connectivity subtab.
7. For the **Mailbox Access Type**, select **Google with Custom App** and then click **Save**.

8. Click **Choose File** and select the **JSON** file that was downloaded from the Google Console platform.

   See the Create Custom Google App in Google Cloud Platform procedure for more information.

9. Click **Upload**, and a **Client ID** will display below the button.

10. If you are logged in as the same user that you will set up, the **Configure Connect in** Vantagepoint **for Your Google Workspace Account** procedure is complete. Proceed to the following procedure: Install the Custom Google App in Users' Gmail Accounts.

11. If you are logged in as a different user than the one you will be setting up, click the Provisioning tab and use the filter in the grid to find the record of the employee you are setting up.

    a) Click the **+Provisioning** button next to the employee name.

    b) Click **Activate Selected** to activate the user.
    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 in 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.

    For detailed information on setting up users, see the procedures for Setting Up and Working With Users and Profiles in Gmail Integration.

Next Step: Install the Custom Google App in Users' Gmail Accounts

Set Up and Work With Users and Profiles in Gmail Integration

While working with Connect for Gmail 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 Users for Connect for Gmail Integration

The Vantagepoint administrator can enter a user's credentials to set up one Connect for Gmail Integration user at a time. This is useful for situations where you only need to set up a small number of individual users.

Prerequisites:

To view the prerequisites and required settings for the Connect for Gmail add-in, see Connect for Gmail 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 form, click the Provisioning tab.

3. Locate the user(s) that you want to provision and click the checkbox next to each name to provision (activate) the account.
4. Complete the **User Provisioning** fields on the form and click the **Activate Selected** button.
5. In the Provision Result grid, click the user name.
   The Users tab opens and displays the selected user.
6. Click the Connectivity tab and select **Google with Custom App** as the **Mailbox Access Type**.
   The Gmail address automatically populates in the **Email** field.
7. Enter the user name for the mailbox or copy the email address into the **User Name** field if it is the same.
   This might be your email address but could be your **Domain/User Name**.
8. Depending on whether or not your user account is set up for two-factor authentication, select one of these actions:
   - If you do not use two-factor authentication, enter the password for your email account.
   - If you use two-factor authentication, enter the App Password.

     To set up the App Password, go to Settings for your email box. See the following article for additional information: https://docs.microsoft.com/en-us/azure/active-director/user-help/multi-factor-authentication-end-user-app-passwords.
9. Click **Save**.
   The user and email are configured.
10. If you have not yet done so, Install the Vantagepoint Connect for Gmail Add-in.
11. The user logs in to Vantagepoint from the Gmail add-in.
12. Select ⋮ **Force Synchronization**.

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 .

Assign Users to a Profile for Gmail 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 Gmail add-in, see Connect for Gmail Prerequisites and Required Settings .

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 activate (provision).
   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, select the checkbox for each row that contains user names that you want to provision. Click **Activate Selected** to complete the activation and display the Provisioning Multiple Users fields.
6. When the Provision Results grid displays, check the **Provisioning Results** column to verify the success of the user activation.
   - If the process is successful, the user names display on the Users list on the Profiles tab when you select this profile.
   - If the process is not successful, review the details provided in the **Message** column to determine the reason.

Remove Users from a Profile for Gmail 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 Gmail add-in, see Connect for Gmail Prerequisites and Required Settings .

To remove a user from a group:

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.

Enable or Disable Synchronization for a Profile in Gmail Integration

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

Prerequisites:
To view the prerequisites and required settings for the Connect for Gmail add-in, see Connect for Gmail Prerequisites and Required Settings .
You must also set up profiles on the Profiles tab. See the Set Up a Connect Profile help topic for more information.

To enable or disable synchronization for a profile:

1. In the Vantagepoint Navigation pane, select **Utilities** » **Integrations** » **Connect** .
2. On the Connect Administration form, click the Profiles tab.
3. Select the name of the profile for which you want to enable or disable synchronization.
   You can use the filter to locate a profile in the grid.
4. Click ⋮ **Enable Synchronization** or ⋮ **Disable Synchronization** on the grid row containing the profile name.
   The Profile fields display.

Remove a Profile from Connect for Gmail Integration

You can remove a profile from Connect for Gmail Integration. This does not delete the users from Connect; only the profiles.

Prerequisites:
To view the prerequisites and required settings for the Connect for Gmail add-in, see Connect for Gmail Prerequisites and Required Settings .
You must also set up profiles on the Profiles tab. See the Set Up a Connect Profile help topic for more information.

To remove a profile from Connect:

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 you want to delete.
4. Click the **Delete** option to remove the profile from Connect.
5. When prompted, confirm the deletion.

Install the Custom Google App in Each User's Gmail Account

After configuring Connect for your Google Workspace account, you must download the custom Google app in each user's Gmail account.

Prerequisites:
To view the prerequisites and required settings for the Connect for Gmail add-in, see Connect for Gmail Prerequisites and Required Settings .
You must also Configure Connect in Vantagepoint for Your Google Workspace Account.

To install the custom Google app in a user's Gmail account:

1. Click the following link: Chrome Web Store and select **Add to Chrome**.
2. Click **Add extension** when prompted.
3. In Vantagepoint **Settings** » **Security** » **Roles**, select **Sync Options** under **Utilities** » **Integrations** » **Connect** to give all provisioned Connect users access to Sync Options.

   For detailed information on setting up users, see the procedures for Setting Up and Working With Users and Groups in Gmail Integration.
4. Have each provisioned Connect user complete the following steps to log in for initial use:

   a) Log in to the Vantagepoint application and click **Utilities** » **Integrations** » **Connect** .

   b) Click **Sync Settings**.

   c) Click the  icon in the **Mail Server Connection Status** field.

   d) Click **Change**. A pop-up displays for you to log into your Gmail account.

   e) Select your account, enter your Gmail password, and click **Allow** to grant Vantagepoint access to your Gmail account. A message displays to indicate that you have successfully signed in and you are returned to Vantagepoint. The Connect Sync Options screen updates to display Google Access.

   f) Open Gmail in your Chrome browser.

   The Vantagepoint Connect Context pane displays with the **Deltek Instance URL** and database name prefilled. If you do not see the pane, open it by clicking the **Connect for Gmail** logo icon that you uploaded in the Google Cloud platform. See the

[Download and Save the Custom Connect for Gmail Logo] help topic for more information.

g) Enter your Vantagepoint **User ID** and **Password** and then click **Sign In**.

After the user is configured, they will only need to click the **Connect for Gmail** logo icon and enter their Vantagepoint credentials to log in to the Connect context pane.

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 for Gmail Integration

The synchronization status for both users and groups displays on the Dashboard, Users, and Profiles tabs in the Connect Administration 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 Gmail add-in, see Connect for Gmail 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 Profiles tab and the Edit 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 connectivity to the 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 connectivity to the 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.

Delete Connect for Gmail 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 Gmail, or when you finish testing the integration in a preview or sandbox environment and now want to configure it in a production environment.

When you delete Connect Configuration, all Connect users and profiles 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 Gmail 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 Gmail topic.

Troubleshoot Synchronization and Connect Add-in Issues for Gmail Integration

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

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 the Connect Administration Form for Gmail Integration in **Utilities** » **Integrations** » **Connect** , or the Connect Add-in will not work.

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 Gmail 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 Gmail 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.

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

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 Gmail server address. Refer to the following for a sample URL: https://exchangeserverhost.com:443/autodiscover/metadata/json/1.

Sync Cannot Be Configured for Any Users

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

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

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** .
- Credentials to Gmail 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 the Connect Administration Form for Gmail Integration.

1. In the Context Pane in Gmail, 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 group, you will see a message in the **Effective Synchronization Status** field. In this case, you must enable synchronization for the group. To do this, open the group in **Utilities** » **Integrations** » **Connect** and select **Enable Synchronization**.

If sync is enabled for this user's group, 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 Gmail 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 E-mail Configuration subtab of Users in Connect Administration for Gmail Integration. 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 in to Vantagepoint using the contextual pane in Gmail.

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.

Connect Administration Form for Gmail Integration

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

Requirements

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

Display the Connect Administration Form for Gmail Integration

You display the Connect Administration form in Integrations.

Prerequisites:

To view the prerequisites and required settings for the Connect for Gmail add-in, see Connect for Gmail 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 the Connect Administration Form for Gmail 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 Work With Connect Administration Tabs and Grids.

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 email messages 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 Gmail expired ▪ Credentials to Vantagepoint expired ▪ Unknown sync error ▪ 10 consecutive failed synchronizations

Vantagepoint Connect for Gmail

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

Field	Description
Vantagepoint **Tenant**	Enter the URL for the Vantagepoint Connect Tenant. To see this URL, click **Help** » **About** and check the System Info tab.

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.

Field	Description
	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.

Google with Custom App

Field	Description
Upload JSON File	Click **Choose File** under Google with Custom App and then select the JSON file that was downloaded from the Google Console Platform. See the Create a Custom Google App in Google Cloud Platform procedure for more information.
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.

Sync Tab of Connect Administration Form for Gmail 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.

Field	Description
	▪ **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 Gmail 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 Gmail Integration help topic for troubleshooting information.

Administration

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

Dashboard Tab of the Connect Administration Form for Gmail 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.

Field	Description
	After you log in, the Connect Administration Dashboard displays.
Provisioning (Users)	Refer to these fields for the total number and status of users provisioned, or activated, 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. 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. De-provisioned users do not display in the total number of users.
Synchronization Status	These fields display the number of synchronization attempts that meet the following criteria: ▪ **Active**: Current, or active, synchronizations ▪ **With Issues**: Synchronization batches that contained issues ▪ **Suspended by Error**: Batches that were suspended due to errors in the files ▪ **Not Configured**: Users with the **Mailbox Status** option set to **Not initialized** Click the number of items to open the Users tab and view a detailed list of the users who meet the criteria for selected synchronization status.
Add-in Use	This field displays the percentage of the Connect Add-in for Gmail Integration 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 Connect Add-in for Gmail Integration 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 Gmail 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 Individual Connect Users and Use Profiles to Set Up Multiple Connect Users online help topics for details.

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

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

Contents

Field	Description
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 Setting Up and Working With Users and Profiles in Gmail Integration topic for details on assigning users to profiles.
Mailbox Access Type	Select **Google with Custom App** as the mailbox access type.
Send Welcome Email	Select this option to send a welcome message to the user to alert them when they are provisioned.
Employee Number	This field displays the assigned employee number.
User Name	This field displays the assigned user name.
Email	This field displays the email address associated with the employee.
+ Provision	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.

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

Profiles Tab of the Connect Administration Form for Gmail 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 and Work With Users and 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 the Connect Administration Tools and Options help topic.

Field	Description
Name	This field displays the **Name** and an **External ID** for the group. If you are entering a new group, an **ID** field also displays. After 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. Select **Google with Custom App** and click **Save**.

Field	Description
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 for Profiles for Connect for Gmail

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 Tab for Profiles for Connect for Gmail

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. 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.

Field	Description
Mailbox Access Type	Select **Google with Custom App**.
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 Status	This field lists the synchronization status for the selected user: ▪ **Enabled**: Synchronization is enabled. ▪ **Disabled**: Synchronization is disabled. Click **Enable Synchronization** or **Disable Synchronization** to change the synchronization status 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.
Role	This field displays the users role.
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.

Sync Issues Subtab

Select this subtab to view any issues related to synchronization.

The number of issues displays for all issues, contacts, appointments, and emails.
To download a log of these issues, click the **Export to CSV** option.
See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail Integration help topic for troubleshooting information.

Statistics Tab for Profiles for Connect for Gmail

Select this subtab to view the synchronization statistics for the selected profile.

Activity Subtab for Profiles for Connect for Gmail

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 for Profiles for Connect for Gmail

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

Contents

Field	Description
Mailbox Access Type	Select **Google with Custom App**.

Users Tab of the Connect Administration Form for Gmail 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 Details, Statistics, Sync 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 the Connect Administration Tools and Options help topic.

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.
Mailbox Access Type	Select **Google with Custom App**.

Field	Description
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 Status	This field lists the synchronization status for the selected user: ▪ **Enabled**: Synchronization is enabled. ▪ **Disabled**: Synchronization is disabled. Click ⋮ **Enable Synchronization** or **Disable Synchronization** to change the synchronization status for the user.
Mailbox Status	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 On	This field displays the date on which the user was created.
Role	This field displays the user's role.
⋮ **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 Gmail Configuration

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.

Field	Description
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 for Users in Connect for Gmail

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

Contents

Field	Description
Mailbox Access Type	This field displays how the mailbox or email account is accessed.
Account Logon	This field displays the type of account logon.
Authentication Type	This field displays the type of profile to which the user is assigned.
E-Mail:	This field displays the user's email address.

Statistics Subtab for Users in Connect for Gmail

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 for Users in Connect for Gmail

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 Gmail

Select this subtab to view any issues related to the selected user.

The number of issues displays for all issues, contacts, appointments, and emails.

To download a log of these issues, click the **Export to CSV** option.
See the Troubleshoot Synchronization and Connect Add-in Issues for Gmail Integration help topic for troubleshooting information.

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