




Deltek

# Deltek WorkBook

Configuring WorkBook to Use Google  
Workspace OAuth

**September 28, 2023**



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## Introduction

This guide provides the configuration information that you need so that you can implement calendar synchronization and email synchronization between Google Workspace and WorkBook.

**Note:** Some of the tasks that this document describes must be performed by a user who has Admin access to the Google Cloud, and who may or may not be the WorkBook System Administrator.

Before Release 13.4, WorkBook provided the following capabilities:

- Google Calendar synchronization using OAuth 2.0, configured via System Variables
- Google email synchronization using Basic Authentication

Beginning with Release 13.4, WorkBook provides the following capabilities:

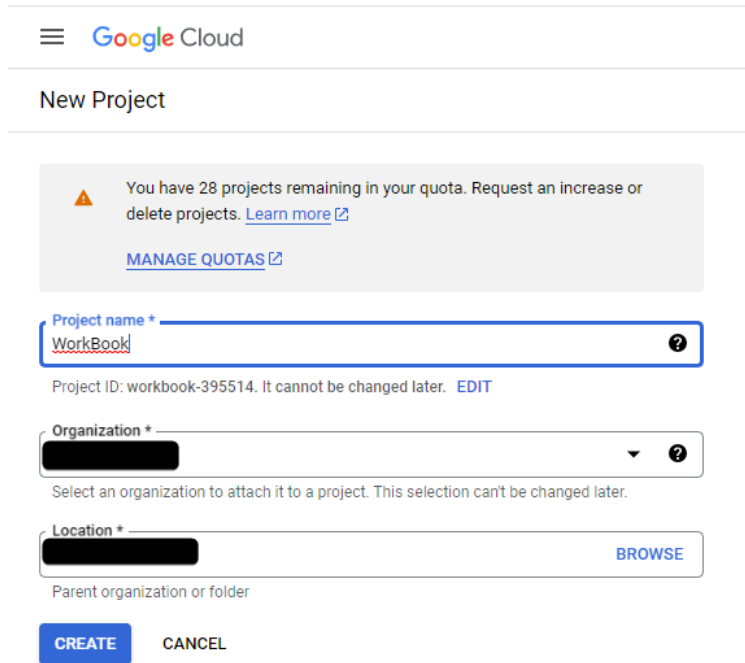
- Google Calendar synchronization using OAuth 2.0, configured in Settings » Global System Settings » OAuth 2.0 Integration Settings
- Google email synchronization using OAuth 2.0

# Set Up Google Cloud OAuth 2.0 Integration

Perform these steps if you do not have a project created for WorkBook. Review them if you already have a project.

## To set up Google Cloud OAuth 2.0 integration:

1. Register the WorkBook application in the Google Cloud portal  
<https://console.cloud.google.com/apis/dashboard>



Google Cloud

New Project

You have 28 projects remaining in your quota. Request an increase or delete projects. [Learn more](#)

[MANAGE QUOTAS](#)

Project name \*  
WorkBook

Project ID: workbook-395514. It cannot be changed later. [EDIT](#)

Organization \*  
[Redacted]

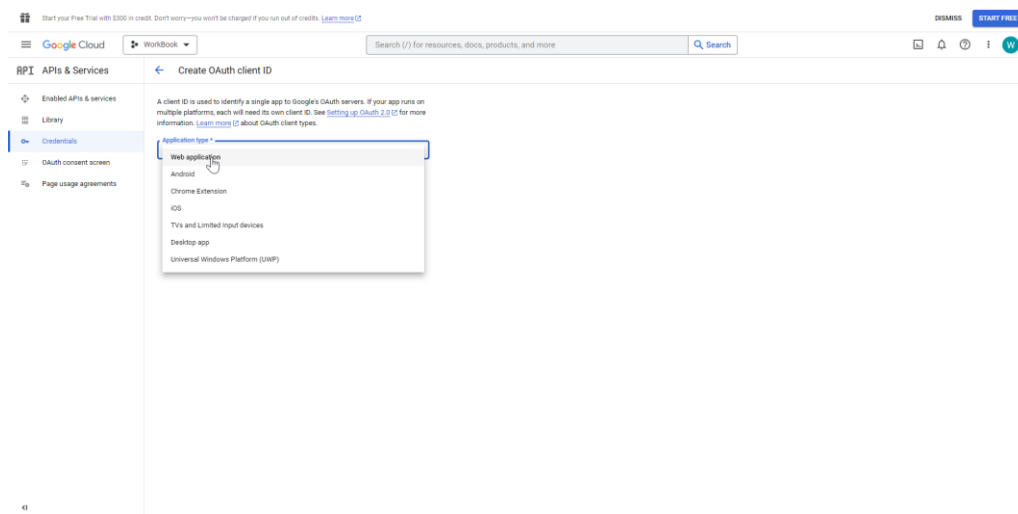
Select an organization to attach it to a project. This selection can't be changed later.

Location \*  
[Redacted] [BROWSE](#)

Parent organization or folder

[CREATE](#) [CANCEL](#)

2. Create a Client ID.



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Google Cloud Workbook

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BPI APIs & Services

Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information. [Learn more](#) [Get about OAuth client types](#)

Application type \*  
Web application  
Android  
Chrome Extension  
iOS  
TVs and Limited input devices  
Desktop app  
Universal Windows Platform (UWP)

41

## Set Up Google Cloud OAuth 2.0 Integration

### 3. Enter Authorized redirect URIs: <your\_workbook\_url>/api/oauth2/redirect

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Google Cloud Workbook

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APIs & Services

Enabled APIs & services

Library

Credentials

OAuth consent screen

Page usage agreements

Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information. [Learn more](#) about OAuth client types.

Application type \*  
Web application

Name \*  
Web-client 2

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

The domains of the URIs you add below will be automatically added to your [OAuth consent screen](#) as [authorized domains](#).

Authorized JavaScript origins

For use with requests from a browser

+ ADD URI

Authorized redirect URIs

For use with requests from a web server

+ ADD URI

Note: It may take 5 minutes to a few hours for settings to take effect

CREATE CANCEL

- Copy the Client ID and Client Secret and save them in a safe place. You may not be able to retrieve the secret if you close this dialog.

### OAuth client created

The client ID and secret can always be accessed from Credentials in APIs & Services

OAuth access is restricted to users within your organization unless the [OAuth consent screen](#) is published and verified

Client ID	[REDACTED]
Client secret	[REDACTED]
Creation date	[REDACTED]
Status	Enabled

DOWNLOAD JSON

OK

- Enable APIs:
  - Go to **Enable APIs** and enable the required APIs:
    - For Calendar: Calendar API, Gmail API

## Set Up Google Cloud OAuth 2.0 Integration

- For Email and Email Send: Gmail API

Google Cloud

WorkBook

Search (/) for resources, docs, products, and more

APIs & Services

APIs & Services

+ ENABLE APIS AND SERVICES

Enabled APIs & services

Library

Credentials

OAuth consent screen

Page usage agreements

1 hr

Traffic

Google Cloud

WorkBook

Product details



### Gmail API

[Google Enterprise API](#)

View and manage Gmail mailbox data.

MANAGE

TRY THIS API

API Enabled

Google Cloud

WorkBook

Product details



### Google Calendar API

[Google Enterprise API](#)

Manage calendars and events in Google Calendar.

MANAGE

TRY THIS API

API Enabled

OVERVIEW

DOCUMENTATION

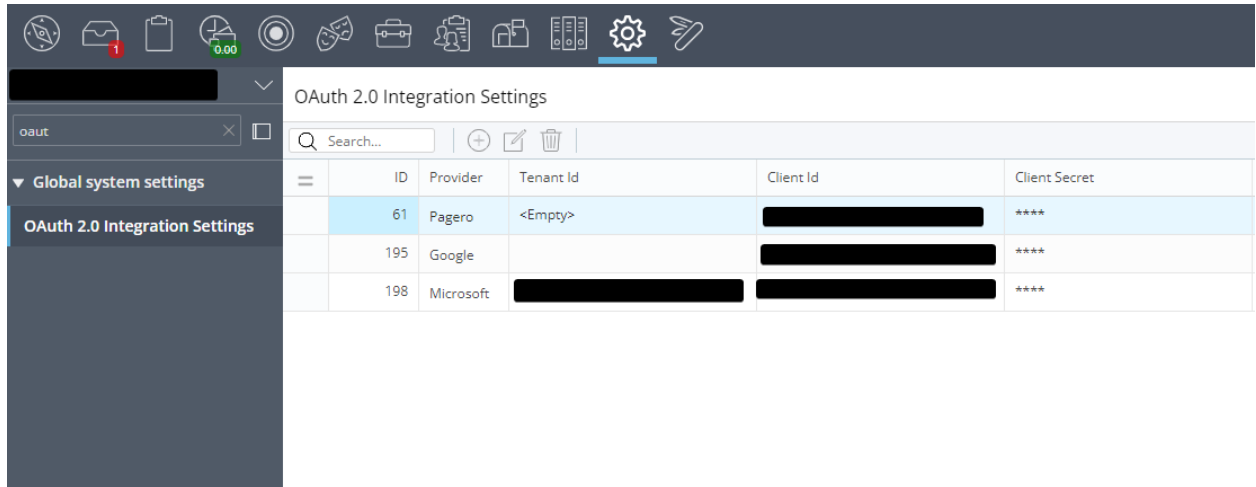
SUPPORT

RELATED PRODUCTS

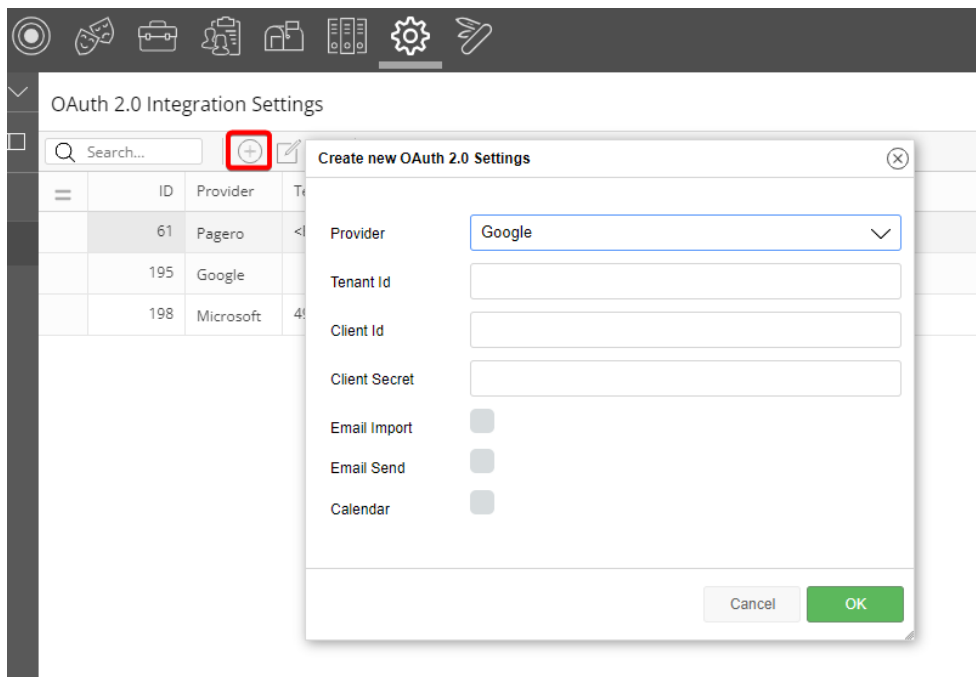
## Configure WorkBook

To configure WorkBook:

1. Navigate to **Settings » Global System Settings » OAuth2 Integration Settings**.




2. If you do not have one, create the setting.




3. Select the Google provider; enter the client ID, and client secret. Check the scopes that you want to set up.



**Note:** If you select the Email Send you are asked to log in right after you click OK. You can have only one email set up that you can send emails with. If the login fails you can log in again by clicking the  key button on the grid toolbar. This button appears when you select a row that includes Email Send scope.

The actual email address that is used for sending email is displayed next to the key button.

#### OAuth 2.0 Integration Settings

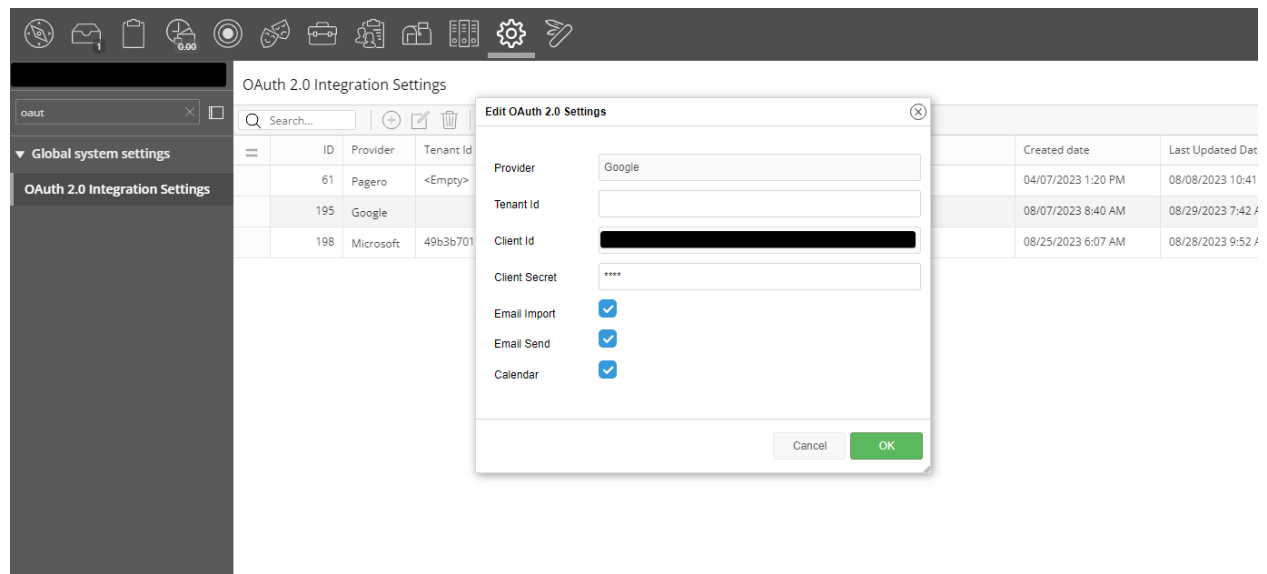
+
✎
🗑

System email: WorkbookTestUser@deltekdemo.com

The following are the settings constraints:

- Client ID must be unique across all settings. You cannot edit it after you have created the settings.
- Email Import – You can have only one setting with Email Import scope per list.
- Email Send – You can have only one setting with Email Send scope in the list.
- Calendar – You can have only one setting per provider in the list.

If you want to create a setting when a setting with the same scope already exists in the list, and one of the constraints is met, the existing setting is disabled.

4. If you have an existing setting, and you want to update the client secret or add/remove scopes, you can do it by using the edit dialog.



#### Additional Notes:

##### Email Send:

- WorkBook can send emails with the primary account (defined in System Variable 289) or with individual accounts (check System Variable 760). For individual accounts you must set up email delegation. See these Knowledge Base Articles for more information:
  - [Delegate a user's email address - Google Workspace Admin Help](#)

## Set Up Google Cloud OAuth 2.0 Integration

- [Send emails from a different address or alias - Gmail Help \(google.com\)](#)
- Then set up Send As from the primary account to the employees' accounts.
- You can send emails from up to 99 different email addresses.
- The domain that is used in the primary account (defined in System Variable 289) as well as other domains that are used for sending emails should be verified.

### Email Import:

- The import happens through the agents. Go to Agent Setup and take advantage of the following OAuth 2.0 agents:
  - Mail Archive Agent (OAuth 2.0)
  - Mail Import Agent (OAuth 2.0)
  - Mail Import Public Agent (OAuth 2.0)

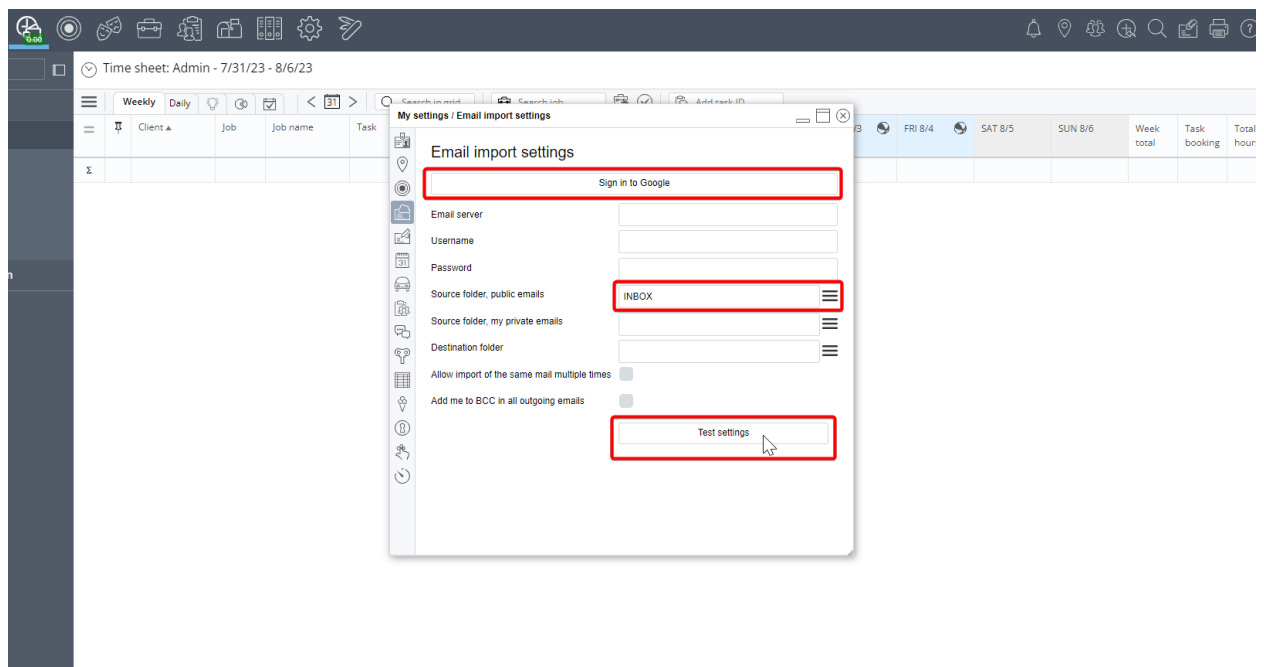
### Email/Calendar access lost:

- When a user changes the password or removes the WorkBook application from the Google account and wants to regain access, they must sign out and sign in again.

## Test Mail Import

### To test your OAuth 2.0 setup with User Settings – Email import settings:

1. Navigate to **My Settings » Email import settings** and sign in with Google.
2. Select the source folder and test settings. If it is successful, the configuration for this user works correctly.



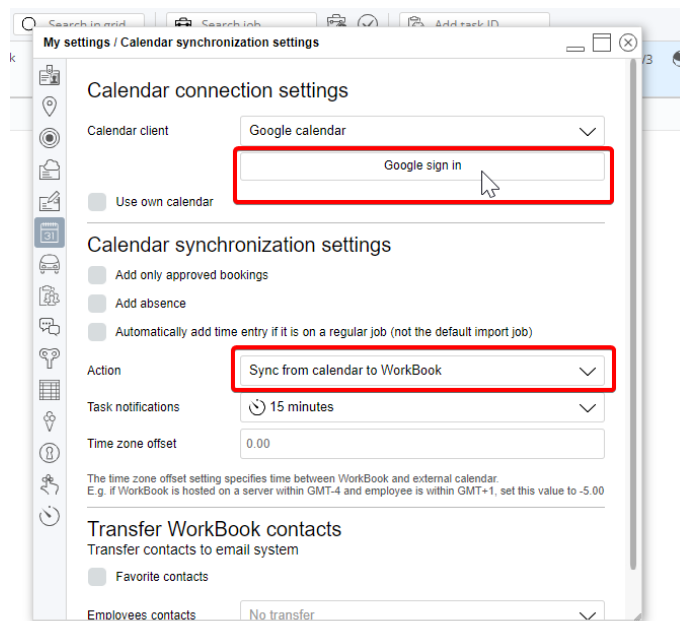
3. Select the folders that are to be used as Source folder public and private emails and Destination folder.
4. Go to Agent Setup and take advantage of the following OAuth 2.0 agents:
  - Mail Archive Agent (OAuth 2.0)
  - Mail Import Agent (OAuth 2.0)

- Mail Import Public Agent (OAuth 2.0)

## Test Calendar

### To test the calendar:

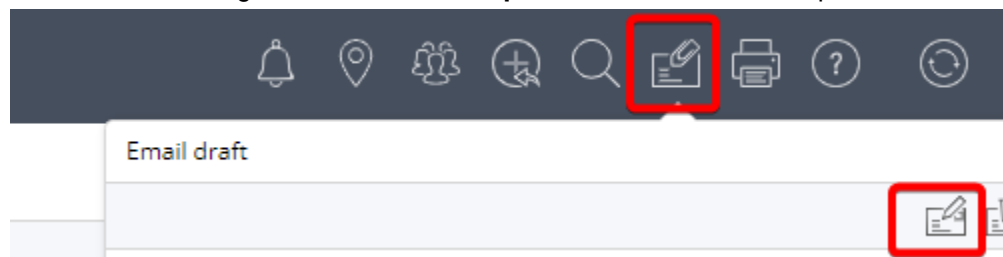
1. Navigate to **My Settings » Calendar synchronization settings** and sign in with Google.
2. Select calendar sync options.
3. Create events that can be synced to WorkBook.
4. Run the Calendar agent and check the logs to confirm that the connection was successful.



## Test Mail Send

### To test sending an email:

1. Send an email using **Email Drafts » Compose New Email** on the top toolbar.





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