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Deltek WorkBook

Configuring WorkBook to Use Google
Workspace OAuth

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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:

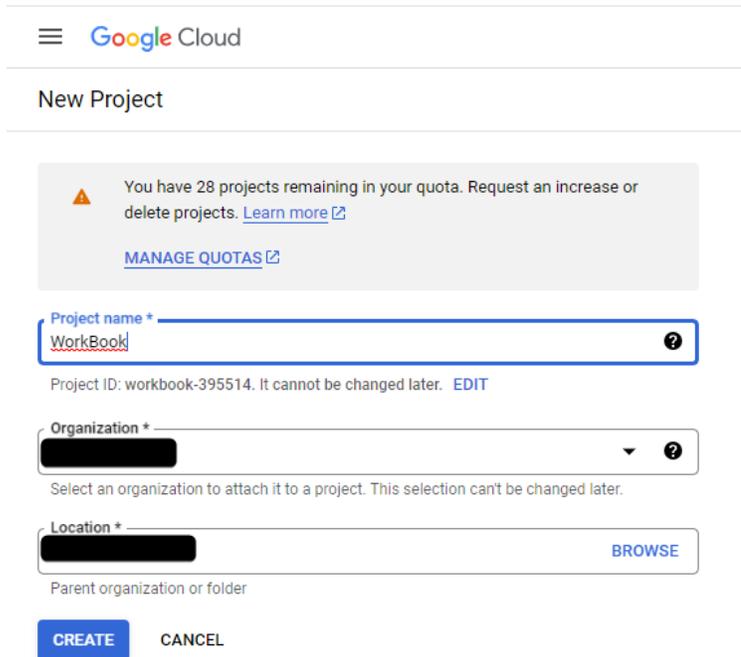
- Google Calendar synchronization using OAuth 2.0, configured in Settings » Global System Settings » OAuth 2.0 Integration Settings
- Google email synchronization using OAuth 2.0

Set Up Google Cloud OAuth 2.0 Integration

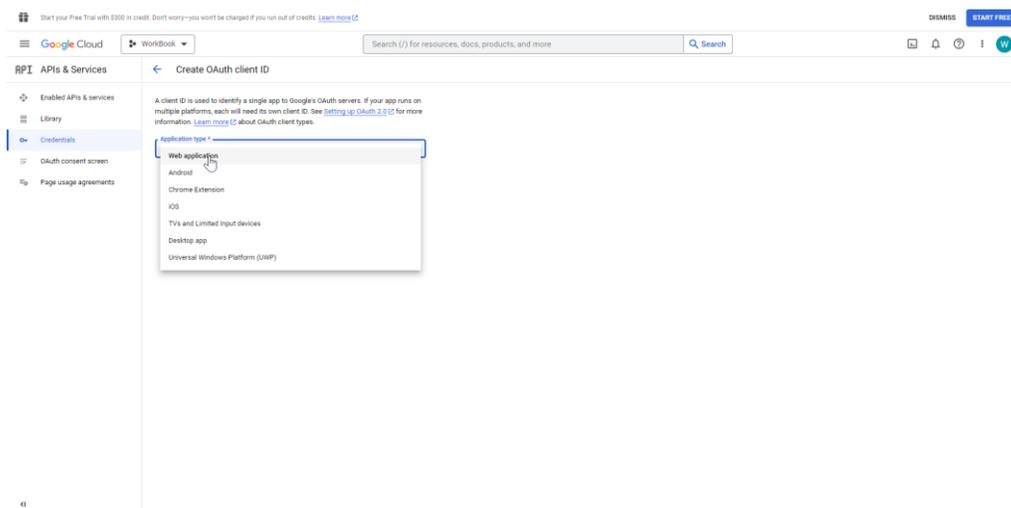
Perform these steps if you do not have a project created for WorkBook. Review them if you already have a project.

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>

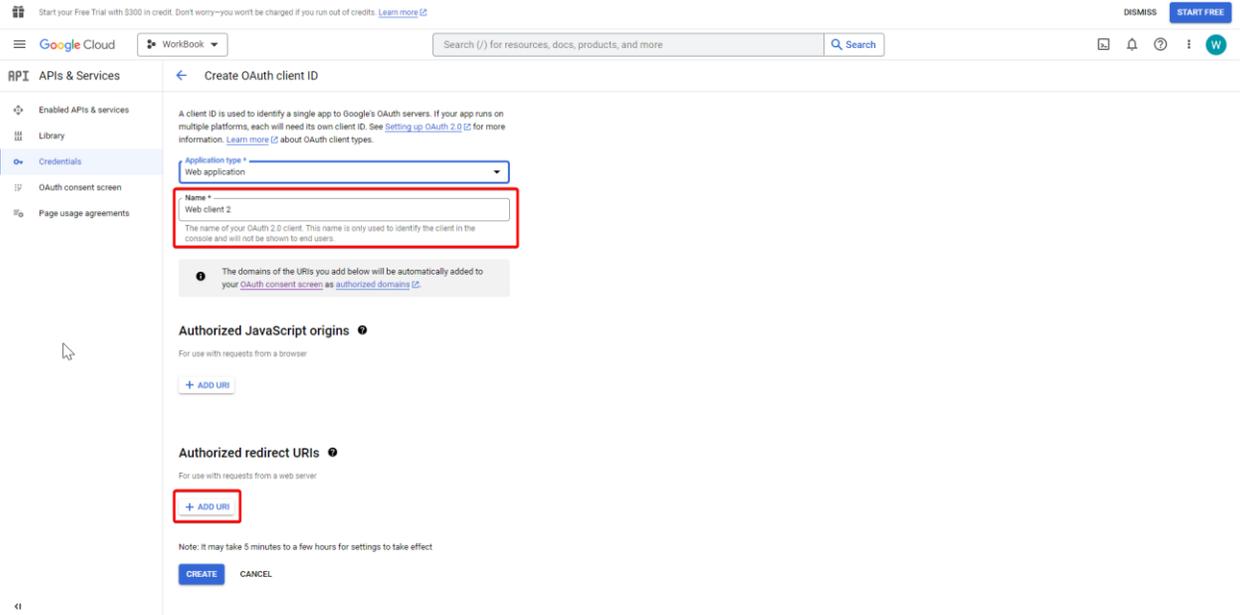


2. Create a Client ID.



Set Up Google Cloud OAuth 2.0 Integration

3. Enter Authorized redirect URIs: <your_workbook_url>/api/oauth2/redirect



4. 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

i 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

5. 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

This screenshot shows the Google Cloud console interface. At the top, there is a navigation bar with the Google Cloud logo, a 'WorkBook' dropdown menu, and a search bar. Below this, the 'APIs & Services' section is active, with a '+ ENABLE APIS AND SERVICES' button highlighted by a mouse cursor. A sidebar on the left lists various API management options: 'Enabled APIs & services', 'Library', 'Credentials', 'OAuth consent screen', and 'Page usage agreements'. The main content area shows a 'Traffic' section with a vertical ellipsis menu.

This screenshot shows a portion of the Google Cloud console navigation bar, including the Google Cloud logo and the 'WorkBook' dropdown menu.

← Product details



Gmail API

[Google Enterprise API](#)

View and manage Gmail mailbox data.

[MANAGE](#) [TRY THIS API](#) ✓ API Enabled

This screenshot shows the Google Cloud console navigation bar with the 'WorkBook' dropdown menu, and a breadcrumb trail that reads '← Product details'.



Google Calendar API

[Google Enterprise API](#)

Manage calendars and events in Google Calendar.

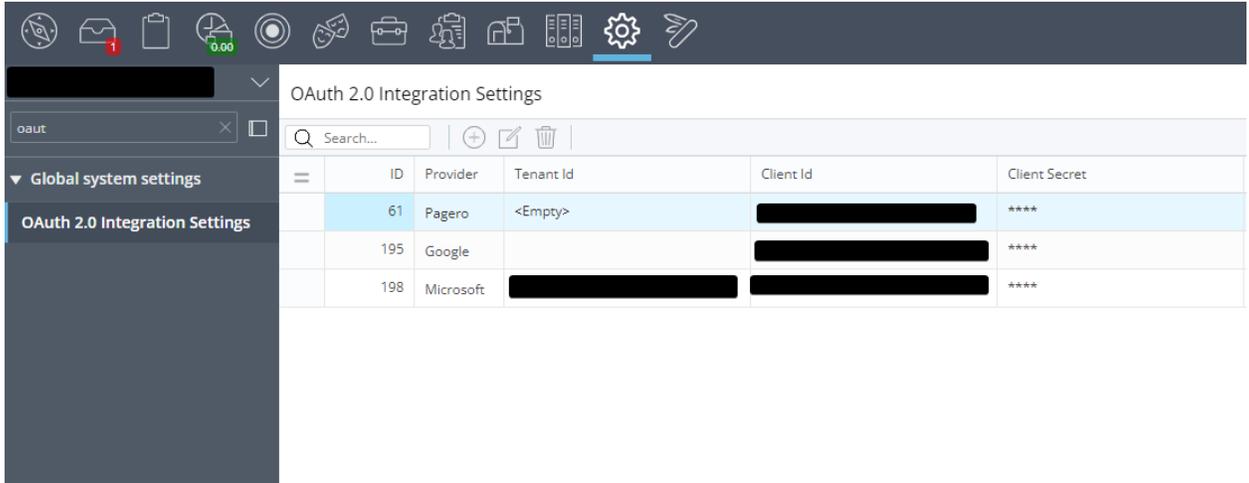
[MANAGE](#) [TRY THIS API](#) ✓ API Enabled

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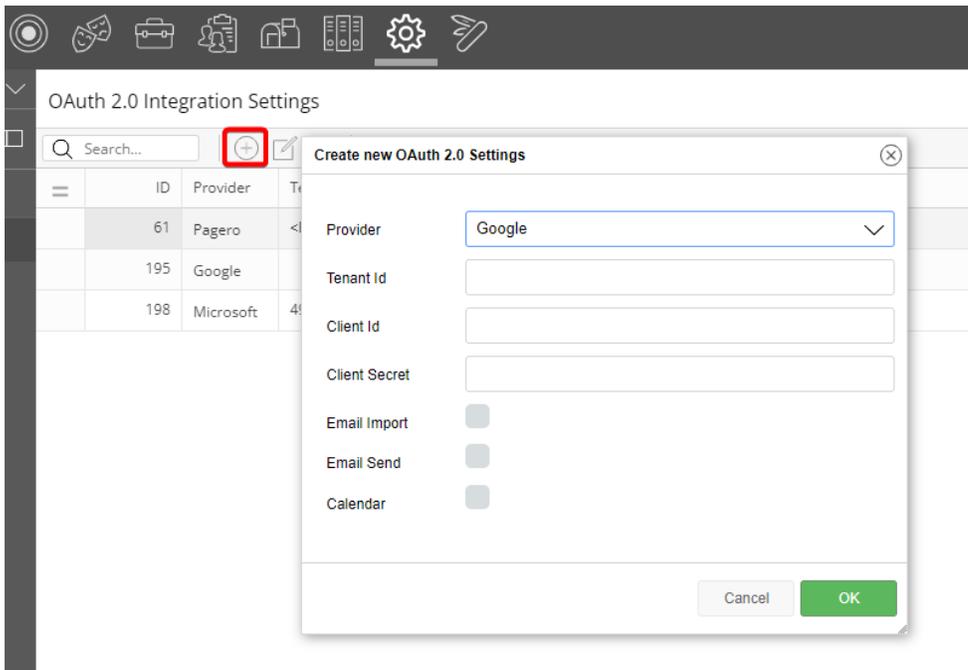
Configure WorkBook

To configure WorkBook:

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



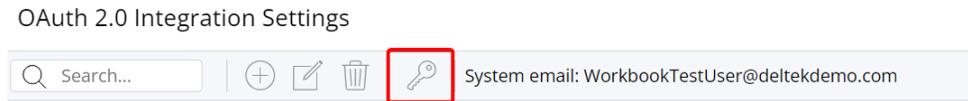
2. If you do not have one, create the setting.



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.

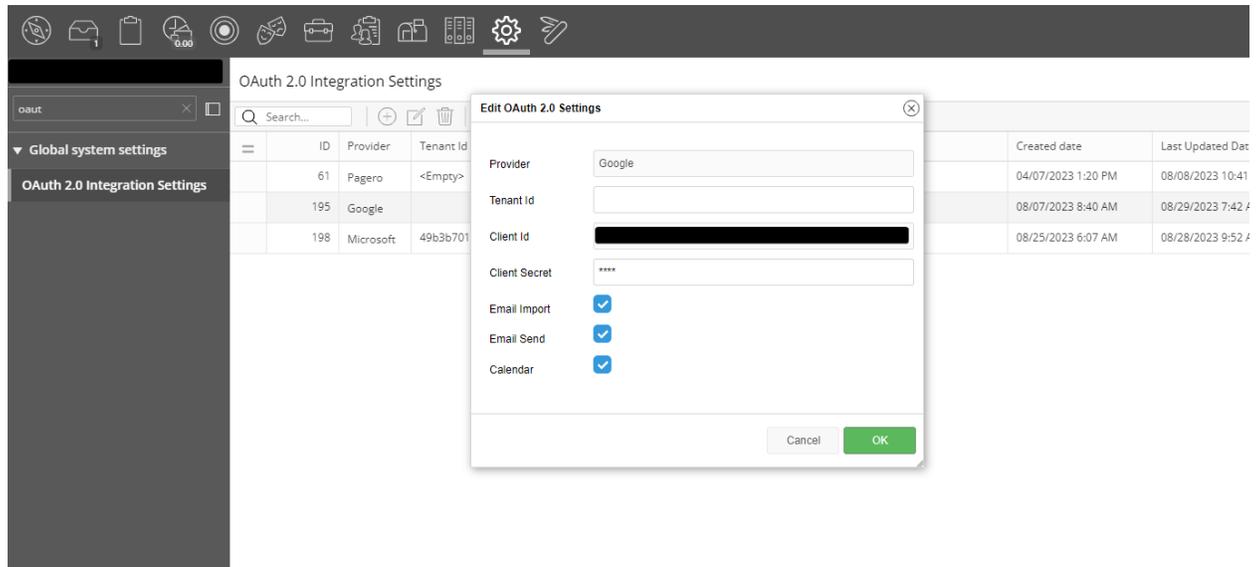


The following are the settings constraints:

- 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)

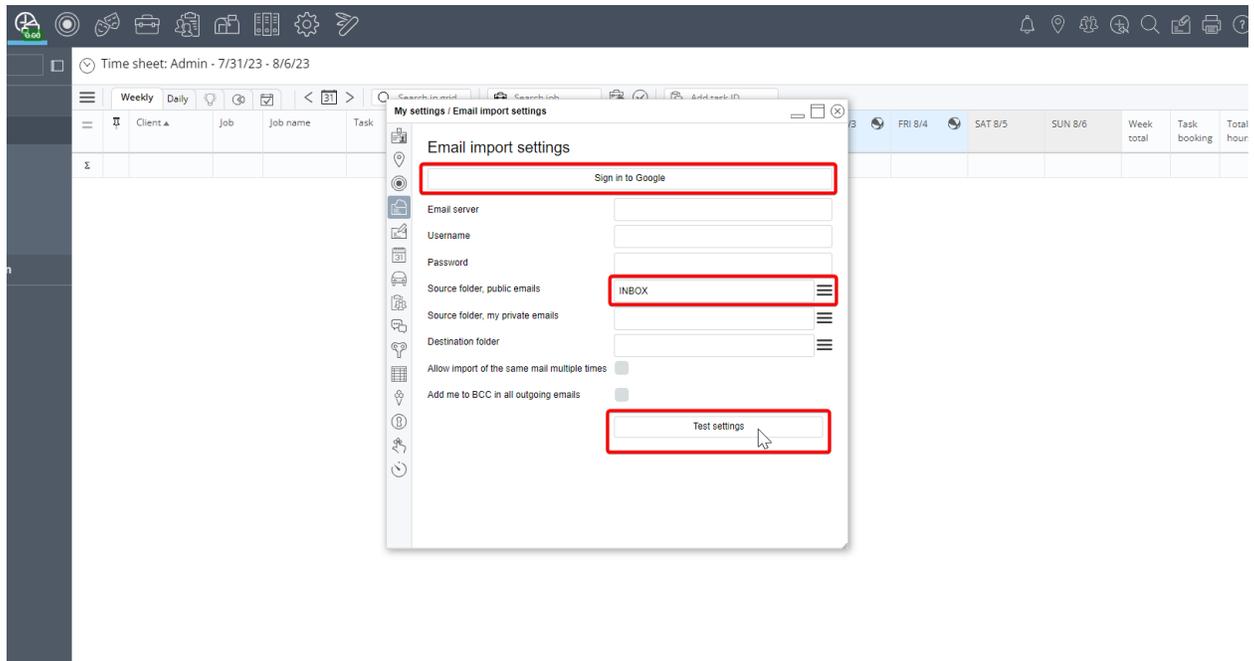
Email/Calendar access lost:

- 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.



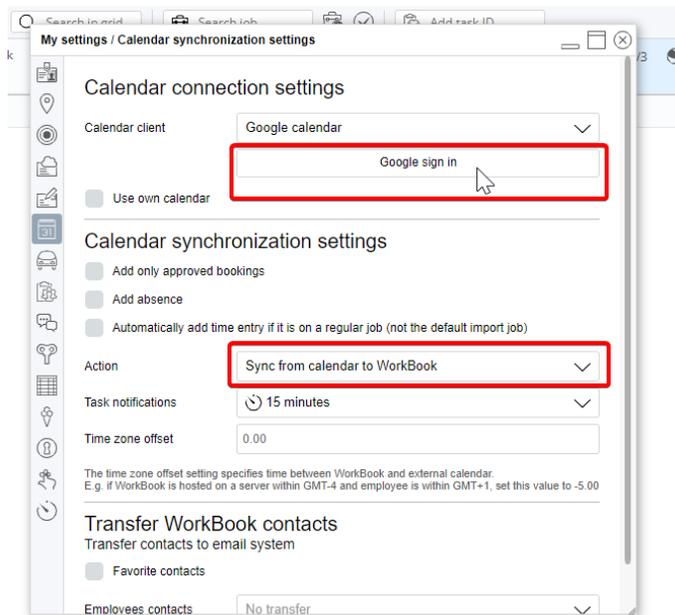
3. Select the folders that are to be used as Source folder public and private emails and Destination folder.
4. Go to Agent Setup and take advantage of the following OAuth 2.0 agents:
 - Mail Archive Agent (OAuth 2.0)
 - Mail Import Agent (OAuth 2.0)

- Mail Import Public Agent (OAuth 2.0)

Test Calendar

To test the calendar:

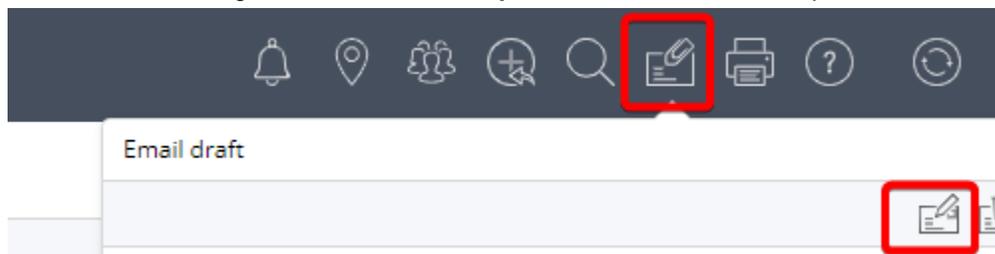
1. Navigate to **My Settings » Calendar synchronization settings** and sign in with Google.
2. Select calendar sync options.
3. Create events that can be synced to WorkBook.
4. Run the Calendar agent and check the logs to confirm that the connection was successful.



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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