




Deltek

Deltek WorkBook

Integration Guide for ConceptShare

May 2021



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Overview

This guide contains procedures on how to integrate ConceptShare with WorkBook. It applies to the cloud version of ConceptShare, and to on-premises, client/server, and cloud deployments of WorkBook.

Scope

This document applies to WorkBook 12.2 or later.

Intended Audience

This guide is for system administrators and advanced users who install and configure ConceptShare and WorkBook.

Prerequisites

In WorkBook, ensure that you:

- Install or update WorkBook to version 12.2 or later. For information on how to install WorkBook, see the *Delltek WorkBook 12.2 Installation Guide*.
- Have a WorkBook account with System Administrator login credentials OR Advanced User login credentials with access to **Settings**. For instructions, see [Enable ConceptShare-Specific Access for WorkBook Roles](#) and [Enable Access to Settings](#).
- Have TLS 1.2 enabled for the cloud version of WorkBook (automatic).
- Have the **web.config** option “**EnableTLS**” set to “**True**” in WorkBook for on-premises version. For instructions, see [Configure the TLS Web.config Setting](#).
- Have System Variable 911 reflect the current WorkBook URL. For instructions, see [Configure System Variable 911](#).

In ConceptShare, ensure that you:

- Have an account and login credentials.
- Have an Account Administrator role or custom account role with adequate permissions.

Note: If you are using a custom account role, make sure that you have the permission for enabling third-party integrations set to **Yes** (Account administrators are automatically given this permission). For instructions, see [Enable Third-Party Integrations](#).

- Have TLS 1.2 enabled for ConceptShare (automatic).

Limitation

Warning: The WorkBook-ConceptShare integration will not work if you have forced Single Sign-On (SSO) enabled in ConceptShare.

WorkBook-ConceptShare Integration

Integrating ConceptShare with WorkBook enables you to:

- Associate a WorkBook company with a ConceptShare account.
- Associate a WorkBook job with a ConceptShare project.
- Manage ConceptShare reviews in WorkBook.

For example, you can create a new ConceptShare project, which is automatically associated with a WorkBook job. You can also associate an existing ConceptShare project with a WorkBook job.

The integration also gives you the flexibility to perform the same actions in either WorkBook or ConceptShare.

You can:

- Create a project
- Create a review
- Add a participant to a review
- Add an asset to a review
- Edit a review (settings, participants, or assets)
- Version an asset under review
- Read comments on a review

The integration allows you to access ConceptShare from the WorkBook application. Your changes are applied and synced in both systems.

Components

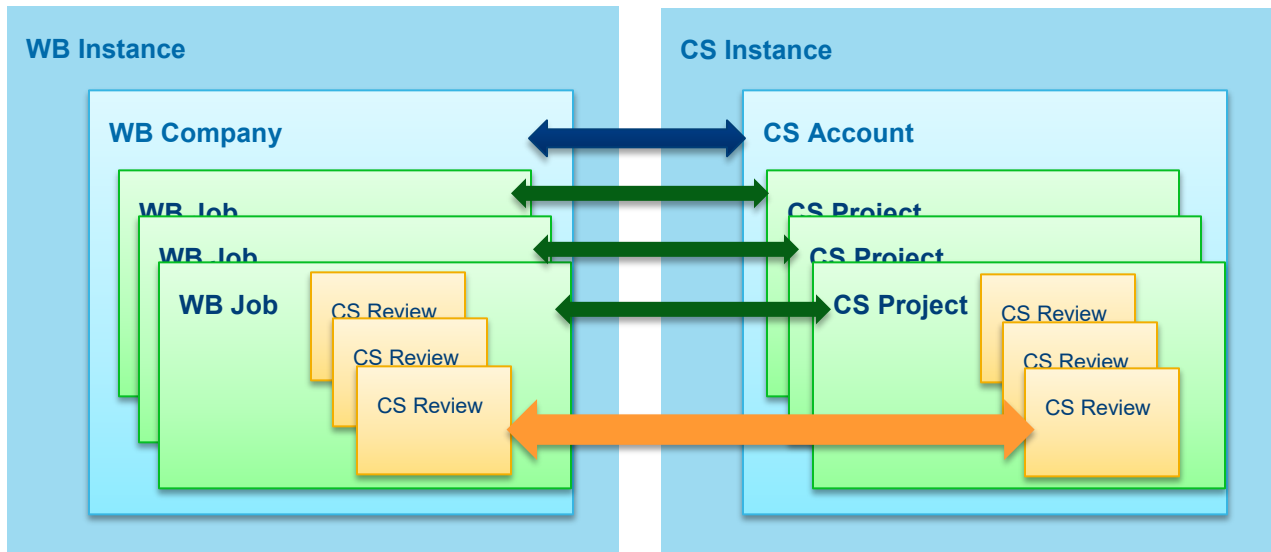
The integration specifically allows you to link your WorkBook company to your ConceptShare account. Once you have established the link, you can then link a WorkBook job to a ConceptShare project in WorkBook.

The following table shows the WorkBook and ConceptShare components per level and how the integration impacts each component:

WorkBook	ConceptShare	WorkBook-ConceptShare Integration Description
Instance	Instance	WorkBook and ConceptShare allow you to have one or more instances of each system.
Companies	Account	<p>A WorkBook instance can support multiple WorkBook companies in the same way that a ConceptShare instance can support multiple ConceptShare accounts.</p> <p>The integration allows you to establish a link between one or more WorkBook Companies and one ConceptShare Account.</p>
Job	Project	<p>A WorkBook company can support multiple jobs. A ConceptShare account can support multiple projects.</p> <p>The integration allows you establish a link between one ConceptShare project and one WorkBook job. There is a one-to-one mapping between these components from each of the systems.</p>
Reviews		<p>Each ConceptShare project can have multiple reviews.</p> <p>With the integration, you can create and manage ConceptShare reviews within WorkBook or ConceptShare, and access these reviews from both systems.</p>

WorkBook-ConceptShare Integration Diagram

The following diagram illustrates the WorkBook-ConceptShare integration.



Configuration


Use the procedures in this section to integrate ConceptShare with WorkBook.


Enable Third-Party Integrations

For users to access ConceptShare from WorkBook, you must first enable the permission for third-party integrations for the account role. You can then [apply the account role to the users that you want to have access to ConceptShare from WorkBook](#). Using the default Account Role: Account Administrator users will already have this permission, but custom roles can be created or edited to grant appropriate access.

Note: Perform this procedure in ConceptShare.

To enable third-party integrations:

1. Log into ConceptShare.
2. At the top right corner of your screen, click the **Gear Wheel** , and select **Account Roles**.
3. On the Account Roles screen, select the custom account role, and click **Edit** to correct the existing custom role permissions.

Alternatively, click **Add**  to create a new custom Account Role. Enter a name and click **Save**. You can then click **Edit** to customize the role permissions.

4. Under the General section, set the **Configure integrations with third-party applications** to **Yes**.
5. Click **Save**.


Apply a Custom Account Role to a ConceptShare User

Apply a custom account role to users that you want to have access to ConceptShare from WorkBook.

Prerequisite: Before you can apply a custom account role to a user, you must first create a custom account role. See step 3 of the [Enable Third-Party Integrations](#) procedure.

Note: Perform this procedure in ConceptShare.

To apply a custom account role to a ConceptShare user:

1. Log into ConceptShare.
2. At the top right corner of your screen, click the **Gear Wheel** , and select **Resources**.
3. Right-click a resource card, select **Change Account Role**, and then select the custom role.
4. When prompted for confirmation, click **Yes**.

Configure the TLS Web.config Setting

This procedure applies only to clients that host WorkBook on their own servers (on-premises deployments). If you are a cloud customer, you can skip this procedure (this setting is automatically enabled for cloud customers).

To configure the TLS web.config setting:

1. Open the WorkBook installation folder then the api folder.
2. In the api folder, right-click **Web.config** and select **Edit with Notepad++**.
3. Under the appSettings of the **Web.config** file, set the value of **EnableTLS** to **True**:

```
</connectionStrings>
<appSettings>
  <add key="MultiHostingEnvironment" value="False" />
  <add key="Owin:AutomaticAppStartup" value="False" />
  <add key="UseForwardFor" value="True" />
  <add key="ida:ClientID" value="643899f6-afca-4137-84e5-f054f02a57e9" />
  <add key="ida:Password" value="zTtq9xRTs7Y4zOSEEAELO+KlPCl4e7yc3hLLvzzv/j4=" />
  <add key="ida:AuthorizationUri" value="https://login.windows.net" />
  <add key="ida:RedirectUri" value="/6845a7dc-1719-460a-9895-0d41bf4e6764.axd" />
  <add key="ImportExport:ServerEndPoint" value="https://importexportserver.workbook.net/" />
  <add key="CompressDynamicData" value="True" />
  <add key="EnableTLS" value="False" />
  <add key="HMRC.ClientId" value="" />
  <add key="HMRC.ClientSecret" value="" />
  <add key="HMRC.CallbackPath" value="HMRC.aspx" />
</appSettings>
```

4. Save the file.

Configure System Variable 911

Set system variable 911 to the current WorkBook URL.

Note: Perform this procedure in WorkBook.

To configure system variable 911:

1. Log into WorkBook using your system administrator credentials.
2. On the main toolbar, click **Settings » Global System Settings » System Variables » Technical Variables**.

Alternatively, enter 911 in the **Setting number** field.



3. Scroll down to **HTML5 version 9 URL redirect** and ensure that the value reflects the current WorkBook URL. If not, enter the correct URL.

Edit Account Callbacks

Add and configure account callbacks in ConceptShare so that all your information will sync in WorkBook.

Note: Perform this procedure in ConceptShare.

To edit an account callback:

1. Log into your ConceptShare account.
2. On the top right of the page, click the **Gear Wheel**  » **Account Callbacks**.
3. On the Account Callback page, click **Add** .
4. In the Add Account Callback dialog box, specify the following information:

URL	<p>Specify the URL of your WorkBook instance.</p> <ul style="list-style-type: none">▪ If you only have a ConceptShare account/accounts from the same instance that is/are linked to Workbook, append the following to the URL of your WorkBook instance: <code>api/integration/conceptshare/callbacks/</code> Sample URL: <code>http://yoursite.com/api/integration/conceptshare/callbacks/</code>▪ If you have ConceptShare accounts from different instances that are linked to Workbook, append the following to the URL of your WorkBook instance: <code>api/integration/conceptshare/callbacks/ID/</code> Sample URL: <code>http://yoursite.com/api/integration/conceptshare/callbacks/ID/</code> Where ID refers to the URL ID that WorkBook assigns a WB company-CS account link. For instructions, see Find a Callback URL ID.
Method	Select POST .
Authorization Header	Use default values.
Enabled	Select Yes .
Retry on Failure?	<p>Select Yes.</p> <p>This option determines if you want to retry sending a callback in case it fails to complete (for reasons such as network issue, connectivity, or server error).</p>

Number of Retry Attempts	Specify a number or use the buttons to increase or decrease the value. The default value is 3 .
Delay (in seconds) between Retry Attempts	This option determines how long the system waits in between retry attempts. Specify a number or use the buttons to increase or decrease the value. The default value is 300 .
Events	Click Events and select an event from the drop-down list. You can select multiple events for a given callback and a request will go out for each instance of the given event. For the list of recommended Callbacks to enable, see Event Callbacks .

5. Click **Save**.

Event Callbacks

The WorkBook-ConceptShare integration allows you to use ConceptShare's callback functionality so you do not have to refresh a page for ConceptShare changes to reflect in WorkBook.

For example, by configuring the callbacks, you will be able to see updates (for example, new comments that were added in a ConceptShare review related to that job) without having to refresh the page. Additionally, you will see if new reviews were added for that job, or if other relevant activities took place related to that job.

The following table lists the relevant callbacks to the WorkBook-ConceptShare integration.

Activity	Callback
Asset Updates	ASSET_CREATED
	ASSET_DELETED
	ASSET_PLACEHOLDER_CREATED
	ASSET_PLACEHOLDER_UPDATED
	ASSET_UPDATED
	ASSET_VERSIONED
Comment Updates	COMMENT_CREATED
	COMMENT_DELETED
	COMMENT_PROMOTED
	COMMENT_PUBLISHED
	COMMENT_UPDATED

Activity	Callback
Project Updates	PROJECT_CREATED
	PROJECT_DELETED
	PROJECT_UPDATED
	REVIEW_COMPLETED
	REVIEW_CREATED
	REVIEW_DELETED
	REVIEW_UPDATED
Reviewer Updates	REVIEW_MEMBER_COMPLETED
	REVIEW_MEMBER_CREATED
	REVIEW_MEMBER_DELETED
	REVIEW_MEMBER_RESET
	REVIEW_MEMBER_UPDATED



Link a WorkBook Company to a ConceptShare Account

Link a WorkBook Company to a ConceptShare Account to view and manage your ConceptShare projects from WorkBook.

Note: Perform this procedure in WorkBook.

Prerequisite: Before you can link a WorkBook Company to a ConceptShare Account, you must have an existing ConceptShare account. If you do not, ask your ConceptShare administrator to create an account for you.

To link an account to a company:

1. Log into WorkBook using your system administrator credentials.
2. On the main toolbar, click **Settings**  » **Global system settings** » **ConceptShare Settings**.
Alternatively, you can type `conceptshare` in the search field.
3. On the menu header, click **Add New** .
4. In the dialog box, select the WorkBook company that you want to associate with your ConceptShare account, and click **OK**.
WorkBook displays the new entry in the grid.
5. Click under the ConceptShare URL column, and enter the URL of the ConceptShare account that you want to link.
WorkBook saves your changes automatically.





Validate the Integration


Perform the following procedures in your WorkBook production environment to generate the necessary authentication token. Generating the authentication token is crucial so that users can begin using the integration and perform actions such as create and edit reviews, or add comments to reviews within the WorkBook application.

Notes:

- You need to validate the integration (generate an authentication token) for every WorkBook company-ConceptShare account (URL) that you are setting up.
- Only a system administrator or an advanced user with access to **Settings** can validate the integration. To allow a non-system administrator to validate the integration, see [Enable Access to Settings](#).



To validate the integration:

1. Create a test job.
 - a. On the main toolbar, click **Jobs** .
 - b. On the side toolbar, click Jobs List .
 - c. On the grid toolbar, click **Create New Job** .
 - d. In the Create New Job dialog box, enter or use the drop-down lists to select the applicable options and click **OK**.
2. Log into ConceptShare from the WorkBook application.
 - a. Select the test job that you created from the previous step.
 - b. On the side toolbar of the Jobs screen, click **Reviews** .
 - c. On the Reviews screen, click **Log In**.

Alternatively, on the upper right corner of the screen, click Log In .
 - d. In the ConceptShare Login dialog box, enter your ConceptShare account credentials and click **Login**.
3. Create a test project.
 - On the Project screen, click **Create New**.
WorkBook displays the option to create a review.

Note: The default project name will be the job number + job name.

4. Create a test review.
 - a. Click **CREATE NEW** or click **Add New Review**  on the grid toolbar.
 - b. In the Create New Review dialog box, provide the values for the required fields.
 - c. Add a sample asset.

- In the Assets to Review section, click **Add assets to review** , select **Browse...** to upload a file from your machine.
Alternatively, drag and drop an asset from your machine to the Asset preview pane.
A thumbnail of the asset is displayed in the Assets to Review section.
- d. Add yourself as a participant.
 1. In the PARTICIPANTS section, click , and enter your email address.
 2. Select **Add as ConceptShare User**.
 3. In the Add User dialog box, provide the required information and click **OK**.
- e. Click **Save and Close**.
WorkBook displays the new review in the Review grid.

Tip: To check if the integration token is activated, see [Check if the Integration Token Is Activated](#).

Setup

This section lists the setup procedures that users must perform to establish the link between the WorkBook and ConceptShare components.

Prerequisite: Before users can use the integration, they must have the following settings enabled:

- In WorkBook, users must have ConceptShare-specific settings enabled for their specific roles. For instructions, see [Enable ConceptShare-Specific Access for WorkBook Roles](#).
- In ConceptShare, they must have the role of an administrator or their custom role must have the permission to **configure integrations with third-party applications** enabled. For instructions, see [Enable Third-Party Integrations](#).

The following links open in the [Deltek WorkBook Online Help](#):

- [Log Into a ConceptShare Account from WorkBook](#)
- [Add a ConceptShare Project to a WorkBook Job](#)
- [Link a WorkBook Job to an Existing ConceptShare Project](#)

Managing Reviews

This section lists how-to links to guide users in their daily use of the WorkBook-ConceptShare integration.

Prerequisites: Before users can use the integration, they must have the following settings enabled:

For managing reviews in WorkBook:

- In WorkBook, users must have ConceptShare-specific settings enabled for their specific roles. For instructions, see [Enable ConceptShare-Specific Access for WorkBook Roles](#).
- In ConceptShare, their role must have the permission to **configure integrations with third-party applications** enabled. For instructions, see [Enable Third-Party Integrations](#).

For performing the functions in ConceptShare:

- If users are members of a ConceptShare project, they need to be assigned to that specific project with a role permitted to do the functions. These settings are managed in ConceptShare. For instructions, see [Edit Project Role Permissions](#) and [Add Resources to a Project](#).

WorkBook Online Help Links	ConceptShare Online Help Links
<ul style="list-style-type: none"> ▪ Add a Review to a ConceptShare Project ▪ Delete a ConceptShare Review ▪ View a ConceptShare Review ▪ Preview Details of a ConceptShare Review ▪ Preview Comments in a ConceptShare Review ▪ Edit a ConceptShare Review ▪ Version an Asset ▪ Preview Assets in a Review ▪ Log Out of a ConceptShare Account or Accounts 	<ul style="list-style-type: none"> ▪ Managing Reviews ▪ Create a Review ▪ Edit a Review ▪ Add a Participant to a Review ▪ Add a Guest Reviewer to a Review ▪ Upload a New Asset Inside a Review ▪ Upload a New Asset Outside a Review ▪ Add a ConceptShare Asset to a Review ▪ Version an Asset Inside a Review ▪ Download an Asset from the Assets Tab ▪ Download an Asset from the Proofing Workspace

Troubleshooting

Use the procedures in this section to fix WorkBook-ConceptShare integration errors.

Enable ConceptShare-Specific Access for WorkBook Roles

Enable ConceptShare-related settings for WorkBook roles. Users that have these roles will then be able to use the integration.

To enable ConceptShare-specific access for WorkBook roles:




1. Log into WorkBook using your system administrator credentials.
2. On the main toolbar, click **Jobs » Reviews**.
3. On the upper left side of the screen, click **Personal Preferences** (blue box with your WorkBook initials), and select **My Settings**.
4. On the My Settings / Language & Formatting Options dialog box, scroll down to the Access Right Settings section, and click **Show the Access Override Control Panel**.
5. In the Element Access Right Selector, click **Job ConceptShare (Reviews) » Access Override » All**.
6. In the grid, ensure that the **Full Access** check box is selected for the Type (user role) that you want to give access to the integration, and click **OK**.
7. Repeat the previous step for the following Element Access Right settings:
 - **ConceptShare Sidebar Main (ConceptShare Sidebar Main)**
 - **ConceptShare Review Details (Review Details)**
8. Click **OK**.

Note: Users may need to refresh their WorkBook application before the changes are applied.

Enable Access to Settings

Perform this procedure if you want a non-system administrator (for example, an advanced user) to be able to generate authentication tokens in a production environment. Once tokens have been generated, other users of the integration can begin performing actions such as create and edit reviews, or add comments to reviews from the WorkBook application.

To enable access to settings for a specific user:

1. Log into WorkBook using your system administrator credentials.
2. On the main toolbar, click **Resources** .
3. In the search grid, enter the name of the user that you want to grant access to **Settings**.
4. In the grid, select the user, and click **Resource Information**  /  on the toolbar to display the resource information card.
5. On the side toolbar of the resource information card, navigate to **Settings » Login Settings » Company Access**.





6. In the grid, locate the **Allow Access to Settings** column and select the check box that corresponds to the company (linked to the ConceptShare account) for which the user must generate an authentication token.

Note: Users may need to refresh their WorkBook application before the changes are applied.

Check if the Integration Token Is Activated

You can check if the token for a WorkBook company-ConceptShare account (URL) integration is activated.

To check if the integration token is activated:

1. Log into WorkBook using your system administrator credentials.
2. On the main toolbar, click **Settings**  » **Global System Settings** » **ConceptShare Settings**.
Alternatively, you can type `conceptshare` in the search field.
3. On the ConceptShare Settings page, click the **Grid View / Data Options Menu**  and select **Modify Grid**.
4. In the **Modify Current Grid** dialog box, click the **Modify Current Grid Misc**  tab.
5. In the tab, select the **Setup** check box and click **Close** .


WorkBook displays the **Setup** column in the grid.





The integration token is activated if the check box that corresponds to the WorkBook Company-ConceptShare account (URL) is selected.

Find a Callback URL ID

Use the WorkBook URL ID when configuring ConceptShare callbacks in order to send relevant event notifications back to WorkBook that are related to a specific company and its jobs. This procedure is only relevant when linking multiple ConceptShare accounts, otherwise, it can be skipped.

To find a WorkBook URL ID:


1. Log into WorkBook using your system administrator credentials.
2. On the main toolbar, click **Settings**  » **Global System Settings** » **ConceptShare Settings**.
Alternatively, you can type `conceptshare` in the search field.
3. On the ConceptShare Settings page, locate the **URL Id** column.

ConceptShare Settings			
the X Company @XComp	 	Q Search grid	
Search		Company	ConceptShare URL
the X Company @XComp		https://company1.workbook-dev.conceptshare.com	URL Id

Unlink a ConceptShare Project from a WorkBook Job

Unlink a ConceptShare project from a WorkBook job so you can link the project to a different job.

To unlink a project:


1. Log into ConceptShare from WorkBook.
For instructions, see [Log into a ConceptShare Account from WorkBook](#) (this link opens in the Deltek WorkBook Online Help).
2. In the **Reviews** grid, click the **Grid Actions Menu** .
3. Click **Remove Project Link**.
4. Click **Delete**.

Note: After you unlink a project from a job, the project or reviews associated with it are not deleted from ConceptShare. For good account hygiene it is advisable to log into ConceptShare and delete the project as well if it is no longer a work in progress. Otherwise, the appropriate job should be opened, and the orphaned project should be linked to it. For instructions, see [Delete a Project](#) (opens in the ConceptShare Online Help).

Unlink a ConceptShare Account from a WorkBook Company

Unlink a ConceptShare Account from a WorkBook Company if you no longer want WorkBook to be able to create projects and reviews in ConceptShare.

To unlink an account:

1. On the main toolbar click **Settings » Global system settings » ConceptShare Settings**.
2. Select an item from the grid.
3. Click **Delete** . Review the connected job(s) that will be affected when you perform this action.
4. Click **Yes**.

Note: When you unlink an account from a company, the ConceptShare projects are not deleted. Only the references to the ConceptShare projects are removed from WorkBook.

For more information, see [Link a WorkBook Company to a ConceptShare Account](#) and [Link a WorkBook Job to an Existing ConceptShare Project](#) (opens in the WorkBook Online Help), and [Deleting a ConceptShare Project](#) (opens in the ConceptShare Online Help).

Difficulties Connecting to ConceptShare from WorkBook

If you are unable to log into your ConceptShare account from WorkBook or use the integration functions, it could be due to the following:

Reason	Recommended Solution
You do not have a ConceptShare account.	Ask your ConceptShare administrator to create an account for you.
Third-party integration is not enabled for your account role in ConceptShare.	For instructions, see Enable Third-Party Integrations .
TLS 1.2 is not enabled for WorkBook.	Enable TLS 1.2. For cloud customers, submit a ticket to Deltek Support to confirm if TLS 1.2 is forced for your account.
The Web.config setting for TLS is not set to True .	For instructions, see Configure the TLS Web.config Setting .
The system variable 911 does not reflect the current WorkBook URL.	For instructions, see Configure System Variable 911 in WorkBook .
You do not have system administrator access or your role does not allow access to Jobs .	Contact your system administrator to request access to Jobs as defined in the Employee Cross-Company access submodule under Settings .
Your role does not allow access to the following: <ul style="list-style-type: none"> Job ConceptShare (Reviews) ConceptShare Sidebar Main (ConceptShare Sidebar Main) 	For instructions, see Enable ConceptShare-Specific Access for WorkBook Roles .

Difficulties Integrating with your UAT WorkBook Environment

If the integration fails in your UAT system, it could be due to the following:

Reason	Recommended Solution
A data refresh of your UAT WorkBook environment could have affected the integration.	Reconfigure the setup.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using WorkBook, Deltek makes a wealth of information and expertise readily available to you.

Customer Care

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who have an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Delttek Support Center

To access the Delttek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Delttek Support Center **Username** and **Password**.
3. Click **Login**.

Notes:

- If you forget your username or password, you can click the **Need Help?** button on the login screen for help.
- Your username is case-sensitive.

Additional Documentation

The following table lists the Delttek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Delttek Support Center.

You can perform a Delttek Support Center search for additional documentation at the following link:

https://deltek.custhelp.com/app/answers/detail/a_id/79935.

Document Name	Description
<i>WorkBook 12.2 Release Notes</i>	This document discusses the features included in the Delttek WorkBook 12.2 release.
<i>WorkBook 12.2 Installation Guide</i>	This document contains instructions for installing Delttek WorkBook 12.2 in your system.
ConceptShare Release Notes	This page contains ConceptShare release information.

About Deltek

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