


The background of the page features two large, diagonal stripes. One stripe is a medium blue and runs from the top-left corner towards the bottom-right. The other stripe is a darker blue and runs from the bottom-left corner towards the top-right. These stripes intersect in the center of the page.

Deltek

# Deltek WorkBook

Reconfiguring WorkBook to Use  
Microsoft Exchange OAuth

May 30, 2024



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This edition published May 2024.

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## Introduction

Microsoft Exchange Online has deprecated Basic Authentication for multiple protocols and removed it on October 13, 2020. Basic Authentication is superseded by Modern Authentication (based on OAuth 2.0). As a result, WorkBook users may need to change the configuration of their IMAP agents and Calendar synchronization if they connect Exchange Online.

Who is affected?

- Customers who use the Voucher hot IMAP agent (Agent Type 114) and link that agent to a Microsoft Exchange IMAP server address.
- Customers who use the Calendar synchronization functionality and synchronize with a Microsoft Exchange calendar.

If you use these functions to link with products other than Microsoft Exchange, no reconfiguration is required.

**Note:** Some of the tasks that this document describes must be performed by a user who has Admin access to the Azure Active Directory (AD), and who may not be the WorkBook System Administrator.

## Set Up the Voucher Hot IMAP Agent

The workflow for reconfiguring an IMAP agent involves the following tasks:

In Azure AD:

1. Register an application.
2. Add a client secret.
3. Grant admin consent.

In WorkBook:

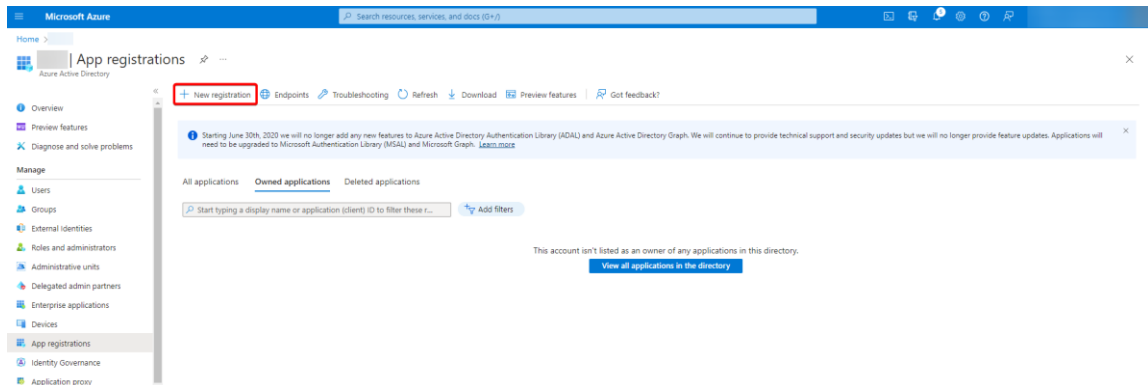
- Create a voucher hot Azure agent (Agent Type 170).

## Configuration Required in your Azure Portal

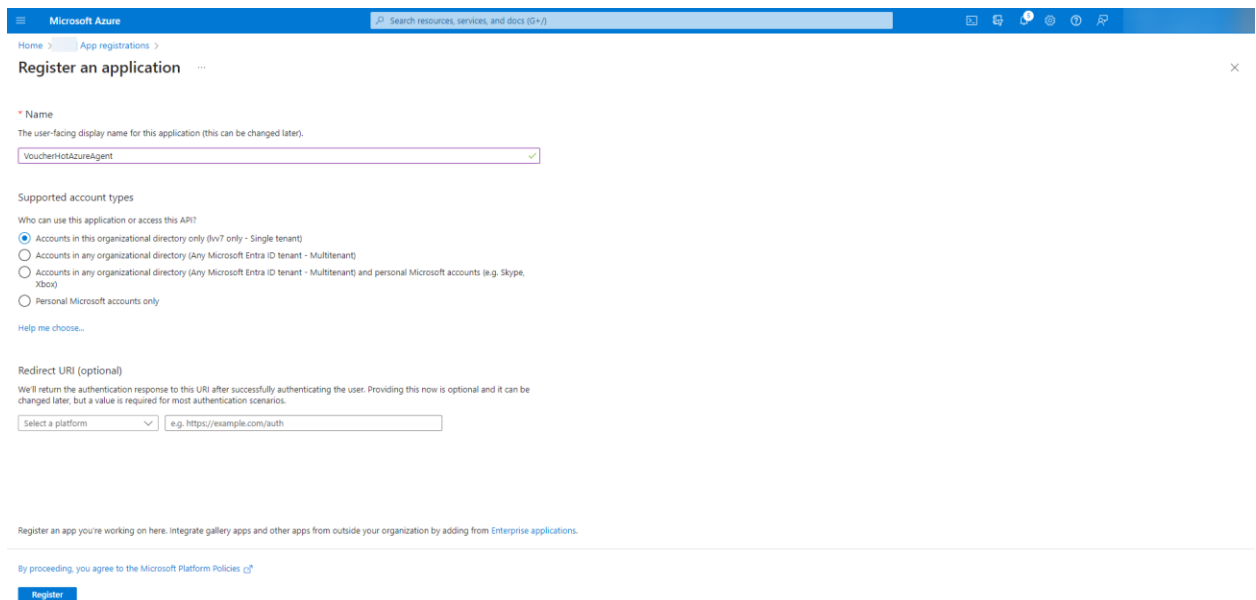
**Attention:** These steps must be performed by a user who has Admin access to the Azure Active Directory (AD).

To register a new application in Azure:

1. Log in to <https://portal.azure.com/>
2. Navigate to **Azure Active Directory » Manage » App registrations**.



3. Click **Register an application**. The following window is displayed.



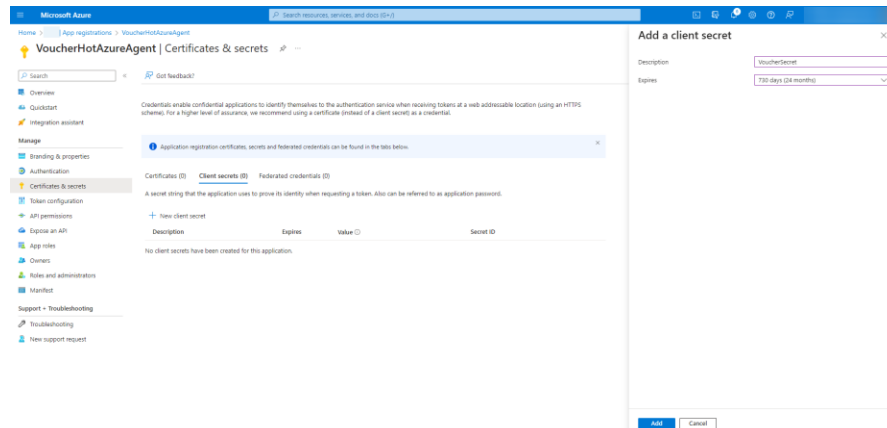
4. Enter a name for the application in the **Name** field. This is a free text field, but you should enter a meaningful name, particularly if you intend to use multiple hot Azure agents.

**Supported account type** defaults appropriately, based on your Azure setup. Do not change the default value.

5. Leave the **Redirect URI** field blank.
6. Click **Register**.

## Set Up the Voucher Hot IMAP Agent

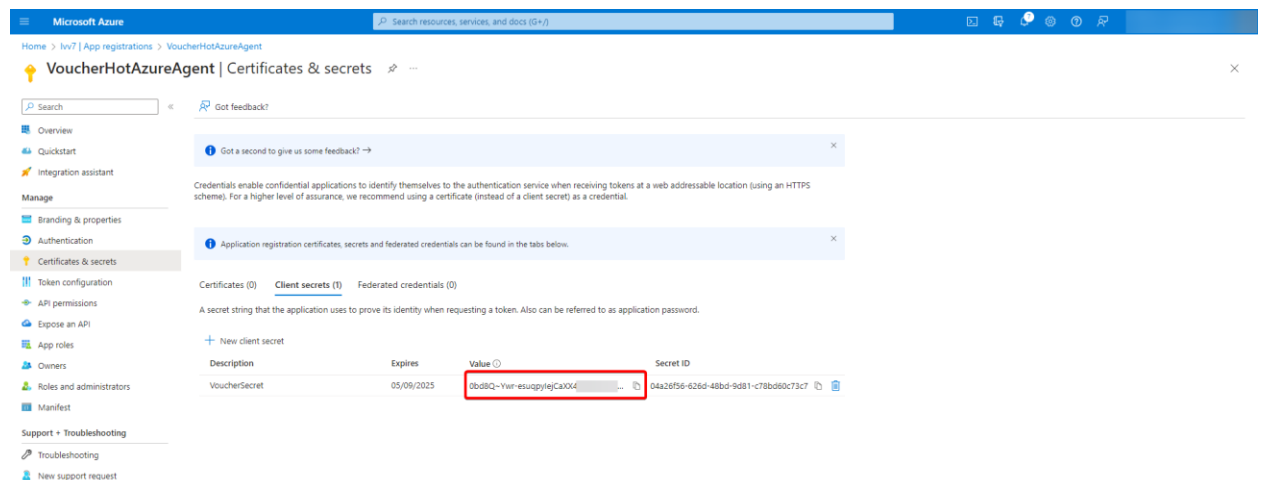
- Navigate to **Manage » Certificates & secrets**. The **Add a client secret** dialog is displayed.



- Add a client secret and copy the value, because this is the only time that you can see it.
- Enter the description and indicate whether you want the secret to expire.

Having a secret expire instead of being retained indefinitely means that you must generate a new secret. You may also want to delete the secret and create another one even more frequently than once a year.

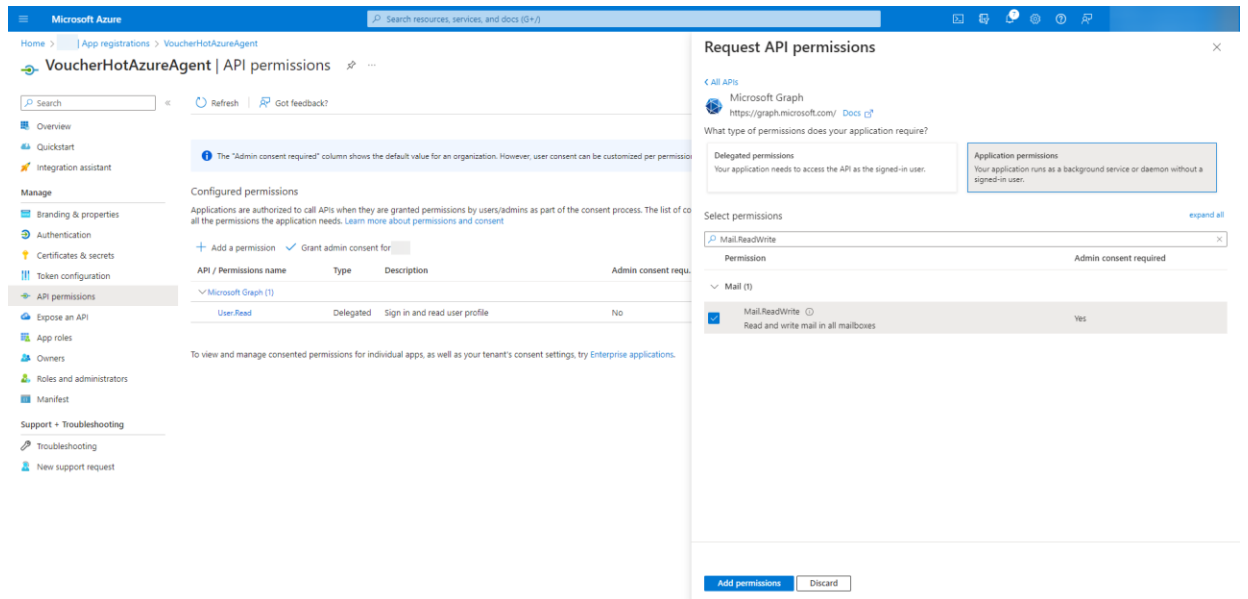
Make sure that you do not leave the client secret in a place where others can access it, because this secret is used for authentication purposes. If you left the page without copying down the value, or you managed to lose it, you must delete the secret and create another one.



- Navigate to **Manage » API permissions**. The **Configured permissions** pane is displayed.

## Set Up the Voucher Hot IMAP Agent

11. Click **Add a permission**. The **Request API permissions** pane is displayed.

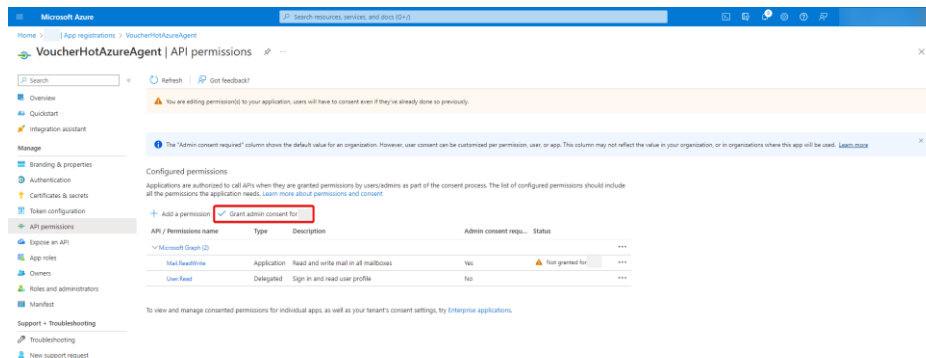


12. Add a permission for **Mail.ReadWrite**:

- Select **Application permission**; otherwise, the Mail.ReadWrite permission is not displayed.
- Search for the permission **Mail.ReadWrite** and select its checkbox.

13. Click **Add permissions** at the bottom of the **Request API permissions** pane.

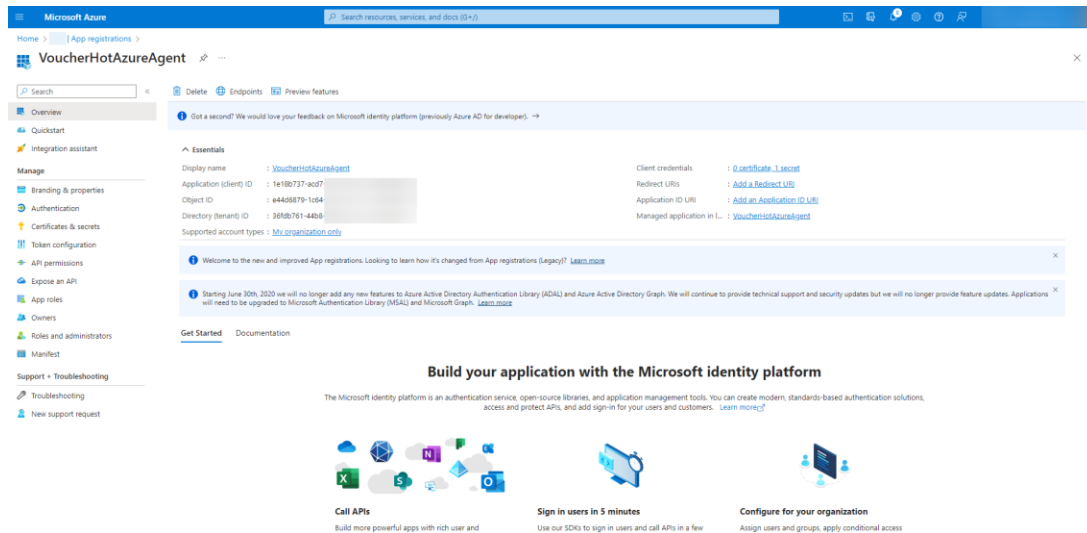
This takes you to the **API permissions Configured permissions** pane.



14. Click **Grant admin consent**. This button name varies because it includes your specific Azure service name.

## Set Up the Voucher Hot IMAP Agent

### 15. Navigate to **Overview**.




**Tip:** Write down the values of the **Application (client) ID** and **Directory (tenant) ID** indicated for the Application that you just registered. You need to know these values to perform the configuration in WorkBook that is described in the next procedure.

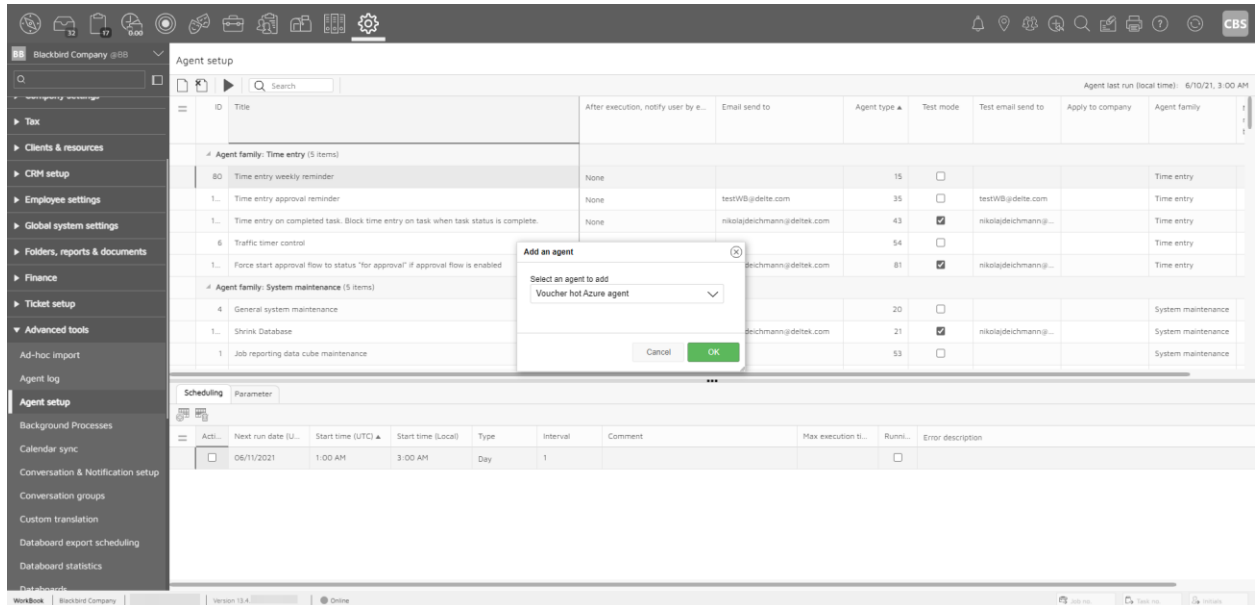


## Configuration Required in WorkBook

These steps must be performed by either a WorkBook System Administrator or an Advanced User who has access to Settings » Agent Setup.

To set up the voucher hot Azure agent:

1. Go to WorkBook and navigate to **Settings » Advanced Tools » Agent Setup**.
2. Click  **Add Agent**. The **Add an Agent** dialog is displayed.



3. Select **Voucher hot Azure agent** from the **Select an agent to add** drop-down list.
4. Enter the parameters for the agent:
  - **Email** – The email address that is to be linked to
  - **Tenant ID** – To be obtained from the application in the Azure portal
  - **Client ID** – To be obtained from the application in the Azure portal
  - **Client secret** – To be obtained from the application in the Azure portal

## Set Up the Voucher Hot IMAP Agent

The screenshot shows the 'Agent setup' window in the DelteK application. The left sidebar contains a navigation menu with options like Tax, Clients & resources, CRM setup, Employee settings, Global system settings, Folders, reports & documents, Finance, Ticket setup, and Advanced tools. The 'Agent setup' section is currently selected.

The main area displays a table of agents. The 'Voucher hot Azure agent' is highlighted. Below the table, the 'Parameter' tab is active, showing the configuration for this agent.

ID	Title	After execution, notify user by e...	Email send to	Agent type	Test mode	Test email send to	Apply to company	Agent family
38	Automatically block in-active creditors (Company variable 48)	None		168	<input type="checkbox"/>			Finance
1...	Voucher hot Azure agent	None	denispetersen@deltek.com	170	<input checked="" type="checkbox"/>	denispetersen@del...		Finance
2...	Voucher hot Azure agent	None	camilabruhstender@deltek.c...	170	<input checked="" type="checkbox"/>	camilabruhstend...		Finance

Below the table, the 'Voucher hot Azure agent' configuration is shown with the following parameters:

- 715 Email: email@email.dk (Default: None)
- 716 Tenant id: 95f0d4cc- (Default: None)
- 717 Client id: test1 (Default: None)
- 718 Client secret: b22 (Default: None)
- 719 Email Source Folder (The one we read from): inbox (Default: None)

After you have entered these parameters, the agent definition is complete. When you schedule it, the agent operates as a hot IMAP agent, using Microsoft OAuth.

# Set Up Microsoft 365 OAuth 2.0 Integration

Register your Application in Azure Portal

**To register your application in Azure Portal:**

1. Enter the Redirect URI.

The integration works for multi-tenant as well as single-tenant applications.

[Home](#) > [App registrations](#) >

## Register an application

\* Name

The user-facing display name for this application (this can be changed later).

### Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only only - Single tenant
- ☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)
- ☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- ☐ Personal Microsoft accounts only

[Help me choose...](#)

### Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

**Attention:** Deltek recommends that you create one application registration instead of several.

Add Permissions to your Application


**To add permissions to your application in the API permissions / Add a permission wizard:**

1. For all: User.Read, offline\_access as type delegated

## Set Up Microsoft 365 OAuth 2.0 Integration

Request API permissions

All APIs

 Microsoft Graph  
<https://graph.microsoft.com/> Docs

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.


Application permissions  
Your application runs as a background service or daemon without a signed-in user.

Select permissions

offline

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
OpenId permissions (1)	
<input checked="" type="checkbox"/> offline_access ⓘ Maintain access to data you have given it access to	No

 Microsoft Graph  
<https://graph.microsoft.com/> Docs

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.

Application permissions  
Your application runs as a background service or daemon without a signed-in user.

Select permissions

Start typing a permission to filter these results

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
OpenId permissions (1)	
<input type="checkbox"/> email ⓘ View users' email addresses	No
<input checked="" type="checkbox"/> offline_access ⓘ Maintain access to data you have given it access to	No
<input type="checkbox"/> openid ⓘ Sign users in	No
<input type="checkbox"/> profile ⓘ View users' basic profile	No

2. For mail import:
  - Imap.AccessAsApp as type application
    1. In the Azure portal, choose the **API Permissions blade** in your Azure AD application's management view.
    2. Select **Add permission**.
    3. Select the **APIs my organization uses** tab and search for **Office 365 Exchange Online**.

## Request API permissions

Select an API

Microsoft APIs **APIs my organization uses** My APIs

Apps in your directory that expose APIs are shown below

Office 365 Exchange Online	
Name	Application (client) ID
Office 365 Exchange Online	

4. Click **Application permissions**.
5. For IMAP access, choose the **IMAP.AccessAsApp** permission.

6. Choose **Mail.ReadWrite**.

Request API permissions

< All APIs

Office 365 Exchange Online  
https://outlook.office.com

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

Select permissions

expand all

Start typing a permission to filter these results

Permission

Admin consent required

> Other permissions

> Calendars

> Contacts

> Exchange

IMAP (1)

☒ IMAP.AccessAsApp ⓘ  
IMAP.AccessAsApp

Yes

> Mailbox

> MailboxSettings

Mail (1)

☐ Mail.Read ⓘ  
Read mail in all mailboxes

Yes

☒ Mail.ReadWrite ⓘ  
Read and write mail in all mailboxes

Yes

7. After you choose the type of permission, select **Add permissions**.

- Mail.ReadWrite as type application under **Microsoft Graph**

Request API permissions ×

[← All APIs](#)

Microsoft Graph  
https://graph.microsoft.com/ Docs [🔗](#)

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.

Application permissions  
Your application runs as a background service or daemon without a signed-in user.

Select permissions expand all

mail

Permission	Admin consent required
> MailboxSettings	
▼ Mail (1)	
<input type="checkbox"/> Mail.Read ⓘ Read mail in all mailboxes	Yes
<input type="checkbox"/> Mail.ReadBasic ⓘ Read basic mail in all mailboxes	Yes
<input type="checkbox"/> Mail.ReadBasic.All ⓘ Read basic mail in all mailboxes	Yes
<input checked="" type="checkbox"/> Mail.ReadWrite ⓘ Read and write mail in all mailboxes	Yes
<input type="checkbox"/> Mail.Send ⓘ Send mail as any user	Yes

3. For mail send:

- Mail.Send as type application
- Mail.ReadWrite as type application

Request API permissions ×

[← All APIs](#)

Microsoft Graph  
https://graph.microsoft.com/ Docs [🔗](#)

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.

Application permissions  
Your application runs as a background service or daemon without a signed-in user.

Select permissions expand all

mail

Permission	Admin consent required
> MailboxSettings	
▼ Mail (2)	
<input type="checkbox"/> Mail.Read ⓘ Read mail in all mailboxes	Yes
<input type="checkbox"/> Mail.ReadBasic ⓘ Read basic mail in all mailboxes	Yes
<input type="checkbox"/> Mail.ReadBasic.All ⓘ Read basic mail in all mailboxes	Yes
<input checked="" type="checkbox"/> Mail.ReadWrite ⓘ Read and write mail in all mailboxes	Yes
<input checked="" type="checkbox"/> Mail.Send ⓘ Send mail as any user	Yes

4. For calendar:

- Calendars.ReadWrite as type application

**Request API permissions** ×

[← All APIs](#)

Microsoft Graph  
https://graph.microsoft.com/ Docs [↗](#)

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.

**Application permissions**  
Your application runs as a background service or daemon without a signed-in user.

Select permissions expand all

calen

Permission	Admin consent required
Calendars (1)	
<input type="checkbox"/> Calendars.Read ⓘ Read calendars in all mailboxes	Yes
<input type="checkbox"/> Calendars.ReadBasic.All ⓘ Read basic details of calendars in all mailboxes	Yes
<input checked="" type="checkbox"/> Calendars.ReadWrite ⓘ Read and write calendars in all mailboxes	Yes

The following example shows the resulting permissions setup for calendar, mail import, and mail send:

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for DeltekDemo.com

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (5)				
Calendars.ReadWrite	Application	Read and write calendars in all mailboxes	Yes	✓ Granted for
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	✓ Granted for
Mail.Send	Application	Send mail as any user	Yes	✓ Granted for
offline_access	Delegated	Maintain access to data you have given it access to	No	✓ Granted for
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for
Office 365 Exchange Online (2)				
IMAP.AccessAsApp	Application	IMAP.AccessAsApp	Yes	✓ Granted for
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	✓ Granted for

**Note:** You must grant all consents for permissions to work correctly.



## Set Up Microsoft 365 OAuth 2.0 Integration

- Click the **New Client Secret** button in the **Certificates and Secrets** panel to create an application secret.

The screenshot shows the 'Add a client secret' dialog box. The 'Description' field contains the placeholder text 'Enter a description for this client secret'. The 'Expires' field is highlighted with a red box and shows a dropdown menu with '24 months' selected. There are 'Add' and 'Cancel' buttons at the bottom.

- Select a value for the **Expires** field. The integration will work until this time period elapses.

**Tip:** Be sure to refresh the secret **before** it expires.

## Configure OAuth 2.0 for Office 365 Mailing

### To configure OAuth 2.0 for Office 365 mailing:

Enable IMAP for your organization and mailbox:

- Navigate to the Microsoft 365 admin portal at <https://admin.microsoft.com/> and log in as Administrator.
- Go to **Settings » Org Settings**.
- Select **Modern authentication** and select **Turn on modern authentication for OAuth flows**.

## Enable Use of PowerShell

### To use Windows PowerShell on your computer to register service principals in Exchange:

- Set the execution policy:
 

```
Set-ExecutionPolicy RemoteSigned
```
- Install the ExchangeOnlineManagement module:
 

```
Install-Module -Name ExchangeOnlineManagement
Import-Module ExchangeOnlineManagement
```

3. Connect, and then log in as Administrator. (You are prompted for the password.)

```
Connect-ExchangeOnline -UserPrincipalName your-admin-account@your-domain.onmicrosoft.com
```

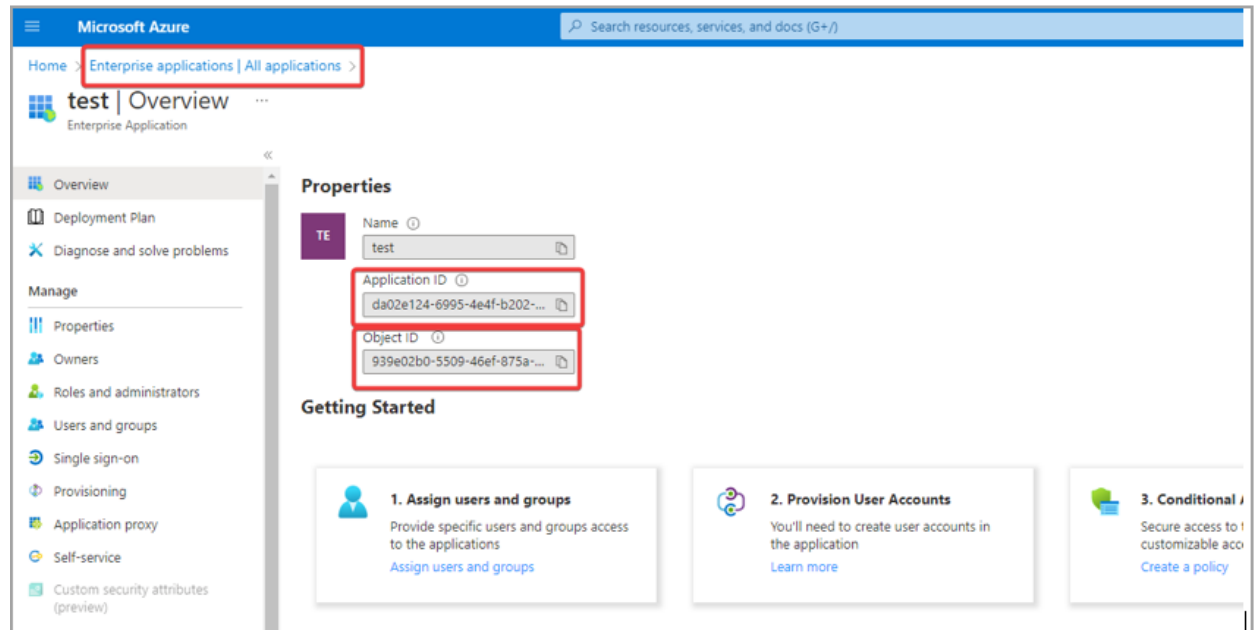
4. For Exchange running in hybrid mode, log in using the following code:

```
$lc = Get-Credential
Connect-ExchangeOnline -Credential $lc
```

5. Create the service principal:

```
New-ServicePrincipal -AppId <APPLICATION_ID>
-ServiceId <OBJECT_ID> [-Organization <ORGANIZATION_ID>]
```

Ensure that you use the Object ID from the Enterprise Application:



6. Add permissions to a specific mailbox:

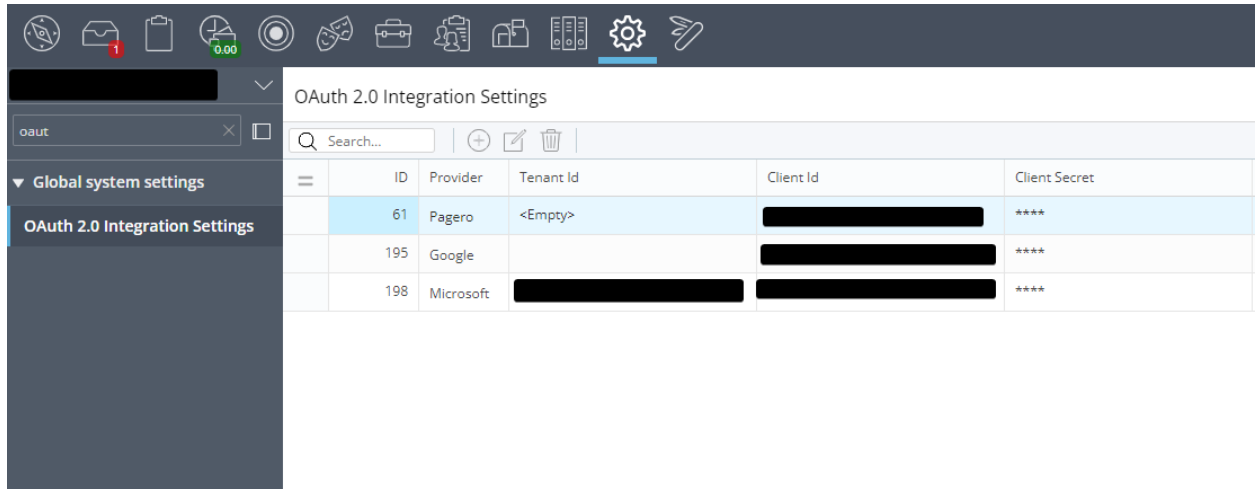
```
Add-MailboxPermission
-Identity "<USER@your-domain.onmicrosoft.com>"
-User <OBJECT_ID>
-AccessRights FullAccess
```

You must use Add-MailboxPermission for every shared mailbox to which you require access.

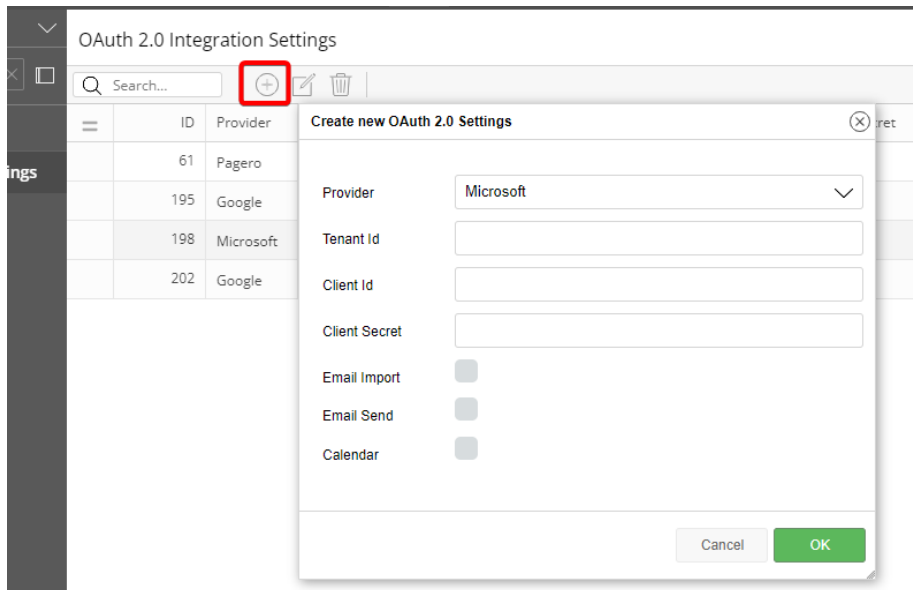
## Configure WorkBook

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 Microsoft provider; enter the tenant ID, 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

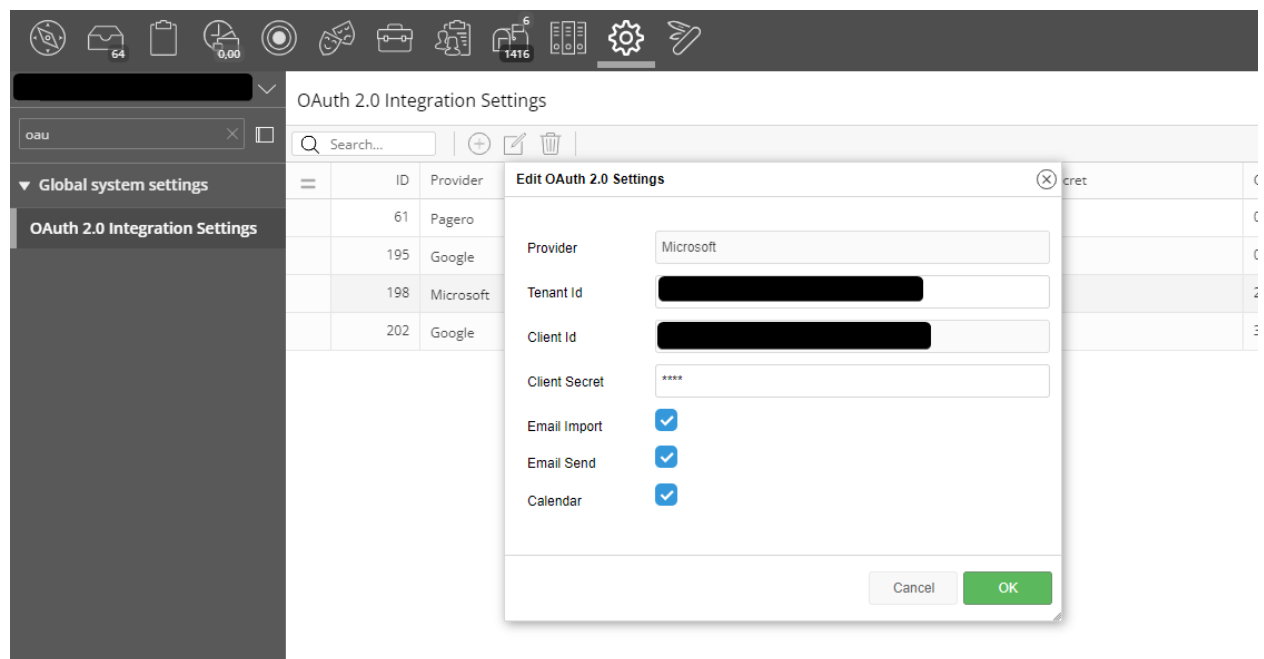
Q Search... | (+) (edit) (trash)  System email: WorkbookTestUser@deltekdemo.com

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.

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 OAuth 2.0 Settings dialog box as shown in the following example.



OAuth 2.0 Integration Settings

ID	Provider	
61	Pagero	
195	Google	
198	Microsoft	
202	Google	

**Edit OAuth 2.0 Settings**

Provider: Microsoft

Tenant Id: [Redacted]

Client Id: [Redacted]

Client Secret: [Redacted]

Email Import: ☒

Email Send: ☒

Calendar: ☒

Cancel OK

## 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). See [Configure OAuth 2.0 for Office 365 Mailing](#).

- 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

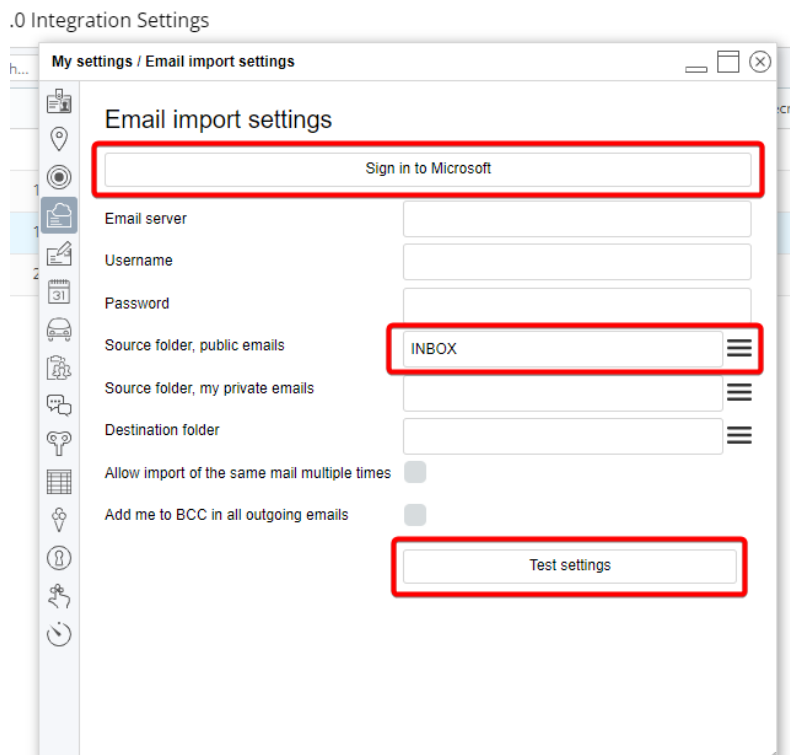
The import happens through the agents. Go to Agent Setup and take advantage of the following OAuth 2.0 agents:

- Mail Archive Agent (OAuth 2.0)
- Mail Import Agent (OAuth 2.0)
- Mail Import Public Agent (OAuth 2.0)

### 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 Microsoft.
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.

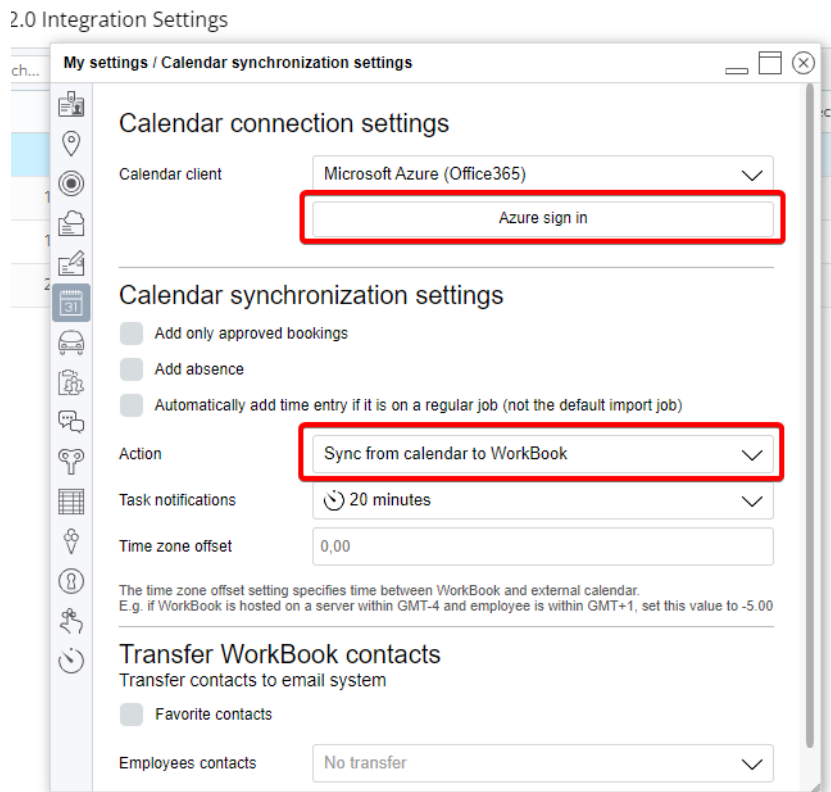
## Set Up Microsoft 365 OAuth 2.0 Integration

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:

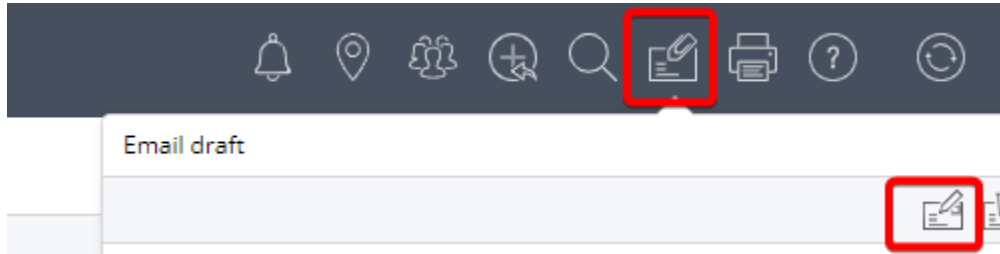
1. Navigate to **My Settings » Calendar** and sign in with Microsoft.
2. Select calendar sync options.
3. Create events that can be synced to WorkBook.
4. Run the Calendar agent and check the logs to confirm that the connection was successful.



### Test Mail Send

#### To test sending an email:

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



## Troubleshooting

1. Check the permissions:

```
Get-ServicePrincipal  
Get-MailboxPermission -Identity <email_address>
```

1. Check the **Tenant Id**, **Client Id**, and **Client Secret** fields.
2. Ensure that you took the **ObjectId** from the Enterprise Application page.
3. Ensure that you added the correct permissions and granted **Admin consents**.

Depending on your security settings for your Exchange account, Administrators may need to approve users manually when they authorize access to their own Outlook.



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