OpenScape Business V1

Tutorial
Interaction with Microsoft Office 365
(Edition 2013)

Version 1.0
Definitions

HowTo
An OpenScape Business HowTo describes the configuration of an OpenScape Business feature within the OpenScape Office administration. It addresses primarily trained administrators of OpenScape Business.

Tutorial
Within the OpenScape Business tutorials procedures for installation, administration and operation of specific devices, applications or systems, which are connected to OpenScape Business, are described. The tutorial addresses primarily trained administrators of OpenScape Business.
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<tr>
<td>2013-07-29</td>
<td>1.0</td>
<td>Initial Creation</td>
</tr>
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1 Introduction

Introduction:
To give you an overview, what this configuration manual is about, you might first want to know, what benefit the functionality will give you when you perform this configuration within your local "OpenScape Business" system and the "Microsoft Office 365" in the new 2013\textsuperscript{th} variant in the cloud:

- **What is Microsoft Office 365?**

  It's familiar Microsoft Office collaboration and productivity tools delivered through the cloud. Everyone can work together easily with anywhere access to email, web conferencing, documents, and calendars. It includes business-class security and is backed by Microsoft. Whether you are a small business or multinational enterprise, Office 365 offers plans designed to fit your organization's unique needs. (Text source: www.microsoft.com) For more details or a 30 day trial account, please visit: http://www.microsoft.com/Office365

- **These functions will your OpenScape Business be able to use within Microsoft Office 365:**

  **Exchange Calendar Integration:**

  When users set appointments in their Microsoft Outlook calendar, the OpenScape Business system will automatically check for keywords in the calendar appointment subjects like: "Meeting", "Sick", "Break", "Out of Office", "Holiday", "Lunch" or "Home". If such a keyword is found, the OpenScape Business will set the users presence status automatically when the appointment time is reached, even if the Microsoft Outlook session of this user is not active anymore.

  The user just simply configures his appointments with these keywords and OpenScape Business will set his telephone presence status automatically and will forward calls to his voicemail or for example to his cellphone, depending on the set presence status and the from the user desired forwarding target. The user can also configure in a general client setting, if his presence status should be switched back to "Office" presence status when the appointment time has ended.

  This will also work, even if the user does not use the local Outlook client and will setup the appointment with the above named keywords directly in the Outlook webpage in the cloud.

  **Email forwarding:**

  With this configuration option, the OpenScape Business will be able to send emails to the in the Microsoft Office 365 included Microsoft Exchange Server 2013.

  This will enable your users to receive emails for new voicemails, faxes or conference calls with the ability to perform an automatically from OpenScape Business created WebCollaboration session.

  OpenScape Business will generate emails for such actions and will keep users updated also via email if such new notifications arrive in their OpenScape Business message box.
Are you interested now? Then please follow this little manual carefully to enable these OpenScape Business functions in combination with the Microsoft Office 365 in the cloud...

The following steps describe how to connect a local OpenScape Business to "Microsoft Office 365" in the cloud to use the following OpenScape Business functions:

- Exchange Calendar Integration
- Email forwarding from OpenScape Business to the in the Microsoft Office 365 integrated Microsoft Exchange Server 2013

Preconditions:
- Microsoft Office 365 "Office 365 Enterprise E3" with the known local installed "Microsoft Office Professional Plus 2013" suite and the "Office Web Apps" usage.
- Users are available in Microsoft Office 365 and connected with the local Microsoft Outlook 2013 with the assigned mail-addresses in Microsoft Exchange 2013 of Microsoft Office 365.
- The OpenScape Business system is running in version V1 or higher.

Notes:
- The test was done with Microsoft Office 365 "Office 365 Enterprise E3" with local installed "Microsoft Office 2013" suite and the "Office Web Apps" usage. Other Microsoft Office 365 Plans may also work to use the functionality. To use the full here described functionality a local Microsoft Outlook 2013 client connected to Microsoft Office 365 is needed in this package. Otherwise the "myPortal for Outlook" add-in bar will not be able to use.
- All available Microsoft Updates and Service Packs installed.
- The OpenScape Business system ip-address in this example is "198.6.127.12".
- The name of the Microsoft Office 365 domain in this example is set to: "osbiz1.onmicrosoft.com". Please change this value to match your environment settings.
- In this test 3 Microsoft Windows 7 SP1 with Microsoft Outlook 2013 computers were used as test user accounts. You will find these as "user1" to "user3".
- The user "oso" is used in this example as Service Account with the role privilege for "ApplicationImpersonation" which is used to give the OpenScape Business access to the mailbox database of the Microsoft Exchange Server 2013. This user has to be added to the Microsoft Office 365 user directory as shown later. It requires also a configured mail-address.
- The integration test was successfully done with OpenScape Business.
- The known "Microsoft Exchange Public Folder Contacts search" of the OpenScape Business Client is not available, because Microsoft Office 365 does not offer this functionality.
These steps grant OpenScape Business access to Microsoft Office 365:


- After this logon to the Microsoft Office 365 portal: [https://portal.microsoftonline.com](https://portal.microsoftonline.com)

- Add a user “oso” and some test users “user1” - “user3” to your Microsoft Office 365 user directory like shown below and assign a valid mail-address: oso@osbiz1.onmicrosoft.com and user1@osbiz1.onmicrosoft.com - user3@osbiz1.onmicrosoft.com

  This user “oso” needs to be set as “Global Administrator”. 
<table>
<thead>
<tr>
<th>Display Name</th>
<th>User Name</th>
<th>Status</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td><a href="mailto:admin@local.com">admin@local.com</a></td>
<td>In Cloud</td>
<td></td>
</tr>
<tr>
<td>User1</td>
<td><a href="mailto:user1@local.com">user1@local.com</a></td>
<td>In Cloud</td>
<td></td>
</tr>
<tr>
<td>User2</td>
<td><a href="mailto:user2@local.com">user2@local.com</a></td>
<td>In Cloud</td>
<td></td>
</tr>
<tr>
<td>User3</td>
<td><a href="mailto:user3@local.com">user3@local.com</a></td>
<td>In Cloud</td>
<td></td>
</tr>
<tr>
<td>User4</td>
<td><a href="mailto:user4@local.com">user4@local.com</a></td>
<td>In Cloud</td>
<td></td>
</tr>
</tbody>
</table>

Quick steps:
- Reset passwords
- Edit Exchange properties
- Edit Lync properties
Assign licenses:
- Microsoft Office 365 Plan E3
- Windows Server Active Directory Rights
- Office 365 ProPlus
- Lync Online (Plan 2)
- Office Web Apps
- SharePoint Online (Plan 1)
- Exchange Online (Plan 1)

20 of 25 licenses available. Buy more licenses.
### Active Users

<table>
<thead>
<tr>
<th>Display Name</th>
<th>User Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>User1</td>
<td><a href="mailto:user1@example.com">user1@example.com</a></td>
<td>In cloud</td>
</tr>
<tr>
<td>User2</td>
<td><a href="mailto:user2@example.com">user2@example.com</a></td>
<td>In cloud</td>
</tr>
<tr>
<td>User3</td>
<td><a href="mailto:user3@example.com">user3@example.com</a></td>
<td>In cloud</td>
</tr>
</tbody>
</table>

**Quick steps**
- Reset passwords
- Edit Exchange properties
- Edit User properties
user1 user1

details

Name
First name: 
user1

Last name: 
user1

* Display name: 
user1

* User name: 
user1

@ someUser@someDomain.com

Additional details

SAVE  cancel
**Assign role**

Do you want this user to have administrator permissions? [Learn more about administrator roles]

- [ ] No
- [x] Yes

**Set sign-in status**

- [x] Allowed
  
  The user can sign in and access services.

- [ ] Blocked
  
  The user can’t sign in or access services.

**Set user location**

Different services are available in different locations. [Learn more about licensing restrictions]

[United Kingdom]
Sign out of the Microsoft Office 365 portal and logon with the new created user „oso“ to change his temporary password:
Please sign in as user “oso” and change its temporary password.
Logon once with it to check the changed password.
After the successful logon with user “oso”, please check if the user can see the “Admin” page as shown above. After this check was done, please sign out of the page and logon with your main Microsoft Office 365 administrator again.

Make sure that your users are available in the Microsoft Office 365 user directory and have already logged on to their profile once to change their temporary password and can logon to their Microsoft Office 365 mailbox with the local installed Microsoft Outlook 2013.

You will need to have this local Microsoft Outlook 2013 installation connected to Microsoft Office 365 for the next steps in this manual, so if not already done, please download the Microsoft Office 2013 from the Microsoft Office 365 portal and install and update it with all the available Microsoft Updates for it.

Microsoft Office 365 download link: https://portal.microsoftonline.com/default.aspx

After the installation of the Microsoft Office 2013, please run all Microsoft Windows and Microsoft Office 2013 updates. Because this will take a while, if you have not already done this step, the manual continues now with some other configuration...

Within the next step the just created “Global Administrator” user here called “oso” will be set as privileged user to be allowed to access the user calendars for the Exchange Calendar Integration:
On a Microsoft Windows 7 computer open the Windows PowerShell in elevated mode (see hint on page 12) and perform the following steps to logon to the Microsoft Exchange 2013 Server included in the Microsoft Office 365:

- Check if the local execution policy allows script usage on the computer:
  
  Get-ExecutionPolicy

- If the result of this command is not "RemoteSigned", then please run this command
  
  Set-ExecutionPolicy RemoteSigned

  and apply with "Yes" to change the value. If this fails, check that your privileges on this computer allow you to change this and you have started the PowerShell in elevated mode.

- Run the following command lines to logon to the online Microsoft Exchange Server and logon with your main Microsoft Office 365 main administrator account credentials:

  $LiveCred = Get-Credential
  Import-PSSession $Session -AllowClobber

  After the command prompt is shown, please run the following command line. This command must be used once for the Microsoft Office 365 configuration:

  Enable-OrganizationCustomization

  After the command prompt is shown, please run the following command line. Please keep attention to the user "oso@osbiz1.onmicrosoft.com" named in this single-line command and change the privileged user value to fit to your environment settings:

  New-ManagementRoleAssignment -Name "Impersonation-MyApp" -Role "ApplicationImpersonation" -User oso@osbiz1.onmicrosoft.com

  After the command is shown, please run this command line to check the set value:

  Get-ManagementRoleAssignment "Impersonation-MyApp"

  After the command prompt is shown, please run these command lines to leave the actual session:

  Remove-PSSession $Session
  exit

  The PowerShell will be closed after the "exit" command. If the PowerShell is closed before the "Remove-PSSession $Session" was used, a new access may be locked for 15 minutes.

Please ensure that these commands work and no red error messages are shown during the execution. Otherwise the functionality will not be given.
The yellow warning messages shown above may be ignored.

For further help about the PowerShell usage, please have a look in the Microsoft Office 365 help.

Note:
It might take a couple of minutes until Exchange configuration modifications are active for the configured user “oso”. The time you will need to perform the next shown steps should normally be enough to have the configuration active in the Microsoft Office 365 server configuration.

Hint:
To open the Windows PowerShell in elevated mode, please perform the following actions:

• On a Microsoft Windows 7 computer, open the start menu.
• Type “Power” into the input field. The “Windows PowerShell” command should be marked.
• Press and hold the “Shift”+“Ctrl” keys and use the “Enter” key to start the highlighted “PowerShell” command.
• Apply the upcoming UAC message with “Yes” to start the PowerShell.
• Perform the commands named on page 11 to apply changes to MS Office 365.

For the next steps, you will need to find out the server name to where your users are connected to, to be able to use this information within the OpenScape Business configuration:
• Sign in to the Microsoft Office 365 portal (https://portal.microsoftonline.com) and logon with the user „oso“ to get these informations and select “Outlook” to get to the Outlook page:

• Please note down the shown part of the URL as marked in the picture above.

You will need this address here shown as “pod51049.outlook.com” within the next steps. Please change this value to fit your Microsoft Office 365 environment settings.
Apply the following changes in OpenScape Business to connect it to the Microsoft Office 365 server:

- Login into the OpenScape Business Assistant and please navigate to:
  
  Setup | UC Suite | External Providers Config | Calendar Providers | Exchange

Assign the Exchange Server configuration as shown in the example below according to customer's environment settings:

Server URL: https://pod51049.outlook.com/ews/exchange.asmx
User name: oso@osbizLonmicrosoft.com
Password: oso user password

Syntax description:

Server URL: https://<YourServerName>.outlook.com/ews/exchange.asmx
User name: Privileged user set in Microsoft Office 365 directory
Password: Privileged user password set in Microsoft Office 365 directory

These changes will enable access of the OpenScape Business to the Microsoft Exchange Server 2013 within the Microsoft Office 365 for the Exchange Calendar Integration.

NOTE: The fields for “Contact Providers | Exchange” must be kept empty, because the Exchange public folder feature is not possible to use in Microsoft Office 365.
- The following configuration will enable the mail-access from OpenScape Business to Microsoft Office 365. In OpenScape Business Assistant please navigate to:

Service Center | E-mail Forwarding

Assign the Exchange Server configuration as shown in the example below according to customer’s environment settings:

Add the configuration with the following syntax and save the configuration with “OK & Next”:

- **Outgoing Mail Server (SMTP):** The Microsoft Office 365 server address
- **Checkbox TLS/SSL:** Check this setting, for Microsoft Office 365
- **User name:** Privileged user set in Microsoft Office 365 directory
- **Password:** Privileged user password set in Microsoft Office 365 directory
- **Confirm Password:** Privileged user password set in Microsoft Office 365 directory
- **E-Mail Address:** Mail address of the privileged user
You can check the function with the button “Check e-mail forwarding” from OpenScape Business.

Finally the OpenScape Business client settings need to be installed and configured:

- Make sure that the Microsoft Office 2013 suite is installed to the users computers and connected to Microsoft Office 365 and if not already done, please install the CommunicationsClients with at least the option “Outlook Integration”:

  On your users computers, open the following path in Windows Explorer:
  \198.6.127.12\applications\install-common\CommunicationsClients.exe

  Syntax:
  \\<OpenScape Business ip-address\>\applications\install-common\CommunicationsClients.exe

  and logon with user “hoome” and password “hoomesw” if you are asked for credentials.

  Follow the setup wizard and install at least the option “Outlook Integration”:

- Open the Microsoft Outlook 2013 and logon with the users credentials to the OpenScape Business system as usual with the OpenScape Business clients. More details about this you will find in the OpenScape Business documentation.
NOTE:
There is also a “Silent Installation” option to install the CommunicationsClients unattended to the users computers. Please visit the OpenScape Business Service documentation for more details about this. Chapter “12.1.8 Silent installation/Uninstallation for UC PC Clients” will show more details.

In the following steps the configuration within the OpenScape Business clients is done.

• In the OpenScape Business client “myPortal for Outlook” please navigate to:

  Setup | Personal Details | My Personal Details

Add the users “Email” address if not already done for “user1”...(Mandatory!)
Repeat this step for the other users also.

Notes:

• This setting can be done also within the “UC Suite User Directory” web page.

To perform this action in the OpenScape Business Assistant and please navigate to:

  Setup | UC Suite | User Directory

Select and edit the user related to the Microsoft Office 365 user and add the Email address. Save the setting.

• A configured valid mail-address is needed for the usage of the Exchange Calendar Integration and also for the optional mail notification when the user receives a message from OpenScape Business.
• OpenScape Business will automatically send a “Welcome”-mail to all new entered mail-addresses within this configuration.

Configuration of the ‘Calendar Integration’ feature in the client applications:
• In the OpenScape Business client “myPortal for Outlook” please navigate to:
  Setup | My Preferences | Outlook Connectivity

Set “Exchange Calendar Integration”, activate the checkbox “Automatically generate calendar appointments from my presence changes” and select “Exchange PST” for “user1”…(Mandatory!)

Repeat this step for the other users also.

Notes:
• This setting can be done also within the “UC Suite Profiles” function to set the option for multiple users at the same time. To perform this action in the OpenScape Business Assistant and please navigate to:

  Setup | UC Suite | Profiles

  Add a profile there, change the above named setting, save and deploy the profile to the users that should use this feature.

• Further details for the usage of the Microsoft Exchange Calendar Integration feature in the OpenScape Business clients can be found in the manual of the OpenScape Business clients itself.
With the following optional setting „Auto back to office“ each user can decide, if his presence status should be changed back to “Office” status, when the appointment time has ended:

- In the OpenScape Business client “myPortal for Outlook” please navigate to:
  
  **Setup | My Preferences | Miscellaneous**

  ![Miscellaneous Settings](image)

  Set the „Auto back to office“ option for “user1”... (Optional!)

  Repeat this step for the other users also.

**Notes:**

- This setting can be done also within the “UC Suite Profiles” function to set the option for multiple users at the same time. To perform this action in the OpenScape Business Assistant and please navigate to:

  **Setup | UC Suite | Profiles**

  Add a profile there, change the above named setting, save and deploy the profile to the users that should use this feature.

- Further details for the usage of the Microsoft Exchange Calendar Integration feature in the OpenScape Business clients can be found in the manual of the OpenScape Business clients itself.
With the following optional setting „VM Notification“ each user can decide, if mails for voicemails should be send in specific presence statuses, when a new voicemail is saved in his voice mailbox:

- In the OpenScape Business client "myPortal for Outlook" please navigate to:

  Setup | Communications | VM Notification

Set the „VM Notification“ option for “user1”... (Optional!)
Repeat this step for the other users also.

Notes:
- This setting can be done also within the “UC Suite Profiles” function to set the option for multiple users at the same time. To perform this action in the OpenScape Business Assistant and please navigate to:

  Setup | UC Suite | Profiles

  Add a profile there, change the above named setting, save and deploy the profile to the users that should use this feature.
With the following optional setting „Fax Notification“ each user can decide, if mails for faxes should be send in specific presence statuses, when a new fax is saved in his fax mailbox:

- In the OpenScape Business client “myPortal for Outlook” please navigate to:

  Setup | Communications | Fax Notification

Set the „Fax Notification“ option for “user1”... (Optional!)
Repeat this step for the other users also.

Notes:
- This setting can be done also within the “UC Suite Profiles” function to set the option for multiple users at the same time. To perform this action in the OpenScape Business Assistant and please navigate to:

  Setup | UC Suite | Profiles

  Add a profile there, change the above named setting, save and deploy the profile to the users that should use this feature.
If you have carefully followed all above named steps, the full functionality should be available now.

How to test the new added features plus notes and hints:

- **E-Mail function:**
  - You can check the function with the button “Check e-mail forwarding” from in the “E-Mail forwarding” section in the “Service Center” of the OpenScape Office Business Assistant. Enter a valid mail address as recipient and check receive of the test mail in the inbox of this mail account.

- **Exchange Calendar integration:**
  - Understanding the function: When users set appointments in their Microsoft Outlook calendar, the OpenScape Office Business system will automatically check for keywords in the calendar appointment subjects like: “Meeting”, “Sick”, “Break”, “Out of Office”, “Holiday”, “Lunch” or “Home”. If such a keyword is found, the OpenScape Office Business will set the users presence status automatically when the appointment time is reached, even if the Microsoft Outlook session of this user is not active anymore. The user just simply configures his appointments with these keywords and OpenScape Office Business will set his telephone presence status automatically and will forward calls to his voicemail or for example to his cellphone, depending on the set presence status and the from the user desired forwarding target. The user can also configure in a general client setting, if his presence status should be switched back to “Office” presence status when the appointment time has ended. This will also work, even if the user does not use the local Outlook client and will setup the appointment with the above named subject keywords directly in the Outlook webpage in the Outlook Web Access (OWA).
  
  - The user that should use the Exchange or local Outlook Calendar integration must have a valid e-mail address in their UC Suite client configuration as well as the set UC Suite client Outlook settings configuration named in the manual above. The UC Suite-user to Exchange-user combination is done be the entered mail address, so this is mandatory to be able to use the function.
  
  - The UC Suite users Voicemail language setting is used to combine the keywords like: “Meeting”, “Sick”, “Break”, “Out of Office”, “Holiday”, “Lunch” or “Home” to his language setting, so that a f.e. to german set Voicemail language can be used with the german keywords in the appointments subject line like “Besprechung”, “Krank”, “Pause”, “Außer Haus”, “Urlaub”, “Mittag” or “Zu Hause” only.
  
  - In case the “Auto back to office” option is not used, the user’s presence status will be kept to the set status after the appointment time ends and the return time shown and told to other users or callers will be raised every 15 minutes. If the “Auto back to office” option is used and the appointment time ends, the user’s presence is automatically set to “Office” again.
  
  - Important note for testing: Appointments set into the future with less than 3 minutes are ignored, because the system expects that the user is just creating a new appointment where everything can change within these 3 minutes. The communication system checks for appointments in the users calendars every 30 seconds. For this reason and for possible time delays between the communication system and the Exchange Server, try to use test appointments with more than 3,5 minutes. In tests appointments set into the future with more than 5 minutes worked perfectly to avoid the small time delays between communication system and the Exchange server and the 30 seconds read delay of the calendar read requests.
○ New appointments values are fully read within the minute the appointment start time is set to within the before named 30 seconds queries. So in case start time is just reached, please keep in mind that the 30 seconds query has to be done within this minute and then the presence status is set. The query also sets the users return time according to the end time of the appointment.

○ If you want to test the functionality when myPortal for Outlook or myPortal for Desktop is closed for the user, simply use the Outlook webpage in the Outlook Web Access (OWA). Usually you can reach the page by using this URL in a web browser: "https://<YourExchangeServerAddress>/OWA". Login with the users credentials and add the appointment with the keyword to the calendar. Check in another UC Suite user's client that the presence changes when the appointment time was reached.

For further information to all of these features, please use the system manuals.
About Unify

Unify is one of the world’s leading communications software and services firms, providing integrated communications solutions for approximately 75 percent of the Fortune Global 500. Our solutions unify multiple networks, devices and applications into one easy-to-use platform that allows teams to engage in rich and meaningful conversations. The result is a transformation of how the enterprise communicates and collaborates that amplifies collective effort, energizes the business, and enhances business performance. Unify has a strong heritage of product reliability, innovation, open standards and security.

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