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OpenScape Business

Tutorial

Interaction with Microsoft Exchange Server 2016

Version 1.0

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Date	Version	Changes
2016-06-10	1.0	Initial Creation

1. Introduction

The following steps describe how to connect an OpenScape Business V2 system to a Microsoft Exchange Server 2016 in order to use the following OpenScape Business V2 features:

- Calendar Integration
- Public Folder Contacts search
- Send e-mails from OpenScape Business V2 to Microsoft Exchange Server 2016

Preconditions:

- Microsoft Exchange Server 2016
- Outlook Web Access (OWA) in use
- Public Folder Contacts in use
- Users with e-mail addresses assigned in use
- OpenScape Business V2 released software version with MS Exchange 2016

Notes:

- Test was done with Microsoft Windows Server 2012 R2 Standard with Microsoft Exchange Server 2016.
- In this example the Microsoft Exchange Server 2016 has the following IP-address: 198.6.127.33. Please change the IP-address to match customer's environment settings.
- The user "UCServiceAccount" is used in this example as Service Account with the role privilege for "ApplicationImpersonation" which is used to give the OpenScape Business V2 access to the mailbox database of the Microsoft Exchange Server 2016. This user has to be added into customer's Active Directory. It requires also a valid e-mail address.
- The OpenScape Business system IP-address in this example is "198.6.127.12".

2. Configuration

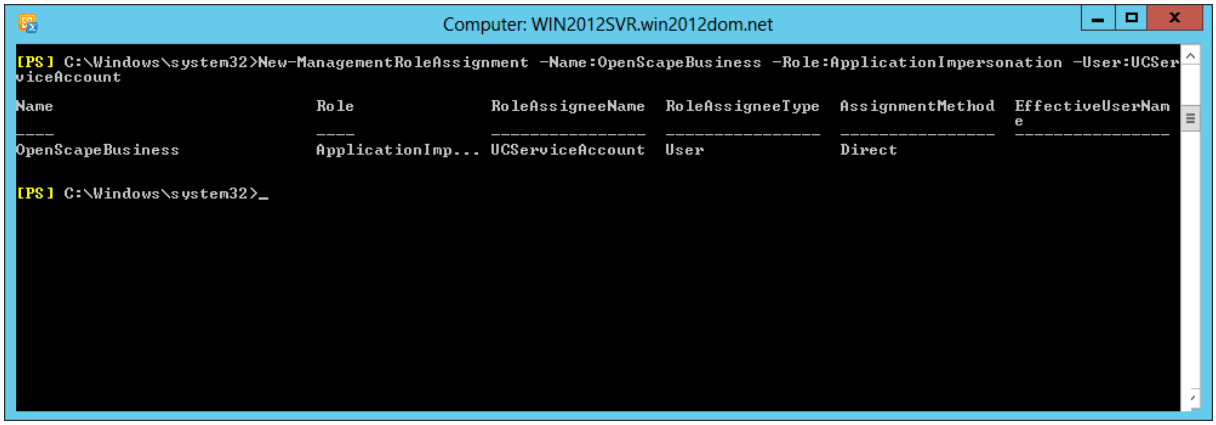
Perform these steps to grant OpenScape Business V2 access to MS Exchange Server 2016:

- Add the user “UCServiceAccount” to your Active Directory and assign a valid mail-address. E.g.: “UCServiceAccount@win2012dom.net”.
- In Microsoft Exchange management shell enter the following command line:

  New-ManagementRoleAssignment -Name:OpenScapeBusiness -Role:ApplicationImpersonation -User:UCServiceAccount

  Syntax description:

  New-ManagementRoleAssignment -Name:[<NameOfTheRole>] -Role:ApplicationImpersonation -User: [<privileged user>]



Note:

- It might take a couple of minutes until Exchange configuration modifications are applied for the configured UCServiceAccount user.

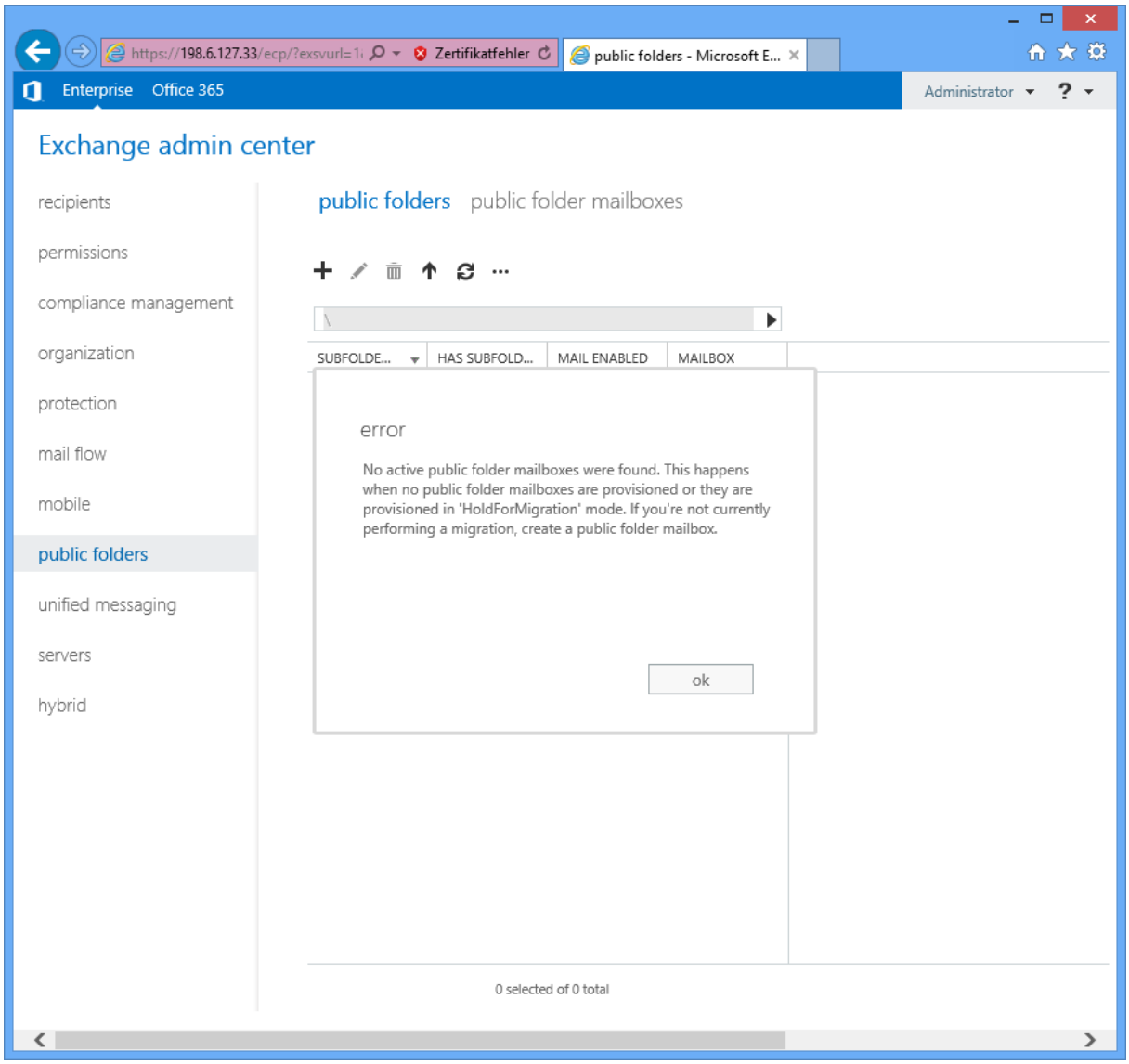
To enable the Public Folder search function additional changes are needed in the Microsoft Exchange Server 2016 because only the root folder of the Public Folder environment is used in the application search:

- Log in with the Administrator user to the Microsoft Exchange Admin Center (ECP) https://198.6.127.33/ecp

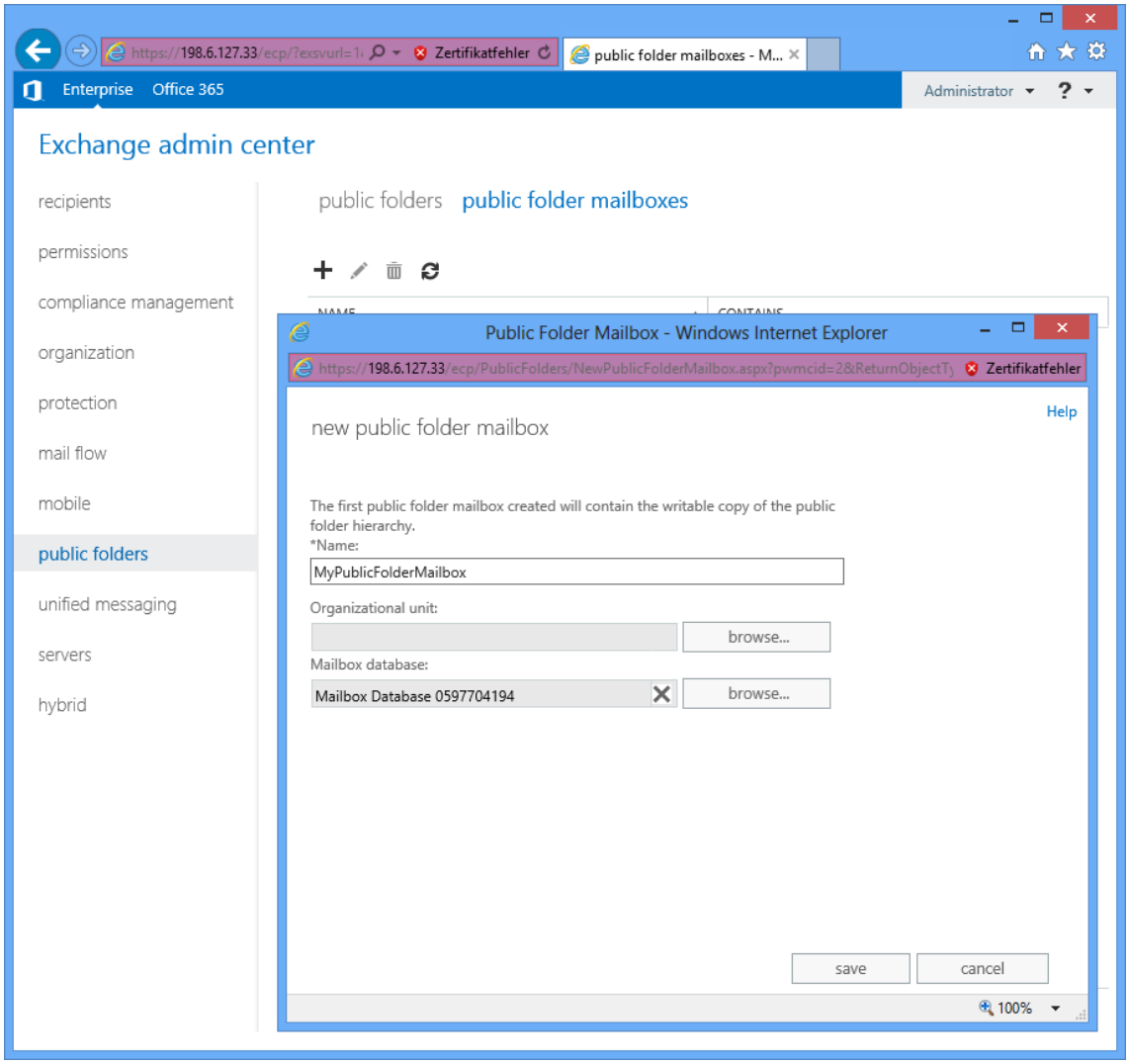
  Format: https://<Exchange-Server-IP-Address>/ecp

- Navigate to “public folders”

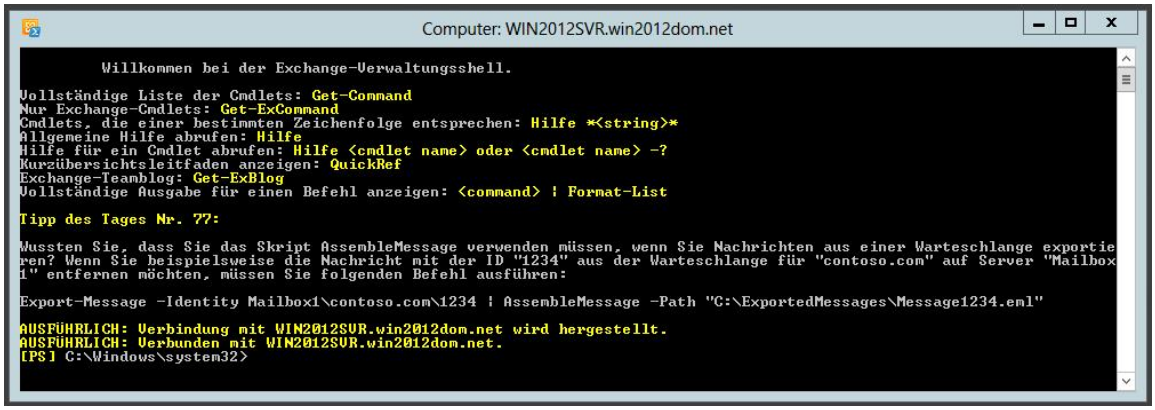
- If no public folder configuration was done so far, this notification message will be shown:



- Click on “public folder mailboxes” and use the “+” button to add a new public folder mailbox as shown below:

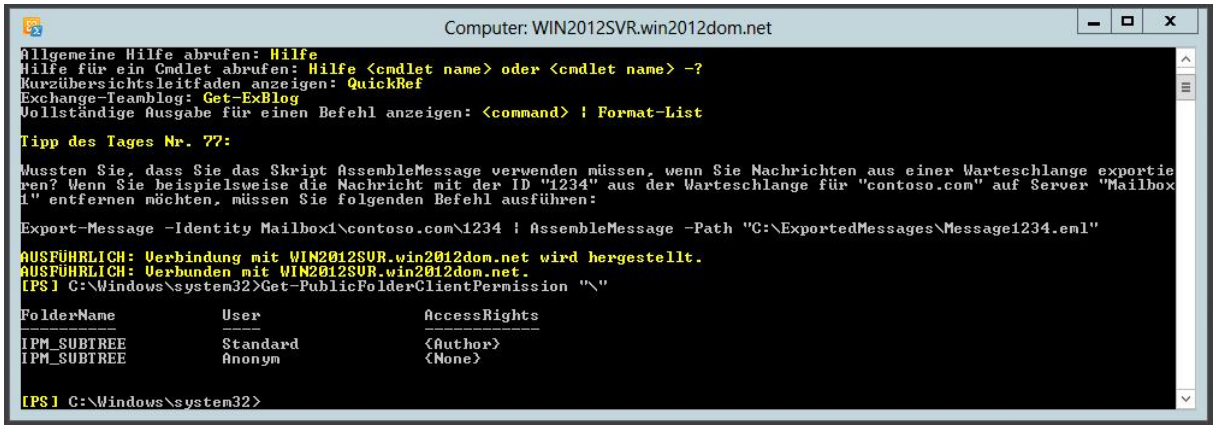


- Open the “Exchange Management Shell” on the Microsoft Exchange Server 2016:



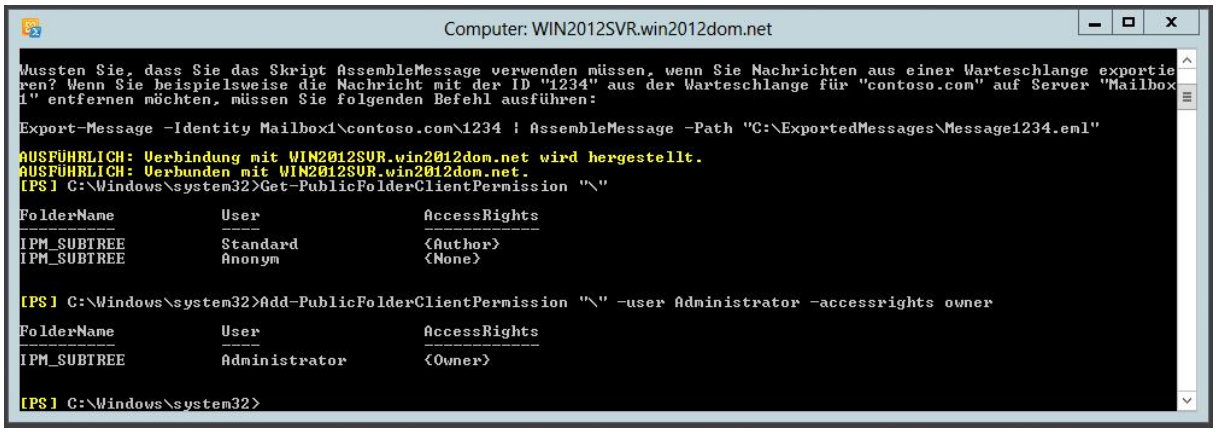
- Enter the following command to check if the Administrator user has “owner” rights on the public folder in the root:

  Get-PublicFolderClientPermission "\"

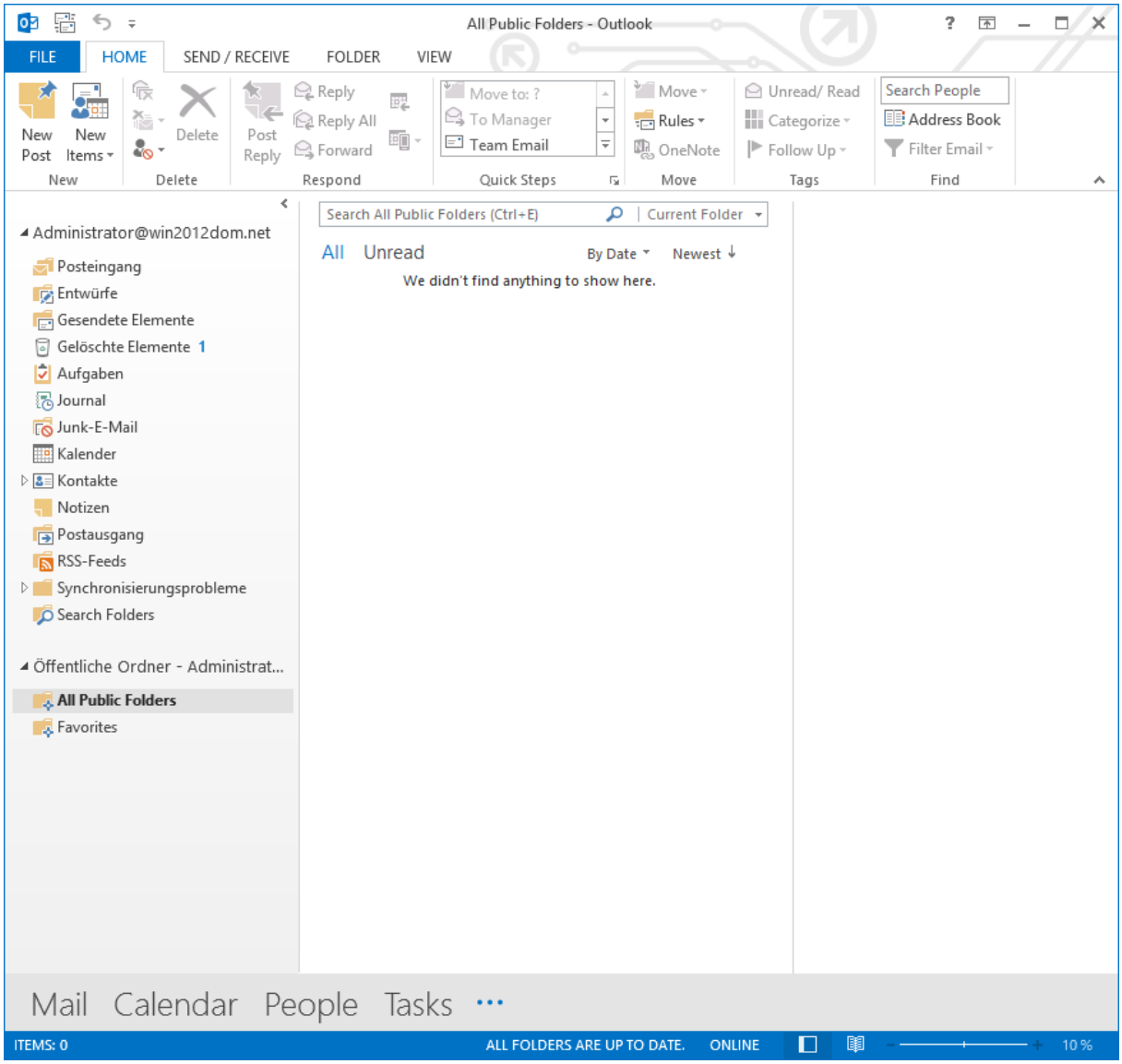


- In case the “owner” privilege is not set, please use the following command to add it:

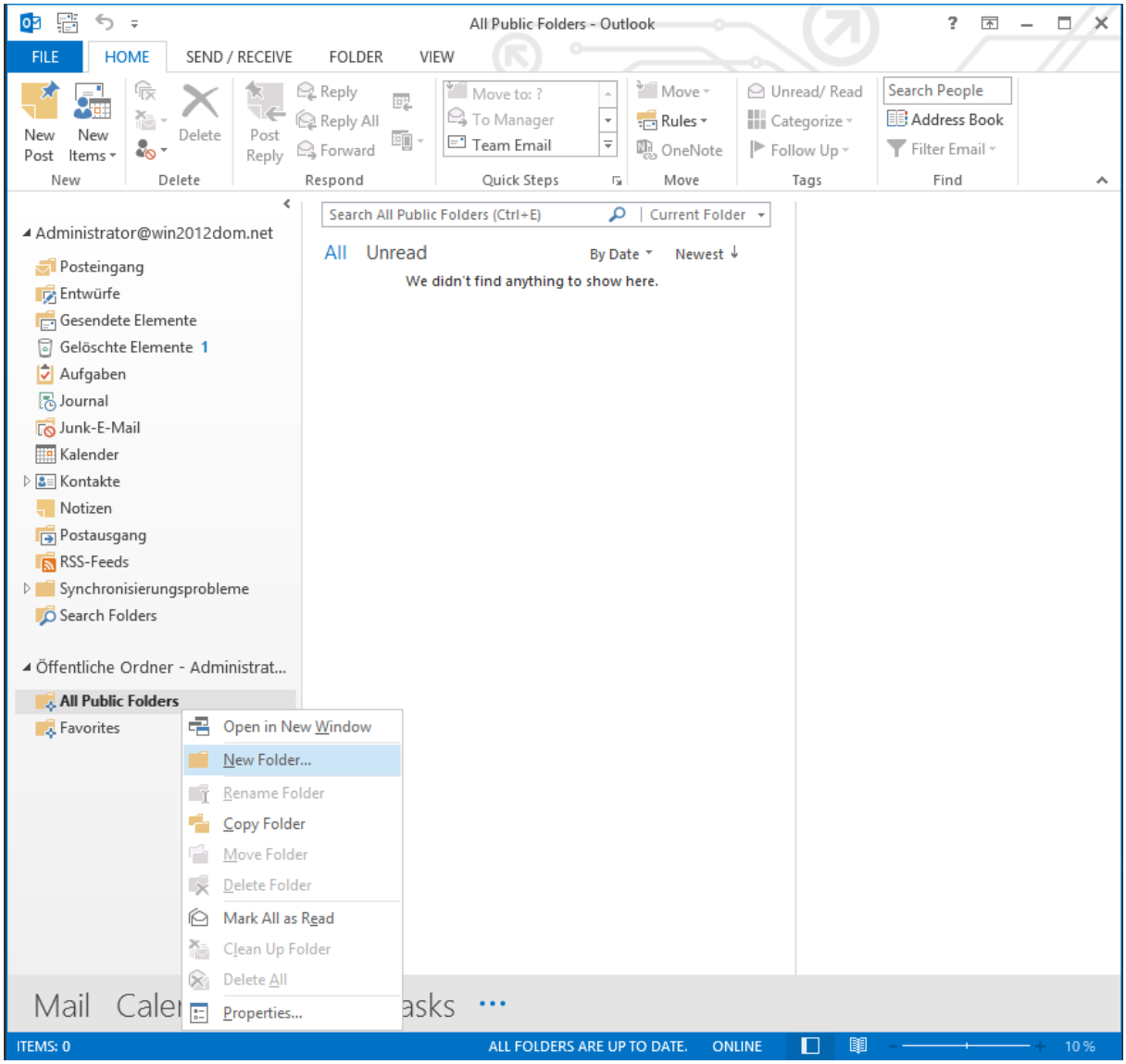
  Add-PublicFolderClientPermission "\" -user Administrator -accessrights owner



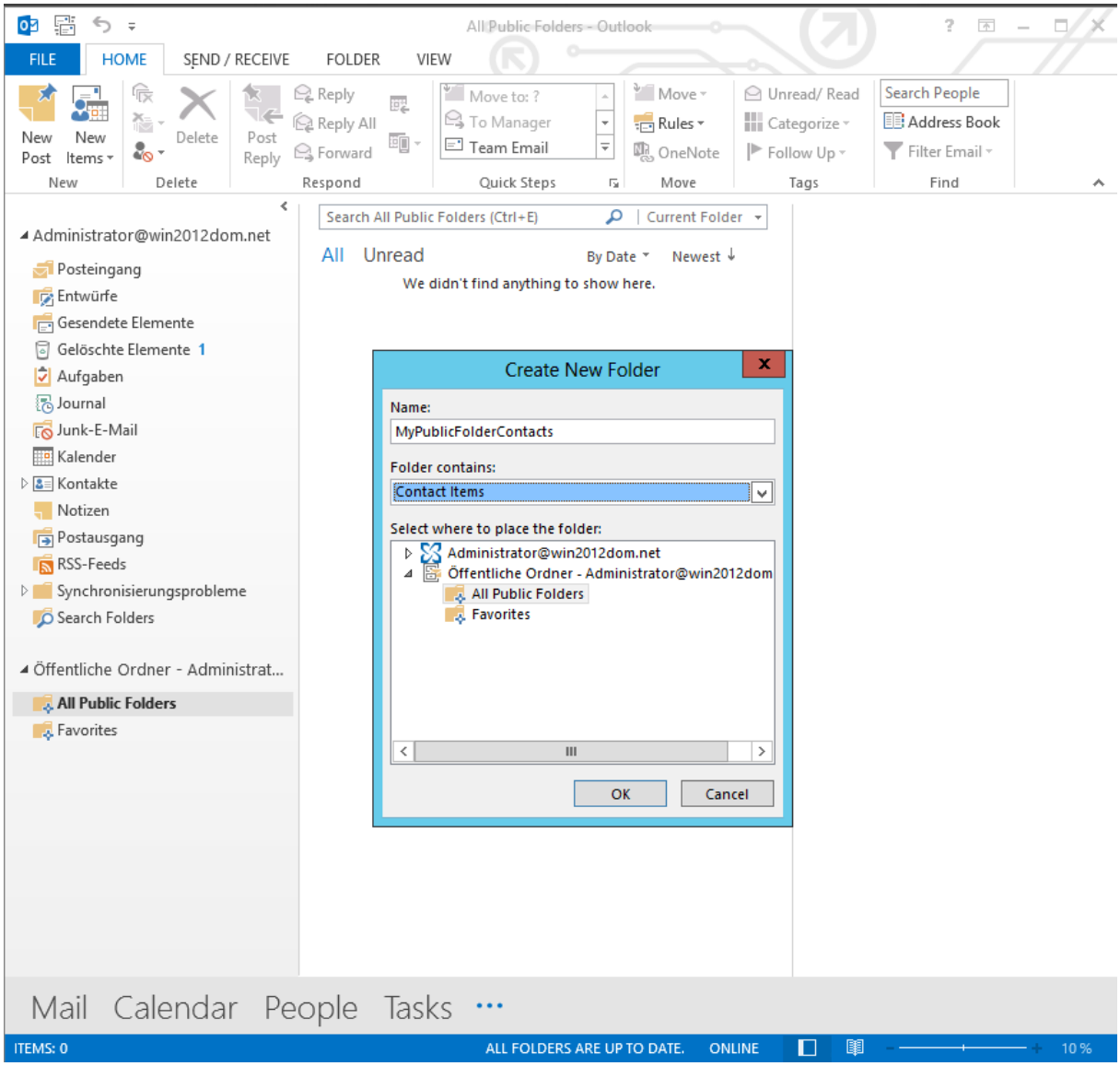
- With the Administrator account open Outlook connected to the Microsoft Exchange Server 2016 and navigate to “Folders” with the “...” right next to “Tasks” in the bottom line:



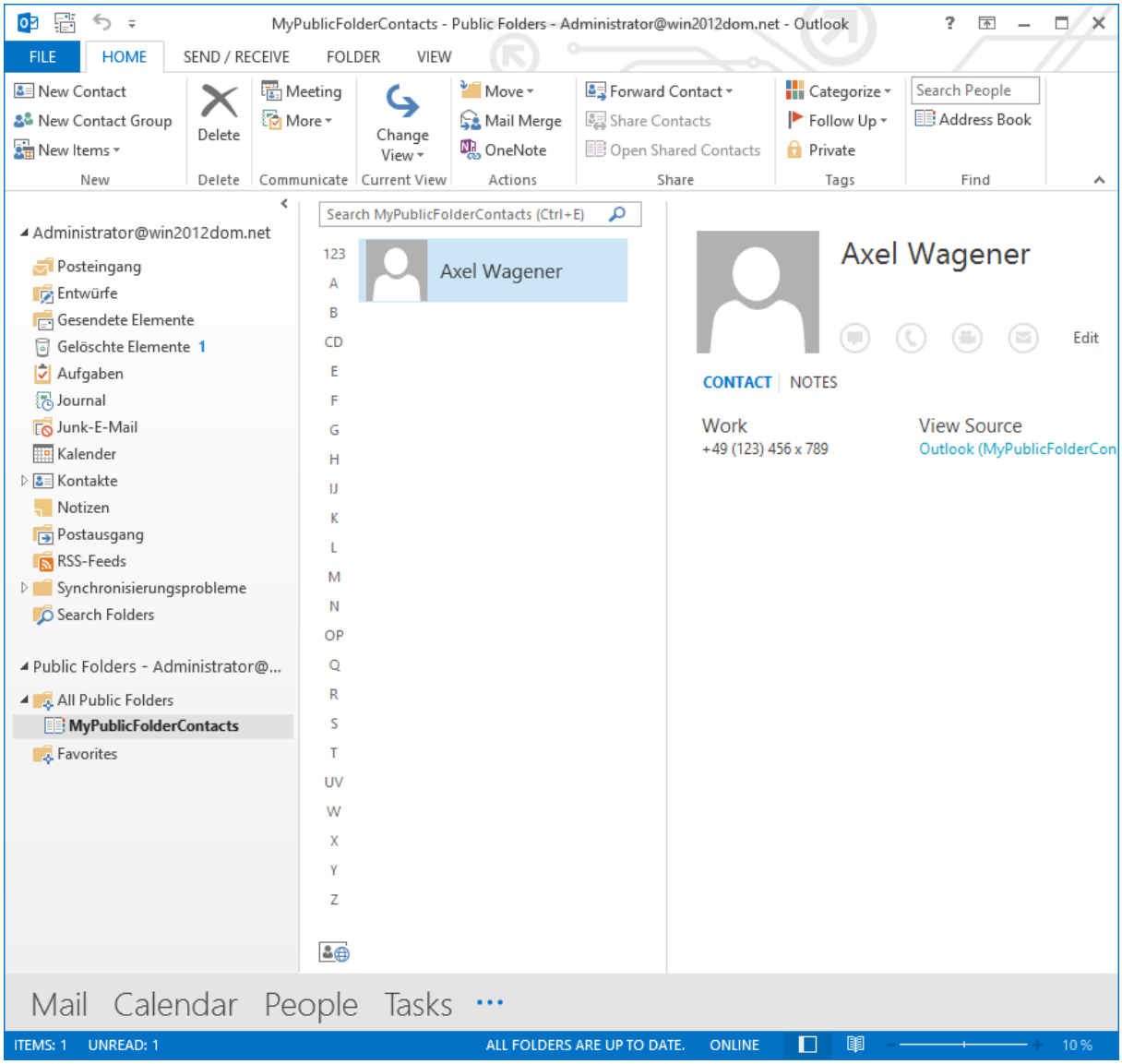
- Expand the public folder section and perform a right click on “All Public Folders”. In the context menu use “New Folder...” option:



- Add a new “Contacts Items” public folder to the root folder structure as shown below:



- This new contacts folder in the public folders root will be searched for contacts only:



To enable the Exchange Calendar Integration and the Exchange Public Folder Contacts search perform the following steps:

- In the OpenScape Business Assistant please navigate to:

  Setup | UC Suite | External Providers Config | Calendar Providers| Exchange

  Setup | UC Suite | External Providers Config | Contact Providers | Exchange

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

  Server URL: https://198.6.127.33/ews/exchange.asmx

  User name: UCServiceAccount@win2012dom.net

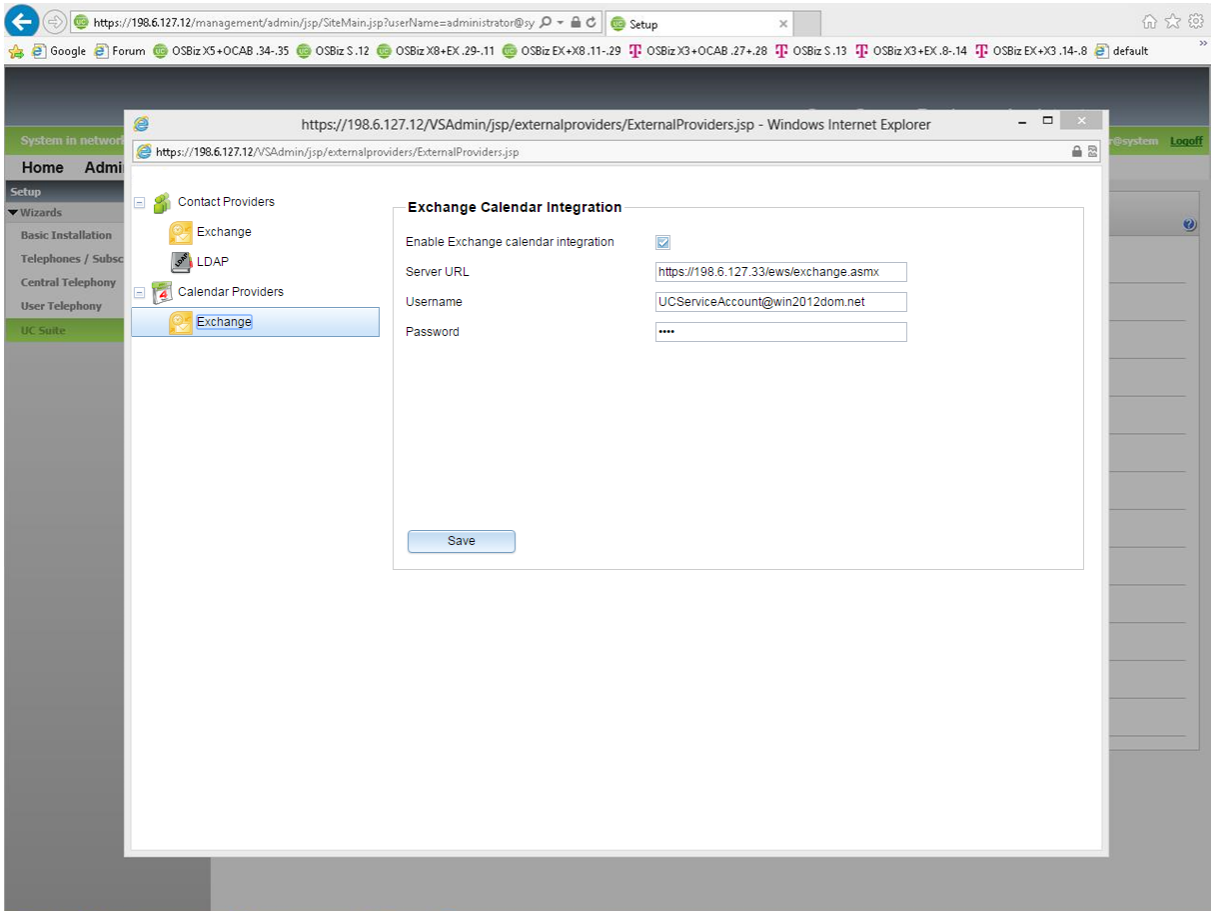
  Password: UCServiceAccount user password

  Syntax description:

  Server URL: https://<MS_Exchange_2016_IP>/ews/exchange.asmx

  User name: Privileged user set in Active Directory@domainname

  Password: Privileged user password set in Active Directory



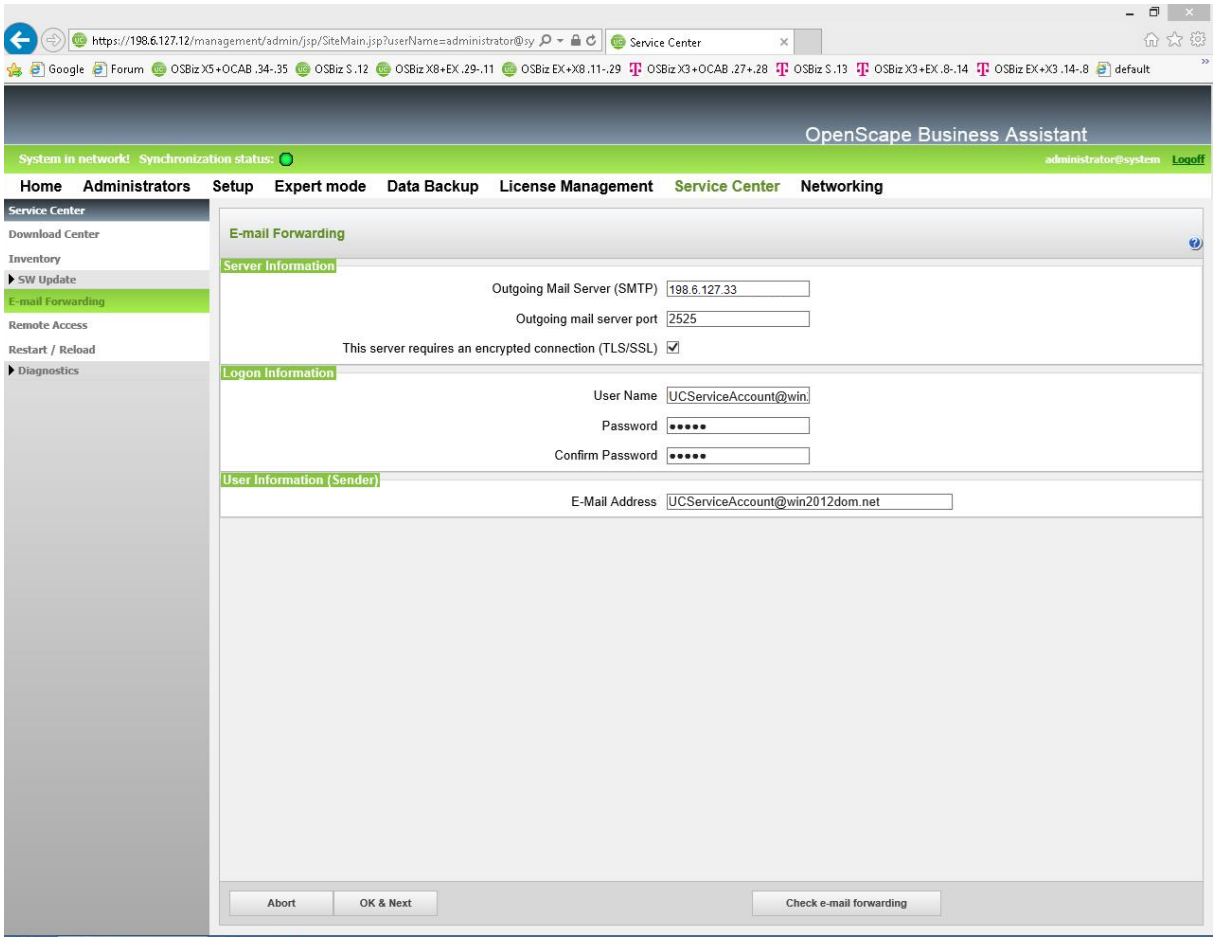
These changes will enable access of the OpenScape Business V2 to the Microsoft Exchange Server 2016 for the Exchange Calendar Integration and the Exchange Public Folder Contacts search.

The following configuration will enable SMTP (e-mail forwarding) access for OpenScape Business V2 to Microsoft Exchange Server 2016:

- In OpenScape Business V2 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:



- Note: The port "2525" is the default port in the Microsoft Exchange Server 2016.

  To check if the same port is used in your environment please perform these steps:

  - Logon with the Administrator user to the Microsoft Exchange Admin Center (ECP)
    https://198.6.127.33/ecp
    Format: https://<Exchange-Server-IP-Address>/ecp

  - Navigate to "mail flow" and then to the sub item "receive connectors".

  - Select and edit the entry "Default <ExchangeServerName>".

  - In the pop up select the menu point "scoping" and check the shown port number.

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

- Make sure that the Microsoft Office suite is installed and outlook is connected to customer's Microsoft Exchange Server. Afterwards you can install the CommunicationsClients with "Outlook Integration" feature as minimum selection:

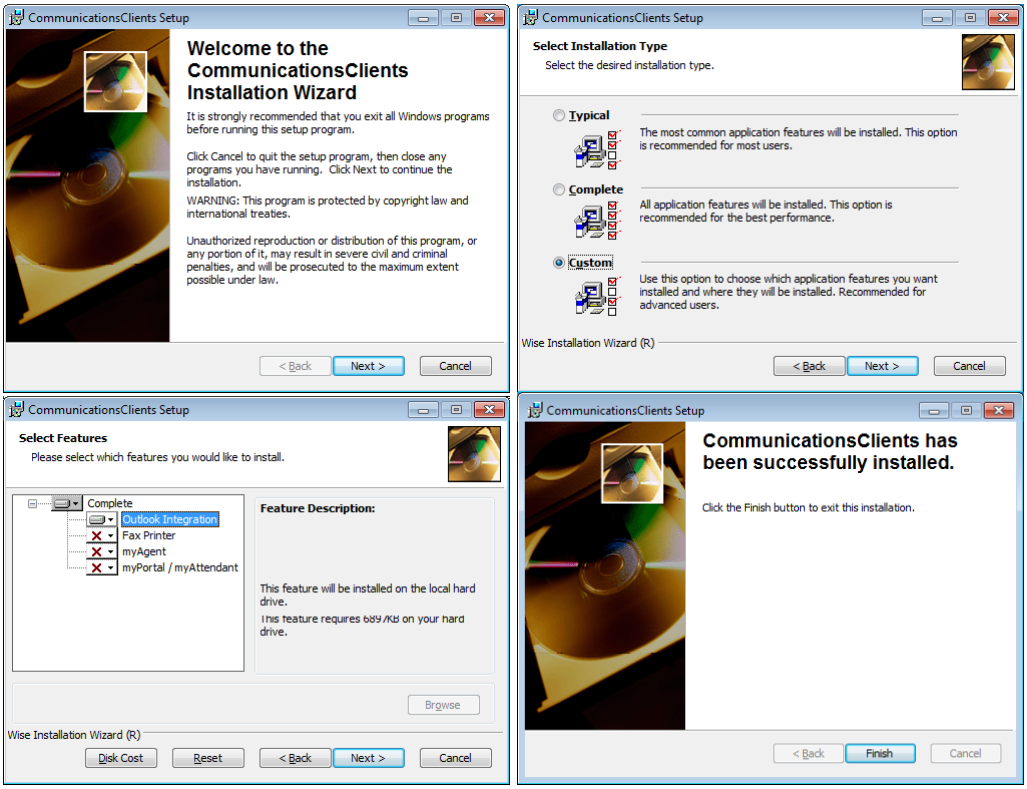
  Users can directly download the CommunicationsClients installation file from OpenScape Business via http:

  https://198.6.127.12/management/downloads/CommunicationsClients.exe

  Syntax:

  https://<OpenScape Business UC ip-address>/management/downloads/CommunicationsClients.exe

  Follow the setup wizard and select at least the option "Outlook Integration":



- Open the Microsoft Outlook and log in with the user's credentials to the OpenScape Business system as usual for UC clients. More details about this you can find in the OpenScape Business documentation.

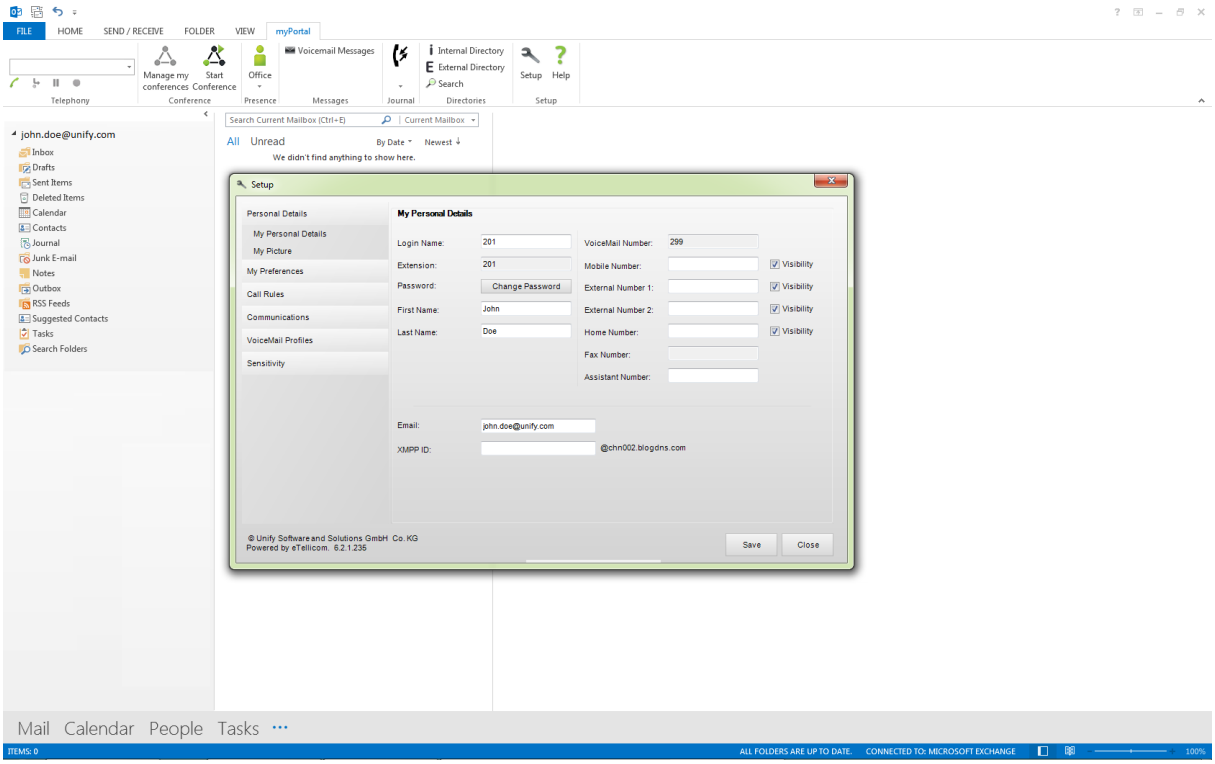
NOTE:

There is also a "Silent Installation" option to install the CommunicationsClients unattendend to the users computers. Please visit the OpenScape Business V2 Administrator documentation for more details about this. Chapter "12.2.8 Silent installation/Uninstallation for UC PC Clients" will show more details.

In the following steps the configuration for the OpenScape Business UC clients is explained.

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

  Setup | Personal Details | My Personal Details



Add the user’s “e-mail” address if not already done... (Mandatory!)

Repeat this step for all configured UC users.

Notes:

- This configuration option can also be applied from the “UC Suite User Directory” web page.

  To perform this action from the OpenScape Business Assistant, please navigate to:

  Setup | UC Suite | User Directory

  Select and edit the user related to the Microsoft Outlook user and add the e-mail address. Save changes.

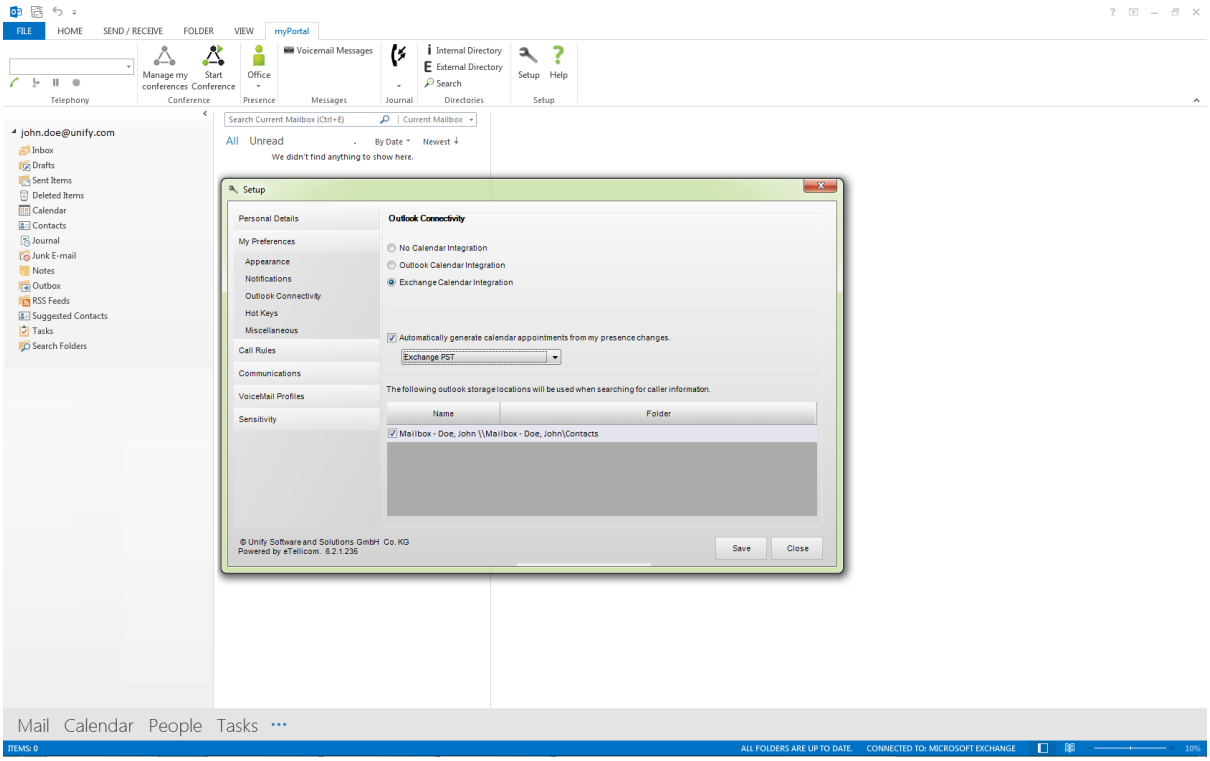
- A valid configured e-mail address is needed for the Exchange Calendar Integration and also for the optional e-mail notification when the user receives a voicemail message from OpenScape Business.

- OpenScape Business will automatically send a “Welcome” e-mail to all new configured e-mail addresses during this configuration step.

Configuration of “Exchange Calendar Integration” feature from UC client side:

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

  Setup | My Preferences | Outlook Connectivity



Select “Exchange Calendar Integration”, enable “Automatically generate calendar appointments from my presence changes” checkbox and select “Exchange PST” option... (Mandatory!)

Repeat this step for all configured UC users.

Notes:

- These settings can also be applied from “UC Suite Profiles” wizard which allows the configuration of multiple users concurrently. To perform this action from the OpenScape Business Assistant, please navigate to:

  Setup | UC Suite | Profiles

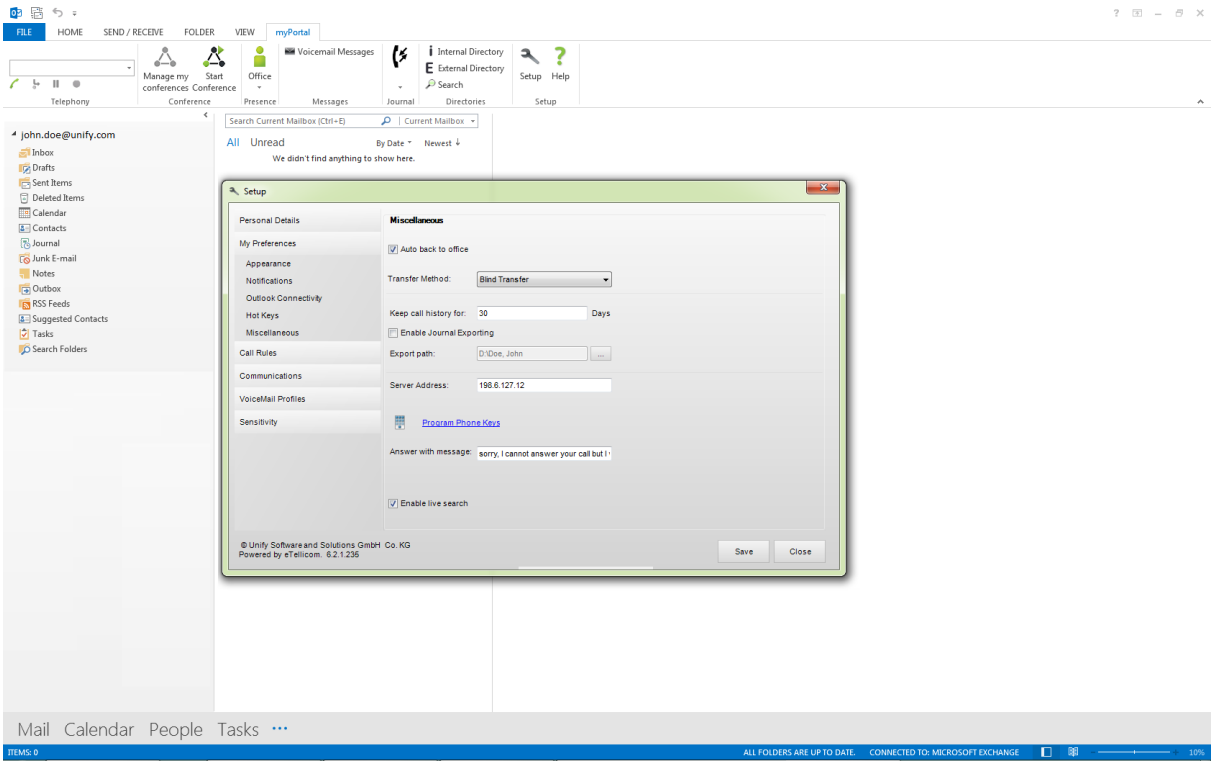
  Add a profile, configured required settings, save it and assign the profile to the respective UC users.

- More details about the usage of the Microsoft Exchange Calendar Integration feature can be found in the UC related documents of OpenScape Business V2.

With the following configuration option „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



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

Repeat this step for all configured UC users.

Notes:

- These settings can also be applied from “UC Suite Profiles” wizard which allows the configuration of multiple users concurrently. To perform this action from the OpenScape Business Assistant, please navigate to:

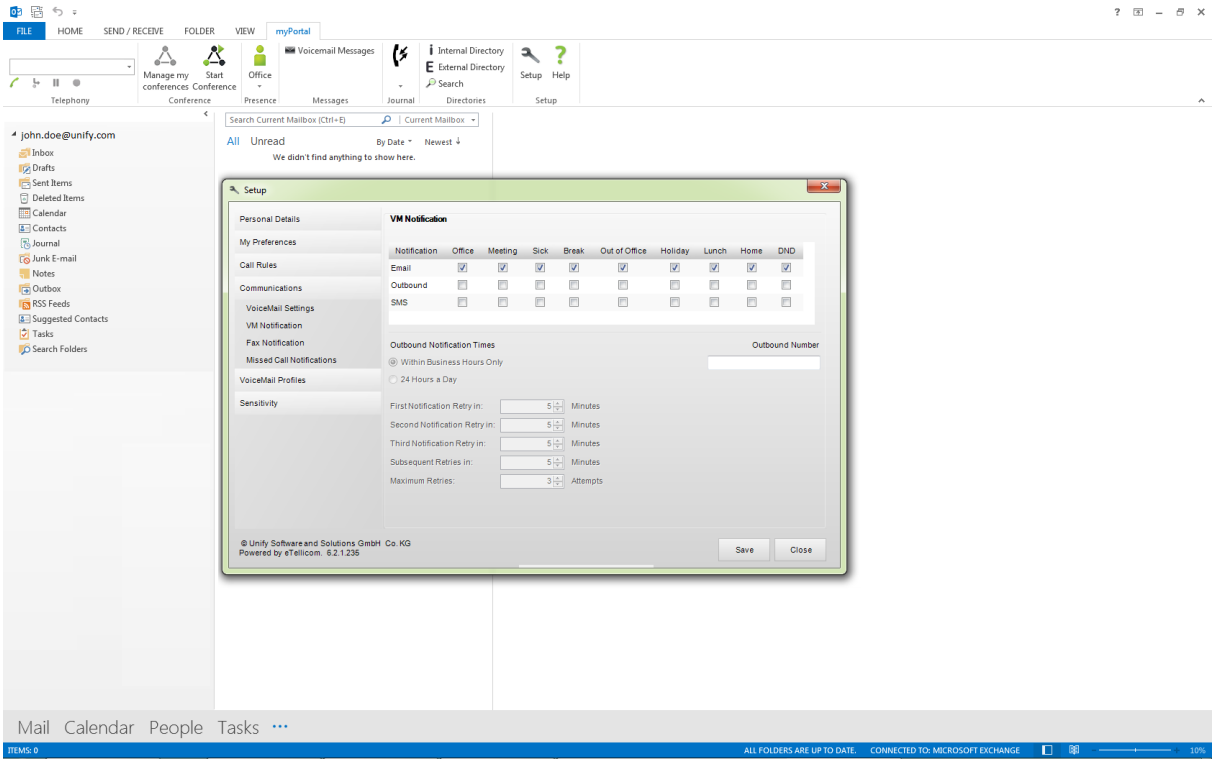
  Setup | UC Suite | Profiles

  Add a profile, configured required settings, save it and assign the profile to the respective UC users.
- More details about the usage of the Microsoft Exchange Calendar Integration feature can be found in the UC related documents of OpenScape Business V2.

With the following configuration option „VM Notification“ each user can decide, if e-mail notifications will be send for newly arrived voicemails. Each user’s presence status can have different configuration for VM notification.

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

  Setup | Communications| VM Notification



Set the „VM Notification“ configuration options for the user... (Optional!)

Repeat this step for all configured UC users.

Notes:

- These settings can also be applied from “UC Suite Profiles” wizard which allows the configuration of multiple users concurrently. To perform this action from the OpenScape Business Assistant, please navigate to:

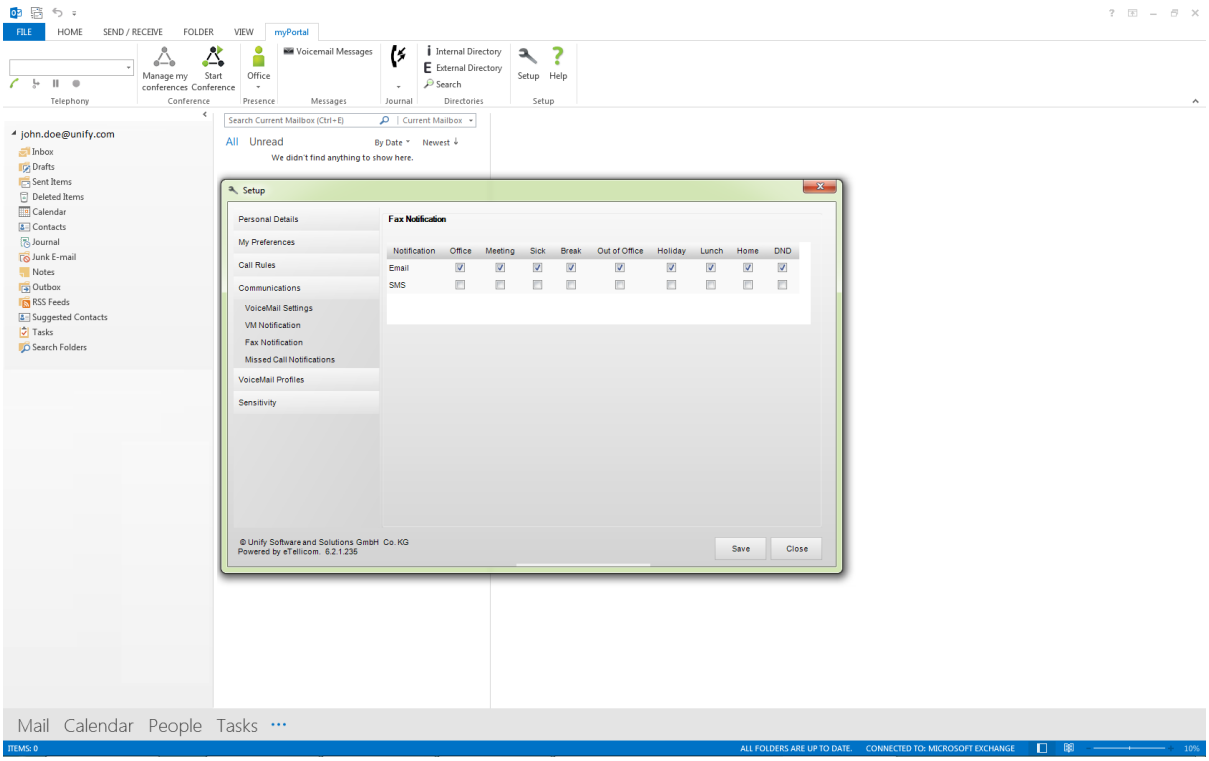
  Setup | UC Suite | Profiles

  Add a profile, configured required settings, save it and assign the profile to the respective UC users.

With the following configuration option „Fax Notification“ each user can decide, if e-mail notifications will be send for newly arrived faxes. Each user's presence status can have different configuration for Fax notification.

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

  Setup | Communications| Fax Notification



Set the „Fax Notification“ configuration options for the user... (Optional!)

Repeat this step for the other users also.

Notes:

- These settings can also be applied from “UC Suite Profiles” wizard which allows the configuration of multiple users concurrently. To perform this action from the OpenScape Business Assistant, please navigate to:

  Setup | UC Suite | Profiles

  Add a profile, configured required settings, save it and assign the profile to the respective UC users.

If you have carefully followed all aforementioned steps, the full functionality should be available now.

How to test the newly added features (notes and hints):

- E-Mail Forwarding:
    - You can check the functionality with the “Check e-mail forwarding” option in the "E-Mail forwarding" section in the "Service Center" of the OpenScape Office Business Assistant. Enter a valid e-mail address as recipient and check test e-mail reception.
- Public folder contacts search:
    - The public folder contacts search is restricted to the root level of the public folder structure only. Subfolders with contacts below the root level in the public folder structure are not queried.
    - To test the public folder contacts search functionality, simply use the search feature in myPortal for Desktop or myPortal for Outlook and search for a contact.
- Exchange Calendar integration:
    - Understanding the function: When a user set appointments in his Microsoft Outlook calendar, the OpenScape Office Business system will automatically check for keywords in the calendar appointment subject like: “Meeting”, “Sick”, “Break”, “Out of Office”, “Holiday”, “Lunch” or “Home”. If such a keyword is found, the OpenScape Office Business will set the user’s presence status automatically when the appointment time is reached, even if the Microsoft Outlook session of the specific user is not active anymore. The user simply configures his appointments with these keywords and OpenScape Office Business will automatically set his telephone presence status and as a result all calls will be routed to his voicemail or to his cell phone, depending on the configured forwarding destinations. The user can also configure in miscellaneous settings, whether his presence status should be switched back to “Office” presence status when the appointment time has ended. Appointments can also be set from Outlook Web Access (OWA) instead.
    - A valid e-mail address for every user must be configured in all applications, as described in aforementioned steps respectively.
    - The UC Suite users Voicemail language settings is used by OpenScape Business to understand the keywords like: “Meeting”, “Sick”, “Break”, “Out of Office”, “Holiday”, “Lunch” or “Home", so for example, German set Voicemail language can be used with the German keywords in the appointments subject like "Besprechung", "Krank", "Pause", "Außer Haus", "Urlaub", "Mittag" or "Zu Hause" only.
    - In case "Auto back to office" option is not used, the user’s presence status will be kept to the configured appointment status even if the appointment time elapses. As a result, the return time shown to other users will be increased every 15 minutes. If the "Auto back to office" option is used and the appointment time ends, the user’s presence status is automatically set to "Office" again.
    - Important note for testing: Appointments set into a future date and time with less than 3 minutes are ignored, because the system expects that the user creating an appointment can alter any option within 3 minutes. The OpenScape Business checks for appointments in the user’s calendar every 30 seconds. For this reason and for any possible delays impaired by the network between the OpenScape Business and the Exchange Server 2016, please configure test appointments starting at minimum after 3 and a half minutes or more.

- If you want to test the Exchange Calendar Integration functionality when user is not logged in either in myPortal for Outlook or in myPortal for Desktop, you can simply use the Outlook webmail. Usually you can access outlook webmail by using this URL: "https://<YourExchangeServerAddress>/OWA". Login with the user's credentials and add the appointment with the appropriate keyword to the calendar. Check in another UC Suite user's client that the presence status changes when the appointment time has reached.

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

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