

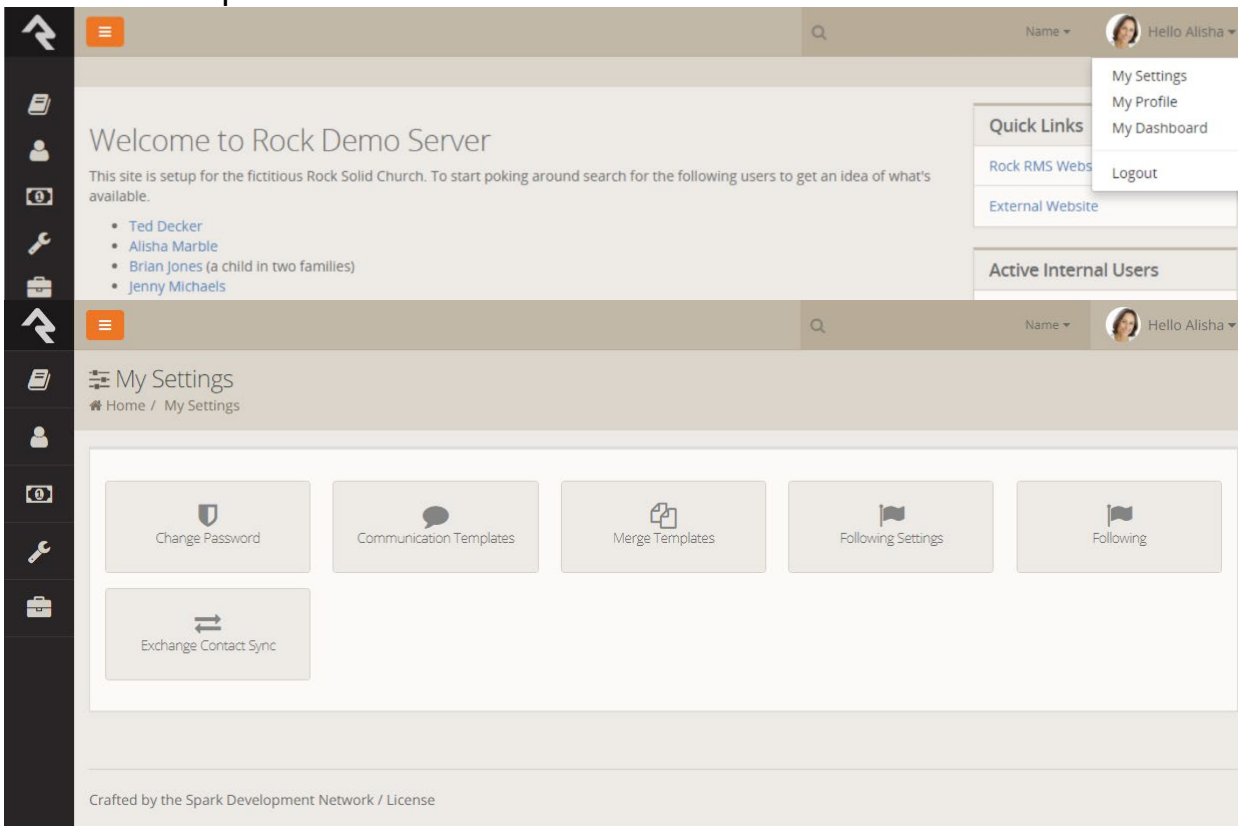
## Exchange Contact Sync – Version 4.0

### Introduction

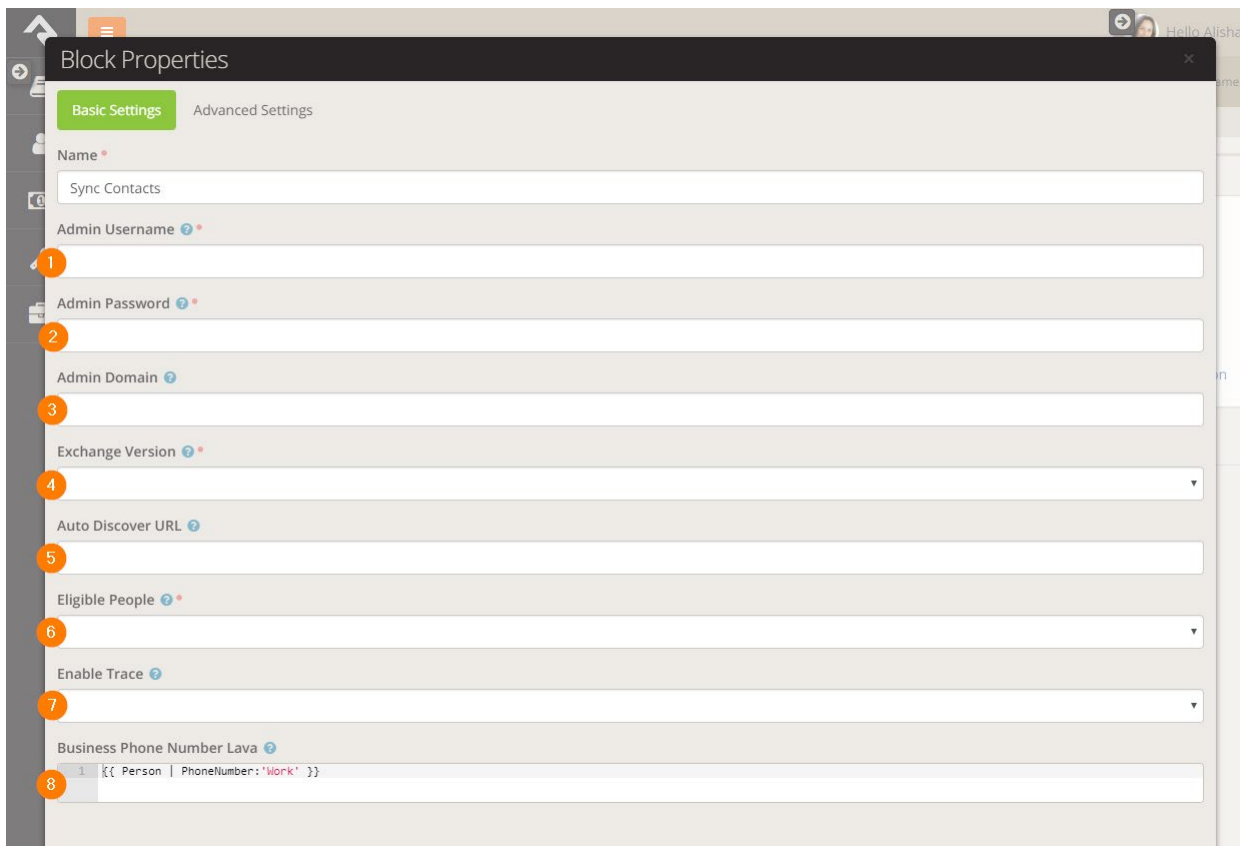
Having all your data in Rock allows you to do some powerful things. But, sometimes you'll want to access it in different systems. This is especially true for mobile users. Wouldn't it be nice to have the latest contact information on your phone for the people you interact with the most? The Exchange Contact Sync does just that. It allows each individual (you get to select who has access) to sync contact information to their Exchange contact list. This will ensure that it's available on Outlook as well as their mobile devices.

### Setup

After installing the plugin from the Rock Shop, you will notice a new "Exchange Contact Sync" setting option under the "My Settings" option of the Login Status block in the upper-right corner of the internal portal.



Before your users can sync their contacts, you will need to configure some block settings on this page.



The sync settings block contains the following settings:

1. **Admin Username:** To sync the contacts the plugin logs into the Exchange server as an admin user and creates the contacts on behalf of the user using the impersonation features of Exchange. Details on how to configure the impersonated user can be found below.
2. **Admin Password:** This is the password for the admin user.
3. **Admin Domain:** The active directory domain that the admin user belongs to.
4. **Exchange Version:** The version of the Exchange server.
5. **Auto Discover URL:** The URL of the Exchange Auto Discover service. If left blank, the plugin will attempt to determine the value automatically using the email of the currently logged in user. Entering the correct value here though will speed up the time it takes to connect to exchange when syncing contacts.
6. **Eligible People:** This is a Rock group that determines who can access the contact syncing features.
7. **Enable Trace:** This option can be turned on to help diagnose why the plugin may not be able to connect to the Exchange Server. When enabled, the most recent connection attempt will be logged to a `~/App_Data/Logs/ExchangeContactSync.txt` file.
8. **Business Phone Number Lava:** Because other systems may be dependent on how the business number is formatted in Exchange, you have a bit more control over how the plugin syncs the business phone number. You can use the power of LAVA to format this value however you'd like. If you leave this field blank, the business number will not be synced to Exchange.

After the settings have been saved, you should test the connection to ensure that the sync will be able to communicate with your Exchange server.

**Tip:** If you enable a trace and then test the connection, the Auto Discover URL will be logged in the trace file:

```
<Value>https://outlook.office365.com/EWS/Exchange.asmx</Value>
</UserSetting>
</UserSettings>
</UserResponse>
</UserResponses>
</Response>
</GetUserSettingsResponseMessage>
</s:Body>
</s:Envelope>
</Trace>

10/4/2016 2:24:45 AM AutoDiscoverUrl https://outlook.office365.com/EWS/Exchange.asmx

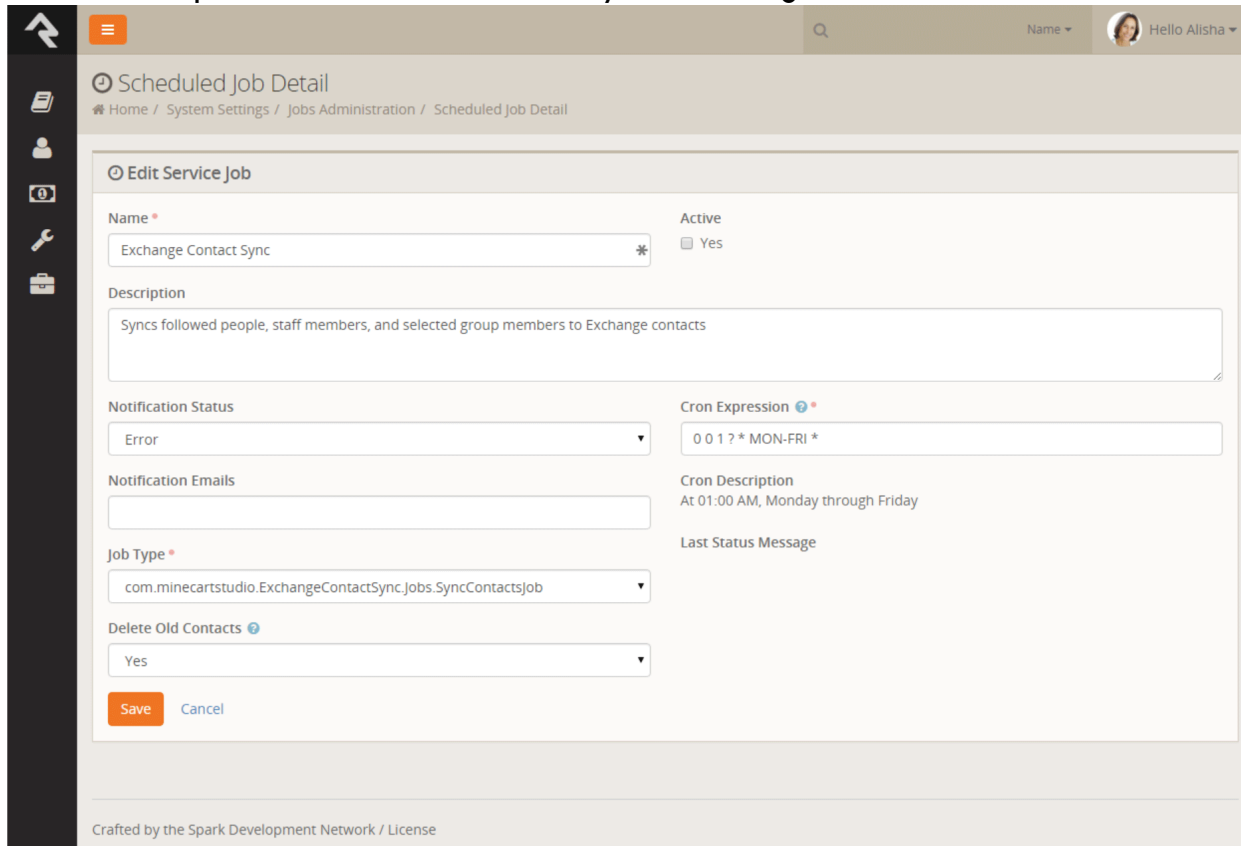
10/4/2016 2:24:45 AM EwsRequestHttpHeaders <Trace Tag="EwsRequestHttpHeaders" Tid="32" Time="2016-10-04 09:24:45Z">
POST /EWS/Exchange.asmx HTTP/1.1Content-Type: text/xml; charset=utf-8Accept: text/xmlUser-Agent: ExchangeServicesClient/15.00.0913.015Accept-
</Trace>

10/4/2016 2:24:45 AM EwsRequest <Trace Tag="EwsRequest" Tid="32" Time="2016-10-04 09:24:45Z" Version="15.00.0913.015">
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:m="http://schemas.microsoft.com/exchange/services/2006/messages"
<soap:Header>
<t:RequestServerVersion Version="Exchange2013 SP1" />
```

Entering this value in the settings above will speed up the time it takes to sync contact information.

### Sync Job

Once the block settings above have been enabled, you must configure a Rock Job to facilitate the sync. This job has already been created for you but is configured in an Inactive state. You can edit this job under “Admin Tools > System Settings > Jobs Administration”.



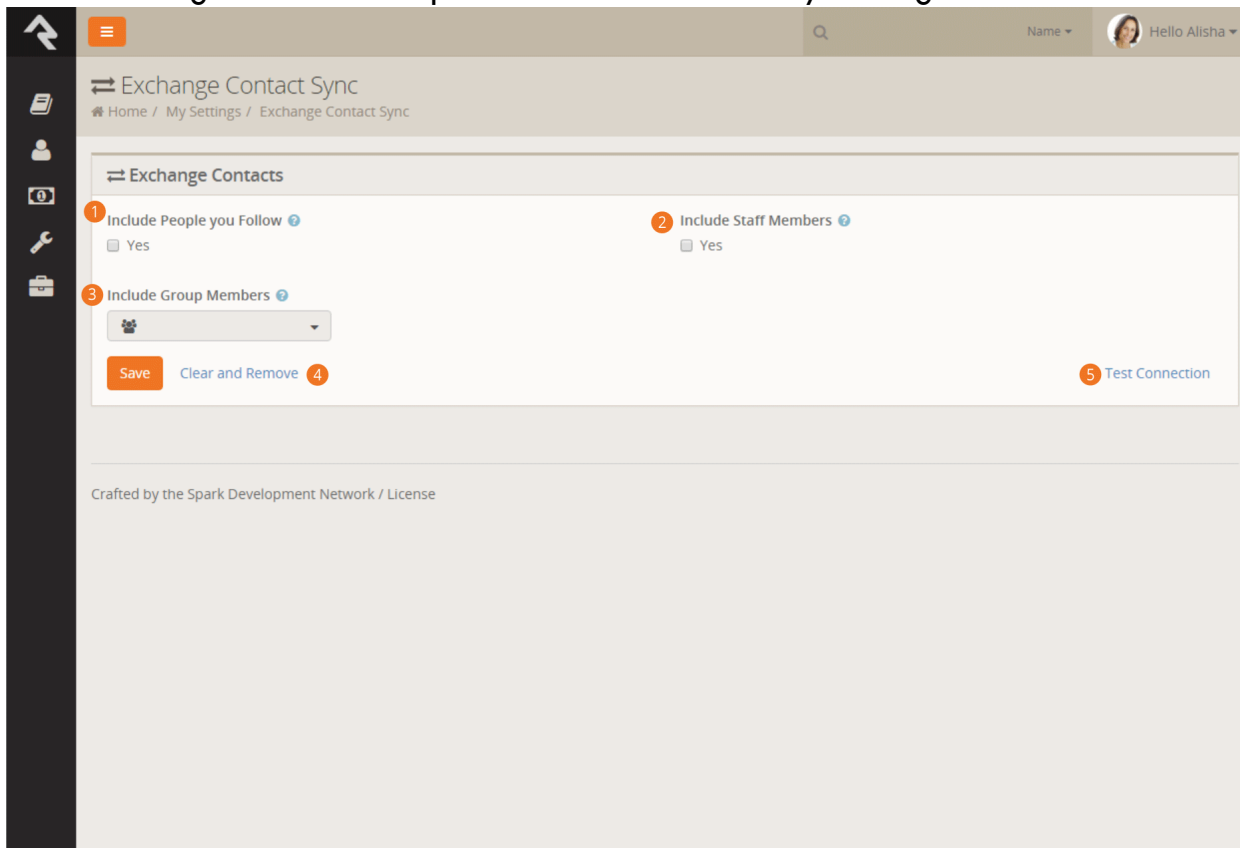
There are few settings as the job reads the admin email address and password from the block settings above. Things you’ll want to consider:

- **Active:** You’ll definitely want to enable this, otherwise you’ll not have too much success.

- **Cron Expression:** This comes configured to run every weekday morning at 1 am. You may wish to adjust this to your needs.
- **Delete Old Contacts:** This setting determines if previously synced contacts who no longer meet the qualifications of syncing should be deleted. For instance, if you are syncing staff contacts, and a person leaves staff. Should this person’s contact information be removed from everyone contact list?

## Usage

Now that everything is configured, let’s look at how the tool is used. Each Rock user who is in the group configured with the block setting will be allowed to enable the contact sync and provide custom settings to meet their personal needs under “My Settings”.



These settings include:

1. **Include People You Follow:** Should the person’s following list be synced?
2. **Include Staff Members:** If enabled all of the individuals in groups of type ‘Organization Unit’ will be synced.
3. **Include Group Members:** The active group members of the selected groups will be synced.
4. **Clear and Remove:** Clicking this link will remove all of the current contacts for the logged in user.
5. **Test Connection:** This link will test that the connection to the Exchange server is working and everything is configured correctly.

# Exchange Configuration

For the sync to work, an admin user must be created on the Exchange server with impersonation enabled. Instructions for configuring your Exchange server can be found at the link below.

We've included the steps for Exchange 2013 below. Other versions are covered using the link.

<http://www.3cx.com/blog/docs/how-to-create-impersonated-user/>

1. In Exchange Admin Center, Navigate to **Recipients > Mailboxes**
2. Add a new **User Mailbox**
  - a. **First Name:** Rock
  - b. **Last Name:** Connector
  - c. **Alias:** rockconnector
  - d. **User logon name:** rockconnector
  - e. **Description:** Service Account used by Rock for making Exchange mailbox updates
  - f. Enter a password
  - g. Select **Save**
3. Open User in Exchange Admin Center or Active Directory and uncheck "Require password change on next logon"
4. In Exchange Admin Center, Navigate to **Permissions > Admin Roles**
5. Add a new **Role Group**
  - a. **Name:** Rock Application Impersonation
  - b. **Description:** Allows the Rock Connector to impersonate a mailbox in Exchange to sync contacts
  - c. **Write Scope:** Default
  - d. **Roles:** Add the Role name "ApplicationImpersonation"
  - e. **Members:** Add the User "Rock Connector"
  - f. Select **Save**
6. Open Exchange Server Power Shell
7. Run the following command
  - a. `New-ManagementRoleAssignment -Name:RockApplicationImpersonation - Role:ApplicationImpersonation -User:rockconnector`