GRAD**LEADERS**

Microsoft Exchange 2017/2010 and Office 365 – Outlook Integration

Version 1.2

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OVERVIEW

Exchange Web Services allow GradLeaders to integrate with a school's Exchange Server to provide seamless interaction with an administrator, candidate, or staff's calendar for GradLeaders events. Simple Object Access Protocol provides the messaging structure for information to be sent between GradLeaders and the Exchange Server. This document will provide the client with information regarding requirements and testing.

REQUIRED ITEMS FOR INTEGRATION

In order to provide the bridge between the school's Exchange Server and GradLeaders, the following should be provided to GradLeaders.

1. Web Service URL to access the Outlook 2007/2010 Exchange Server
   a. https://schoolurl/EWS/exchange.asmx
2. A user account (username / password) which users will need to add this account as a Publishing Editor to their calendars. Calendar items are marked as Public. By default, the Publishing Editor permission contains the following:
   a. Read: Full Details
   b. Write: Create Items/Create Subfolders/Edit All
   c. Delete Items: All
   d. Other: Folder Visible
3. Test Accounts
   a. GradLeaders will require at least 1 test account that will be able to login to the Outlook Web Access site. This will help ensure that calls to the Exchange Web Service are successful during GradLeaders Career Center setup. This account should have the permissions outlined in section 2.
   b. Ideally, 3 accounts would be provided so that Admin, Staff, and Candidate actions can be simulated.

WEB SERVICE CALLS

When the Exchange Web Service is called, the following methods are used to Insert, Update and Delete.

1. Insert – The Insert method uses the CreateItem operation
2. Update – The Update method uses the UpdateItem operation
3. Delete – The Delete method uses the DeleteItem operation

TESTING YOUR SETUP

Testing your setup with GradLeaders Career Center will require interaction with the GradLeaders Application. Typically, you would assign a test account to each of the 3 types of roles, Admin, Candidate, and Staff. Assigning an account to a record

in GradLeaders simply means substituting their email address for the new created test accounts. This can be done by logging into the GradLeaders application via admin. The user will also need to have their outlook permissions set to 'true' in order to receive the calendar updates. This will typically be located on the Candidate Profile page and the Staff Detail page.

Before beginning your testing, your school Account Manager at GradLeaders will have performed all of the necessary setup and configuration.

There are three major types of tests you will want to perform in order to fully test the Permission Level set, Insert/Delete/Update. Here are some examples:

1. Insert
    a. Create an event type for a Staff user
        i. Result should be that upon save, the Staff user would login to their OWA account and see a newly created appointment for the time specified.
    b. Signup for an event type as a Candidate user
        i. Result should be that upon save, the Candidate user would login to their OWA account and see a newly created appointment for the time specified.
2. Update
    a. Change the time of an event type as an Admin user
        i. Result should be that upon save, the Candidate and Staff user would login to their OWA account and see the calendar appointment set to a new time.
3. Delete
    a. Remove a Staff user from an event type
        i. Result should be that upon save, the Staff user would login to their OWA account and see that the appointment has been removed.
    b. Withdraw your signup for an event type as a Candidate user
        i. Result should be that upon save, the Candidate user would login to their OWA account and see that the appointment has been removed.

OUTLOOK INTEGRATION APPOINTMENT FORMATS

The following is a list of event types that will sync from within GradLeaders Career Center to your Exchange Server.

1. Workshops
    a. Appointment Start Time: Workshop Date & Workshop Time
    b. Appointment End Time: Workshop Date & Workshop Time + Workshop Duration
    c. Appointment Subject: {Workshop Term}: Workshop Name
    d. Appointment Description: Workshop Description
    e. Appointment Location: Workshop Location (Room Name)
2. Mock Interviews
    a. Appointment Start Time: Mock Interview Schedule Date & Timeslot Start Time
    b. Appointment End Time: Mock Interview Schedule Date & Timeslot Start Time + Timeslot Duration

      c. Appointment Subject: {Mock Term}: Mock Interview Name

      d. Appointment Description: Mock Description

      e. Appointment Location: Mock Location (Room Name)

3. Company Events

      a. Appointment Start Time: Company Event Date & Company Event Time

      b. Appointment End Time: Company Event Date & Company Event Time + Duration

      c. Appointment Subject: {Company Event Term}: Company Event Name

      d. Appointment Description: Company Event Description

      e. Appointment Location: Company Event Location (Room Name)

4. Visits

      a. Appointment Start Time: Visit Schedule Date & Timeslot Start Time

      b. Appointment End Time: Visit Schedule Date & Timeslot Start Time + Timeslot Duration

          i. Appointment Subject: Interview: Visit Org Name

      c. Appointment Description: Date: + Visit Date

          i. Job Title : Visit Job Title

          ii. Description: Job Description

          iii. Appointment Location: Visit Schedule Location (Room Name)

5. Advising Appointments

      a. Candidate

          i. Appointment Start Time: Appointment Schedule Date & Timeslot Start Time

          ii. Appointment End Time: Appointment Schedule Date & Timeslot Start Time + Timeslot Duration

          iii. Appointment Subject: {Advising Term}: Appointment Name

          iv. Appointment Description: {Advisor term} : Advisor First Name and Advisor Last name in school name format + Advising Description + Advising Topic

          v. Appointment Location: Advising Location (Room Name)

      b. Admin

          i. Appointment Start Time: Appointment Schedule Date & Timeslot Start Time

          ii. Appointment End Time: Appointment Schedule Date & Timeslot Start Time + Timeslot Duration

          iii. Appointment Subject: {Candidate Name in school format} – Program: {Candidate Program} – Class Year: {Candidate Class Year} - Topic: Advising Topic

          iv. Appointment Description: Student Name: {Candidate Name in school Format} + Topic: Advising Topic

          v. Appointment Location: Advising Location (Room Name)