



How to Configure Outlook Exchange Integration

Version 6.6

6/10/2019

This manual applies to the following products.

Product Name	Version
infinias ESSENTIALS	6.6
infinias PROFESSIONAL	6.6
infinias CORPORATE	6.6

Thank you for purchasing our product. If there are any questions or requests, please do not hesitate to contact the dealer.

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Intelli-M Access Professional can integrate with the Microsoft Exchange Server installed in your organization or in the cloud to allow Outlook Meetings or Appointments to automatically unlock and re-lock doors controlled by Intelli-M Access. This form of ad-hoc scheduling allows you to manage the lock status of a Door that doesn't operate on a predictable schedule like office or retail business hours. Sporting events, party reservations at public buildings or churches are typical examples of scenarios that Outlook Calendar integration can be useful. You can also apply ad-hoc Access Privileges to apply cardholders to a door based on your Outlook Meetings or Appointments. If your organization does not have Microsoft Exchange services on premises or in the cloud, you can use the Google Calendar integration explained later in [Section 8.0](#).

How it Works

Intelli-M Access Professional is designed to act as a way for Microsoft Exchange to send Meeting Reminder, Meeting Started, and Meeting Ended Events to Intelli-M Access for specified Exchange Room Mailboxes, and for all relevant Meeting Attendees. The integration plugin accomplishes this task by monitoring the Calendar of each specified Exchange Room Mailbox. Therefore, whenever a Meeting or Appointment is scheduled in the Calendar of a Room Mailbox being monitored, the Intelli-M Access Exchange integration will send Events to Intelli-M Access informing it of these Calendar Events. A **Meeting Started** or **Attendee Meeting Started** Event will be sent to Intelli-M Access the moment that a meeting is scheduled to begin, and **Meeting Ended** or **Attendee Meeting Ended** Events will be sent to Intelli-M Access the moment that a meeting is scheduled to end. In addition, the plugin will also send **Meeting Reminder** or **Attendee Meeting Reminder** Events to Intelli-M Access at this time as well. These Events appear in Intelli-M Access no differently than any other Event and can therefore be configured for use on the Rules page like any other Event.

1.1 Ad-Hoc Door Lock Schedule

The most common usage for these Events is to unlock and re-lock meeting room or public-access doors. For example, Intelli-M Access can be programmed to unlock a door when Exchange sends the Meeting Reminder or Meeting Start Events and programmed to re-lock the door (or revert the door schedule) when the Meeting Ended Event occurs. This is useful for doors requiring public access, such as gymnasiums, public conference rooms, and so on. Once you have configured the unlock/revert Rules in Intelli-M Access, all you have to do is create Meetings or Appointments in Outlook to control the meeting room door.

Integration Checklist

You will need to provide several pieces of information about Microsoft Exchange to the Intelli-M Access Exchange plugin when you configure it, so be prepared to have the following information available:

- **Internet Domain**- You'll need to know the internet domain name that Exchange uses for creating its email addresses, i.e. the part of your Exchange email address that's on the right side of the '@' character. If your Exchange Server allows using the full email address as the username, you can leave this field blank.
- **Exchange User Account**- You'll need to know the chosen Exchange User account (and its password) that you specified for Calendar permissions in the Exchange Management Console. If you specified the Domain name in the Domain field, then provide the user account name. If you leave the Domain field blank, provide the entire email address.
- **WebMail Url**- Intelli-M Access logs into Exchange via Exchange Web Services (formerly known as WebDAV) to monitor the requested Calendars, using the ordinary Mailbox account you specified. If you don't know your Exchange Web Services URL, consult the IT Administrator, or follow the instructions at this Microsoft blog: <http://blogs.msdn.com/b/deva/archive/2011/12/02/how-to-get-the-ews-endpoint-url-from-outlook-2007-2010.aspx>.
- **Room Mailbox Email Addresses**- You'll need to know the email address of each Room Mailbox you gave Full Access Permissions to the ordinary Mailbox account in the Exchange Management Console. These email addresses will be used by the Intelli-M Access plugin to know which Room Mailbox accounts to monitor.

Once you have secured this information, you are ready to install and configure the Exchange integration.

Configuration of the Exchange Calendar is performed by creating an Intelli-M Access Peripheral, then referencing that Peripheral when you create one or more Rules designed to utilize that Peripheral.

Calendar Permissions

Integrating Microsoft Exchange with Intelli-M Access means you must configure Exchange to allow an ordinary Exchange Mailbox account to have Full Access Permission rights to each Room Mailbox account who's Calendars you wish to monitor. While you can

use any Exchange Mailbox account for this purpose, we recommend that you create a Mailbox account specifically for monitoring Calendars.

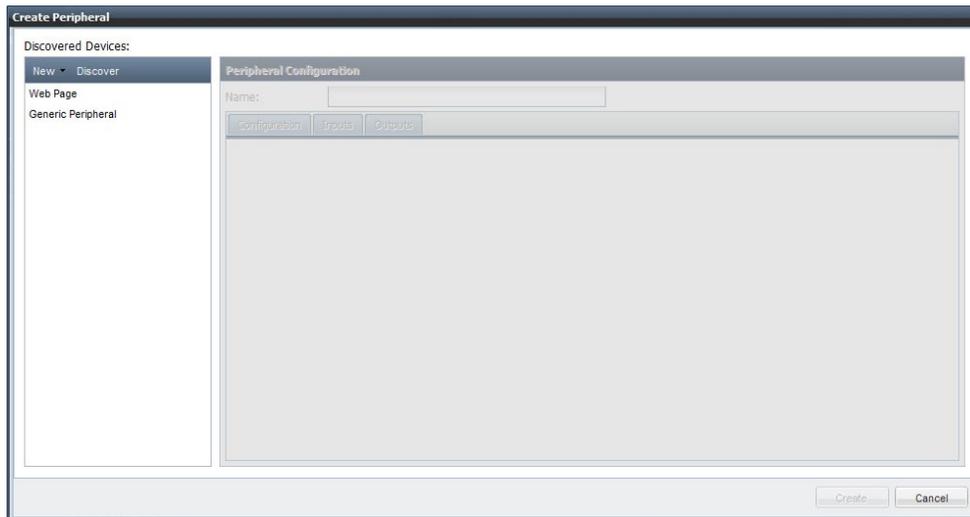
Note: Administrator Mailbox accounts do not automatically have Full Access Permission rights to anyone's Calendar - you must specific assign these rights.

To provide Full Access Permission rights which will allow the Mailbox to monitor the Room Mailbox Calendars, open the Microsoft Exchange Management Console. In the tree view on the left side of the console window, click the plus sign to open the **Microsoft Exchange On-Premises (...)** item, and then click the plus sign to open the **Recipient Configuration** item. Select the **Mailbox** item to view all Exchange Mailboxes in the right-side view. Right- click each Room Mailbox you wish to manage and select the **Manage Full Access Permission...** menu item. Follow the wizard's instructions to add the chosen ordinary Mailbox account to the list of accounts that have full access permissions to this Room Mailbox. Perform this same task for all Room Mailboxes that represent areas with doors being managed by Intelli-M Access.

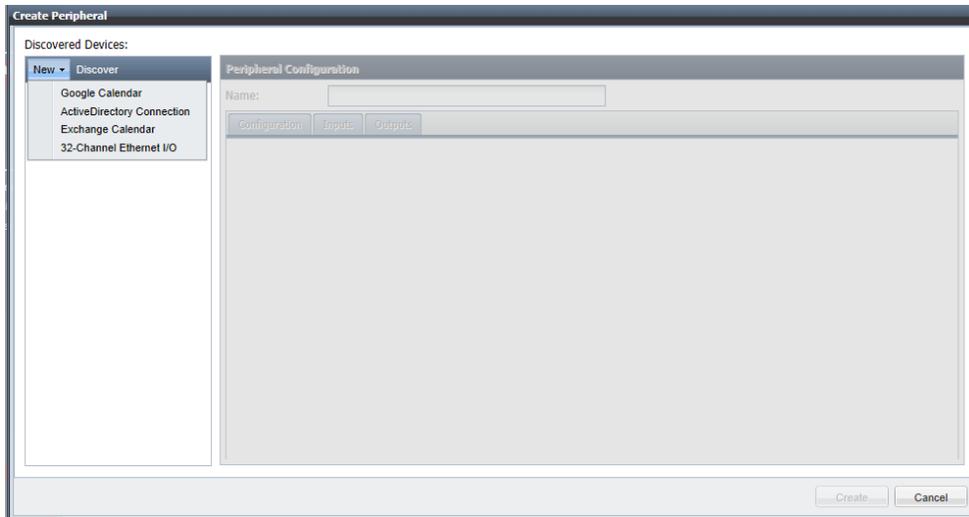
6.1 Create a Peripheral

Steps:

1. Login to Intelli-M Access and proceed to the Peripherals Page under the Configuration Section. Click the **Create Peripheral** Action and a Create Peripheral Dialog will appear.
2. Click the **New** menu to see the available plugins to use as Peripherals, and you should

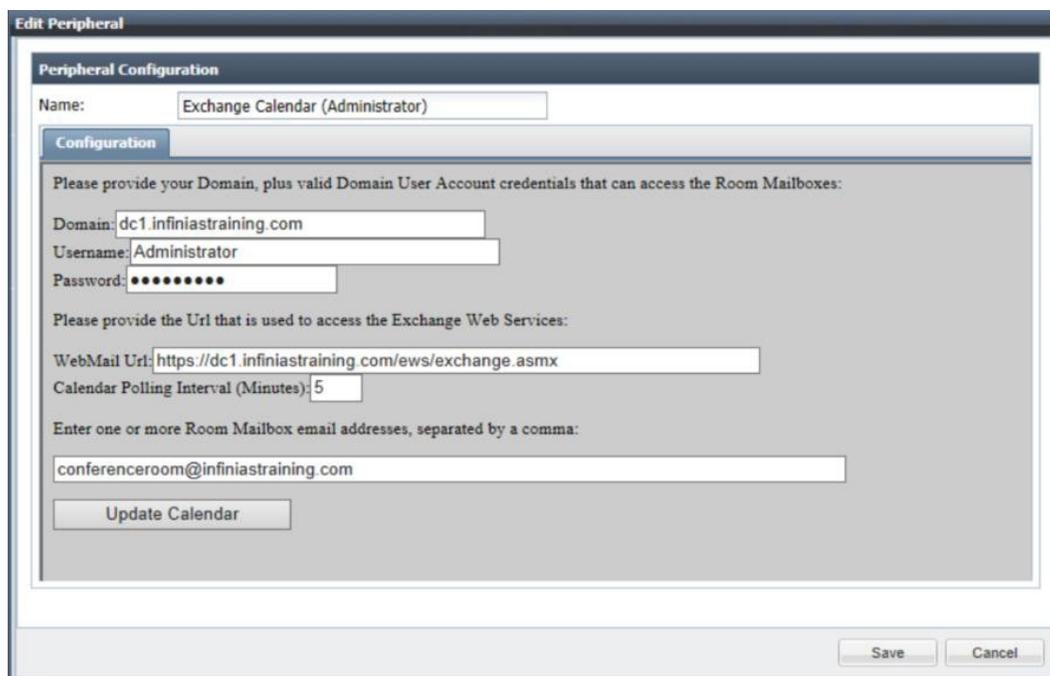


see a menu with one or more menu items.



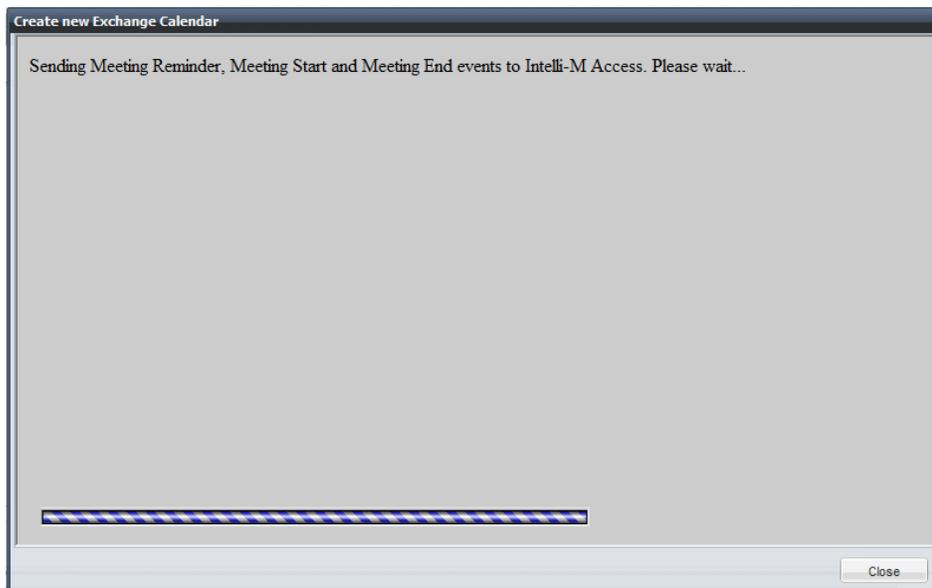
If you do not see **Exchange Calendar** in the popup menu, click the Discover button and wait several seconds for Intelli-M Access to re-discover the plugins, and then click the **New** button again. If you still do not see the Google Calendar menu item, please verify that you are using a licensed Intelli-M Access Professional installation. If the plugin installation proceeded correctly, you will see the **Exchange Calendar** entry among the other menu items in the popup menu.

3. Select the **Exchange Calendar** menu item to start creating the Peripheral based on this plugin, and a Create New Exchange Calendar popup dialog will appear.



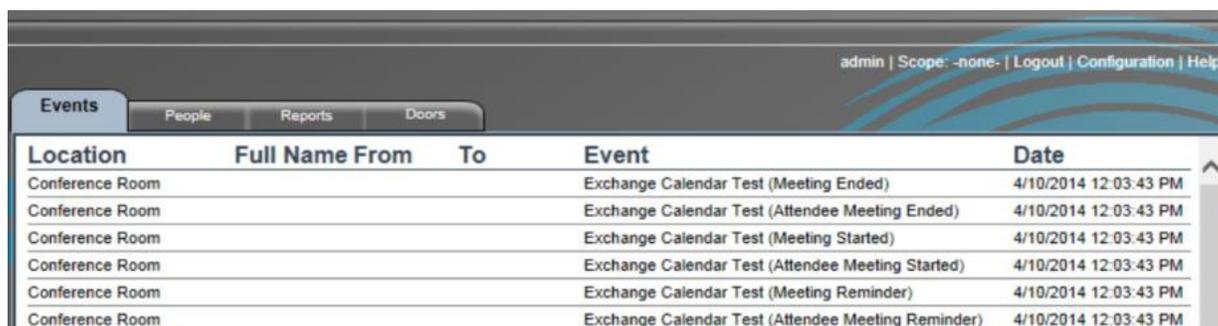
4. Configure the **Domain**. Enter the part of your Exchange email address that's on the right side of the '@' character, or leave this field blank and enter the entire email address below.
5. Configure the **Username**. Provide the username of the ordinary Mailbox account you previously gave Full Access Permissions to the Room Mailboxes in Exchange Management Console. Enter just the username portion of the account, not its email address. If you left the Domain field blank, enter the entire email address.
6. Configure the **Password**. Provide the password for the user account you entered above.
7. Configure the **WebMail Url**. Replace the *mail.mycompany.com* portion of the sample WebMail Url with your corporate webmail name.
8. Set the **Calendar Polling Interval (Minutes)**. This field is user-definable and will poll the Exchange Server for all calendar updates. If you book a meeting, make sure that the meeting reminder (the first event that hits our database) is beyond the polling interval.
9. Configure the **Room Mailboxes**. For each Room Mailbox you have previously configured, enter the *email address* of each conference room, separating each email address with the comma (,) character.

The window will update to show a progress indicator while Intelli-M Access connects to the Exchange server using the supplied information.



Note: If one or more pieces of information were entered incorrectly on the Create Peripheral popup, or if there is some other connectivity issues like a firewall blocking the port, the previous configuration page will appear, giving you the ability to adjust the values you entered and try again.

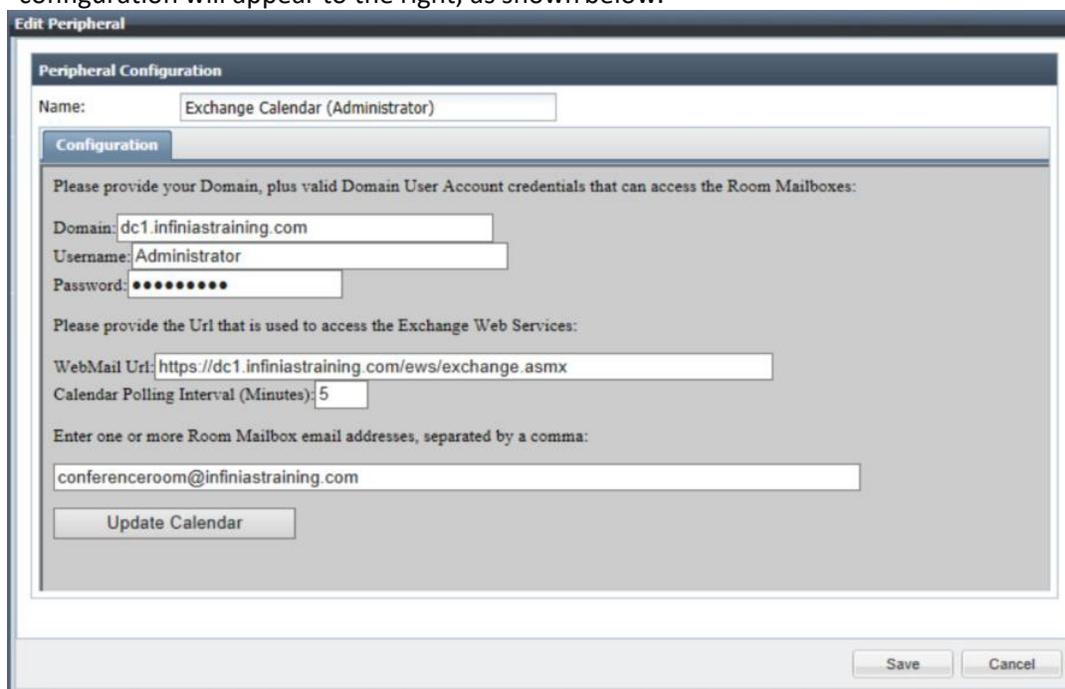
For each Room Mailbox you specified, the Exchange plugin will send Intelli-M Access six test Events: one for Meeting Reminder, one for Attendee Meeting Reminder, one for Meeting Started, one for Attendee Meeting Started, one for Meeting Ended, and one for Attendee Meeting Ended. The purpose for these test Events is so Intelli-M Access will be informed of the Room Mailbox names and the Events they will generate. This in turn allows Intelli-M Access to be able to display this information on the Rules page for creating Rules.



The screenshot shows the 'Events' tab in the Intelli-M Access interface. The table displays six test events, all occurring on 4/10/2014 at 12:03:43 PM. Each event is associated with a 'Conference Room' location and an 'Exchange Calendar Test' event name.

Location	Full Name From	To	Event	Date
Conference Room			Exchange Calendar Test (Meeting Ended)	4/10/2014 12:03:43 PM
Conference Room			Exchange Calendar Test (Attendee Meeting Ended)	4/10/2014 12:03:43 PM
Conference Room			Exchange Calendar Test (Meeting Started)	4/10/2014 12:03:43 PM
Conference Room			Exchange Calendar Test (Attendee Meeting Started)	4/10/2014 12:03:43 PM
Conference Room			Exchange Calendar Test (Meeting Reminder)	4/10/2014 12:03:43 PM
Conference Room			Exchange Calendar Test (Attendee Meeting Reminder)	4/10/2014 12:03:43 PM

10. If you entered the correct server information, the progress will complete and a new entry in the Discovered Devices list will appear. Click the newly-added Device, and the device's name and configuration will appear to the right, as shown below.



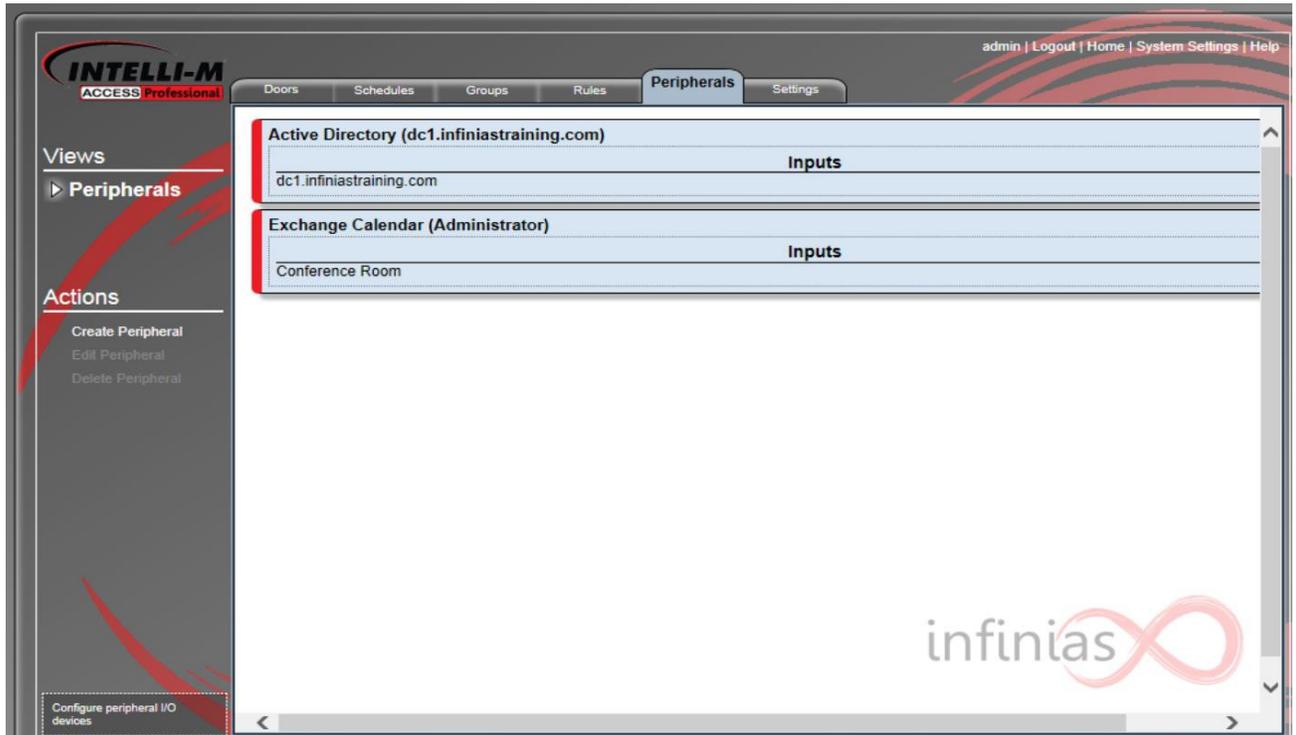
The 'Edit Peripheral' dialog box shows the configuration for an 'Exchange Calendar (Administrator)'. The configuration fields are as follows:

- Name:** Exchange Calendar (Administrator)
- Configuration:**
 - Please provide your Domain, plus valid Domain User Account credentials that can access the Room Mailboxes:
 - Domain: dc1.infiniastraining.com
 - Username: Administrator
 - Password: [Redacted]
 - Please provide the Url that is used to access the Exchange Web Services:
 - WebMail Uri: https://dc1.infiniastraining.com/ews/exchange.asmx
 - Calendar Polling Interval (Minutes): 5
 - Enter one or more Room Mailbox email addresses, separated by a comma:
 - conference room@infiniastraining.com

Buttons: Update Calendar, Save, Cancel

The **Name** field defines the actual name of the Peripheral as it is understood by Intelli-M Access. Change the name from its default to your liking, and press the

Create button. The Peripheral will now be created and shown as a Peripheral along with Room Mailbox names in the Peripherals page.



Create Rules for Ad-Hoc Door Lock Schedule

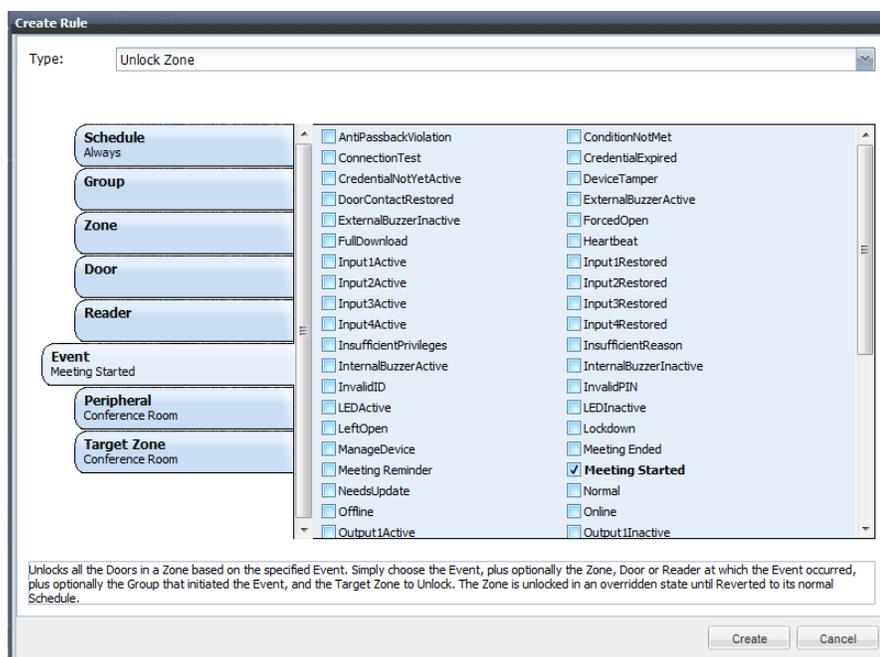
Now that you have created a Peripheral that represents the Exchange Server and its Room Mailboxes, you can create Rules that act on Events that will be generated by the Room Mailboxes for meeting notifications.

Unlock Zone Rule

You can unlock the door of a room associated with an Exchange Room Mailbox by creating an Unlock Zone Rule for that Room Mailbox.

1.1.1. Steps:

1. From the Intelli-M Access interface, click the Configuration link and then click on the Rules tab.
2. When the Rules page appears, click the **Create Rule** Action from the Actions menu. A popup dialog will appear and will show the Access Privilege Rule by default. Select **Unlock Zone** from the **Rules Type** drop down box. The popup dialog will populate with fields for supplying information to configure the unlock zone rule.



3. Configure the **Schedule**. Choose a Schedule that defines the time range you want to allow this Rule to run (usually the **Always** Schedule).
4. Configure the **Event**. Select **Meeting Reminder** or **Meeting Started** Event from the list.
5. Configure the **Peripheral**. Choose the Room Mailbox name associated with the Door that is physically securing that area.
6. Configure the **Target Zone**. Choose the Zone you wish to unlock, which contains the Door that is physically securing the area represented by the Room Mailbox.
7. Click the **Create** button to create the Rule.

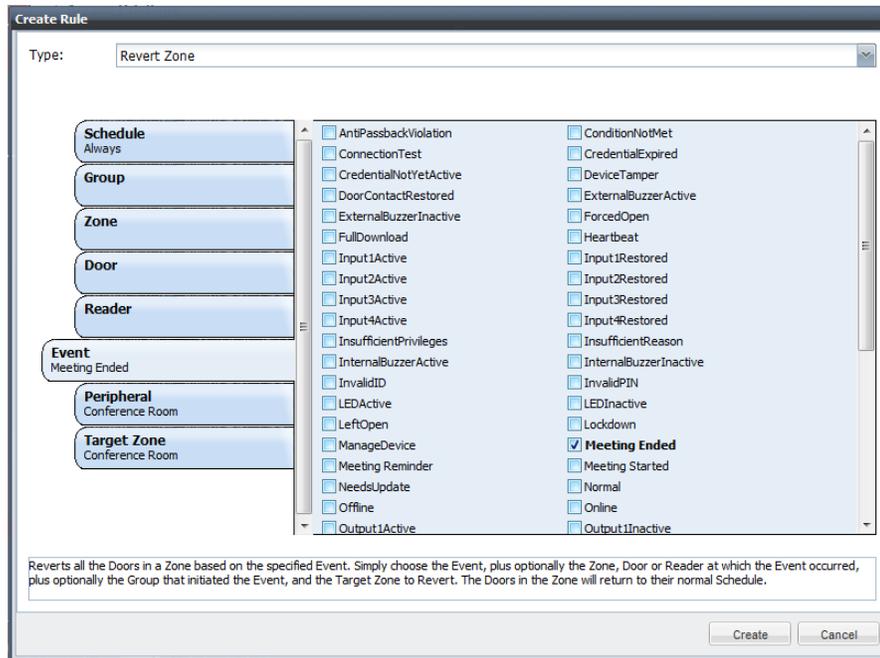
Create a Revert Zone Rule

You can re-lock the door of a room associated with an Exchange Room Mailbox by creating a Revert Zone Rule for that Room Mailbox. This will revert the door to its normal lock schedule (which is assumed to be locked).

1.1.2. Steps:

8. From the Intelli-M Access interface, click the Configuration link and then click on the Rules tab.
9. When the Rules page appears, click the **Create Rule** Action from the Actions menu. A popup dialog will appear and will show the Access Privilege Rule by default. Select **Revert Zone** from the **Rules Type** drop down box. The popup dialog will populate with fields for

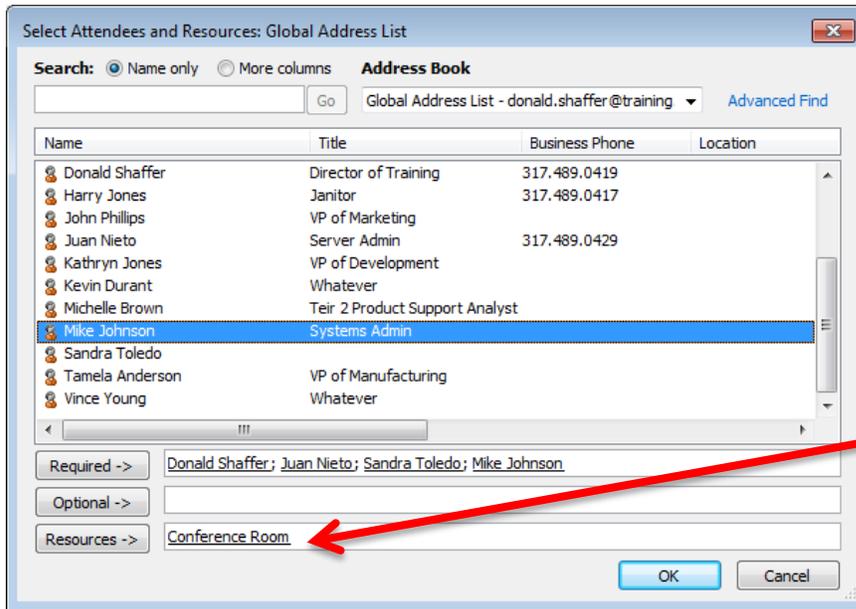
supplying information to configure the Revert Zone rule.



10. Configure the **Schedule**. Choose a Schedule that defines the time range you want to allow this Rule to run (usually the **Always** Schedule).
11. Configure the **Event**. Select **Meeting Ended** from the list.
12. Configure the **Peripheral**. Choose the same Room Mailbox that you specified in the Unlock Zone Rule.
13. Configure the **Target Zone**. Choose the same Zone that you specified in the Unlock Zone Rule.
14. Click the **Create** button to create the Rule.

Create a Meeting in Outlook

You have completed the installation and configuration of the Intelli-M Access Exchange integration, and setup your system to manage the Door locks via Microsoft Exchange. You can now use Outlook or other Exchange client to unlock and re-lock the doors by merely creating Meetings or Appointments that include the associated Room Mailbox accounts in the meeting or appointment.



When creating a Meeting it is important to remember that the Room Mailbox must

Make sure you set the **Meeting Reminder** if that is what will provoke the **Unlock Zone**

Rule to start.

