



O365/Outlook Integration with SSO

Available Mid-June 2017

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O365/Outlook Integration with SSO

Overview

View's O365/Outlook integration allows end users to directly access their archive from within the O365/Outlook environment

Benefits for End Users:

- No archive URL to bookmark
- No extra usernames or password to remember
- One-click access from any Microsoft environment

Benefits for Organizations:

- Extra level of security with SSO login methods
- Optional self-registration eliminates the need to create/update users manually
- Easy to setup



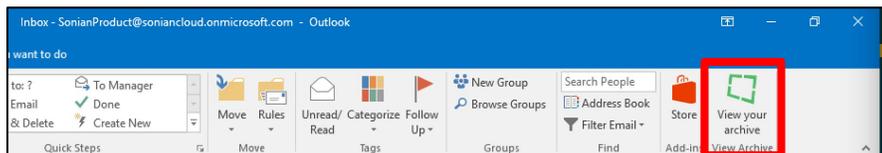
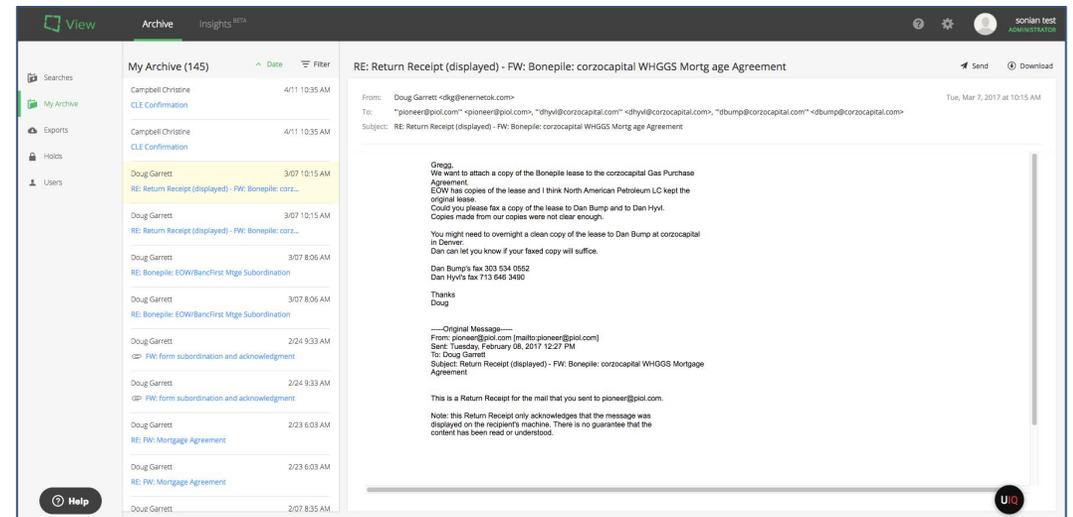
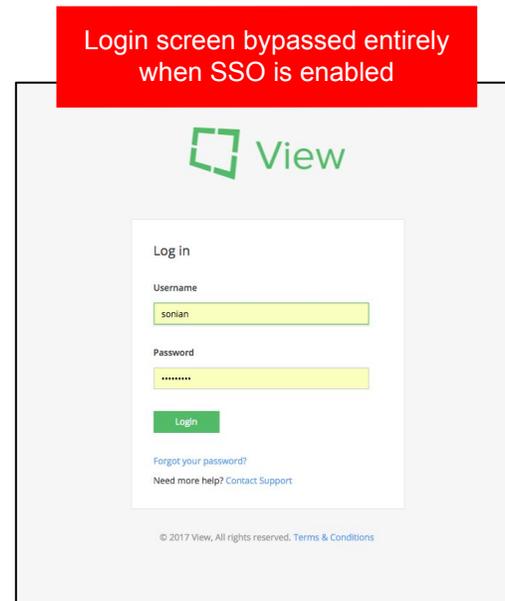
End User Experience

Steps for an End User to access View via O365/Outlook

1.) The user clicks the Archive tile in the O365 control panel (or the Archive command in the Outlook ribbon if applicable)



2.) A new browser window opens to View with the user already logged into the Archive. The login page is completely bypassed. It is truly one click access to the user's Archive from their Microsoft environment



Instructions for Implementation

Getting Started

When an Admin logs into the account for the first time, the login method is always set to “Direct.” The Admin will use the credentials created during initial setup to login. Before enabling SSO, the Admin should:

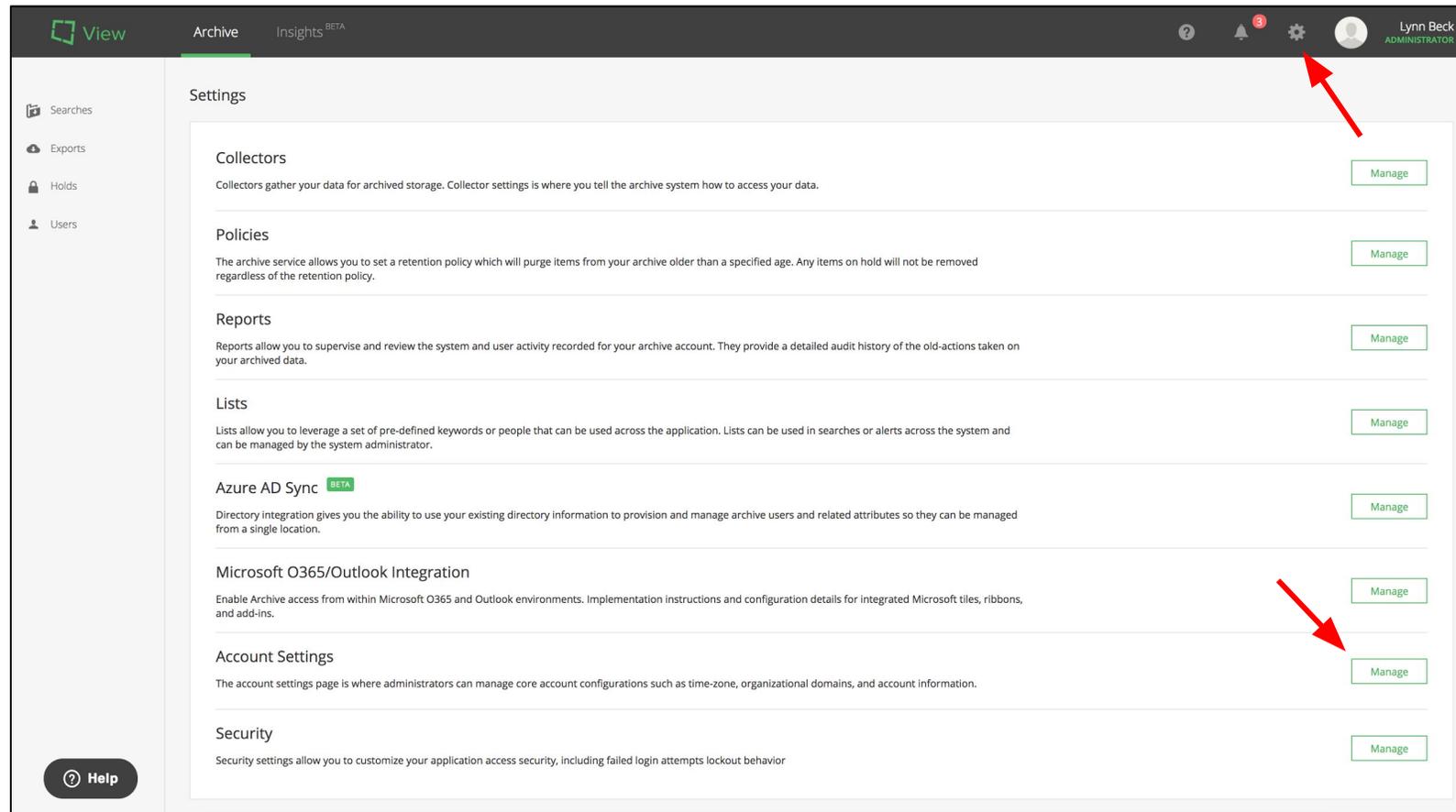
- Confirm that their user account is assigned the correct username, email address, and roles to avoid the potential of missing a critical role or being locked out of the account entirely once SSO is enabled
- Add additional admin-level users to the account before opting into self-registration for user management as, for security purposes, users who self-register are initially assigned only the end user role by default



Instructions for Implementation

Step 1: Enable Microsoft SSO

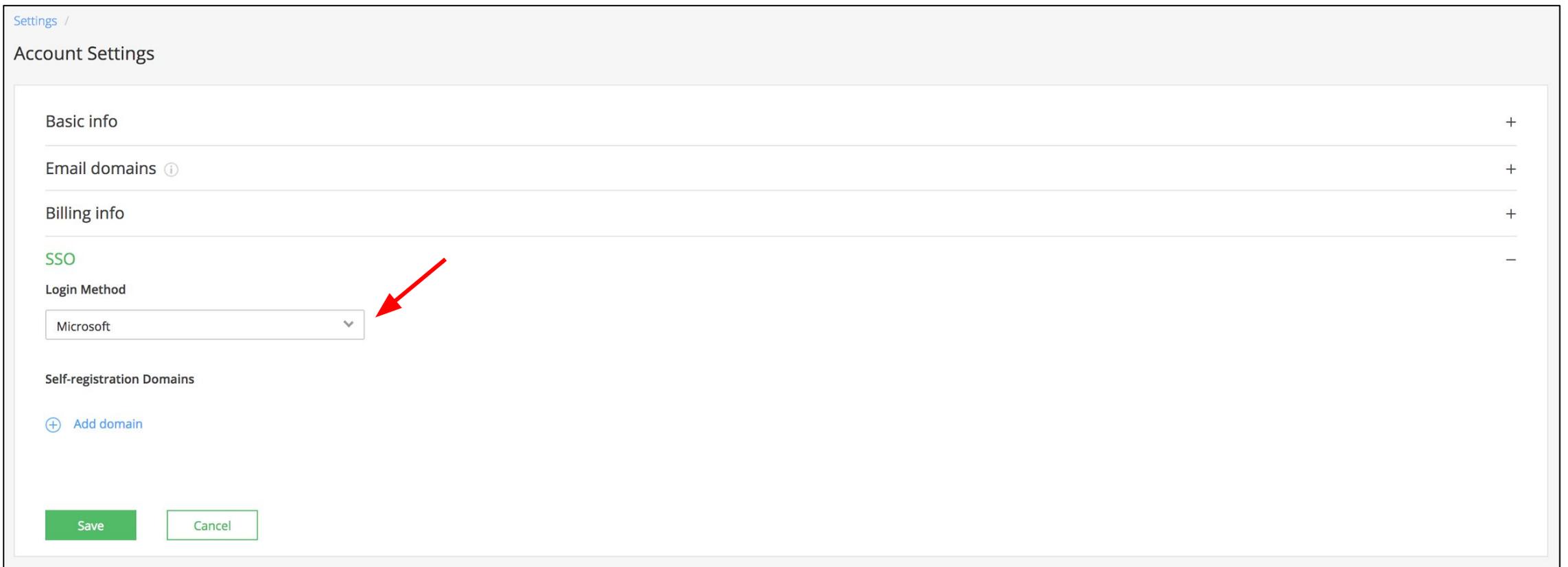
Click the cog in the header, then click the Manage button in the Account Settings section



Instructions for Implementation

Step 1: Enable Microsoft SSO

Expand the SSO section and select Microsoft from the Login Methods drop down. Opt in to self-registration (see next slide) or click the Save button



The screenshot shows the 'Account Settings' page with the following sections:

- Basic info (+)
- Email domains ⓘ (+)
- Billing info (+)
- SSO (-)
- Login Method: Microsoft (dropdown menu with a red arrow pointing to it)
- Self-registration Domains: + Add domain

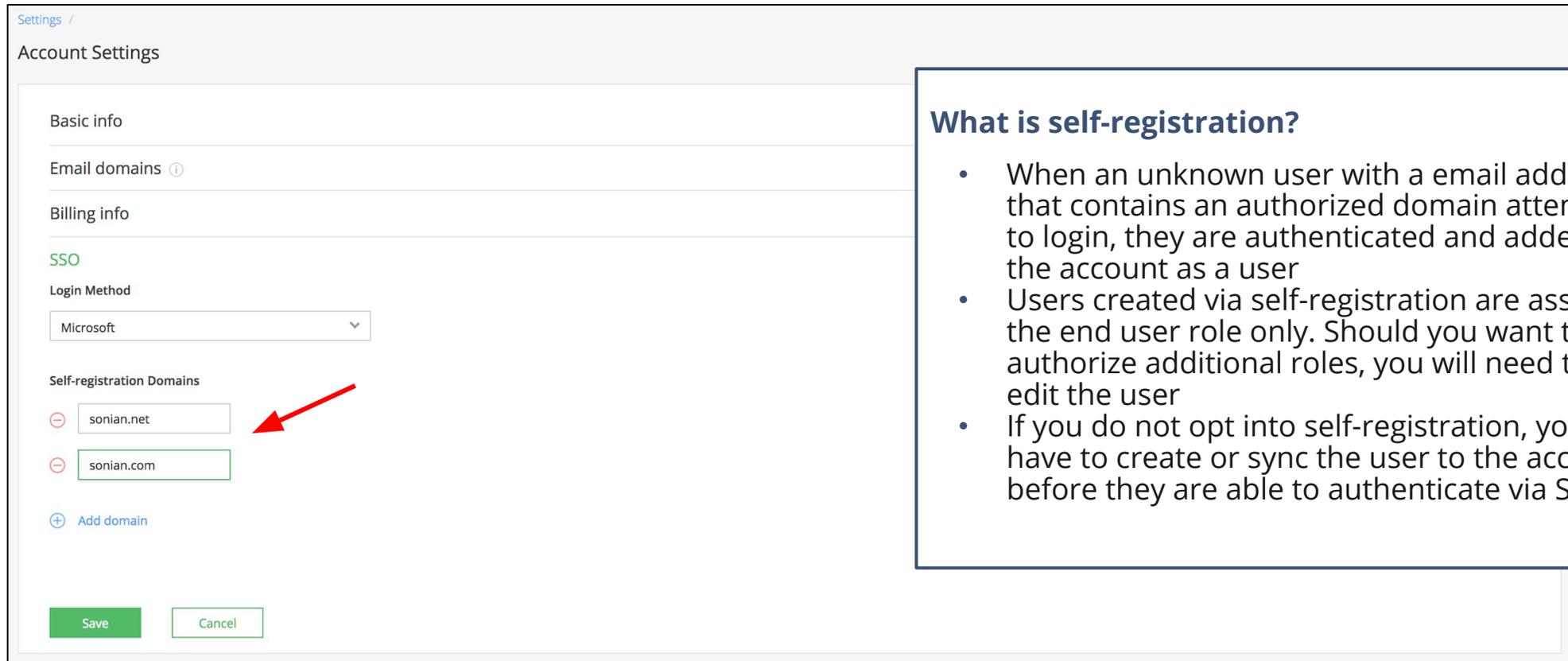
At the bottom, there are 'Save' and 'Cancel' buttons.



Instructions for Implementation

Step 2: Setup User Self-Registration (Optional)

If you would like to allow users to self-register, enter all of the domains from which self-registration should be allowed. Click the Save button



The screenshot shows the 'Account Settings' page with the following sections:

- Basic info
- Email domains ⓘ
- Billing info
- SSO
 - Login Method: Microsoft
 - Self-registration Domains
 - sonian.net (highlighted with a red arrow)
 - sonian.com
 - + Add domain

At the bottom, there are 'Save' and 'Cancel' buttons.

What is self-registration?

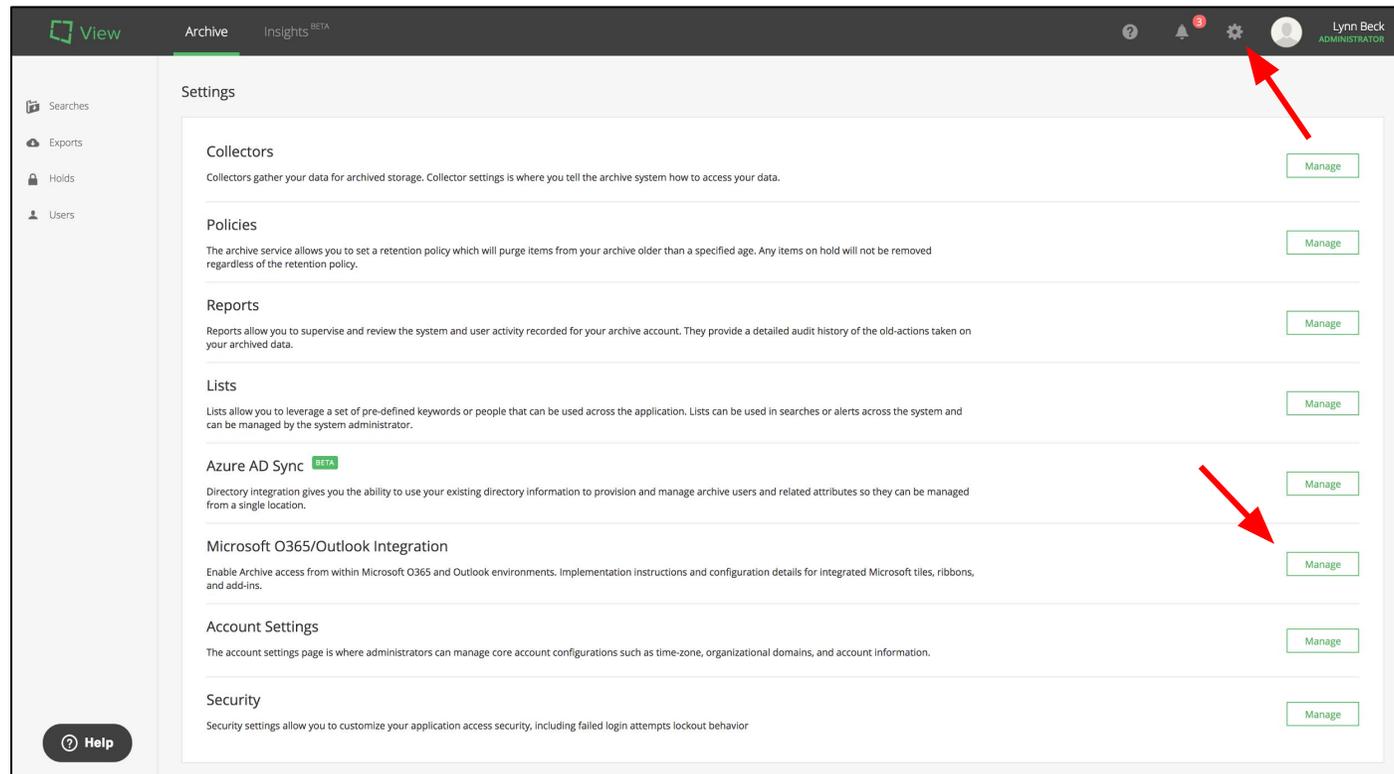
- When an unknown user with a email address that contains an authorized domain attempts to login, they are authenticated and added to the account as a user
- Users created via self-registration are assigned the end user role only. Should you want to authorize additional roles, you will need to edit the user
- If you do not opt into self-registration, you will have to create or sync the user to the account before they are able to authenticate via SSO



Instructions for Implementation

Add App Tile in O365

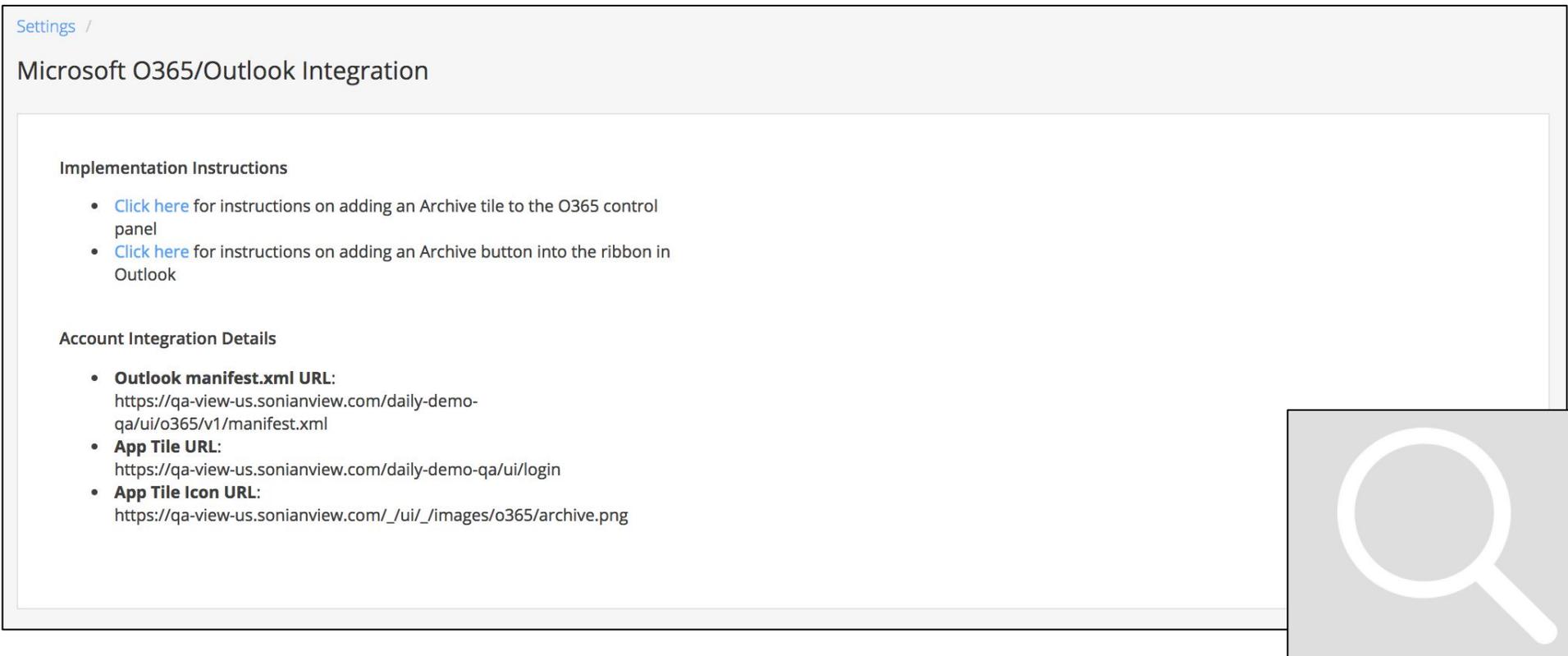
Click the **cog** in the header, then click the **Manage** button in the **Microsoft O365/Outlook Integration** section



Instructions for Implementation

Add App Tile in O365

In this section are links to implementation instructions in the KnowledgeBase as well as the required URLs and optional tile/ribbon image provided as a courtesy



Settings /

Microsoft O365/Outlook Integration

Implementation Instructions

- [Click here](#) for instructions on adding an Archive tile to the O365 control panel
- [Click here](#) for instructions on adding an Archive button into the ribbon in Outlook

Account Integration Details

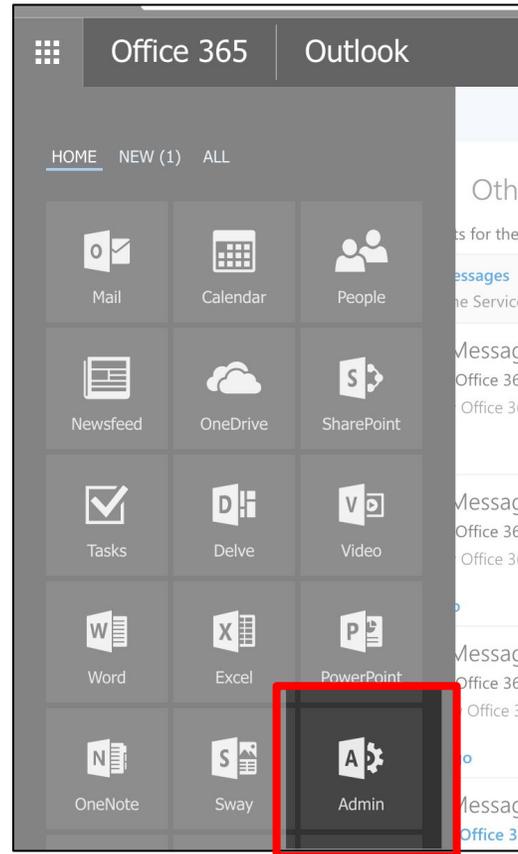
- **Outlook manifest.xml URL:**
<https://qa-view-us.sonianview.com/daily-demo-qa/ui/o365/v1/manifest.xml>
- **App Tile URL:**
<https://qa-view-us.sonianview.com/daily-demo-qa/ui/login>
- **App Tile Icon URL:**
https://qa-view-us.sonianview.com/_/ui/_/images/o365/archive.png



Instructions for Implementation

Add App Tile in O365

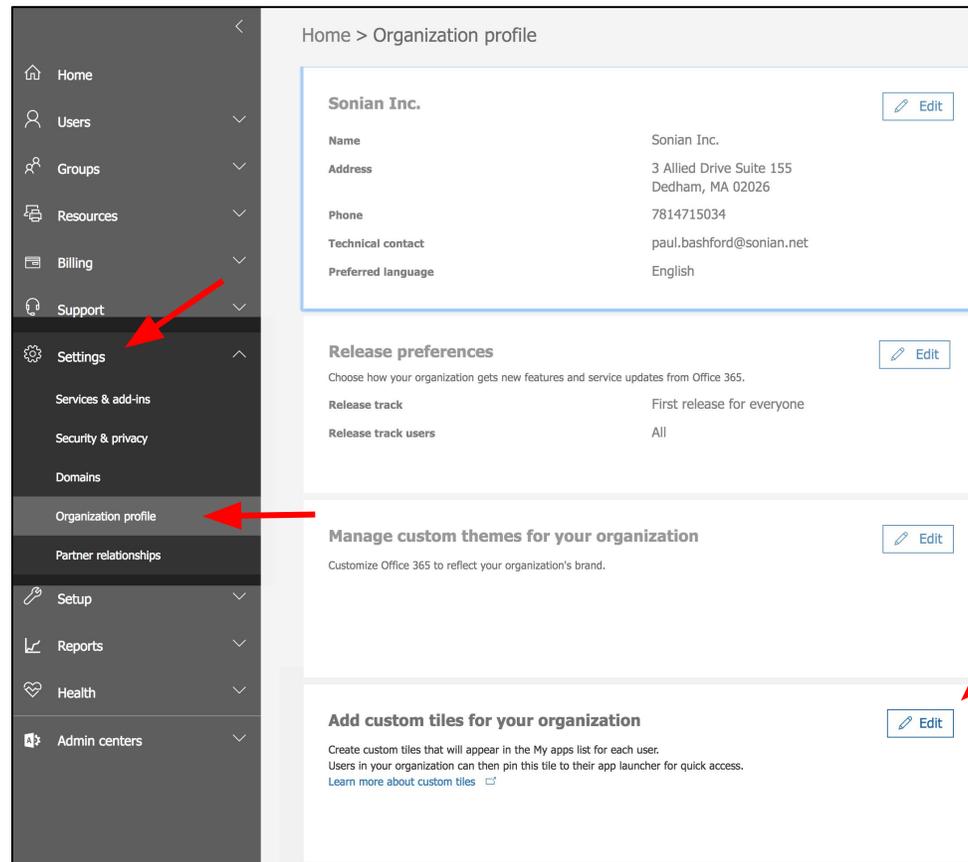
In a separate tab, login to O365 and click the **Admin** tile



Instructions for Implementation

Add App Tile in O365

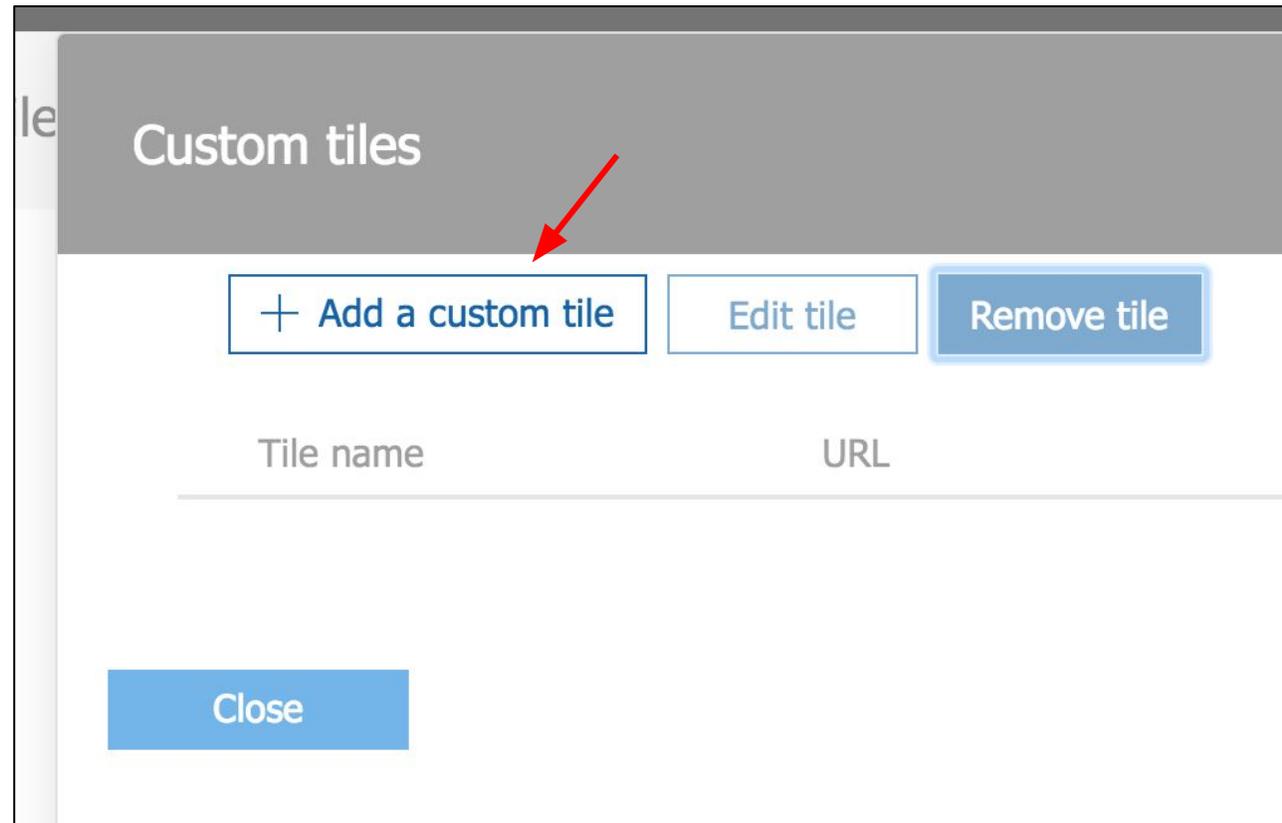
From the Admin page, expand the **Settings** section in the left hand nav and click **Organization profile**. Then, in the **Add custom tiles for your organization** section, click the **Edit** button



Instructions for Implementation

Add App Tile in O365

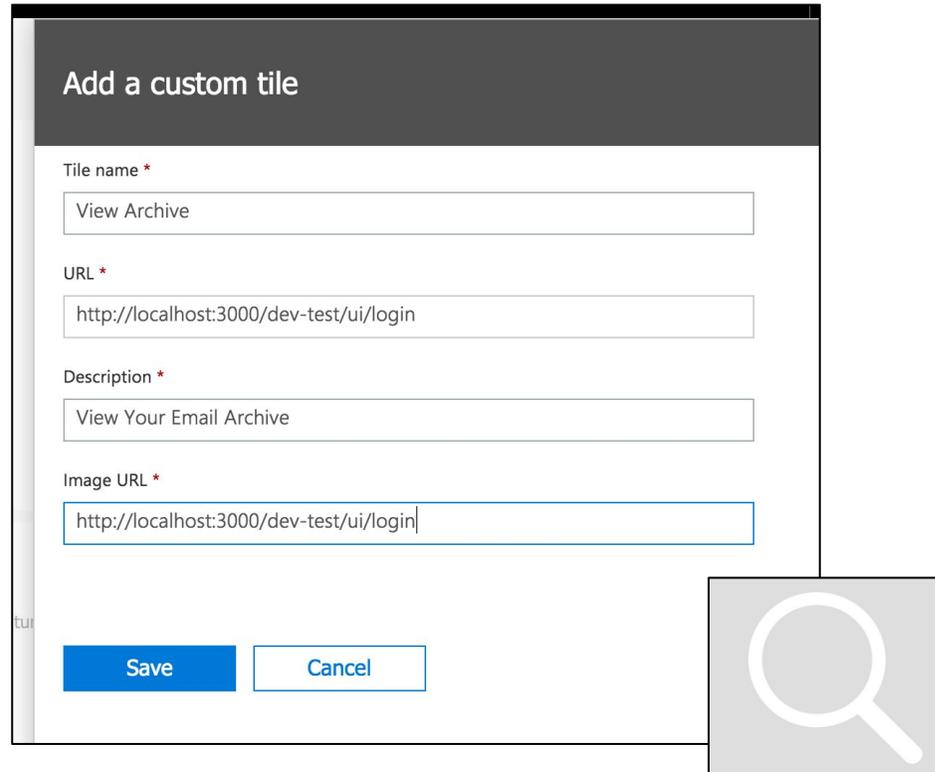
From the **Custom tiles** pane, click the **Add a custom tile** button



Instructions for Implementation

Add App Tile in O365

In the **Add a custom tile** section, enter the **App Tile URL from the Archive** (slide 12) into the **URL** field. Give the tile a name, description, and image. Click the **Save** button. *For your convenience, we provide the URL to a properly-sized magnifying glass image (shown) should you not want to create your own (slide 12)*



Add a custom tile

Tile name *
View Archive

URL *
http://localhost:3000/dev-test/ui/login

Description *
View Your Email Archive

Image URL *
http://localhost:3000/dev-test/ui/login

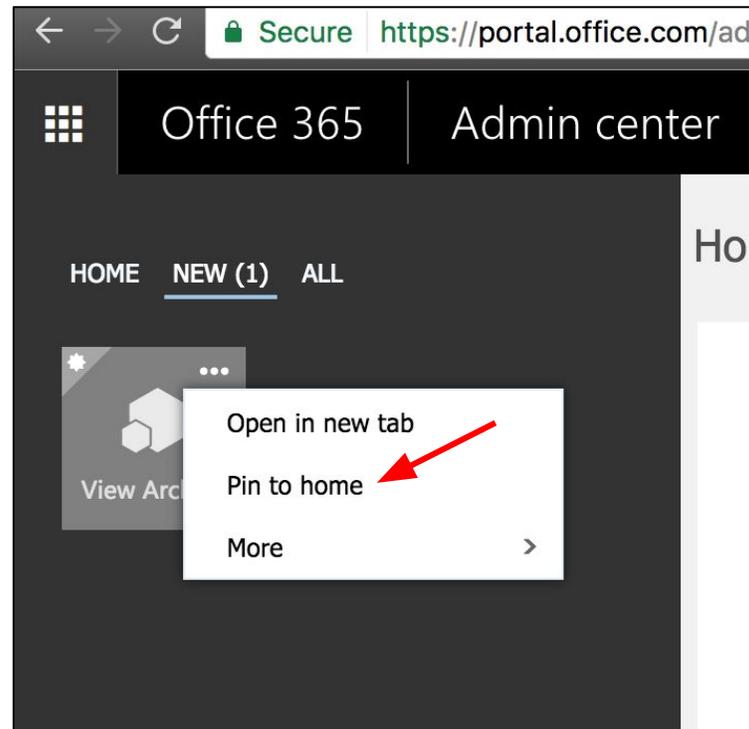
Save Cancel



Instructions for Implementation

Add App Tile in O365

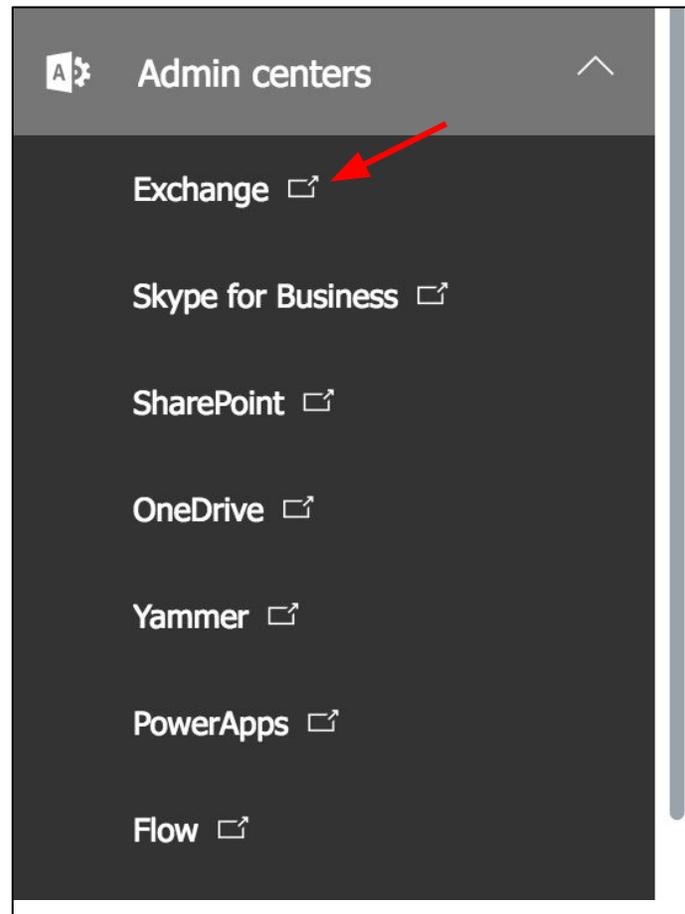
The newly created app tile will now appear in the list of custom tiles in your O365 control panel. For your users, this tile will appear in the **New** section of their control panel. It would be helpful to instruct them to add it to their **Home** section by hovering over the tile and selecting the **Pin to home** option. *Helpful Tip: The tile will take a while to propagate so please be patient!*



Instructions for Implementation

Add-in for Outlook 2016 and 2013

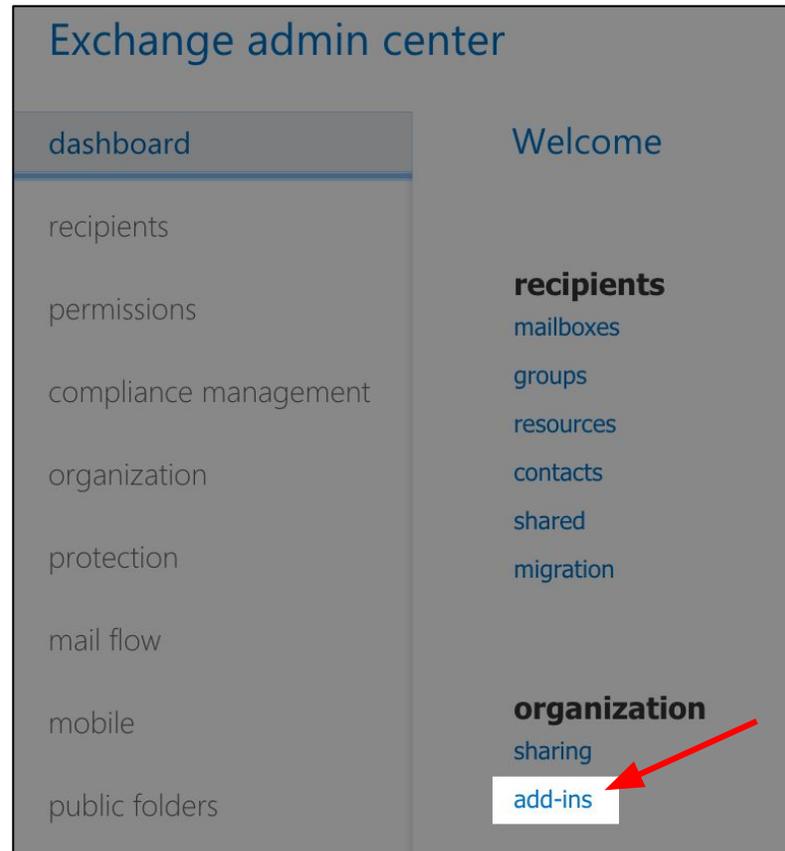
Login to your Admin center. Open **Admin centers** section and click **Exchange**



Instructions for Implementation

Add-in for Outlook 2016 and 2013

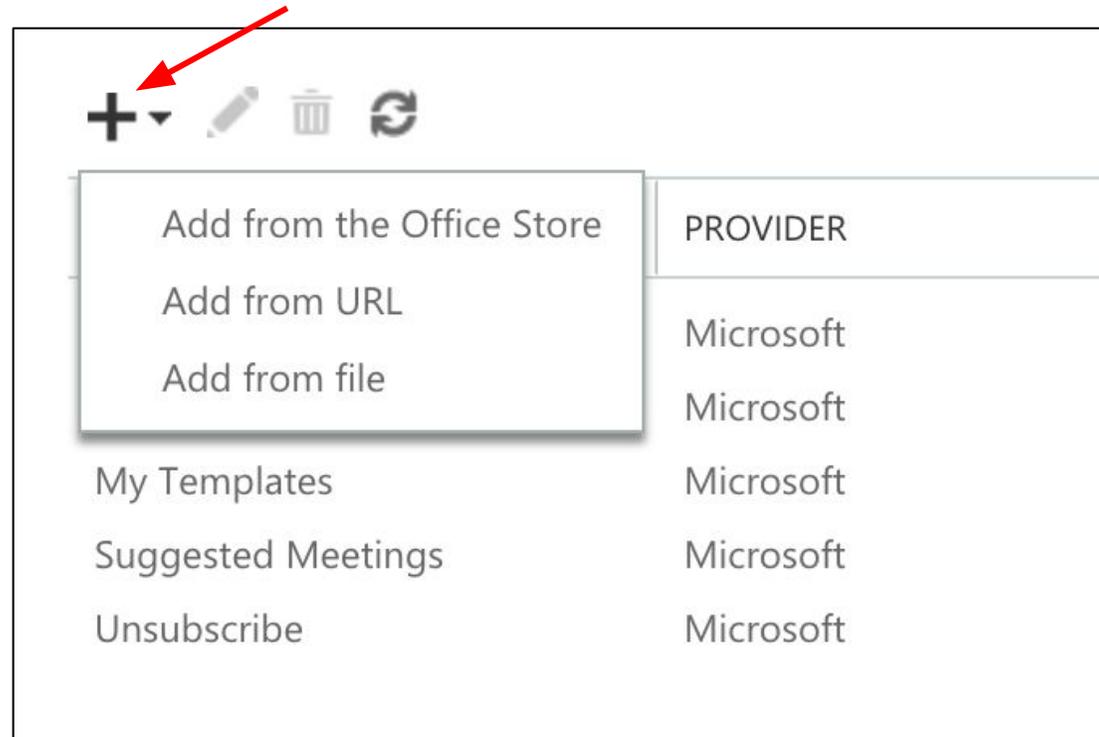
From the **Exchange admin center**, click **add-ins** under the **organization** section



Instructions for Implementation

Add-in for Outlook 2016 and 2013

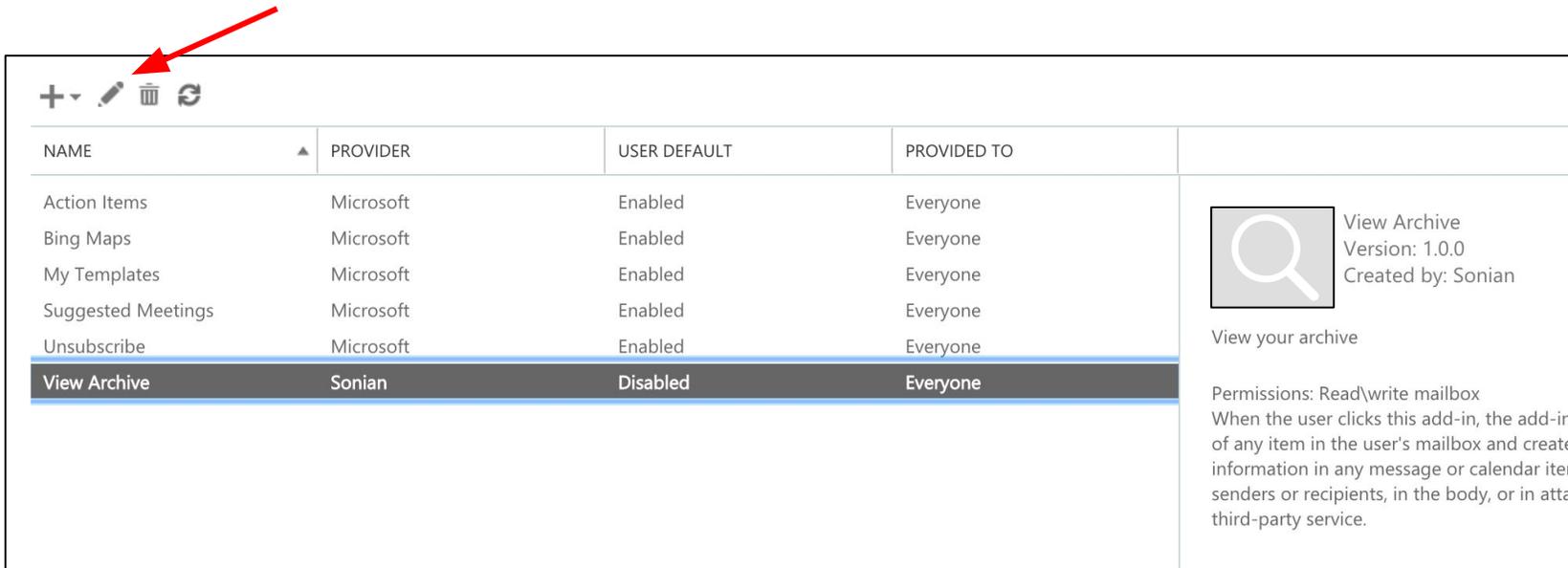
Click the **Add** button to access the drop down menu. Select the **Add from URL option** and enter the **Outlook manifest.xml URL** from the Archive (slide 12.) *Helpful Tip: If adding the manifest via the URL does not work, download the manifest and try adding it via the **Add from file** option*



Instructions for Implementation

Add-in for Outlook 2016 and 2013

The add-in will now appear in the **list of add-ins for the Exchange server**. Customize your desired add-in availability settings by clicking the **Pencil** icon. *Helpful Tip: An Admin can add the add-in for all users, but it will take a while to propagate. It will not appear immediately in desktop or web clients, so please be patient!*



NAME	PROVIDER	USER DEFAULT	PROVIDED TO
Action Items	Microsoft	Enabled	Everyone
Bing Maps	Microsoft	Enabled	Everyone
My Templates	Microsoft	Enabled	Everyone
Suggested Meetings	Microsoft	Enabled	Everyone
Unsubscribe	Microsoft	Enabled	Everyone
View Archive	Sonian	Disabled	Everyone

View Archive
Version: 1.0.0
Created by: Sonian

View your archive

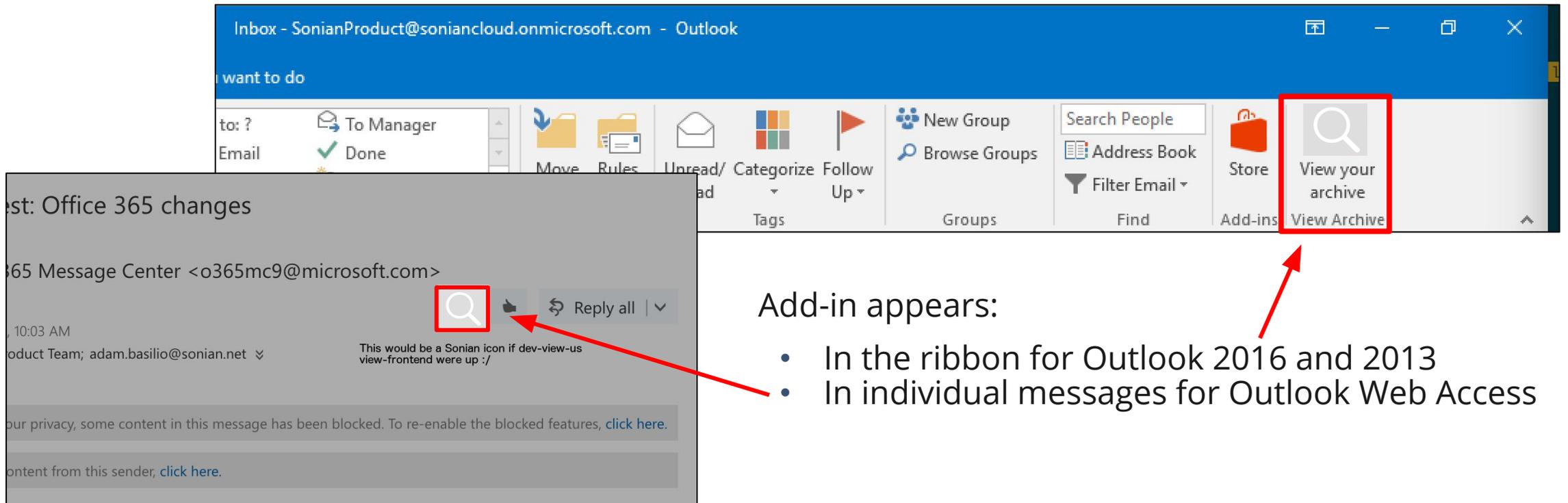
Permissions: Read/write mailbox
When the user clicks this add-in, the add-in...
of any item in the user's mailbox and create...
information in any message or calendar item...
senders or recipients, in the body, or in attac...
third-party service.



Instructions for Implementation

Add-in for Outlook 2016 and 2013

The add-in appears in different locations in different versions of Outlook. This is controlled by Microsoft. We cannot affect where the add-in appears



Add-in appears:

- In the ribbon for Outlook 2016 and 2013
- In individual messages for Outlook Web Access



O365/Outlook Integration with SSO

Implementation Scenarios by Environment/Version

Environment/Version	Access Point in MS Environment	Archive Login Method	Archive Landing Page from Access Point
O365*	Tile in control panel	Direct with credentials	Login page
		SSO	MyArchive page
Hosted Exchange (Desktop) 2013/2016*	Ribbon button in Outlook	Direct with credentials	Login page
		SSO	MyArchive page
Hosted Exchange (OWA) 2013/2016*	Add-in button in message	Direct with credentials	Login page
		SSO	MyArchive page
On-Prem Exchange (Desktop) 2013/2016**	Ribbon button in Outlook	Direct with credentials	Login page
On-Prem Exchange (OWA) 2013/2016**	Add-in button in message	Direct with credentials	Login page

* O365 tile and Hosted Exchange ribbon/add-in buttons can be implemented simultaneously to maximize Archive access points across online MS environments

** SSO only available after syncing users from On-Prem Active Directory to Azure Active Directory via Microsoft's free AD Azure Connect service. See FAQs section for details



O365/Outlook Integration with SSO

Legacy LDAP

If your legacy Archive account utilized LDAP integration, please be aware that after careful consideration the decision was made to not replicate that functionality in View at this time

- Top customer use cases for LDAP are single sign-on and user management
 - LDAP SSO replaced with OpenID SSO capabilities
 - LDAP user management replaced with Azure AD Sync or the self-registration option available with SSO
- Benefits of new implementations
 - Modern technologies provide increased security
 - Simplified integrations make enablement quick and easy
 - Seamless experience for users of the Microsoft suite of products



O365/Outlook Integration with SSO

Azure AD Sync v. Self-registration

Both Azure AD Sync and self-registration (an option with SSO) are methods of automated user management

- In order to avoid conflicts, only one method of user management can be enabled at a time
- Priority is given to Azure AD Sync as it is a more robust system with capabilities that go beyond simple user creation/updating
- If an account is utilizing Azure AD Sync, the self-registration option will not be available *See next slide for information on choosing which is right for your account*

See next slide for help deciding which method is right for your account



O365/Outlook Integration with SSO

Azure AD Sync v. Self-registration

Trying to decide which user management functionality is right for you?
See below to get started

Use Azure AD Sync:

- If you want your users to login with credentials, not via SSO
- If you have a complex directory setup with many aliases, groups, etc.
- If your user base changes frequently

Use Self-Registration:

- If you allow your users to login via SSO as SSO is required
- If you have a simple directory setup
- If your user base remains fairly constant
- If you do not use Azure

Still not sure? Contact support for help deciding which is right for your account



O365/Outlook Integration with SSO

FAQs

Can we utilize SSO without the O365/Outlook integration and vice versa?

- SSO and O365/Outlook integration are two stand-alone features which - when utilized in tandem - provide the end user with a seamless login process from MS environments to the archive
 - SSO without the O365/Outlook integration requires users to have a direct link to the login page of View Archive
 - O365/Outlook integration without SSO requires users to have unique View Archive credentials

Can I white-label the O356 tile and the Outlook add-in?

- The O365 tile can be white-labeled by default. The Admin chooses the text and image shown in the UI during setup. As a courtesy, Sonian provides a properly sized generic magnifying glass image should you choose to use it
- The Outlook add-in can be white-labeled should your accounts be utilizing white-labeling
 - The URLs needed for setup (slide 12) will inherit the account's white-labeled URL
 - The text (ribbon button only) and the image (both the ribbon button and message add-in) are embedded into the manifest (slide 21) and are intentionally generic
 - Should you want to use something other than what is embedded in the manifest, simply upload the manifest into Exchange via the Upload option rather than the URL option and edit the manifest with your preferences prior to uploading

Can some of my users login directly with credentials and others via SSO?

- At this time, only one login method can be enabled per account at any given time



O365/Outlook Integration with SSO

FAQs

Can I use SSO if our organizations only uses On-Prem Exchange?

- Microsoft offers a free service called Azure AD Connect which allows you to sync your on-prem Active Directory account to a cloud-based Azure Active Directory account. Once synced, SSO as well as the self-registration option, can authenticate the users from Azure Active Directory and will work as designed. For more information from Microsoft on Azure AD Connect and instructions for implementation, please visit: <https://docs.microsoft.com/en-us/azure/active-directory/connect/active-directory-aadconnectsync-what-is>

Can third-party users access an account via Microsoft SSO with an external email address?

- Provided the external email address is also associated with a Microsoft-based account and the third-party user exists in the account with its external email address, that user will be authenticated. This is the method that should be used when a partner admin, legal counsel, or other third-party needs to access the system

Can the SSO functionality connect to services other than Microsoft?

- SSO is built on OpenID Connect and thus can be utilized with most services that accept OAuth 2.0 protocol. Currently, the integrations available out of the box are with Microsoft and Google, but we plan on adding other email providers as well as identity management systems (ie. Okta, Centrify, etc.) Please contact support if you would like to request SSO integration with a specific service

