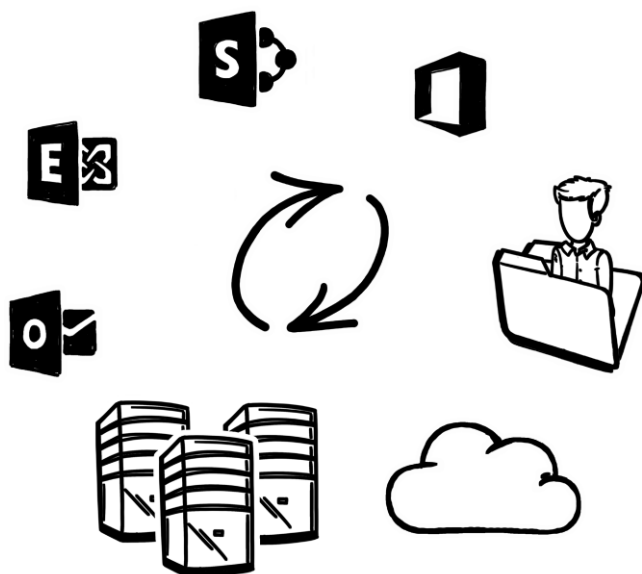




Directory Connector for Mobile Devices



messageconcept PeopleSync

Setup and Configuration Guide

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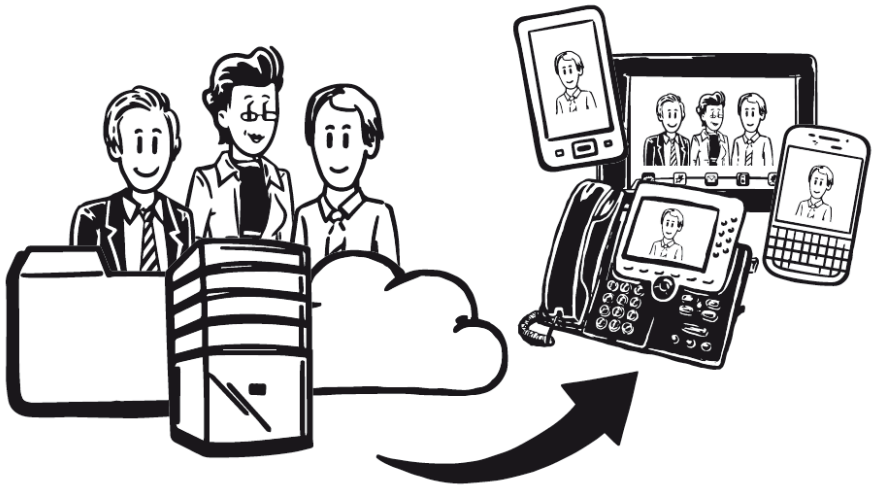
Hint: The **blue hint boxes** will save you time and are very helpful for the understanding of the software functionality.

Document Version 14.2

Last Update: 2015-02-11

1 Introduction and Overview

Keeping all your contact data up-to-date and in sync and making it available everywhere can be a tedious task. Especially for enterprises which want to provide a global address book, this poses a challenge. If you have a wide variety of clients wanting to access this information, you need a solution which works on all platforms, including mobile ones. You also want tight control over which user has access to your data and you need powerful management tools.



PeopleSync was designed with all that in mind. It builds on industry standards such as CardDAV and LDAP and utilizes your existing Active Directory infrastructure to manage access control.

2 How does PeopleSync work?

PeopleSync consists of several components which work together to provide contact data to mobile devices. In this chapter, an overview will be given about how these components work together in PeopleSync.

2.1 Architecture

PeopleSync consists of several components which work together to provide contact data to devices and applications. In this section, an overview will be given about how these components work together in PeopleSync.

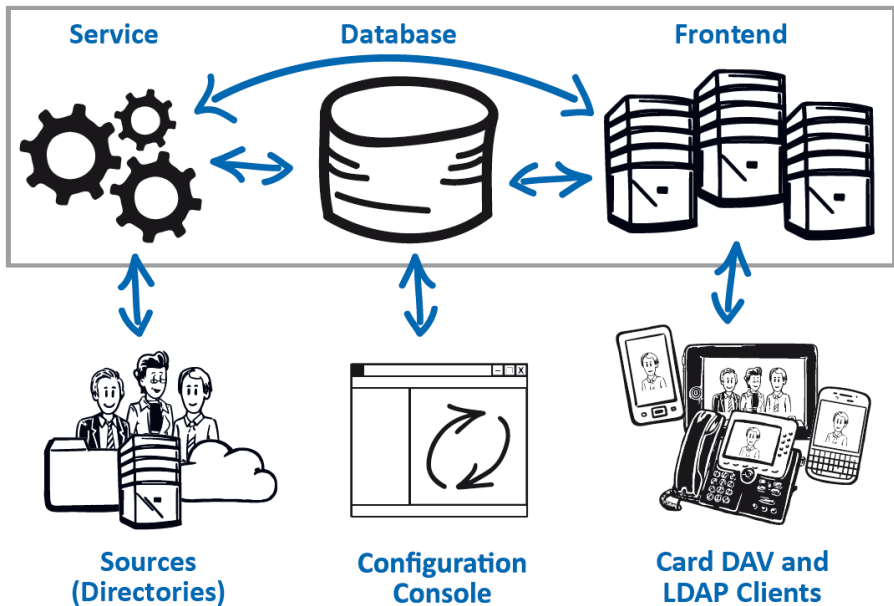


Figure 1: PeopleSync Architecture

Viewed from the client perspective, the devices and applications connect to the PeopleSync Frontend Server. The Frontend Server is a combination of two components. The CardDAV server runs on top of the Microsoft Internet Information Services (IIS). The LDAP service is based on Microsoft Active Directory Lightweight Directory Services (AD LDS).

The Frontend Server connects to an Active Directory or a local AD LDS instance in order to authenticate the user. The user's group memberships are used to determine which address list the user has access to. Address lists and their content are parallel stored in the PeopleSync Database in Microsoft SQL Server and in the LDAP directory. Devices and applications connect to PeopleSync via the standard protocols CardDAV and LDAP.

The PeopleSync Service executes PeopleSync Agents, which extract contact data from various source systems, e.g. Active Directory, Exchange or SharePoint, and imports these contacts into corresponding address lists.

All Agents are unidirectional – i.e. they mirror contacts from a source system, but do not write back changes made in PeopleSync. Therefore, address lists serviced by PeopleSync Agent should be read-only for users.

Finally, the PeopleSync Console is used to configure address lists, permissions and data import. The console runs on clients with Microsoft Windows 7 x64 or higher or servers systems with Windows Server 2008 R2 x64 and higher.

2.2 Software Components

PeopleSync comes with a modular and scalable design. The following software modules can be installed altogether on one machine or on dedicated machines.

2.2.1 Server Components

The **PeopleSync Service** is the core component of PeopleSync. The service executes all workflows including license checks, address list synchronization agents and database content management.

The **PeopleSync Frontend Server** is the single point of connection for the clients. The server provides the address lists for client-side synchronization via CardDAV with the database. It is supported to add several web servers for scalability and availability reasons in PeopleSync Enterprise Edition.

The **PeopleSync Database** stores the address lists and all configuration information in Microsoft SQL Server.

2.2.2 Administrative Components

The **PeopleSync Console** is the administrative GUI for PeopleSync. The console stores the configuration in the database.

2.3 Configuration Objects

In this chapter, an overview about the different configuration objects in PeopleSync is given.

2.3.1 Address Lists and Service Accounts

A **PeopleSync Address List** is a collection of contact items that are stored in the PeopleSync database. Agents store their data in address lists. Clients synchronize address lists – e.g. to a phone's local address book. The access to an address list is controlled by an Active Directory based access control list.

A **PeopleSync Service Account** is an account with permissions to write to an address list. It is for use by an agent.

Address lists should be modified either by a single agent job or by a client. To modify contact data in a shared PeopleSync address list on PeopleSync clients, assign **Modify** permissions to a user or group in the access control list.

2.3.2 Agents

A **PeopleSync Agent** is a software interface for a specific data source. Agents synchronize contact items from a data source to a PeopleSync address list. The following agents come with PeopleSync:

- The **Active Directory Agent** imports contact data including thumbnail photos from Active Directory user and contacts to PeopleSync. An LDAP-filter selects and filters the synchronized data. This agent can be used to retrieve the GAL for Exchange on premise installations.
- The **Exchange GAL Agent** imports users and contacts from the Microsoft Exchange Server global address list to PeopleSync. A filter can be set to include only selected objects. This agent is primarily used for Office 365 Exchange Online GALs.
- The **Exchange Folder Agent** imports contacts located in a contacts folder in an Exchange mailbox or public folder.
- The **SharePoint Agent** imports items from SharePoint lists to PeopleSync. Default contact lists and customized lists are supported. The mapping of fields can be customized in the agent configuration.
- The **Database Agent** imports contacts from a database table into PeopleSync using a custom field mapping. The agent can also import photos referenced by URL or folder path.

It is possible to create several agent jobs per agent type to synchronize e.g. two different Exchange contact folders to dedicated PeopleSync Address Lists.

2.3.3 Workflows

An agent is defined by a **PeopleSync Workflow**. The workflow contains a set of tasks that will be executed to import contacts from data sources. Currently, Workflows cannot be customized. The customizing of workflows is expected to be supported in PeopleSync Enterprise Edition in the future.

3 System Requirements

The following system requirements apply for the PeopleSync components. We distinguish between the different PeopleSync server roles and the console:

Requirements	Roles	Service	Frontend	Database	Console
x64 CPU Architecture		X	X	X	X
System Memory (RAM)		4 GB			2 GB
Free Hard Disk Space		1 GB *			
Microsoft Windows 7 x64 and higher					X
Microsoft Windows Server 2008 R2 x64 and higher		X	X	X	X
Microsoft Internet Information Services 7 and higher			X		
PHP 5.4 or higher			X		
Microsoft SharePoint Server 2013 Client Components SDK		X			X
Microsoft Active Directory Lightweight Directory Services					
Microsoft SQL Server 2008 or higher				X	
Windows Management Framework 3.0		X			
Member in an Active Directory Domain		X		X	X

Note: It is possible to install all roles on a single server or on dedicated systems. All-in-one systems need to fulfill all requirements of the different roles.

3.1 PeopleSync Service

3.1.1 Hardware

We recommend the following minimum hardware:

- x64 CPU architecture
- 4 GB RAM
- 1 GB free hard disk space

The requirements for the Microsoft software products apply for PeopleSync also. Depending on the number of address book entries and clients, extended hardware requirements might apply.

3.1.2 Microsoft Software

The following **Microsoft software components** are required:

- Microsoft Windows Server 2008 R2 x64 and higher
- SharePoint Server 2013 Client Components SDK
- Windows Management Framework 3.0¹

Microsoft Active Directory is generally needed for user authentication and address book assignment. The PeopleSync server must be a member in an Active Directory domain.

¹ Only required in all releases of Windows Server 2008.

3.2 PeopleSync Frontend Server

3.2.1 Hardware

We recommend the following minimum hardware:

- x64 CPU architecture
- 4 GB RAM
- 1 GB free hard disk space

The requirements for the Microsoft software products apply for PeopleSync also. Depending on the number of address book entries and clients, extended hardware requirements might apply.

Note: To scale to a large number of clients, it is possible to implement several load-balanced PeopleSync Frontend Servers.

3.2.2 Microsoft Software

The following **Microsoft software components** are required:

- Microsoft Windows Server 2008 R2 x64 and higher
- Microsoft Internet Information Services 7 and higher
 - Web Server (IIS) Role
 - IIS Role Services → Application Development → CGI Feature

The PeopleSync Frontend Server may, but does not need to be a member of an Active Directory domain.

Warning: You may not install any WebDAV features on the PeopleSync Frontend Server. PeopleSync will not run on an IIS with WebDAV enabled.

3.2.3 PHP

The PeopleSync Frontend Server is a web application which implements a CardDAV server on top of IIS. It requires **PHP 5.4 or higher**. In addition, the following **PHP extensions** need to be available:

- **php_ldap.dll** Active Directory access
- **php_openssl.dll** encrypted Active Directory access, recommended
- **php_pdo.dll** data base access
- **php_pdo_{*}.dll** data base specific drivers, including
- **php_pdo_sqlsrv.dll** for access to Microsoft SQL Server

Note: The Implementation of IIS and PHP with all required features and extensions will be explained in detail in the installation description.

3.2.4 Active Directory

Authentication is handled by Microsoft Active Directory. The Frontend Server needs access to an Active Directory Global Catalog Server.

3.2.5 Network requirements

The Frontend Server needs access to the PeopleSync Database and an Active Directory Global Catalog Server. If port restrictions are in place, the following ports need to be opened:

- Active Directory Global Catalog Server: Port 3268 TCP
- Microsoft SQL Server: Port 1433 TCP²

² See Microsoft KB Article 287932 (<http://support.microsoft.com/kb/287932/en>)

3.3 PeopleSync Database

Microsoft SQL Server 2008 or higher is required as a local database instance or on a dedicated database server. SQL Server must be configured for **SQL Server Mixed Mode Authentication**.

Microsoft SQL Server hardware requirements apply for this system. Depending on the number of address book entries and clients, extended hardware requirements might apply.

Note: All SQL Server Editions (Express, Standard, Enterprise,...) are supported.

3.4 PeopleSync Console

3.4.1 Hardware

We recommend the following minimum hardware:

- x64 CPU architecture
- 2 GB RAM
- 1 GB free hard disk space

The requirements for the Microsoft software products also apply to PeopleSync.

3.4.2 Microsoft Software

Microsoft Active Directory is generally needed for user authentication and address book assignment.

The following **Microsoft software and components** are required:

- Microsoft Windows 7 x64 or Windows Server 2008 R2 x64 and higher
- SharePoint Server 2013 Client Components SDK

Microsoft Active Directory is generally needed for user authentication and address book assignment. The system with PeopleSync console must be a member in an Active Directory domain.

3.5 PeopleSync Clients

PeopleSync uses the open standards CardDAV and LDAP on the client side. Therefore PeopleSync works with all CardDAV and LDAP clients in the market.

- **CardDAV Clients**

The PeopleSync Frontend Server provides vCards via the CardDAV protocol in Microsoft IIS. The protocol is supported on all major mobile device platforms. Apple iOS, BlackBerry OS10 and Windows Phone come with native support for CardDAV.

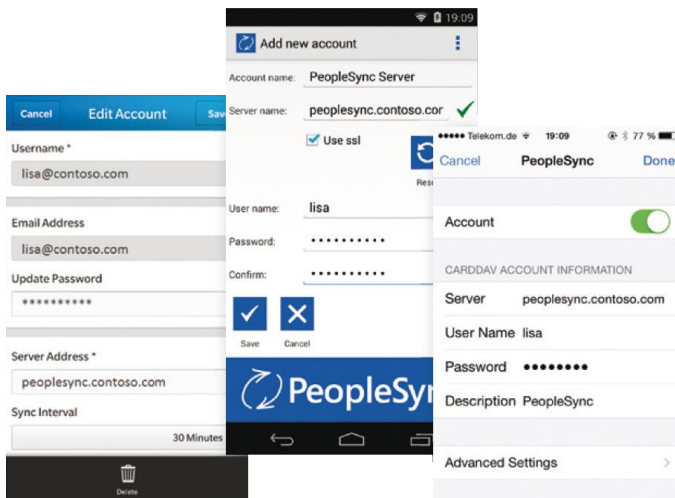


Figure 2: CardDAV clients in various smartphones

messageconcept provides a free CardDAV App for Android smartphones and tablets in the Google PlayStore and the Amazon Appstore. The app comes with AutoDiscover of the PeopleSync server settings via DNS.

- **PeopleSync-Clients**

Beyond mobile devices, PeopleSync works with other CardDAV clients such as Apple's Address Book application on Mac OS X. Many email applications such as Microsoft Outlook or Mozilla Thunderbird support PeopleSync natively or via CardDAV plugins.

The PeopleSync Frontend Server uses Microsoft AD LDS to provide directory services for LDAP clients. In contrast to CardDAV, the LDAP protocol supports no synchronization, but online access. The protocol is natively supported on most mobile platforms and in almost all email clients.

Beyond computers and mobile devices, LDAP is supported by most desktop phones and telephone systems. This allows caller ID resolution on every office phone.

It is even possible to combine CardDAV and LDAP on a single device to synchronize via CardDAV a data subset, e.g. customer addresses of a dedicated sales district, and access other data via an LDAP online query. If you need to synchronize with further platforms, contact our support team to find a solution for your clients.

Please find more details on supported clients and devices in the PeopleSync Client Configuration Guide.

4 Setup

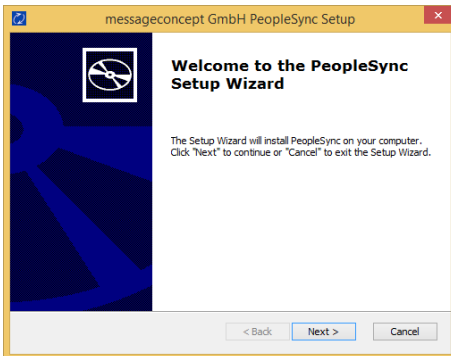
PeopleSync consists of a PeopleSync Agent, PeopleSync Console and PeopleSync Frontend Server. These components need to be installed in the following order:

1. PeopleSync Console & Agent
2. PeopleSync Frontend Server
3. Initial Configuration
4. Optional: Further PeopleSync Consoles

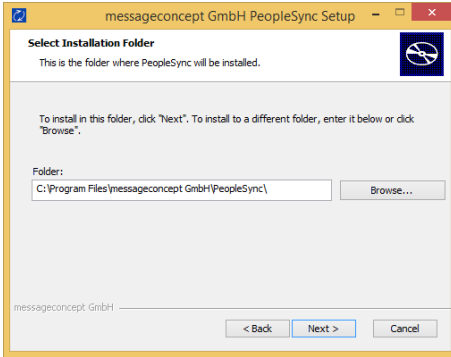
4.1 Console & Agent Installation

The installer needs to be run under an account that is both a local administrator and an administrator of the SQL Server.

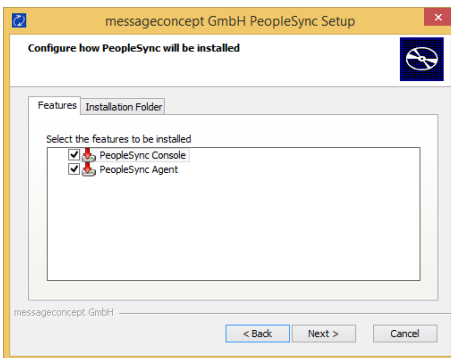
1. Start the PeopleSync Console & Agent Installer.



2. Select the installation folder.

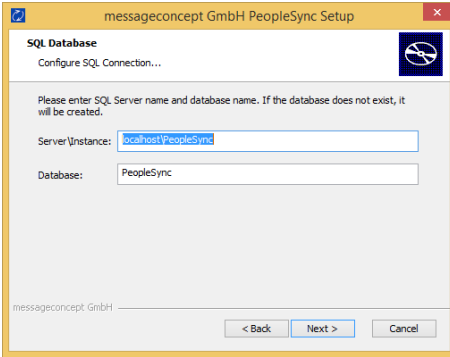


3. Choose which components to install. If you choose to install the PeopleSync Agent, the console will automatically be selected.



4. Enter the database connection. The database will be created by the installer. If you are connecting to the default instance of SQL Server, only the server

name needs to be entered.



messageconcept GmbH PeopleSync Setup

SQL Database

Configure SQL Connection...

Please enter SQL Server name and database name. If the database does not exist, it will be created.

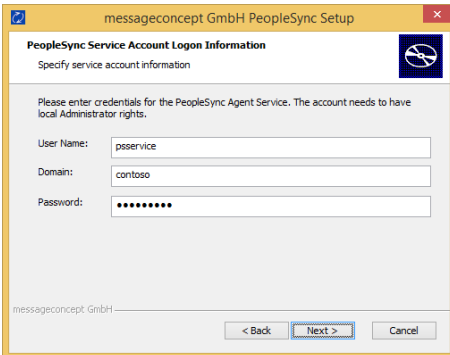
Server \Instance: localhost\PeopleSync

Database: PeopleSync

messageconcept GmbH

< Back Next > Cancel

5. Enter credentials for PeopleSync Agent's service account. The service account must be a domain account that is a member of the server's local administrators group. Note that the account shouldn't have domain administrator rights.



messageconcept GmbH PeopleSync Setup

PeopleSync Service Account Logon Information

Specify service account information

Please enter credentials for the PeopleSync Agent Service. The account needs to have local Administrator rights.

User Name: psservice

Domain: contoso

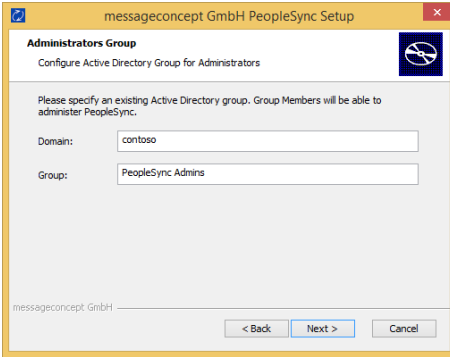
Password: *****

messageconcept GmbH

< Back Next > Cancel

6. Enter the name of an existing Active Directory security group whose members will be allowed to use the PeopleSync Console. It is recommended to create a new group in Active Directory. Please create the group before

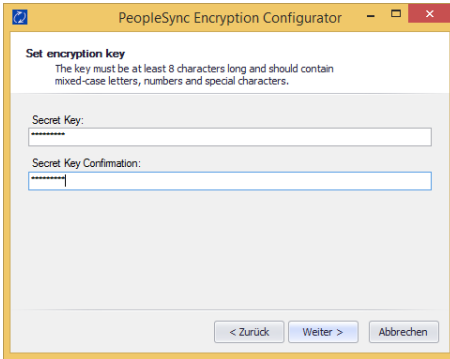
proceeding; otherwise PeopleSync will not work properly.



7. Start the installation.
8. After installation has finished, a password must be set which will be used by PeopleSync to encrypt and decrypt sensitive configuration data. Please note down the password you chose and enter the same password on all systems where you install either PeopleSync Console or Agent. The password is set with **PeopleSync Encryption Configurator**, which will be automatically launched by the setup.

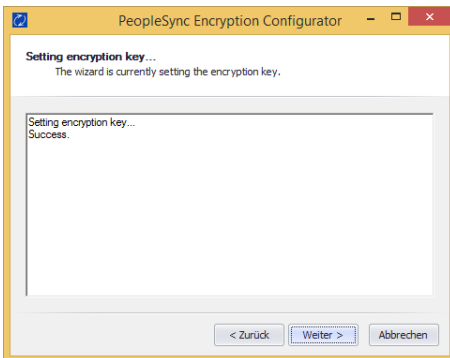


9. Enter an encryption key. It must be at least 8 characters long and should contain mixed-case letters, numbers and special characters.



The screenshot shows a window titled "PeopleSync Encryption Configurator". Inside, the section "Set encryption key" has a sub-header "The key must be at least 8 characters long and should contain mixed-case letters, numbers and special characters." Below this, there are two input fields: "Secret Key:" and "Secret Key Confirmation:". Both fields contain masked characters (dots). At the bottom of the window, there are three buttons: "< Zurück", "Weiter >", and "Abbrechen".

10. In this step, the PeopleSync Encryption Configurator will check if the encryption key can be used to encrypt and decrypt data on the system. The Output should be as shown below.



The screenshot shows the same window, but now the section is "Setting encryption key..." with a sub-header "The wizard is currently setting the encryption key." Below this, there is a text area that displays "Setting encryption key..." followed by "Success." on a new line. The same three buttons ("< Zurück", "Weiter >", "Abbrechen") are at the bottom.

After setup has finished, please proceed with frontend server installation.

Attention: Please check, if the encryption key generation has been successful! In case of a failure run the PeopleSync Encryption Configurator again with elevated admin permissions.

4.2 Frontend Server Installation

This section will give detailed instructions on how to install and setup the PeopleSync Frontend Server on Windows Server. All screenshots and examples show Windows Server 2012 using Internet Information Server (IIS) 8.0. Other releases of Windows Server and IIS should be almost identical to these detailed instructions.

4.2.1 Preparing the database

The PeopleSync Frontend Server needs a SQL Server login to connect to the PeopleSync database. The following steps will guide you through the process of creating the login and granting the necessary permissions.

Please write down the login and password you created in the following steps, as those will be needed during further setup.

Configure SQL Server for mixed authentication mode:

1. Open SQL Server Management Studio.
2. In SQL Server Management Studio Object Explorer, right-click the server, and then click **Properties**.
3. On the **Security** page, under **Server authentication**, select **SQL Server and Windows authentication mode**, and then click **OK**.
4. In the SQL Server Management Studio dialog box, click **OK** to acknowledge the requirement to restart SQL Server.
5. In Object Explorer, right-click your server, and then click **Restart**. If SQL Server Agent is running, it must also be restarted.

Create a SQL Server login:

1. Open SQL Server Management Studio.
2. Open a new query window.
3. Type in the following command, set a password and hit Enter:
`CREATE LOGIN psweb
WITH PASSWORD = '<enterStrongPasswordHere>',
CHECK_POLICY = OFF;
GO`

Grant permission to PeopleSync Database:

1. Open SQL Server Management Studio.
2. In Object Explorer, expand the **Databases** folder.
3. Expand the **PeopleSync** database.
4. Right-click the **Security** folder, point to **New**, and select **User...**
5. In the **Database User – New** dialog box, on the **General** page, select **SQL user with login**.
6. In the **User name** box, enter the name **psweb**.
7. In the **Login name** box, enter the name **psweb**.
8. In the **Default schema** box, enter **dbo**.
9. In the **Membership** tab, select **db_datareader** and **db_datawriter**.
10. Click OK.

4.2.2 Internet Information Services

To install IIS, including all necessary features, you can use the PowerShell Cmdlet

Add-WindowsFeature. For this start PowerShell and run the following command:

```
$ Add-WindowsFeature `
Web-App-Dev, `
Web-CGI, `
Web-Common-Http, `
Web-Default-Doc, `
Web-Dir-Browsing, `
Web-Filtering, `
Web-Health, `
Web-Http-Errors, `
Web-Http-Logging, `
Web-Mgmt-Console, `
Web-Mgmt-Tools, `
Web-Performance, `
Web-Security, `
Web-Server, `
Web-Stat-Compression, `
Web-Static-Content, `
Web-WebServer
```

You'll need to hit enter twice due to the line breaks in the command line above.

This will install a basic **WebServer** role and in addition the **Web-CGI** feature, which is necessary to run PHP.

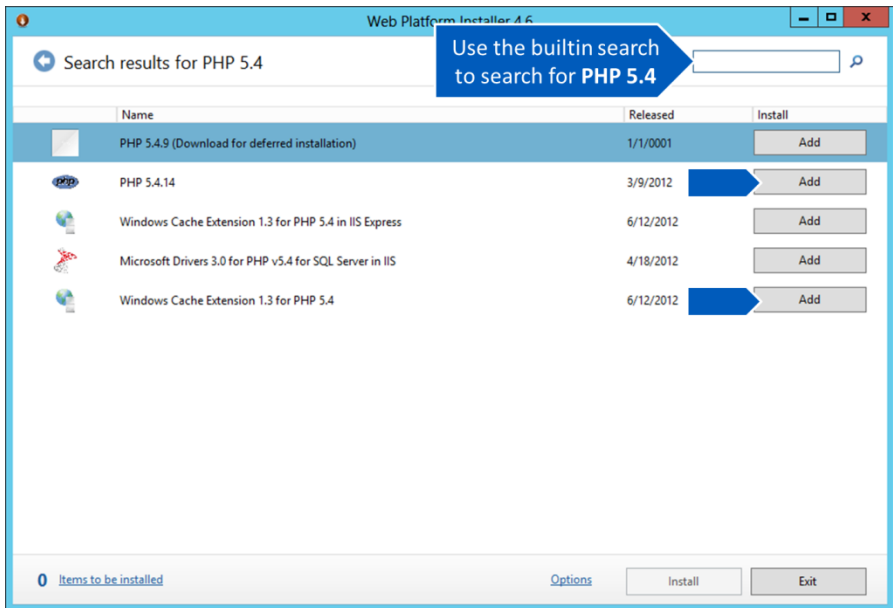
Note: If you are using the graphical **Roles and Feature Wizard** instead of PowerShell, select the **Web Server (IIS)** role and under **Web Server Role (IIS)** → **Role Services** enable the **Application Development** → **CGI** feature.

4.2.3 PHP

Installing PHP is greatly simplified by using Microsoft Web Platform Installer. Download the **WebPI Installer** from the following location:

<http://www.microsoft.com/web/downloads/platform.aspx>

Run the installer. After the installer has finished, use the built-in search box in the upper right corner and search for **PHP 5.4**. Then click the **Add** button for **PHP 5.4.14** and **Windows Cache Extension 1.3 for PHP 5.4**.



Finally, click the **Install** button. This will take care of downloading and installing the selected components and all their dependencies.

Note: The **Cache Extension** is not strictly necessary but noticeably speeds up the PeopleSync application, so its installation is strongly recommended.

You can also start the Web Platform Installer from within IIS Manager.

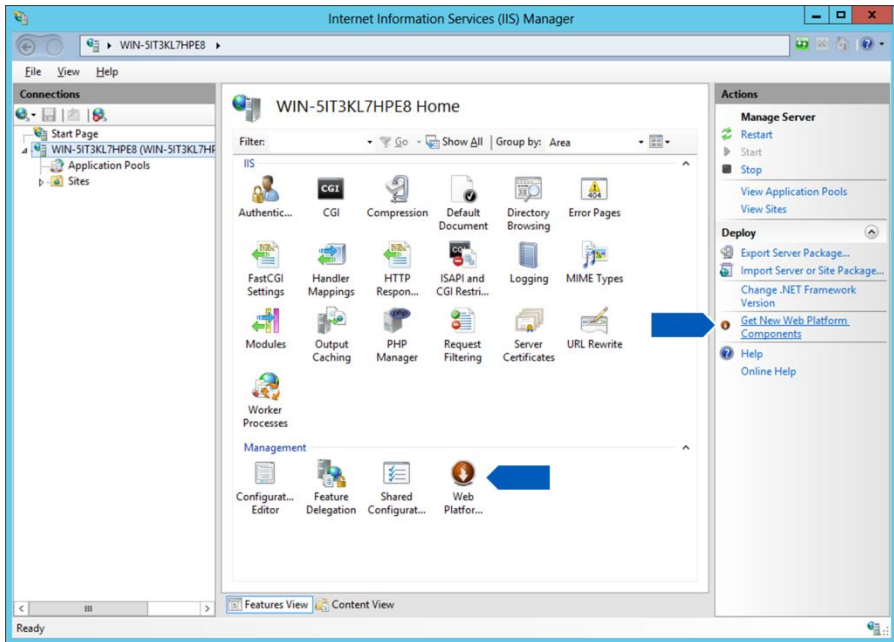


Figure 3: Running the Web Platform Installer

4.2.4 PHP Manager

PHP Manager is a tool to manage PHP on IIS servers. You can download it from the following location:

<http://phpmanager.codeplex.com/>

If during the installation it is detected that you are missing .NET 2.0 runtime support, you can either follow the instructions provided by the installer or run the following PowerShell command to get this dependency installed:

```
$ Add-WindowsFeature NET-Framework-Core
```

After the installation has finished, you can access PHP Manager from within Internet Information Services (IIS) Manager.

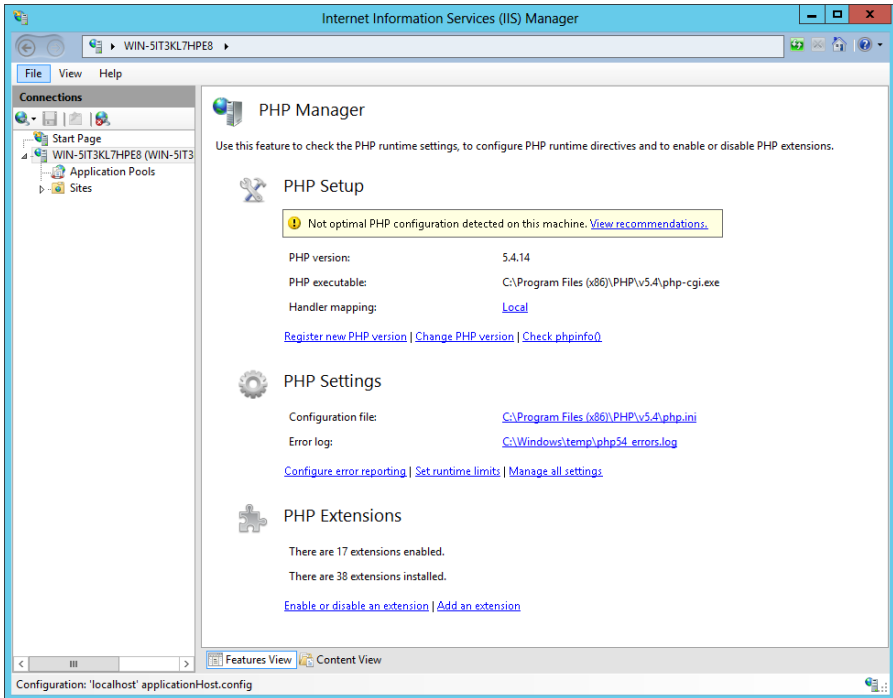


Figure 4: PHP Manager

4.2.5 Setting up PHP

With PHP Manager being installed, it is now simple to configure the PHP settings and enable the **php_ldap.dll** extension. Starting from the main view, go to “PHP Extensions” and click on “Enable or disable an extension”. This will open the following view:

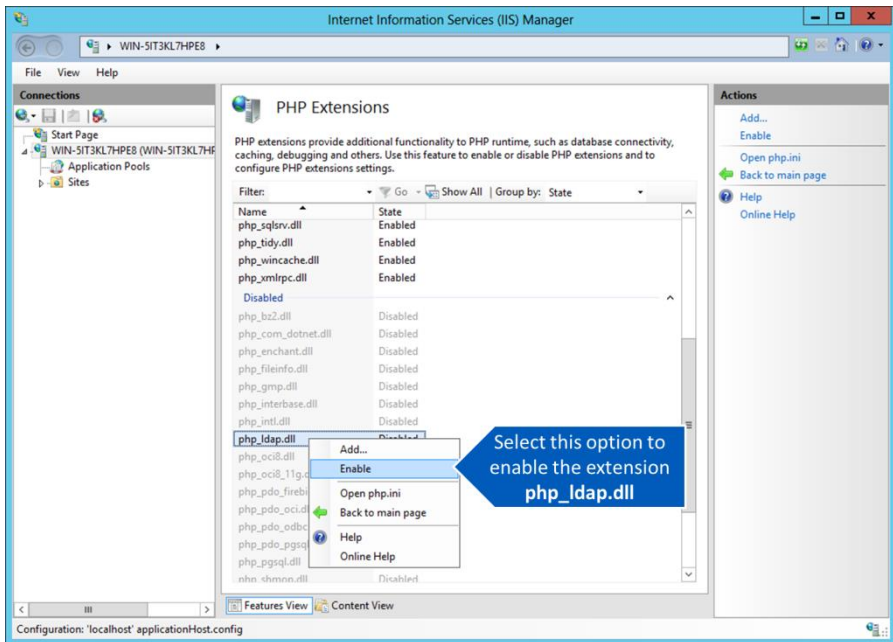


Figure 5: Enabling php_ldap in IIS

Scroll down to **php_ldap.dll** and enable it via the context menu. Please verify that the **php_sqlsrv.dll**, **php_openssl.dll** and **php_wincache.dll** extensions are also enabled.

Before the PeopleSync Frontend Server application can be deployed you need to make sure that Handler Mappings can be overridden. The PeopleSync site needs to be able to set custom options for the **PHP54_via_FastCGI** handler. The policy for this can be configured in IIS Manager under **Management** → **Feature Delegation** where **Handler Mappings** need to be set to **Read/Write**.

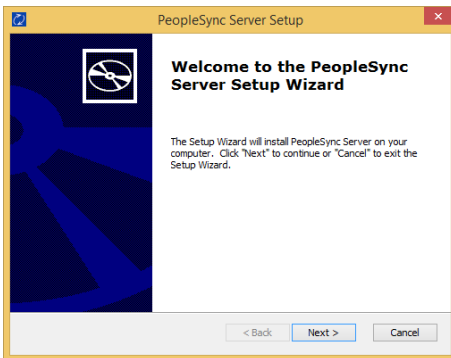
You can also set this with the following PowerShell command:

```
Set-WebConfiguration //System.webServer/handlers  
-metadata overrideMode -value Allow -PSPath IIS:/
```

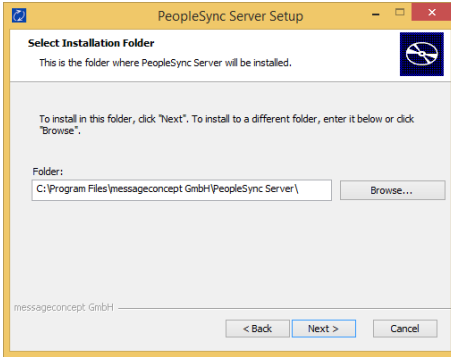
4.2.6 Deploying the Frontend Server

Now that everything is set up, the **PeopleSync Server Setup** can be run. It will create a dedicated site, deploy the web application and write a **server.ini** configuration with the database connection.

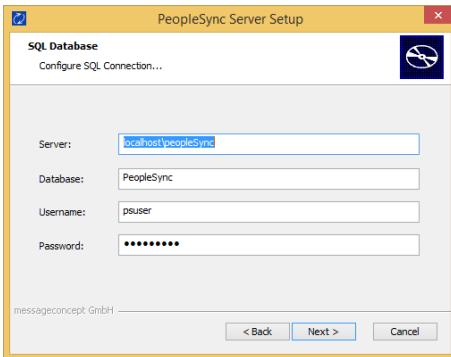
1. Start PeopleSync Server Setup.



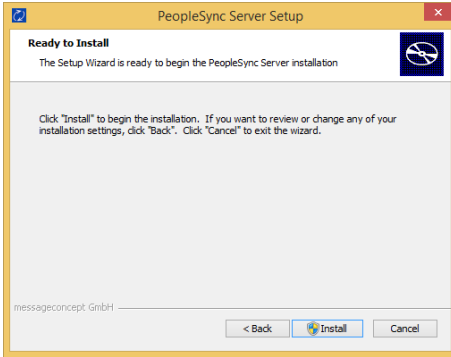
2. Select the installation folder.



3. Enter the SQL Server computer and instance name, database name, as well as the SQL Server login **psweb** and corresponding password you created in section 4.2.1



4. Start the PeopleSync Server installation.



After installation has finished, please proceed to the next section to configure the hostname and SSL encryption in IIS.

4.2.7 Configuring Hostname and SSL

The recommended practice for the website's URL is to use a dedicated hostname like <https://peoplesync.example.com>. Alternatively a dedicated port as in <https://example.com:9443> can be used.

CardDAV clients usually require SSL. Not every CardDAV client supports self-signed server certificates. Some clients require HTTPS 443. Therefore an SSL certificate signed by a public CA and the use of the default SSL port (443) is recommended.

Note: Since confidential data is transmitted between mobile device and PeopleSync Frontend, the use of SSL/TLS is strongly recommended.

4.3 Setting up the PeopleSync LDAP Directory (optional)

PeopleSync uses a Microsoft Active Directory Lightweight Directory Services (AD LDS) instance to provide contacts via LDAP. Messageconcept provides an MSI

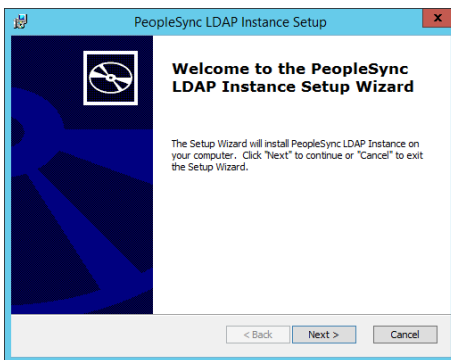
installer that will install and configure a PeopleSync AD LDS instance. In case an existing instance or an Active Directory shall be used, please contact messageconcept support for guidance.

The PeopleSync LDAP directory will use the default LDAP/LDAPS ports 389 and 636. Please make sure that these ports are not in use by any other LDAP directory on the same server (e.g. Active Directory domain controller role). The LDAP directory can be installed on a server running one of the PeopleSync components or on a server of its own.

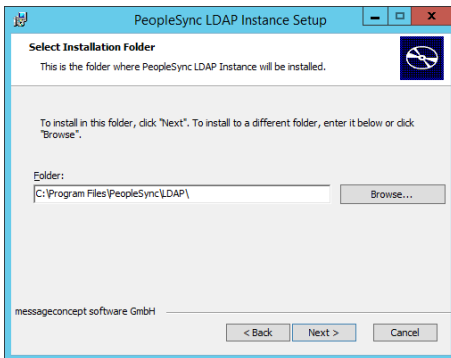
The PeopleSync LDAP directory will have two built-in accounts, an administrative account and an account with read-only permissions. The admin account psLDAP@PeopleSync.local is to be used by the PeopleSync service. The read-only account psRead@PeopleSync.local can be used by clients to search the directory.

To set up the LDAP directory, please follow these steps.

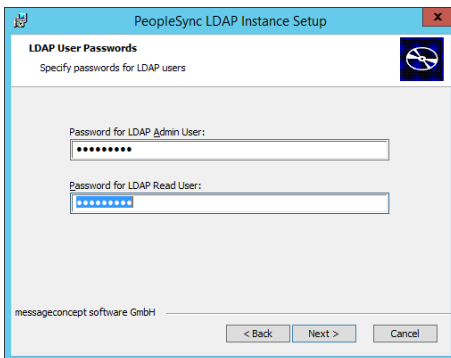
1. Log in to the server where the LDAP directory shall be installed with an account having administrator rights.
2. Run the PeopleSync LDAP Instance Setup MSI.



- Please select an installation directory. This is the location where AD LDS data files will reside:



- Please set passwords for the built-in PeopleSync LDAP accounts:



- Please wait for the installation to finish.

In order to use the LDAP directory with PeopleSync, additional configuration in the PeopleSync Console is required. Please see section **4.4.2 LDAP Settings in PeopleSync Console (optional)**.

4.4 Initial System Configuration

To finish the initial setup of PeopleSync, PeopleSync system settings, as well as licensing information need to be configured. Finally, the PeopleSync Agent service can be started.

4.4.1 System Settings in PeopleSync Console

1. Run PeopleSync Console.
2. Log in with the user **Administrator** and an empty password. You will then be required to set a new password for the user **Administrator**.
3. In the console, click on **System Settings** in the navigation window.
4. Fill in the mandatory settings for Domain Controller, Domain Name, Base DN, Public URL and Internal URL and click on the **Save** button.

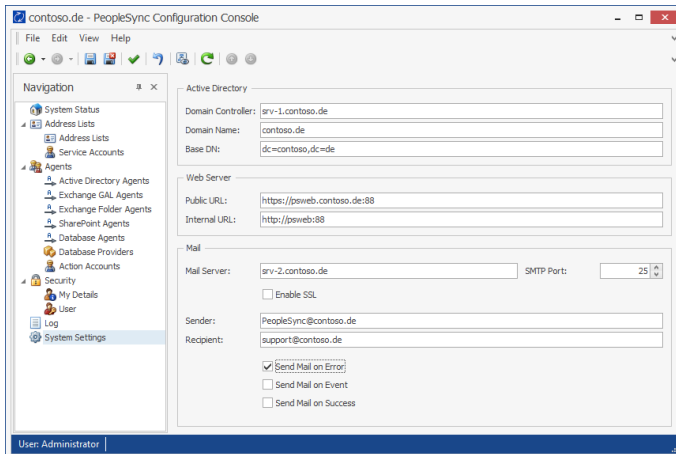


Figure 6: System Settings

Mandatory Settings

- **Domain Controller:** The IP address or DNS name of an Active Directory Global Catalog server. Note that the PeopleSync Frontend server will also access this server.
- **Domain Name:** The Active Directory Domain's DNS name (e.g. contoso.de)
- **Base DN:** The Active Directory Domain's distinguished Name (e.g. dc=contoso,dc=de).
See Appendix 8.1 Appendix
- **Determining an AD Domain's Distinguished Name**
- **Public URL:** The URL clients use to connect to the PeopleSync Frontend Server from the Internet (e.g. <https://peoplesync.contoso.com>).
- **Internal URL:** The URL PeopleSync Agent can use to connect to the PeopleSync Frontend Server via the internal network (e.g. <https://srv01.contoso.local>). Can be the same as the external URL.

Optional settings:

In addition to the mandatory settings listed above, it is possible to configure email alerting to notify administrators in case errors occur in PeopleSync. For email alerting, the following settings need to be configured:

- **Mail Server:** The DNS name or IP address of an SMTP server.
- **SMTP Port:** The SMTP server's TCP Port (e.g. 25).
- **Send Mail on Error:** Send mail only when an error occurs (recommended)
- **Send Mail on Event:** Send an email for every event logged to the PeopleSync database (only for debugging).

- **Send Mail on Success:** Send an email every time an agent successfully runs.

4.4.2 LDAP Settings in PeopleSync Console (optional)

If you want PeopleSync to provide contacts via LDAP, you need to configure the connection to the LDAP directory first. Please proceed as follows:

1. Run PeopleSync Console.
2. Log in with the user **Administrator**.
3. In the console, click on **System Settings** in the navigation window.
4. Enable the **Enable LDAP Address Lists** option.
5. Fill in the mandatory settings for **LDAP Server**, **LDAP Base DN**, **LDAP Username**, **LDAP Password**, **PeopleSync OU**, and click on the **Save** button.

The parameters must be set as follows:

- **Enable LDAP Address Lists:** Check to enable LDAP functionality.
- **LDAP Server:** The LDAP server's DNS name or IP address
- **LDAP Base DN:** The LDAP directory's base DN.

For the PeopleSync LDAP directory, please set to **DC=peoplesync,DC=local**.

- **LDAP Username:** A user with write access to the LDAP directory. This can either be a domain or LDAP user account. If you are using an LDAP account, enter either the distinguished name or – if configured – the user principal name (UPN).

For the PeopleSync LDAP directory, please set to **psLDAP@peoplesync.local**.

- **LDAP Password:** The LDAP user's password. Please note that except for the PeopleSync LDAP directory, password policies may apply and the user's password may expire at some time. Please make sure that the account's password will not expire (AD LDS attribute: **msDSUserDontExpirePassword**).

For the PeopleSync LDAP directory, please use the LDAP admin user password you set during installation of the PeopleSync LDAP directory.

- **PeopleSync OU:** The organizational unit where PeopleSync will create LDAP address lists and contacts. For the PeopleSync LDAP directory, please use **OU=Addresslists,DC=peoplesync,DC=local**.

4.4.3 License Key

Please copy the license keys you received into the following directory:

%ProgramFiles%\messageconcept GmbH\PeopleSync\Agent\Licensekeys

If you chose a different installation directory, please copy the license key into the **Agent\Licensekeys** directory in your installation folder.

Note: If you received a ZIP-file from your vendor, please unzip the file before copying the license key files (XML) to the **Agent\Licensekeys** directory.

4.4.4 Start the PeopleSync Agent Service

As a final step, the PeopleSync Agent service needs to be started.

1. In the Start Menu, run **Services**.
2. Select the service named **PeopleSync Agent**.
3. Click on **Start** button.

4.5 Updating an existing PeopleSync installation

Please follow the following procedure to apply an update or hotfix:

1. Set the startup type for the **PeopleSync Service** to **Disabled**.
2. Restart the system.
3. Run the installer and fill all fields like in the initial installation.

4. Click **OK** in the **Configuration Required** dialog. A new configuration is not needed.
5. Set the startup type for the **PeopleSync Service** back to **Automatic**.

5 Configuration

For the configuration of PeopleSync a dedicated console application is provided.

5.1 Object Management

The PeopleSync Configuration consists of different objects, such as Address Lists, Agents and User Accounts. All object types are managed in a similar way. Therefore we describe the management of objects on a general basis in this chapter.

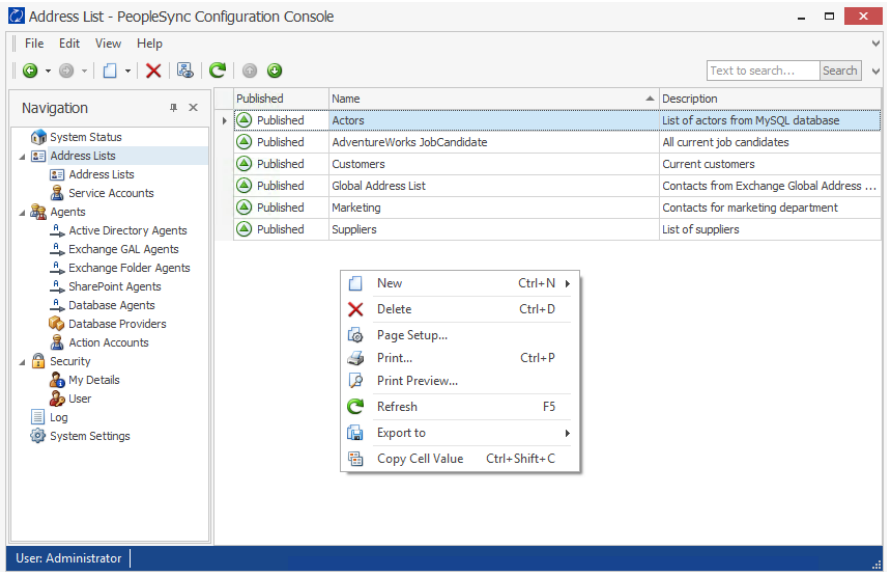


Figure 7: Object Management

All object management functions can be found in the menu, the symbol bar and the context menu. The console also offers shortcut keys for most functions.

5.1.1 Creation of new Objects

To create a new object (e.g. Address List) in the PeopleSync console, navigate to the corresponding menu item in the navigation bar. Use the **File New** command in the menu, the **New** symbol in the icon bar, the **New** command in the context menu or the keystroke **CTRL+N**.

5.1.2 Deletion of an Object

To delete an object in the PeopleSync console, highlight the object in the list. Use the **File Delete** command in the menu, the **Delete** symbol in the icon bar, the **Delete** command in the context menu or the keystroke **CTRL+D**.

5.1.3 Documentation of your Configuration

You are able to print an object for documentation purposes. To print an object in the PeopleSync console, highlight the object in the list. Use the **File Print** command in the menu, the **Print** command in the context menu or the keystroke **CTRL+P**. You are able to change the **Page Setup** or to get a **Print Preview** in the menu and the context menu.

If you would like to export object information for documentation purpose on a file base, you are also able to use the **Export to** function in the menu or context menu.

5.2 System Status

In the **System Status** dashboard, the current status of PeopleSync can be seen:

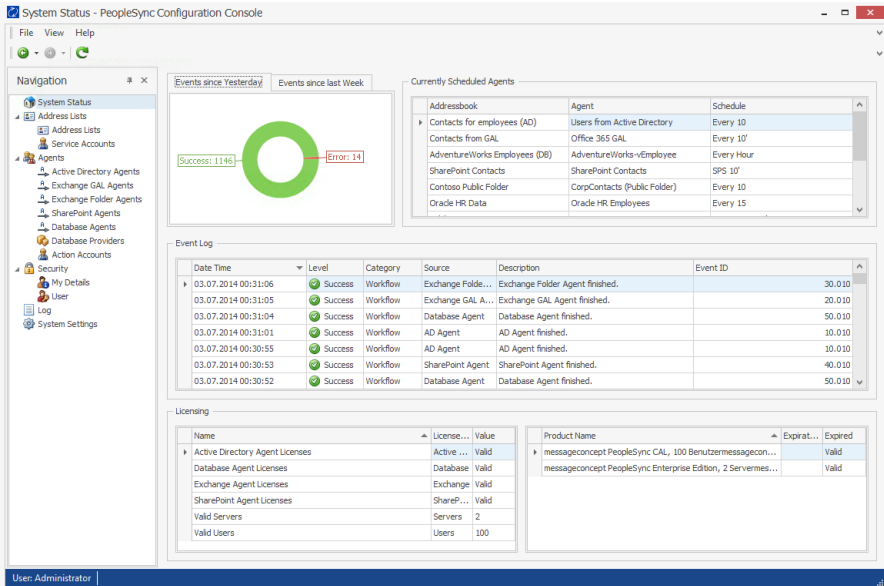


Figure 8: System Status

The console shows error messages from the application Log, as well as licensing information.

5.3 Address Lists

To manage Address Lists in the PeopleSync console, navigate to the **Address Lists** menu item in the navigation bar.

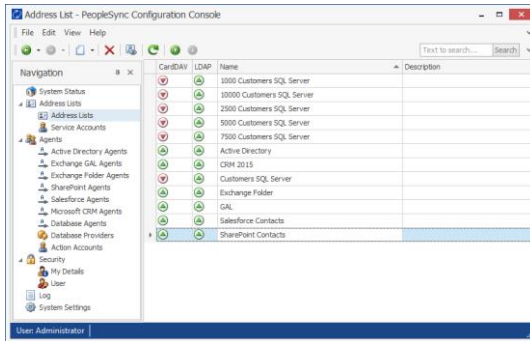


Figure 9: Address Lists

5.3.1 Service Accounts

For the usage of an Address List in PeopleSync, you will need a Service Account first. The Service Account is used to read from and write to the Address List in the database.

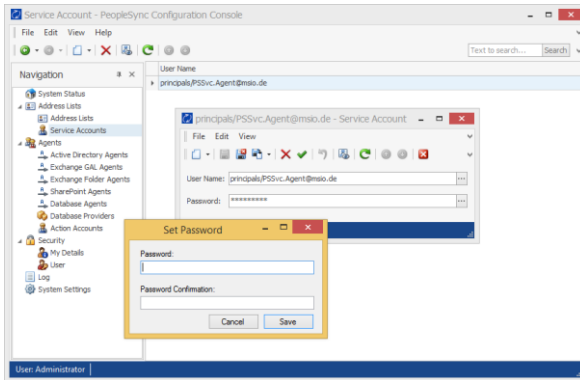


Figure 10: Service Accounts

The **User Name** is an Active Directory user that can be chosen with the [...] button. To enter the **Password**, click on the [...] button. The password will be encrypted before it is stored in the database.

5.3.2 Address Lists

An **Address List** is a logical container that holds contacts of a certain type. Every Agent needs a dedicated Address List to store its data. It is also possible to create an Address List that is not serviced by an agent. In this case, users can be given **modify** permissions so that they can edit and share contacts.

To create Address Lists in the PeopleSync console, navigate to the corresponding menu item in the navigation bar.

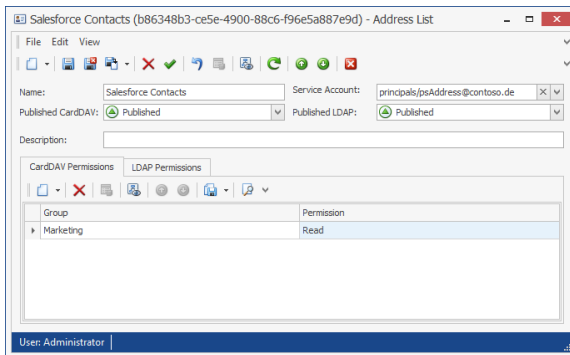


Figure 11: Address List

Each Address List has two text properties. The **Name** is the name of an Address List. The name will be shown on the mobile device. Therefore it is recommended to choose a name that has meaning to users. The **Description** is used for administrative purposes only. Users will not see the description.

You need to set a **Service Account**. It is used by PeopleSync Agents to access the address list. The **Service Account** always has **Modify** permissions.

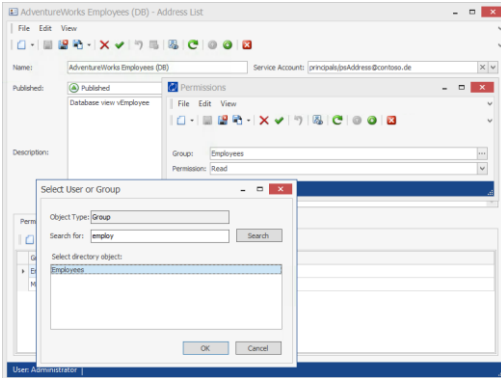


Figure 12: Selecting a Service Account from Active Directory

Address Lists can be published to the PeopleSync CardDAV server, as well as to an LDAP directory. Using the **Published CardDAV** and **Published LDAP** properties, you can control if the Address List is visible by clients.

If **Published CardDAV** is set to “Not Published”, the address list will no longer be shown in the list of available address lists on the client. However, clients that already have subscribed to this address list will in general continue to see the address list.

In contrast, if **Published LDAP** is set to “Not Published”, the Address List does not exist in the LDAP directory. If the Address List was previously published in LDAP, it will be deleted from LDAP.

In the **CardDAV Permissions** and **LDAP Permissions** sections you can maintain the access control list for an Address List. You are able to grant permissions to one or several Active Directory or LDAP groups. For LDAP, only read permission can be assigned, whereas for CardDAV, the following permission levels can be granted:

- **Read**

- **Write**
- **Modify**

Active Directory groups can be managed in Microsoft's Active Directory Users and Computers, PowerShell, or a third-party identity management solution.

LDAP groups can be managed through **ADSI Edit**, which is part of the Windows server operating system, or a third-party solution.

5.4.1 User Management

In **Security > Users** , the following actions can be performed:

- Create administrative user
- Manage administrative users
- Activate / deactivate administrative users
- Set user passwords
- Assign administrative roles

5.4.2 Roles

The following built-in roles can be assigned to administrative users in the **Security > Users** section:

- **Administrators:** Full permissions
- **Address Lists:** Create, delete, and manage address lists. Manage Address list permissions.
- **Agents:** Create, delete, and manage PeopleSync Agents
- **Monitoring:** View the PeopleSync log
- **My Details:** Use the My Details tab
- **Security Administrators:** Manage users and assign roles
- **Users:** Membership in all roles, except Administrators and Security Administrators.

5.4.3 My Details

The **Security > My Details** tab shows information about the currently logged-in user. Users can change their own password and see the roles they are a member of.

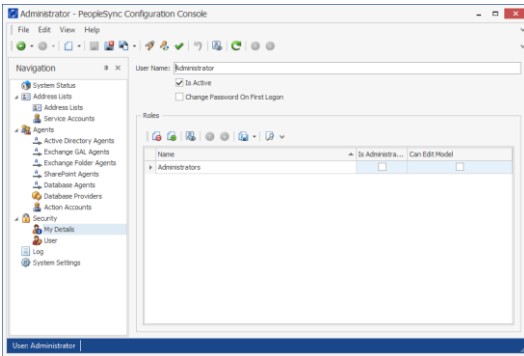


Figure 14: My Details

5.5 Log

Information related to agent execution and licensing issues will be logged in the PeopleSync database and displayed in PeopleSync Console's **Log** section.

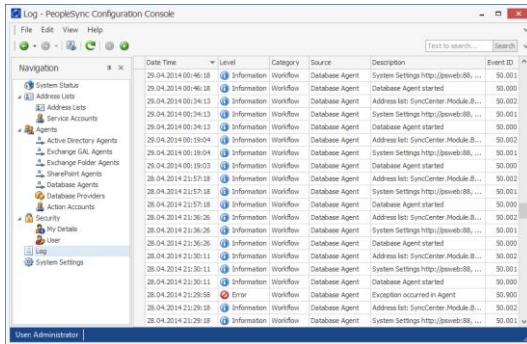


Figure 15: PeopleSync Log

Entries can have the following severity levels:

- Success: Agent has finished successfully
- Error: An error has occurred
- Information: Informational events providing further detail for agent execution.

5.6 System Settings

In the System Settings dialog, essential settings for PeopleSync can be configured.

Mandatory Settings

- **Domain Controller:** The IP address or DNS name of an Active Directory Global Catalog server. Note that the PeopleSync Frontend server will also access this server.
- **Domain Name:** The Active Directory Domain's DNS name (e.g. contoso.de)
- **Base DN:** The Active Directory Domain's distinguished Name (e.g. dc=contoso,dc=de). See Appendix 8.1 Determining an AD Domain's Distinguished Name.
- **Public URL:** The URL clients use to connect to the PeopleSync Frontend Server from the Internet (e.g. <https://peoplesync.contoso.com>).
- **Internal URL:** The URL PeopleSync Agent can use to connect to the PeopleSync Frontend Server via the internal network (e.g. <https://srv01.contoso.local>). It can be the same as the external URL.

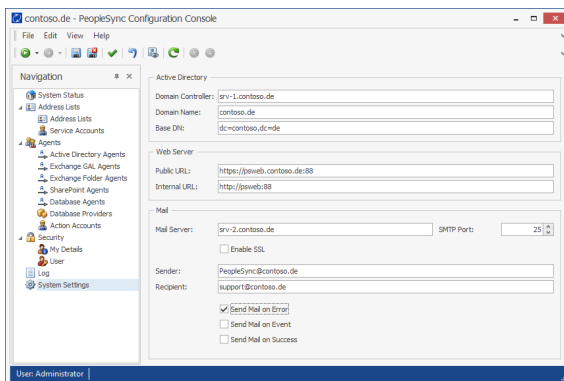


Figure 16: System Settings

Optional settings:

In addition to the mandatory settings listed above, it is possible to configure email alerting to notify administrators in case errors occur in PeopleSync. For email alerting, the following settings need to be configured:

- **Mail Server:** The DNS name or IP address of an SMTP server.
- **SMTP Port:** The SMTP server's TCP Port (e.g. 25).
- **Send Mail on Error:** Send mail only when an error occurs (recommended)
- **Send Mail on Event:** Send an email for every event logged to the PeopleSync database (only for debugging).
- **Send Mail on Success:** Send an email every time an agent successfully runs.

Optional settings for LDAP functionality:

If you want PeopleSync to publish Address Lists to an LDAP directory, you must configure the following parameters:

- **Enable LDAP Address Lists:** Check to enable LDAP functionality.
- **LDAP Server:** The LDAP server's DNS name or IP address
- **LDAP Base DN:** The LDAP directory's base DN.

For the PeopleSync LDAP directory, please set to **DC=peoplesync,DC=local**.

- **LDAP Username:** A user with write access to the LDAP directory. This can either be a domain or LDAP user account. If you are using an LDAP account, enter either the distinguished name or – if configured – the user principal name (UPN).

For the PeopleSync LDAP directory, please set to **psLDAP@peoplesync.local**.

- **LDAP Password:** The LDAP user's password. Please note that except for the PeopleSync LDAP directory, password policies may apply and the user's password may expire at some time. Please make sure that the account's password will not expire (AD LDS attribute: **msDSUserDontExpirePassword**). For the PeopleSync LDAP directory, please use LDAP admin user password you set during installation of the PeopleSync LDAP directory.
- **PeopleSync OU:** The organizational unit where PeopleSync will create LDAP address lists and contacts. For the PeopleSync LDAP directory, please use **OU=Addresslists,DC=peoplesync,DC=local**.

5.7 Frontend Server Configuration

During the installation, the installer will create a **server.ini** configuration file in the PeopleSync website root directory. This file is used to configure the database access and looks like this:

```
[server]
db_type = sqlsrv
db_host = 127.0.0.1
db_name = peoplesync
db_login = peoplesync
db_pass = "secret"
```

All further settings are stored in the database itself. This includes ACLs, user account information and the actual data for the contacts. To manage those settings in the database, a dedicated tool is available called PeopleSync Console.

Note: The hosting of the database on a dedicated server is supported. The server name or IP address can be altered in the file **server.ini**.

6 Agents

Agents are one-way connectors that can be scheduled to import contacts from a variety of source systems, such as Active Directory, SharePoint, Exchange and others into a PeopleSync address list. An address list will always reflect the state of the source system. There is no way to transfer data back to the source system. Changes made to an address list by parties other than the agent will be overwritten during the agent's next run.

Agents always import data from a single source system to a single address list. An agent cannot import data into an address list that is already served by another agent.

The PeopleSync Service runs the agents at the times defined in their schedules. Only enabled agents targeting an enabled address list are executed.

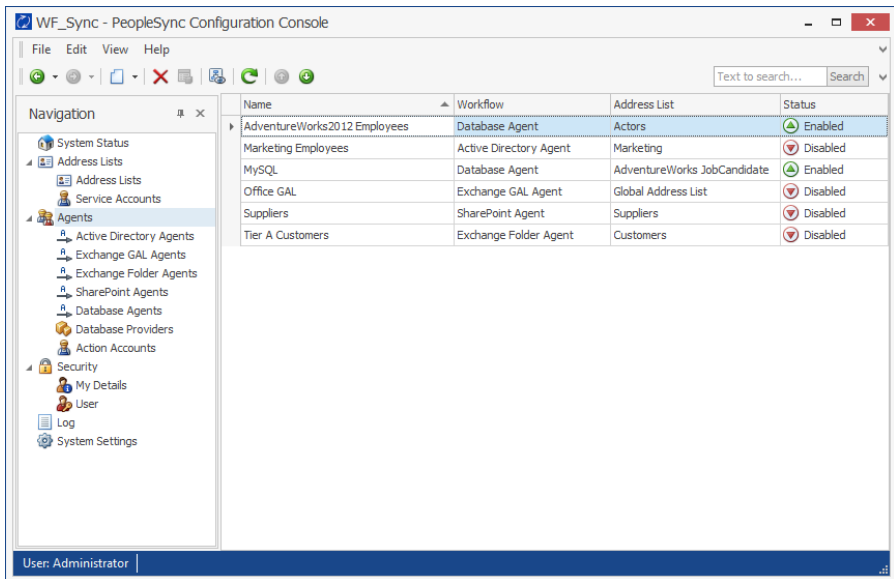


Figure 17: List of Agents

6.1 Agent Control and Sync Schedules

All Agents share a set of generic properties to control and schedule each Agent.

6.1.1 Agent Control

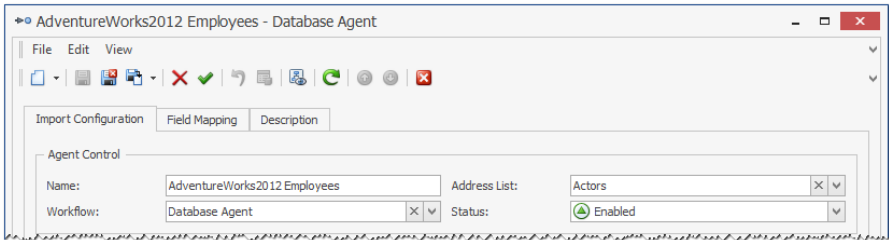


Figure 18: Agent Control

All Agents have the following four properties for agent control:

- The **Name** of an Agent describes the purpose of the agent.
- You need to select an existing **Address List** for each Agent. The Address List will be used to store the contact data, retrieved by the Agent.
- You can select a **Workflow** for the Agent. In most cases, only one workflow will be available.
- The **Status** of each Agent can be set to **Enabled** or **Disabled**. Only enabled Agents will retrieve data according to the schedule.

6.1.2 Sync Schedules

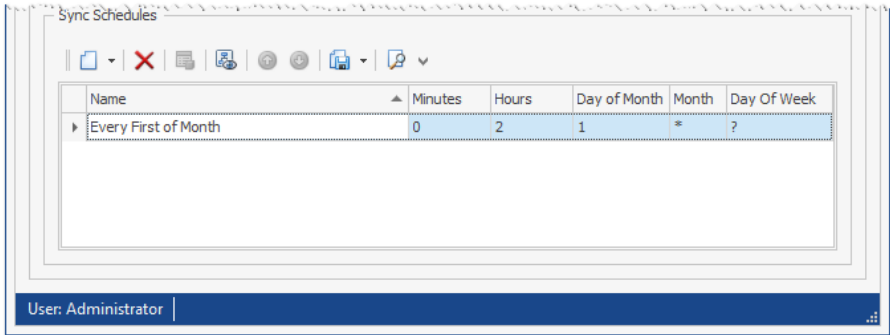


Figure 19: Sync Schedules Overview

You can configure one or more individual **Sync Schedules** for each Agent. A Sync Schedule in PeopleSync uses CRON-style syntax:

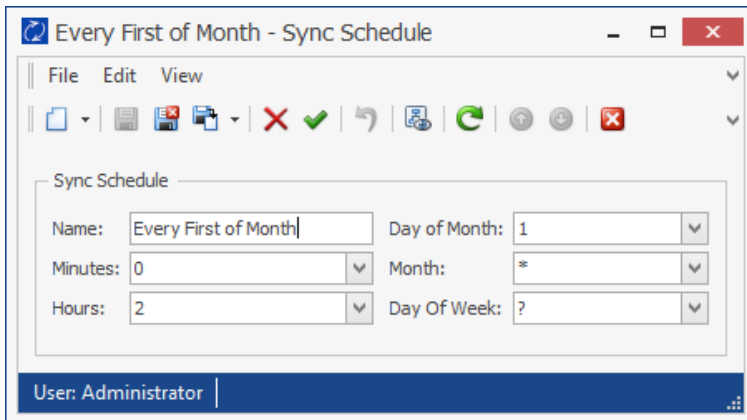


Figure 20: Sync Schedule Configuration

Each **Sync Schedule** has a unique **Name** for documentation purposes.

The **Sync Schedule** must be defined using the following CRON expressions:

Field name	Allowed Values	Allowed Special Characters
Minutes	0–59	,
Hours	0–23	, *
Month	1–12	, *
Day of Month	1–31	, * ?
Day of Week	0–6	, * ?

The following special characters are used as values:

Character	Description
,	Commas are used to separate items of a list. For example, using 8,12,16 in the field hour means hours 8, 12 and 16 of a day.
*	The asterisk indicates that the expression matches for all values of the field. E.g., using an asterisk in the field month indicates every month.
?	The question mark is used instead of * for leaving either day-of-month or day-of-week blank.

CRON expressions beyond the tables above are not supported.

6.2 Action Account

Action accounts store credentials for use in multiple agents. For example, if multiple Active Directory agents exist and both can run with the same credentials, they can use a single action account. Should the credentials change, they can be edited at a single point.

If possible, the user name in the action account should be specified as a user principle name (UPN).

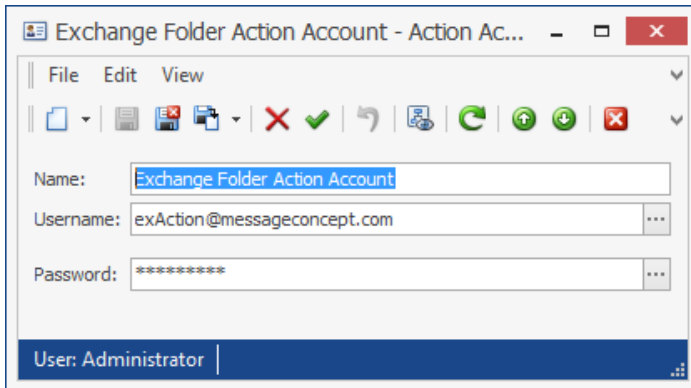


Figure 21: Action Account

6.3 Active Directory Agent ■ ■ ■

The **Active Directory Agent** imports contact data from Active Directory users and contacts. It has a fixed mapping of Active Directory to vCard fields and imports the photo contained in the user objects' **thumbnailPhoto** attribute. It always needs to connect to a domain controller that is a global catalog server.

The agent retrieves all contacts or users found in the subtree of a base DN (i.e. an organizational unit or the domain root), that match the criteria defined by an object filter. To connect to the directory, an account with **read** permission is needed.

Figure 22: Active Directory Agent Configuration shows an Active Directory Agent that imports all "Person" objects in and below the "Marketing" organizational unit. It does not import initials and uses an account named "Active Directory Action Account" to access the directory.

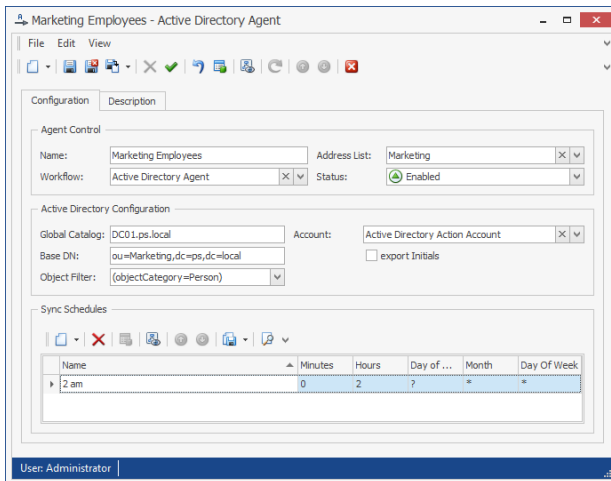


Figure 22: Active Directory Agent Configuration

6.3.1 Requirements

The following requirements must be met by the source system:

- Microsoft Active Directory based on Windows Server 2008 R2 and higher.

6.3.2 Configuration

The **Active Directory Agent** uses the following configuration parameters:

Global Catalog: The DNS name or IP address of an active Directory global catalog server.

Base DN: The distinguished name of a base container or organizational unit. Matching objects will be retrieved from this container and all child containers. For example, the organizational unit "Marketing" located directly below the root of the domain "ps.local" needs to be specified as "ou=Marketing,dc=ps,dc=local". Distinguished names can be copied from the "attribute editor" tab in Active Directory Users and Computers. This tab only shows when "Advanced Features" is enabled in the "View" menu.

Object Filter: The object filter defines which Active Directory objects shall be imported into PeopleSync. For example, the Filter " (objectCategory=Person)" makes sure that only objects of type "Person" – i.e. users and contacts are imported into PeopleSync.

The object filter supports the following classes:

- organizationalPerson
- contact
- user
- person (If object is also organizationalPerson)

The following object filters are provided for ease of use:

- **(objectCategory=Person)**
All objects of type Person – i.e. users and contacts
- **(&(|(telephoneNumber=*)(mail=*)))(objectCategory=Person))**
All objects of type Person, such as users and contacts, provided they have a telephone number and email address.
- **(&(!(msExchHideFromAddressLists=TRUE))(|(telephoneNumber=*)(mail=*)))(objectCategory=Person))**
All objects of type Person, such as users and contacts, provided they have a telephone number and email address and are members of the Exchange Global Address List.

For an introduction on how to create LDAP filters, please refer to the documentation on Microsoft TechNet³.

Account: An account that is used to read data from Active Directory and has at least read permission in Active Directory.

Export Initials: If checked, the "Initials" field will be imported.

6.3.3 Field Mapping

The mapping of Active Directory properties to vCard fields can be found in Appendix 8.2 Active Directory Agent – Field Mapping

³ [http://technet.microsoft.com/en-us/library/aa996205\(v=exchg.65\).aspx](http://technet.microsoft.com/en-us/library/aa996205(v=exchg.65).aspx)

6.4 Exchange GAL Agent

The **Exchange GAL Agent** imports contact data from the Exchange Server global address list to PeopleSync. It has a fixed mapping of Active Directory to vCard fields.

The agent uses a remote PowerShell connection to an Exchange Server to retrieve users and contacts that meet the criteria specified by a filter.

It can be used in scenarios involving a hosted Microsoft Exchange solution (e.g. Office 365 Exchange Online), where Exchange Server can be queried by remote PowerShell, but the hosted Active Directory is inaccessible from client side.

Note: PowerShell 2.0 must be installed. Execution policy must be set to RemoteSigned4. This is configured during setup. The agent will malfunction in case the setting is changed to a level other than "RemoteSigned" or "Unrestricted".

Figure 23: Exchange GAL Agent Configuration shows an example configuration where contacts are loaded from a Microsoft Office 365 Exchange Online tenant. The PowerShell Server URL points to Office 365 and an account with permission to execute the "get-user" and "get-contact" has been specified. In this case, basic authentication has been chosen as authentication method. The filters only allow for users other than the DiscoveryMailbox and contacts with a display name.

Note: If you are using Exchange Server in an on premise installation, we recommend to use the Active Directory Agent to fetch the Exchange GAL.

⁴ <http://technet.microsoft.com/en-us/library/ee176961.aspx>

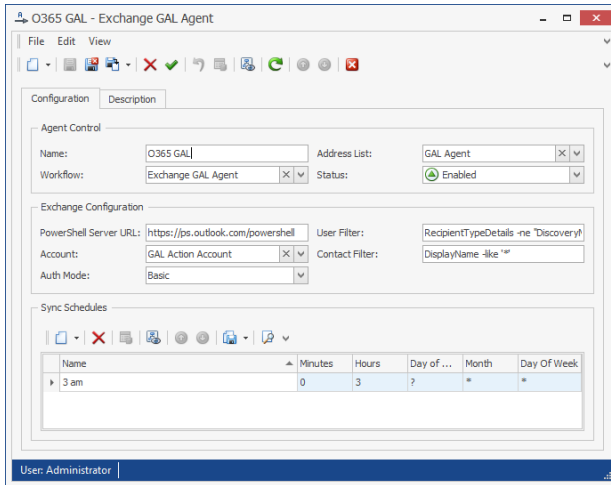


Figure 23: Exchange GAL Agent Configuration

6.4.1 Requirements

The following requirements must be met by the source system:

- Microsoft Office 365 Exchange Online OR
- Microsoft Exchange Server 2010 and higher
- Remote Exchange Management Shell

6.4.2 Configuration

The **Exchange GAL Agent** uses the following configuration parameters:

PowerShell Server URL: The remote PowerShell connection URI to the Exchange Server (Office 365: <https://ps.outlook.com/powershell>).

Account: An account that has permission to connect via remote PowerShell and execute the "get-user" and "get-contact" commands.

Auth Mode: The authentication method used to authenticate the user's credentials. Supported methods are:

- **BASIC:** Basic authentication. Used for Office 365, among others.
- **KERBEROS:** Kerberos authentication is being used.
- **NEGOTIATE:** Either Kerberos or NT LAN Manager (NTLM) is used. Domain accounts are authenticated via Kerberos, while for local computer accounts, NTLM is used.

User and Contact Filter: The filters define which users or contacts are loaded from the Exchange GAL. They use PowerShell-style Filter syntax. For a list of filterable properties, please refer to section 8.

The default user filter "RecipientTypeDetails -ne 'DiscoveryMailbox'" excludes the DiscoveryMailbox user, while the default contact filter "DisplayName -like '*'" excludes all contacts with an empty display name.

6.4.3 Field Mapping

The Exchange GAL Agent uses the same field mapping as the Active Directory Agent (see Appendix 8.2 Active Directory Agent – Field Mapping).

6.4.4 Choosing between AD Agent and Exchange GAL Agent

The Active Directory Agent and the Exchange GAL Agent are both able to fetch the GAL content from Active Directory. The result will be almost the same.

In the case of an on premise Exchange Server installation, we usually recommend the Active Directory Agent. If you are using Office 365 Exchange Online, the Exchange GAL Agent is the only choice.

6.5 Exchange Folder Agent ■ ■ ■

The **Exchange Folder Agent** imports contact data from a Microsoft Exchange Server public folder or a folder inside a mailbox into an address list. It has a fixed mapping of contact to vCard fields. It can import the photo contained in the Exchange contact.

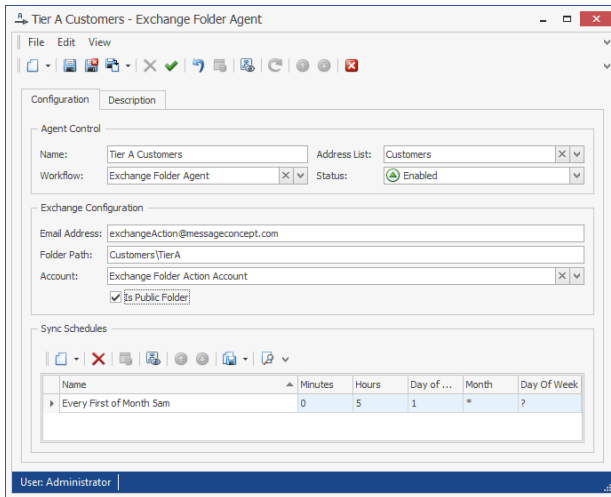


Figure 24: Exchange Folder Agent Configuration

The agent connects to Microsoft Exchange Server via Exchange Web Services (EWS). As it uses Exchange Autodiscover, only an email address needs to be specified in the agent’s configuration and the agent will determine the correct Exchange Server by itself.

Figure 24: Exchange Folder Agent Configuration shows a sample configuration. The **email address** “exchangeAction@messageconcept.com” is used to automatically determine the Exchange Server to connect to. The **action account**

named “Exchange Folder Action Account” is being used. The action account’s user name would be the **windows login name** (more specifically: **user principal name**) associated with the mailbox “exchangeAction@messageconcept.com” – i.e. “exchangeAction@messageconcept.com”. All contacts found in the public folder “Customers\TierA” are loaded into a PeopleSync address list. The checked **Is Public Folder** checkbox signals to the agent that the folder is located in the public folder hierarchy and not the user’s mailbox.

6.5.1 Requirements

The following requirements must be met by the source system:

- Microsoft Office 365 Exchange Online OR
- Microsoft Exchange Server 2010 and higher
- Exchange Autodiscover
- Exchange Web Services

6.5.2 Configuration

The **Exchange Folder Agent** uses the following configuration parameters:

Email Address: The email address of an Exchange mailbox. This email address is used to automatically configure the connection to Exchange Server (Exchange Autodiscover). The folder specified in **Folder Path** must be located in this mailbox, in case the **Is Public Folder** option is not selected.

Folder Path: The path to a contacts folder inside a mailbox or a public folder hierarchy. It uses Windows directory-style syntax. Subfolders are separated by “\”. Examples: Contacts, Sales\Contacts\VIP

Account: The credentials of the user account owning the mailbox specified in **Email Address**.

Is Public Folder: If the folder specified in **Folder Path** is a public folder, this checkbox must be checked. If the folder is located inside the mailbox specified in **Email Address**, it must be unchecked.

6.5.3 Field mapping

The **Exchange Folder Agent** uses the field mapping described in Appendix 8.4 Exchange Folders Agent – Field Mapping.

6.6 SharePoint Agent

The **SharePoint Agent** imports contacts from a list located on a SharePoint Server into an address list. The agent uses a default mapping of list fields to vCard fields, but a custom mapping can also be configured.

Figure 25: SharePoint Agent Configuration shows a sample configuration of the SharePoint agent. The agent will connect to the SharePoint web site <http://intranet.messageconcept.com> and fetch all contacts from the list named "Suppliers". No custom field mapping is defined; instead the default mapping is being used. The credentials used for the connection are stored in the action account named "SharePoint Action Account".

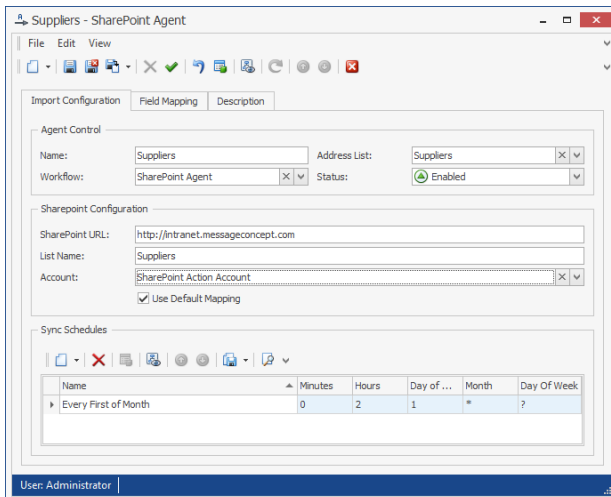


Figure 25: SharePoint Agent Configuration

6.6.1 Requirements

The following requirements must be met by the source system:

- Microsoft Office 365 SharePoint Online OR
- Microsoft SharePoint 2010 and higher

6.6.2 Configuration

The **SharePoint Agent** uses the following configuration parameters:

SharePoint URL: The SharePoint Site's base URL, not the URL to the list directly.

Example: <http://intranet.msio.de>, <https://extranet.msio.de>

List Name: The name of the List. Example: "Clients"

Account: An account that has the right to view the content of the list.

Use Default Mapping: If checked, the default mapping specified in Appendix 8.5 SharePoint Agent – Field Mapping will be used. If unchecked, a custom field mapping must be defined in the **Field Mapping** tab.

Field Mapping (Tab): In the **Field Mapping** tab (see Figure 26: SharePoint Agent Field Mapping), a custom mapping of SharePoint list fields to vCard fields can be specified. The field mapping shows the names of the vCard fields as field names. The corresponding name of the SharePoint list field must be entered into the text box next to the field. For example, to map the SharePoint field "JobTitle" to the "Title" field in the vCard, it needs to be entered into the text box next to the "Title" caption.

If the option **Use Default Mapping** is checked, the **Field Mapping** tab should not be configured.

Suppliers - SharePoint Agent

File Edit View

Import Configuration Field Mapping Description

Person

Last Name: Title

First Name: FirstName

Name: FullName

Department: ol_Department

Company: Company

Manager: ManagersName

Initials: Initials

Title: JobTitle

Notes: Comments

Telephone + Fax

Phone: WorkPhone

Other Phone: OtherNumber

Home Phone: HomePhone

Other Home Phone: HomeZlumber

Mobile Phone: CellPhone

Fax: WorkFax

Other Fax: OtherFaxNumber

Pager: PagerNumber

Telephone Assistant: AssistantNumber

Address

Street Address: WorkAddress

City: WorkCity

State or Province: WorkState

Postal Code: WorkZip

Country or Region: WorkCountry

Internet

Email Address: Email

Web Page: Webpage

User: Administrator

Figure 26: SharePoint Agent Field Mapping

6.6.3 Field Mapping

The default field mapping for the SharePoint Agent is described in Appendix 8.5
SharePoint Agent – Field Mapping.

6.7 Database Agent ■

The **Database Agent** imports contacts from a database table. The agent can connect to any relational database, provided the ADO.NET database provider is installed on the system running the agent, an appropriate connection string can be specified and the database can be queried with a SQL SELECT command. The agent does not have a fixed field mapping. It can import a photo, provided it is specified as a file name having an absolute or relative path, or as a URL.

AdventureWorks Job Candidate - Database Agent

File Edit View

Import Configuration Field Mapping Description

Agent Control

Name: AdventureWorks Job Candidate Address List: AdventureWorks JobCandidate X

Workflow: Database Agent X Status: Enabled

Database Connection

Connection Template: Default SQL Server Integrated Security X

Server Name: .\peopleSync

Account: X

SQL Query

Database Name: AdventureWorks2012

Table Name: [HumanResources].[vJobCandidate]

Where Clause:

Sync Schedules

Name	Minutes	Hours	Day of ...	Month	Day Of Week
9pm	0	21	?	*	*

User: Administrator

Figure 27: Database Agent Configuration

Figure 27: Database Agent Configuration shows a sample Database Agent configuration. Here, contacts are loaded from the table "[HumanResources].[vJobCandidate]" located in the SQL Server Database "AdventureWorks2012". The connection string template "Default SQL Server Integrated Authentication" is being used, which means that no action account needs to be entered, as the account running the People Sync service is used to connect to the database. In this case, all rows of the "vJobCandidate" Table are loaded, as no filter has been defined.

6.7.1 Requirements

The following databases are officially supported:

- SQL Server 2008 R2 and newer
- Oracle 11g and newer
- MySQL 5.6 and newer

Other database providers can be used, but are not officially supported.

For Oracle 11g and newer, the Oracle Data Provider for .NET (ODP.NET) needs to be installed on the machine the PeopleSync Agent runs on, otherwise the agent will not work.

6.7.2 Configuration

The **Database Agent** uses the following configuration parameters:

Connection Template: Select an appropriate connection template for the type of connection that is being configured. The connection template contains a connection string and a corresponding database provider. PeopleSync ships with several pre-defined connection templates. To define custom connection templates, please refer to section 6.7.4 Custom

Server Name: The server's DNS name or IP address. In case of SQL Server, if an instance other than the default instance is being used, the server name needs to be specified as {Server Name}\{Instance Name}.

Account: The account used to log on to the database, if credentials other than those of the account running the PeopleSync Service are needed.

Database Name: The name of the database.

Table Name: The name of the table or view.

Where Clause: If empty, all rows of the table or view will be returned. Use SQL syntax to filter for specific rows. Example: "city in ('Cologne', 'Munich')

Field Mapping (Tab): In the **Field Mapping** tab, a custom mapping of database fields to vCard fields must be specified. The field mapping shows the names of the vCard fields as field names. The corresponding name of the database field must be entered into the text box next to the field. For example, to map the database field "JobTitle" to the "Title" field in the vCard, it needs to be entered into the text box next to the "Title" caption.

If a photo is to be loaded and the photo name is specified with a relative path, the base path needs to be entered into the **Image Folder** field. Note that this is not a database field and therefore the value should not be enclosed by quotes.

6.7.3 Field Mapping

The database agent does not have a default field mapping. The user must specify a custom field mapping.

6.7.4 Custom Database Providers

Custom database providers can be defined in the **Database Providers** section. A custom database provider consists of a Display Name, Invariant Name and a Connection String Template. Custom Database Providers can be used to define a connection using a database provider that is not officially supported or to accommodate for a special connection string.

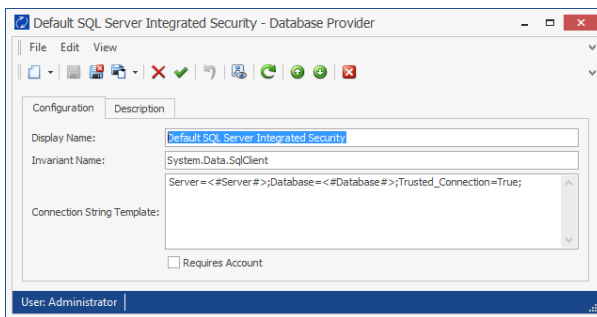


Figure 28: Custom Database Provider

Invariant Name: The Invariant Name can be used programmatically to refer to the data provider. It can be found in the DbProviderFactories section in %windir%\Microsoft.NET\Framework64\v2.0.50727\CONFIG\machine.config.

Connection String Template: The connection string template contains a connection string with placeholders that will be filled when the template is used in an agent. The following placeholders may be used in a connection template:

- **#Server#** The DNS name or IP address of the database server.
- **#Database#** The database name
- **#User#** The user name required to connect to the database
- **#Password#** The password required to connect to the database.

An example of a connection string template can be seen in Figure 28: Custom Database Provider.

Requires Account: This setting should be checked if the **#User#** and **#Password#** placeholders have been used in the connection string. This activates a validity check during agent configuration and prevents users from inadvertently forgetting to configure an action account. Do not check if the connection string template uses integrated authentication – i.e. authenticates with the credentials of the PeopleSync Service.

6.8 Salesforce Agent ■

The **Salesforce Agent** imports contacts from the **contacts** list in Salesforce. The agent uses a default mapping of list fields to vCard fields, but a custom mapping can also be configured.

Figure 29: Salesforce Agent Configuration shows a sample configuration of the Salesforce agent. The agent will connect to Salesforce and fetch all contacts available to the configured service account.

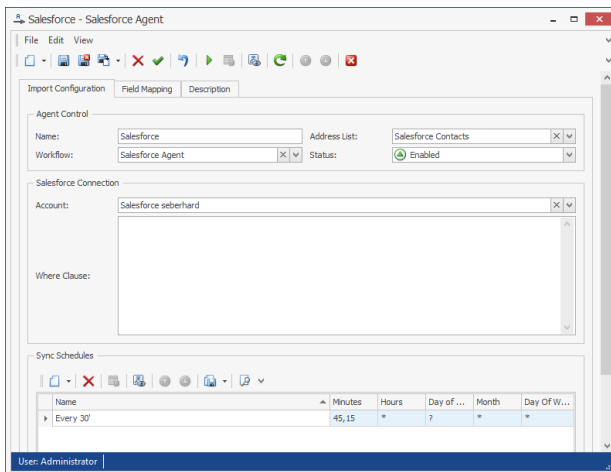


Figure 29: Salesforce Agent Configuration

6.8.1 Requirements

API access must be enabled for the organization. As described in Salesforce knowledge article 000005140, the organization must be on one of the following editions:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

6.8.2 Configuration

The **Salesforce Agent** uses the following configuration parameters:

Service Account: An account that has the right to view the organization's contacts. Please add the Salesforce user's security token at the end of the password when saving the Salesforce Service Account in PeopleSync. For example, if the Password is Password1 and the security token is XXXXXXXXXX, the Service Account's password must be saved as Password1XXXXXXXXXX.

Field Mapping (Tab): In the **Field Mapping** tab (see Figure 30: Salesforce Agent Field Mapping), a custom mapping of SharePoint list fields to vCard fields can be specified. The field mapping shows the names of the vCard fields as field names. The corresponding name of the Salesforce field must be entered into the text box next to the field. For example, to map the Salesforce field "Description" to the "Notes" field in the vCard, it needs to be entered into the text box next to the "Notes" caption.

The screenshot shows the 'Salesforce Agent' application window with the 'Field Mapping' tab selected. The 'Person' section includes fields for Last Name, First Name, Display Name, Department, Company, Manager, Initials, Title, Notes, Image, Image Folder, Anniversary, and Birthday. The 'Address' section includes fields for Street Address, City, Postal Code, Post Office Box, State or Province, and Country or Region. The 'Telephone + Fax' section includes fields for Fax, Other Fax, Account Fax, Pager, Telephone Assistant, Assistant Phone, Phone, Other Phone, Other Phone, Home Phone, Other Home Phone, and Mobile Phone. The 'Internet' section includes fields for Email Address and Web Page. The 'Data Source' section includes a field for Table Name, which is set to 'SalesforcePSSchema'. The status bar at the bottom shows 'User: Administrator'.

Figure 30: Salesforce Agent Field Mapping

Note: The table name “SalesforcePSSchema” should not be changed. If you need a custom schema, please contact messageconcept support.

6.8.3 Field Mapping

6.9 Microsoft CRM Agent ■

The **Microsoft CRM Agent** imports contacts from the **contacts** list in Microsoft Dynamics CRM. The agent uses a default mapping of list fields to vCard fields, but a custom mapping can also be configured.

Figure 31: Microsoft CRM Agent Configuration shows a sample configuration of the Microsoft CRM agent. The agent will connect to a Microsoft Dynamics CRM instance and fetch all contacts available to the service account. The credentials used for the connection are stored in the action account named “contoso\administrator”.

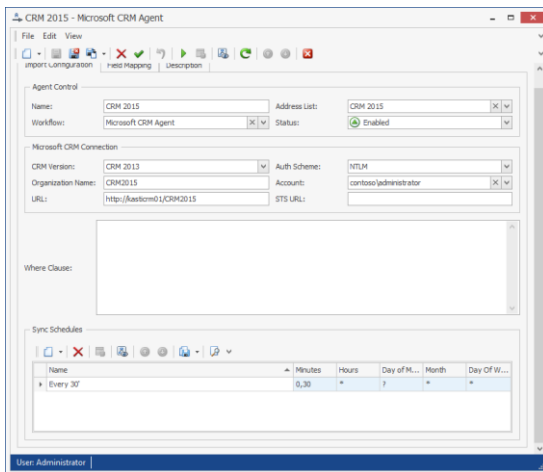


Figure 31: Microsoft CRM Agent Configuration

6.9.1 Requirements

The following Microsoft Dynamics CRM versions are supported:

- CRM Online WLID (Windows Live)
- CRM Online Office 365
- CRM 2013
- CRM 2011
- CRM 2011 IFD
- CRM 4.0

6.9.2 Configuration

The **Microsoft CRM Agent** uses the following configuration parameters:

CRM Version: The type of Dynamics CRM server to which you are connecting. In case of Dynamics CRM Online, use either “CRM Online WLID” or “CRM Online Office 365”. The “CRM Online WLID” setting is required to connect using the Windows Live security token service (STS), and “CRM Online Office 365” is required to connect using the Office 365 STS. For a CRM Online with local ADFS or an IFD instance of CRM, you must also specify the “STSURL” property.

Organization Name: The name of the organization, e.g. “TheOrganization”. This can be determined from the URL used to access Microsoft Dynamics CRM.

URL: The URL of the CRM organization, e.g. “http://mycrm/TheOrganization”.

Auth Scheme: The authentication method used. One of: NTLM, BASIC, DIGEST, NONE. Only used for connections to CRM 4.0.

Service Account: An account that has the right to view the organization’s contacts.

STS URL: The URL of the security token service (STS). Must only be set for IFD instances of CRM or CRM Online with local ADFS.

Field Mapping (Tab): In the **Field Mapping** tab (see Figure 32: Microsoft CRM Agent Field Mapping), a custom mapping of CRM fields to vCard fields can be specified. The field mapping shows the names of the vCard fields as field names. The corresponding name of the CRM field must be entered into the text box next to the field. For example, to map the CRM field “Description” to the “Notes” field in the vCard, it needs to be entered into the text box next to the “Notes” caption.

Figure 32: Microsoft CRM Agent Field Mapping

Note: The table name “SalesforcePSSchema” should not be changed. If you need a custom schema, please contact messageconcept support.

6.9.3 Field Mapping

The default field mapping for the Microsoft CRM Agent is described in 8.7 Microsoft CRM Agent – Field Mapping.

7 Troubleshooting and Support

7.1 Troubleshooting PeopleSync Frontend Server

If your clients cannot successfully connect to the PeopleSync server or no address books and no contact data is shown on the clients. You can try the following steps to narrow down the problem.

First, switch the **PHP Error Reporting to Development machine**. For that, go to PHP Managers main view. Under **PHP Settings** click on **Configure error reporting**. This will open the following view.

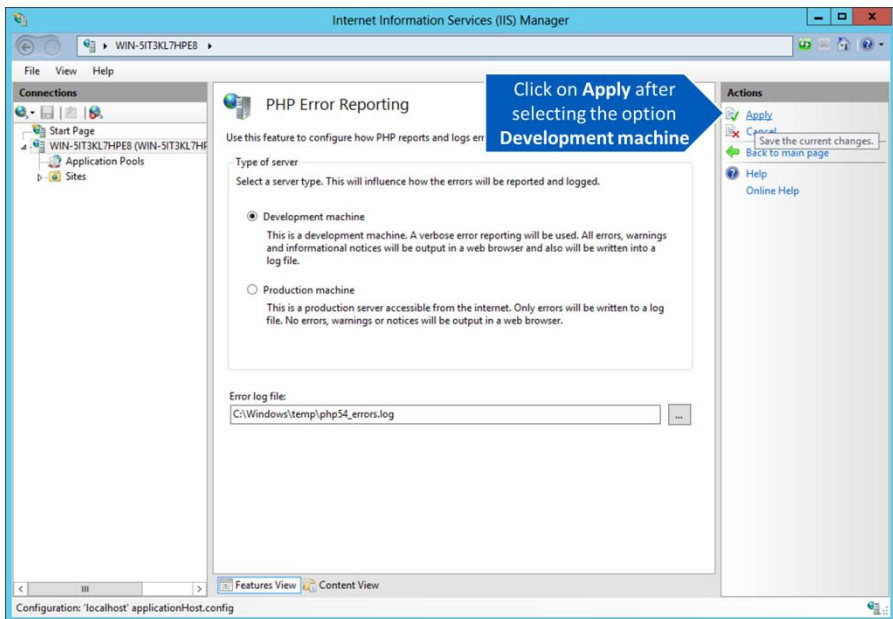


Figure 33: IIS Manager PHP Error Reporting

By switching the server type to **Development machine**, the PHP settings are changed to show errors in the browser instead of logging them to a file. Then open a web browser and enter the URL of your PeopleSync server, such as <http://peoplesync.example.com/>.

This will prompt you for a user name and password. If this succeeds, you can browse through the address books which have been made available for this given user. If this step fails, an error message from the server will be displayed in the web browser. Typical errors include:

- database server not reachable
→ check your **server.ini**
- database not correctly setup
→ use PeopleSync Console to correct this
- failure to authenticate the user
→ check with PeopleSync Console if the configured Active Directory server is correct.

Note: Don't forget to switch **PHP Error Reporting** back to **Production Machine** after solving problems and finishing troubleshooting. Not switching back to **Production Machine** poses a security risk as passwords can potentially be logged in the PHP error log.

7.2 Typical Problems in PeopleSync Agent

This chapter covers typical problems in PeopleSync Agent. Listed below are some of the reasons and solutions to common problems.

7.2.1 Login to PeopleSync Console fails

Symptoms:

- Error message “The application cannot connect to the specified database, because the latter doesn't exist or its version is older than that of the application. (...)” after login.

Cause:

- The Windows domain user has no sufficient permissions.

Resolution:

- Check that the user is a member of the **PeopleSync Admins** group.
- Check that the **PeopleSync Admins** group has **Datareader** and **Datawriter** permissions in the PeopleSync Database.
- Check that the **PeopleSync Admins** group has Mbody permissions for the file <PeopleSync Directory>\Console\LogonParameters.

7.2.2 PeopleSync is not licensed

Symptoms:

- The PeopleSync log shows “Error” events of category “Licensing”.
- The PeopleSync Service is stopped.

Cause:

- PeopleSync is not licensed, license keys have not been copied to the proper directory or license keys have expired.

Resolution:

- Make sure license keys have been copied to “Licensekeys” folder in the PeopleSync Agents’ installation directory (e.g. C:\Program Files\messageconcept GmbH\PeopleSync\Agent)
- Verify that license keys are still valid by opening the license file in a text editor or reading the PeopleSync log entries.
- Restart the PeopleSync Service.

7.2.3 PeopleSync Service stopped: Invalid user, insufficient rights

Symptoms:

- The PeopleSync Service is stopped.
- System event log shows errors with source “Service Control Manager” for service “PeopleSync Agent”

Cause:

- The service user account password is invalid
- The service user does not have sufficient privileges to run a service

Resolution:

- Check that the service user account password is correct.
- Make sure the service user account is an administrator on the local server.

7.2.4 PeopleSync Service fails to start: Database problem

Symptoms:

- The PeopleSync Service is stopped.
- Application event log shows errors with source “PeopleSync_Agent” and event text contains “System.Data.SqlClient.SqlException” and “DevExpress.ExpressApp.Updating.CompatibilityException”.

Cause:

- SQL Server is unreachable
- The database connection is wrong

Resolution:

- Make sure the database is running and the service account running PeopleSync Service has sufficient rights in the database.
- Search for “ConnectionString” in the agent.exe.config file located in the PeopleSync Agents’ installation directory (e.g. C:\Program Files\messageconcept GmbH\PeopleSync\Agent). Make sure the connection string is still correct.

7.2.5 Exchange GAL Agent fails to connect to WinRM server

Symptoms:

- Error message 20900 in the event log: “Connecting to remote server ps.outlook.com failed with the following error message: WinRM cannot complete the operation.”
- If you are using an Exchange Server on premise instead of Office 365, the server name might differ from ps.outlook.com.

Cause:

- Agent connection to the remote server has been blocked by a local firewall or network firewall.
- Problem with forwarding the traffic by a proxy server to the remote server.
- The agent caused too many requests and run in Throttling state.

Resolution:

- Check that the agent can communicate with the remote server.
- Check the Throttling configuration in Exchange Server or Office 365.

- Let the Exchange GAL Agent run less often.

7.2.6 Agent does not load data

Symptoms:

- A PeopleSync Agent does not load data or is not running.

Cause:

- Agent or address list may be disabled
- Schedule is invalid
- Agent configuration is invalid

Resolution:

- Check that the agent and the corresponding address book are both enabled.
- Check the validity of the Schedule. For example, a cron expression that contains the same number twice (e.g. 0,5,10,5) is invalid.
- Check the PeopleSync log for errors regarding this agent. Verify that the agent's configuration parameters are correct.

7.3 Typical Problems in PeopleSync Address lists

This chapter covers typical problems in PeopleSync address lists. The listed possible reasons for your problem might help you to troubleshoot the problem.

7.3.1 Address list not available on device

Symptoms:

- Address list is not visible on device

Cause:

- Device not synchronized
- Insufficient permissions
- Address book disabled

Resolution:

- Make sure that the address list is enabled in the PeopleSync Console.
- Verify that a group has been assigned with at least “Read” permissions and that the user in question is a member of the group.
- Try to force synchronization on the device. If the address list still does not appear, have the user open the PeopleSync Server URL in a web browser and log on with his credentials. Navigate to **addressbooks**, then click on the username and verify that the address list is shown.

7.3.2 Address list content changes continuously or changes are undone

Symptoms:

- Address list changes continuously, although the underlying data source does not.
- Changes made by users are undone after some time.

Cause:

- A user group is able to modify the address list's content and the address list has an agent configured.
- It is not recommended to allow users to modify an address list, and at the same time, have an agent import data into the same list.

Resolution:

- Revoke the "Modify" permission in the address list's permissions.
- As an alternative, disable the associated agent.

7.4 Contacting Support

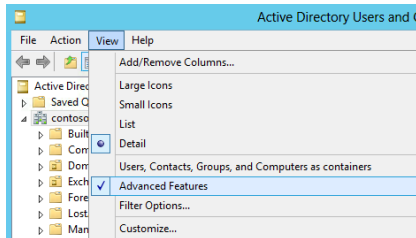
If this manual does not help solve your problem, please contact our support team. Our support staff will guide you through the troubleshooting process or will establish a remote session, if needed.

8 Appendix

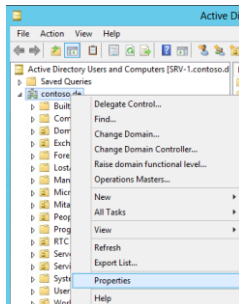
8.1 Determining an AD Domain's Distinguished Name

1. Open **Active Directory Users and Computers**.

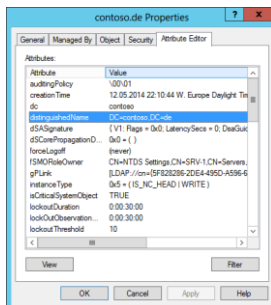
In the **View** menu, enable **Advanced Features**.



2. Right-click on the Domain and select **Properties**.



3. Open the **Attribute Editor** tab.



4. Double-click on the **distinguishedName** attribute and copy its value.

8.2 Active Directory Agent – Field Mapping

The **Active Directory Agent** uses the following field mapping:

Active Directory		VCard
Display Name EN	LDAP Name	Field Name
Initials	initials	Additional Names
Last Name	sn	Family Name
First Name	givenName	Given Name
Company	company	Organization Name
Department	department	Organizational Unit
Home Phone (Others)	otherHomePhone	Car
Mobile Number	mobile	Cell
Fax Number	facsimileTelephone Number	Fax
Home Phone	homePhone	Home
Fax Number (Others)	otherFacsimile TelephoneNumber	Modem
Pager Number	pager	Pager
Phone Number (Others)	otherTelephone	Voice
Telephone Number	telephoneNumber	Work
Country	co	Country Name

Active Directory		VCard
Display Name EN	LDAP Name	Field Name
City	l	Locality
Post Office Box	postOfficeBox	Post Office Box
ZIP/Postal Code	postalCode	Postal Code
State/Province	st	Region
Street Address	streetAddress	Street Address
E-Mail Address	mail	E-Mail
Display Name	displayName	Formatted Name
Description	description	Note
Photo	thumbnailPhoto	Photo
Job Title	title	Title
	MD5 (distinguishedName)	UID
Web Page Address	wWWHomePage	URL
Assistant's telephone	telephoneAssistant	X-MS-ASSISTANT
Manager	manager	X-MS-MANAGER

Note: The Exchange GAL Agent uses the same field mapping as described in the table above.

8.3 Exchange GAL Agent – Filterable Properties

Property Name	User	Contact
AllowUMCallsFromNonUsers	x	x
AssistantName	x	x
City	x	x
Company	x	x
CountryOrRegion	x	x
Department	x	x
DisplayName	x	x
DistinguishedName	x	x
ExchangeVersion	x	x
Fax	x	x
FirstName	x	x
Guid	x	x
HomePhone	x	x
Initials	x	x
LastName	x	x
Manager	x	x
MemberOfGroup	x	x

Property Name	User	Contact
MobilePhone	x	x
Name	x	x
Notes	x	x
Office	x	x
OtherFax	x	x
OtherHomePhone	x	x
OtherTelephone	x	x
Pager	x	x
Phone	x	x
PhoneticDisplayName	x	x
PostalCode	x	x
PostOfficeBox	x	x
RecipientType	x	x
RecipientTypeDetails	x	x
SamAccountName	x	
SimpleDisplayName	x	x
StateOrProvince	x	x
StreetAddress	x	x

Property Name	User	Contact
TelephoneAssistant	x	x
UMDtmfMap	x	x
UMRecipientDialPlanId	x	x
UserPrincipalName	x	
WhenChanged	x	x
WhenCreated	x	x
WindowsEmailAddress	x	x

8.4 Exchange Folders Agent – Field Mapping

The **Exchange Folder Agent** uses the following field mapping:

Exchange Contact	vCard
Initials	Additional Names
Last Name	Family Name
First Name	Given Name
Company	Organization Name
Department	Organizational Unit
Home Phone (Others)	Car
Mobile Number	Cell
Fax Number	Fax
Home Phone	Home
Fax Number (Others)	Modem
Pager Number	Pager
Phone Number (Others)	Voice
Telephone Number	Work
Business Address Country	Work Address Country Name
Business Address City	Work Address Locality
Business Address Post Office Box	Work Address Post Office Box

Exchange Contact	vCard
Business Address ZIP/Postal Code	Work Address Postal Code
Business Address State/Province	Work Address Region
Business Address Street Address	Work Address Street Address
E-Mail Address	E-Mail
Display Name	Formatted Name
Description	Note
Photo	Photo
Job Title	Title
Web Page Address	URL
Assistant's telephone	X-MS-ASSISTANT
Manager	X-MS-MANAGER

8.5 SharePoint Agent – Field Mapping

The default field mapping for the SharePoint Agent is as follows:

SharePoint	vCard
Title	Last Name
FirstName	First Name
FullName	Name
Ol_Department	Department
Company	Company
ManagersName	Manager
Initials	Initials
JobTitle	Title
WorkAddress	Business Address Street Address
WorkCity	Business Address City
WorkState	Business Address State Or Province
WorkZip	Business Address Postal Code
WorkCountry	Business Address Country or Region
WorkPhone	Work Phone
OtherNumber	Other Phone
HomePhone	Home Phone

SharePoint	vCard
Home2Number	Other Home Phone
Cell Phone	Mobile Phone
WorkFax	Work Fax
OtherFaxNumber	Other Fax Number
PagerNumber	Pager
AssistantNumber	Telephone Assistant
Email	Email Address
Webpage	Web Page

8.6 Salesforce Agent – Field Mapping

The default field mapping for the Salesforce Agent is as follows:

SharePoint	vCard
LastName	Last Name
FirstName	First Name
Name	Display Name
Department	Department
AccountName	Company
ReportsToName	Manager
	Initials
Title	Title
MailingStreet	Business Address Street Address
MailingCity	Business Address City
MailingState	Business Address State Or Province
MailingPostalCode	Business Address Postal Code
MailingCountry	Business Address Country or Region
Phone	Work Phone
OtherPhone	Other Phone
HomePhone	Home Phone

SharePoint	vCard
	Other Home Phone
MobilePhone	Mobile Phone
Fax	Work Fax
AccountFax	Other Fax Number
	Pager
AssistantPhone	Telephone Assistant
Email	Email Address
AccountWebsite	Web Page

Supported Attributes:

- AccountNumber
- AccountSource
- AnnualRevenue
- AssistantName
- AssistantPhone
- BillingCity
- BillingCountry
- BillingLatitude
- BillingLongitude
- BillingPostalCode
- BillingState
- BillingStreet
- Birthdate
- CreatedDate
- CreatedDate
- DandbCompanyId
- Department
- Description
- Description
- DunsNumber
- Email
- EmailBouncedDate

- EmailBouncedReason
- Fax
- Fax
- FirstName
- HomePhone
- Industry
- IsEmailBounced
- LastActivityDate
- LastActivityDate
- LastCURequestDate
- LastCUUpdateDate
- LastModifiedDate
- LastModifiedDate
- LastName
- LastReferencedDate
- LastReferencedDate
- LastViewedDate
- LastViewedDate
- LeadSource
- MailingCity
- MailingCountry
- MailingLatitude
- MailingLongitude
- MailingPostalCode
- MailingState
- MailingStreet
- MasterRecordId
- MobilePhone
- NaicsCode
- NaicsDesc
- Name
- Name
- NumberOfEmployees
- OtherCity
- OtherCountry
- OtherLatitude
- OtherLongitude
- OtherPhone
- OtherPostalCode
- OtherState
- OtherStreet
- Ownership
- ParentId
- Phone
- Phone
- Rating
- ReportsToFirstName
- ReportsToId
- ReportsToLastName
- ReportsToName
- Salutation
- ShippingCity

- ShippingCountry
- ShippingLatitude
- ShippingLongitude
- ShippingPostalCode
- ShippingState
- ShippingStreet
- Sic
- SicDesc
- Site
- SystemModstamp
- TickerSymbol
- Title
- Tradestyle
- Type
- Website
- YearStarted

8.7 Microsoft CRM Agent – Field Mapping

The default field mapping for the Microsoft CRM Agent is as follows:

SharePoint	vCard
LastName	Last Name
FirstName	First Name
FullName	Display Name
Department	Department
ParentCustomerId_Name	Company
	Manager
	Initials
JobTitle	Title
Address1_Line1	Business Address Street Address
Address1_City	Business Address City
Address1_StateOrProvince	Business Address State Or Province
Address1_PostalCode	Business Address Postal Code
Address1_PostOfficeBox	Post Office Box
Address1_Country	Business Address Country or Region
Telephone1	Work Phone

SharePoint	vCard
Telephone2	Other Phone
	Home Phone
	Other Home Phone
MobilePhone	Mobile Phone
Fax	Work Fax
	Other Fax Number
	Pager
	Telephone Assistant
EEmailAddress1	Email Address
WebSiteUrl	Web Page

Version History

Version	Changes
1.00	▪ First Public Release

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The description of the CRON-like Sync Schedules is partly copied from the Wikipedia encyclopedia (<http://en.wikipedia.org/wiki/Cron>).

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