


# Configuring Calendar and Meeting Integrations

You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Microsoft 365 Teams and Planner, and Zoom to display an option in the Incident, Problem, Change, and Customer Profile screens for initiating a meeting.

Note: iSupport utilizes or integrates with a number of third party applications and resources; changes in these external applications and resources may have a negative impact on functionality in iSupport. Depending on the nature and degree of the change, iSupport will, at its discretion, revise the current version of iSupport or make a corrective change in a future release of iSupport.

## Google Calendar/Meet

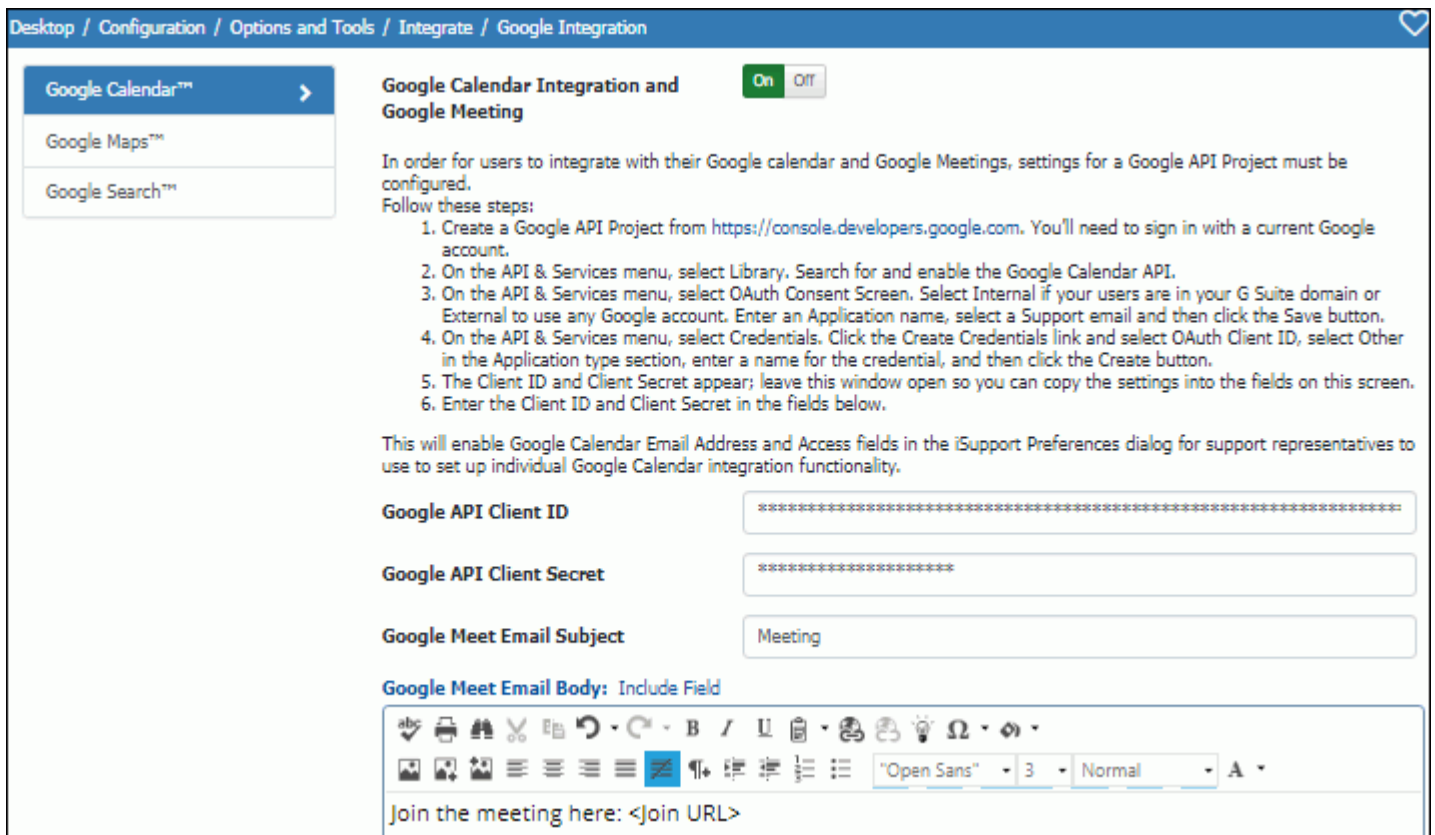
Set up Google Calendar integration in the Options and Tools | Integration | Google Integration screen to enable users to access their Google Calendar for the Calendar option on the Desktop and mySupport portals, a New Meeting option in iSupport entry screens for scheduling a Google Calendar meeting, and a  Google Meet option to appear in work item screens for starting a meeting.

With Google Calendar, support representatives can view the schedules of meeting attendees, create a meeting to be added to their calendar, and configure a notification to be sent to the meeting attendees.

When the Google Meet option is selected, the Generate Join URL dialog will appear for you to enter the topic, share the Join URL, and email a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog.

The timeframe (work hours) during which support representatives are available to be scheduled via iSupport can be set via the Desktop or Support Representative Profile screen. On the Desktop, a support representative can view their calendar via the Calendar component and work item-specific calendars can be viewed from action menu. Administrators can view support representative calendars via the Support Representative Profile screen.

On the Google Calendar tab, follow the steps on the screen and copy the Google API Client ID and Secret into the applicable fields. Enter the subject body of the email to be sent for the scheduled meeting; use the Include Field link to add field values regarding the meeting.

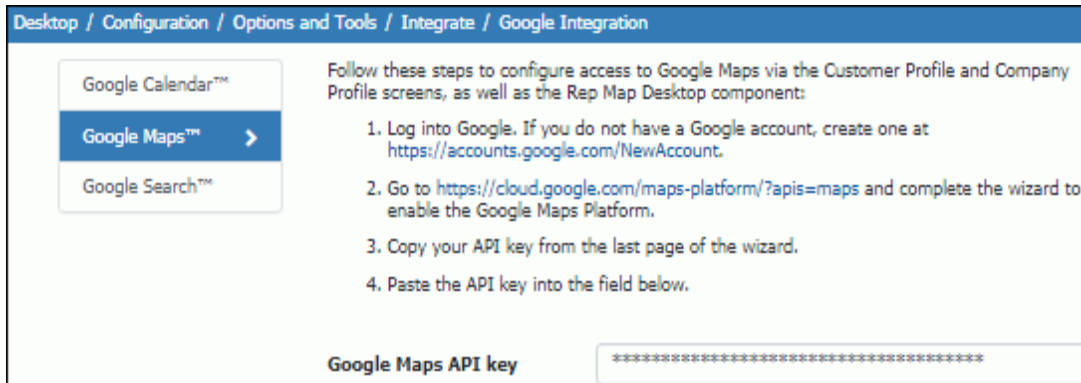


Note: Support representatives will need to use the Google Calendar Email Address and Google Calendar Access fields on the Details screen in the Preferences dialog to enable access to their calendar(s) and set the work day hours during which they are available to be scheduled via iSupport. (The dates/times outside of work day hours are designated as "Unavailable" in the calendars displayed via iSupport.) After clicking the Grant Access link, a Google dialog will appear for the support representative to allow iSupport access to their calendar and a code will be provided. The Grant Access to Your Google Calendar dialog will appear in the Preferences screen with an Auth Code field for pasting the code. After clicking Continue, "Access Granted" will appear in the Google Calendar Access field.

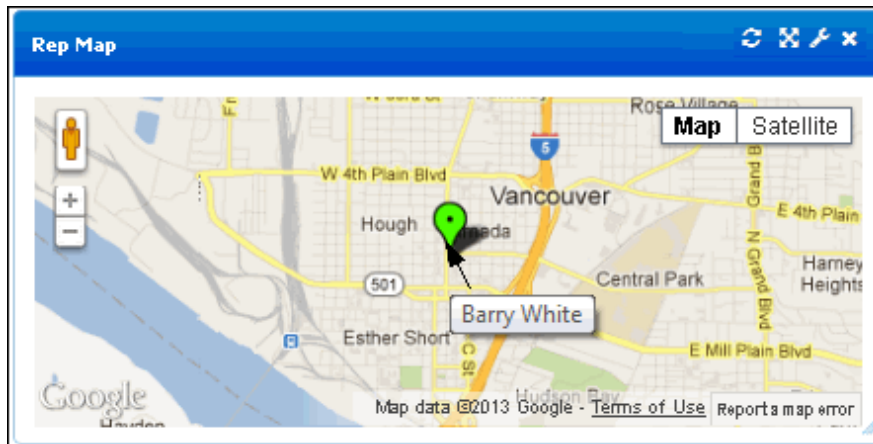
Google Meet meetings can be included in work item screens; add the Google Meetings field to a work item screen layout via the Layouts configuration screen.

## Google Maps

Use the Google Maps tab in the Options and Tools | Integration | Google Integration screen to enable access to Google Maps via the Customer Profile and Company Profile screens, as well as the Rep Map Desktop component. Follow the steps on the screen and enter the Google Maps API key.



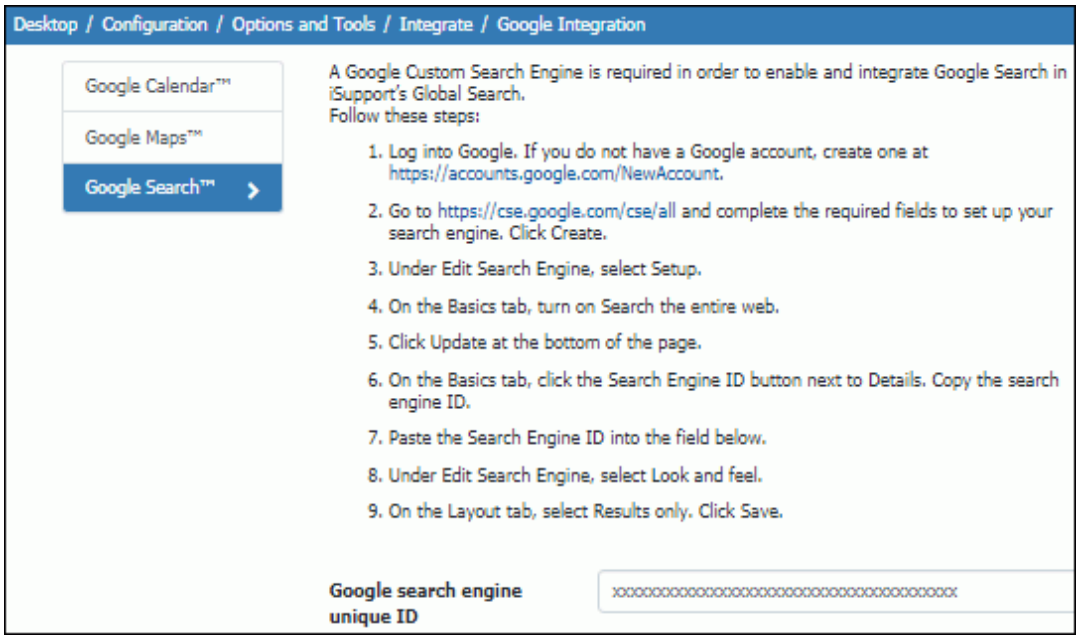
Maps will appear as shown in the example below.



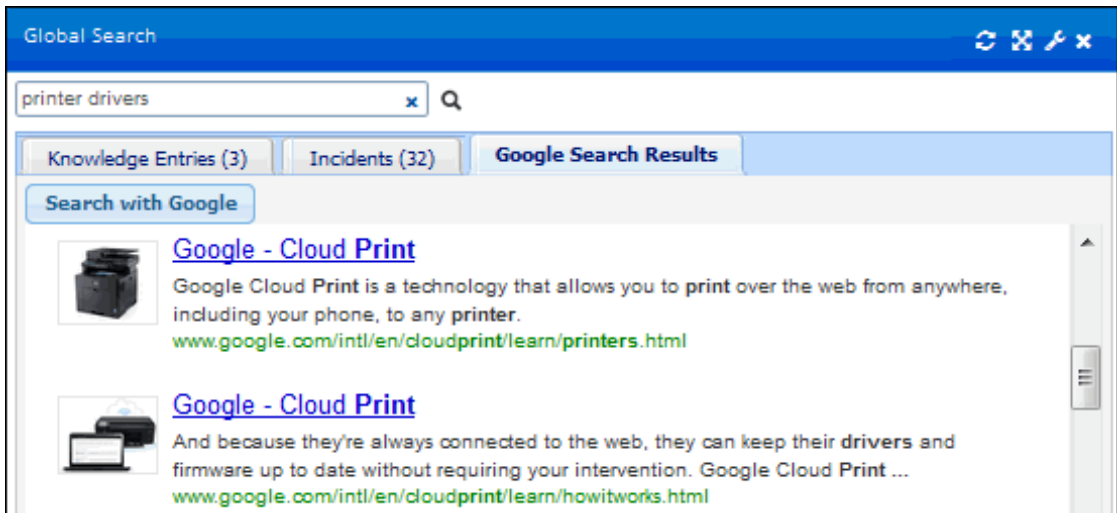
## Google Search

Use the Google Search tab in the Options and Tools | Integration | Google Integration screen to enable access to Google Search throughout the application. Follow the steps on the screen to create a Google Custom Search Engine,

copy the unique ID from the Google Custom Search Engine screen, and enter it in the Google Search Engine Unique ID field.





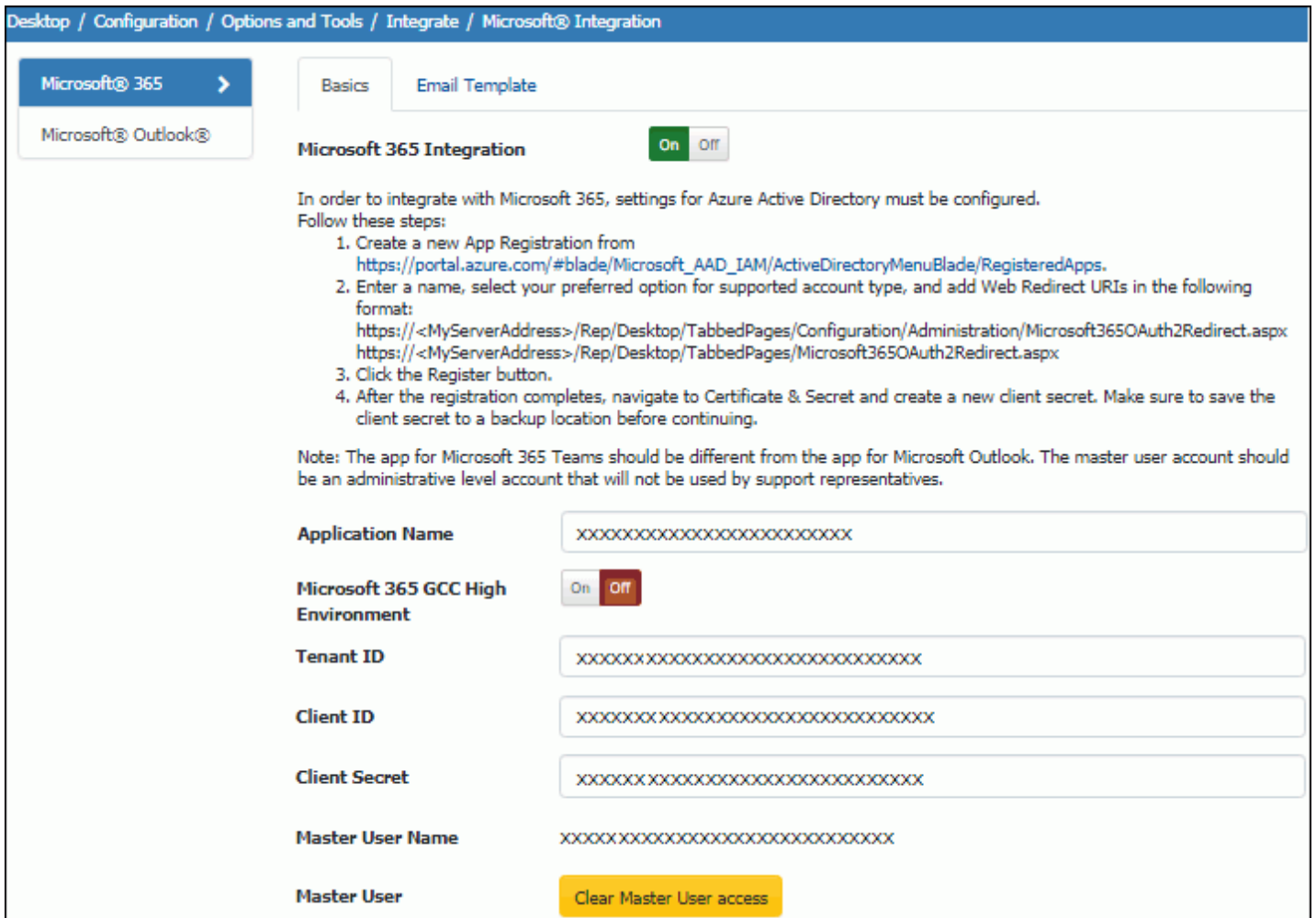
The Google Search tab will appear in the Global Search component as shown in this example.



## Microsoft 365 Integration

Use the Microsoft 365 tab in the Options and Tools | Integration | Microsoft Integration screen to enable the Microsoft Teams Planner component on the iSupport Desktop for viewing and accessing scheduled and unscheduled

Microsoft Teams tasks, and enabling  Microsoft Teams Meeting and  Planner Task option to appear in work item screens for creating meetings and tasks with prefilled references to the iSupport work item number.



Desktop / Configuration / Options and Tools / Integrate / Microsoft® Integration

Microsoft® 365 >

Microsoft® Outlook®

Basics Email Template

**Microsoft 365 Integration**  On  Off

In order to integrate with Microsoft 365, settings for Azure Active Directory must be configured. Follow these steps:

1. Create a new App Registration from [https://portal.azure.com/#blade/Microsoft\\_AAD\\_IAM/ActiveDirectoryMenuBlade/RegisteredApps](https://portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/RegisteredApps).
2. Enter a name, select your preferred option for supported account type, and add Web Redirect URIs in the following format:  
`https://<MyServerAddress>/Rep/Desktop/TabbedPages/Configuration/Administration/Microsoft365OAuth2Redirect.aspx`  
`https://<MyServerAddress>/Rep/Desktop/TabbedPages/Microsoft365OAuth2Redirect.aspx`
3. Click the Register button.
4. After the registration completes, navigate to Certificate & Secret and create a new client secret. Make sure to save the client secret to a backup location before continuing.

Note: The app for Microsoft 365 Teams should be different from the app for Microsoft Outlook. The master user account should be an administrative level account that will not be used by support representatives.

**Application Name**

**Microsoft 365 GCC High Environment**  On  Off

**Tenant ID**

**Client ID**

**Client Secret**

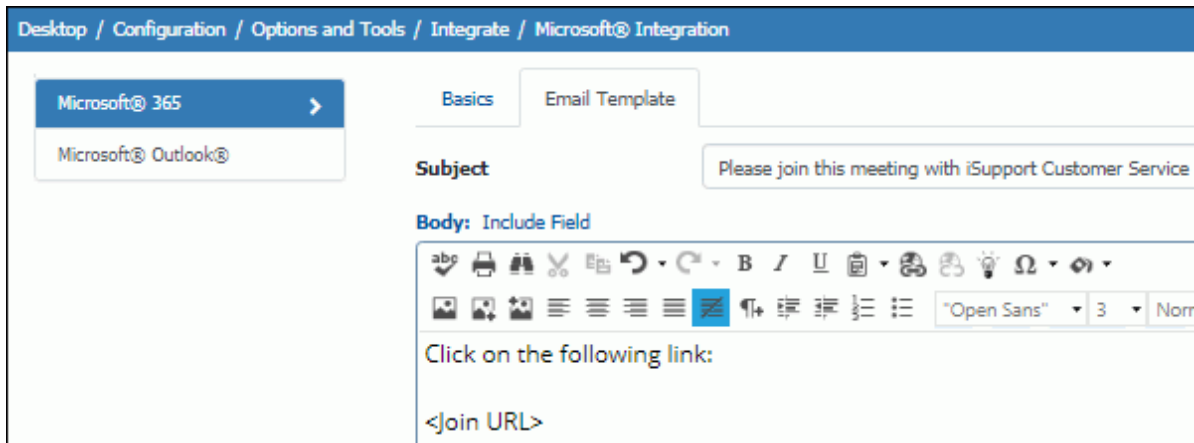
**Master User Name**

**Master User**

Follow the steps on the screen and complete the fields. Note that this requires administrator level access in Microsoft. The app for Microsoft 365 Teams should be different from the app for Microsoft Outlook. The master user account should be an administrative level account that will not be used by support representatives. Enable the Microsoft GCC High Environment setting if your Microsoft account was created under the .US domain in a Government Community Cloud High environment.

If you wish to allow support representatives to enable access to Teams and a group calendar in the Preferences screen without Microsoft administrator level access, ensure that you select the Consent On Behalf of Your Organization checkbox while requesting permissions in this screen. The Master User account is used for Team channel posts via rules and Outlook calendar groups available for display on dashboards.

Use the Email Template tab in the Microsoft 365 Integration screen to enter defaults for the subject and body of the email to be sent with a link to the meeting.




Note: Support representatives will need to use the Microsoft 365 Access field on the Details screen in the Preferences dialog to enable access to their calendar(s).

To add list fields of Microsoft Teams meetings and Planner tasks in work item screens, add the Microsoft Teams Meetings and Microsoft Planner Tasks fields to a work item screen layout via the Layouts configuration screen.

You can utilize the MS Teams Channel recipient with the Notify - Email action in work item rules.

## Microsoft Outlook Calendar Integration

Use the Microsoft Outlook tab in the Options and Tools | Integrations | Microsoft Integration screen to enable:

A  New Meeting option to appear in iSupport entry screens after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting.

A support representative to view their calendar via the Desktop Calendar component and work item-specific calendars via the Action menu. Administrators can view support representative calendars via the Support

Representative Profile screen. Support representatives can view the schedules of meeting attendees, create a meeting to be added to their calendar, and configure a notification to be sent to the meeting attendees.

Desktop / Configuration / Options and Tools / Integrate / Microsoft® Integration

Microsoft® 365  
Microsoft® Outlook®

**Microsoft Outlook Calendar Integration**  On  Off  
Note that this feature utilizes basic (legacy) authentication; OAuth support will be added in a future release.

**Microsoft Exchange Server**

**Use SSL**  Yes  No

**Microsoft Exchange Domain (Optional)**

Click the Validate Connection button to enter a user's Microsoft Outlook login and email address for testing the Microsoft Outlook server connection. This login will be used only for validating the connection.

**Microsoft Active Directory® Server**

**Use SSL**  Yes  No

**Microsoft Active Directory Search Root**

If anonymous Microsoft Active Directory connections are not allowed your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave the Username and Password fields blank.

**Microsoft Active Directory User Name**

**Microsoft Active Directory Password**

**Microsoft Outlook Calendar Integration** - Select On to enable the Microsoft Outlook Calendar Integration feature.

**Microsoft Exchange Server** - Enter the web address of the installation location of the Microsoft Exchange Server. If using SSL, the format must be: `https://<server>`

**Use SSL** - SSL is an encryption method that overlays the connection between the iSupport server and the Microsoft Active Directory server. Select Yes if SSL encryption is enabled on the Microsoft Active Directory server.

**Microsoft Exchange Domain (Optional)** - Enter the domain for accessing the Microsoft Exchange server. An entry in this field may be needed for a successful test connection.

A valid connection to the Microsoft Outlook server is required; click the Validate Connection button to enter a Microsoft Outlook login and email address to test the connection. Note that this information will be used only for validating the connection.

**Microsoft Active Directory Server** - Enter the installation location of the Microsoft Active Directory Server.


**Use SSL** - SSL is an encryption method that overlays the connection between the iSupport server and the Microsoft Active Directory server. Select Yes if SSL encryption is enabled on the Microsoft Active Directory server.

**Microsoft Active Directory Search Root** - Enter the complete search root URL for querying user information in Active Directory® entries. The search root can point to anywhere in the Active Directory® hierarchy, but the entry must be preceded by: `ldap://`

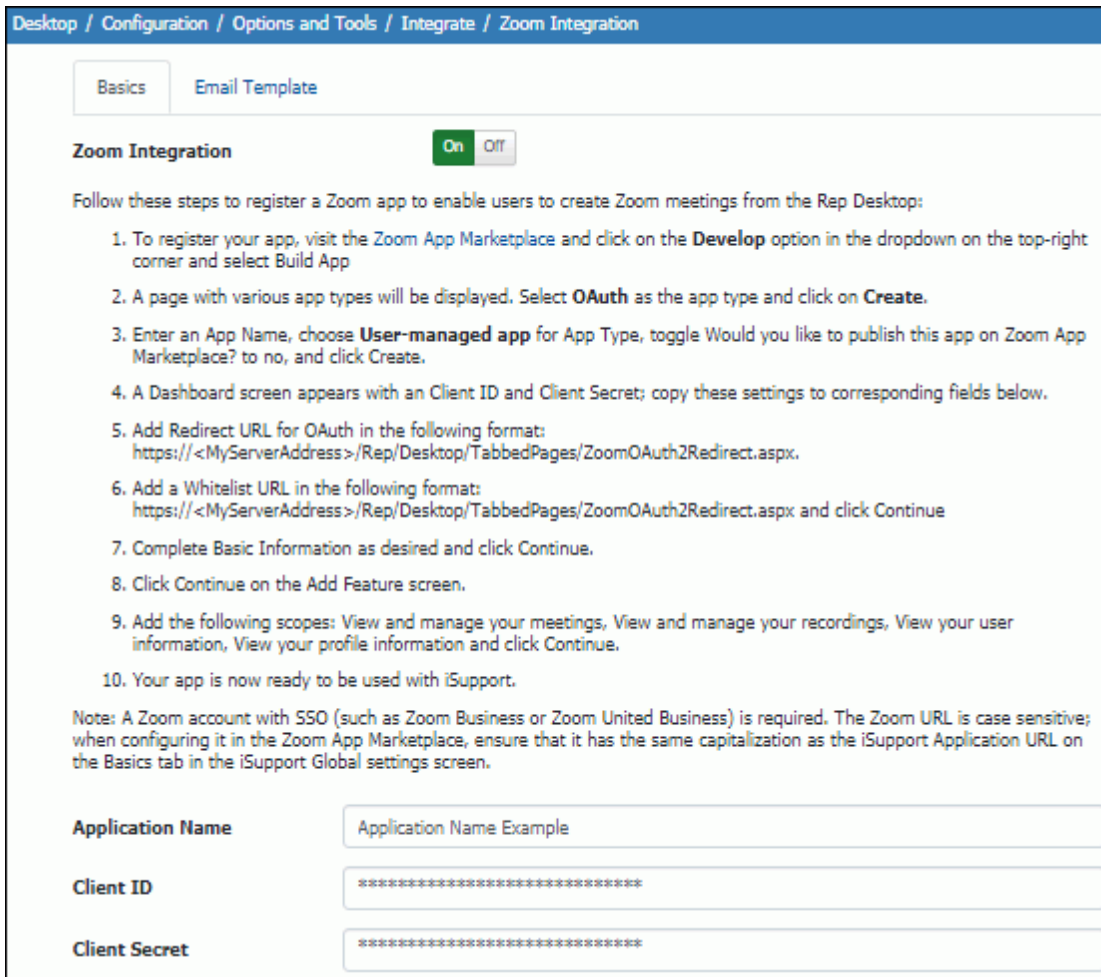
**Microsoft Active Directory User Name/Microsoft Active Directory Password** - If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a login for authentication when queries are performed. The username should be in the following format: `DOMAINNAME\username` If anonymous connections are allowed, leave these fields blank.

Note: Support representatives will need to use the Microsoft Exchange User Name and Microsoft Exchange Password fields on the Details tab in the Preferences dialog and set the work day hours during which they are available to be scheduled via iSupport. The timeframe (work hours) during which support representatives are available to be scheduled via iSupport can be set via the Desktop or Support Representative Profile screen. (The dates/times outside of work day hours are designated as "Unavailable" in the calendars displayed via iSupport.)

## Zoom Integration

Use the Options and Tools | Integrations | Zoom Integration configuration screen to enable a  Zoom Meeting option to appear in the Incident, Change, Problem, and Customer screens for scheduling an on-demand Zoom meeting. When the option is selected, a Generate Join URL dialog will appear for you to enter the topic and options for sharing the Join URL, and emailing a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog.

Follow the steps on the screen, enter an application name, and then enter the Client ID and Client Secret in the applicable fields.



Desktop / Configuration / Options and Tools / Integrate / Zoom Integration

Basics Email Template

**Zoom Integration**  On  Off

Follow these steps to register a Zoom app to enable users to create Zoom meetings from the Rep Desktop:

1. To register your app, visit the [Zoom App Marketplace](#) and click on the **Develop** option in the dropdown on the top-right corner and select **Build App**
2. A page with various app types will be displayed. Select **OAuth** as the app type and click on **Create**.
3. Enter an App Name, choose **User-managed app** for App Type, toggle **Would you like to publish this app on Zoom App Marketplace?** to no, and click **Create**.
4. A Dashboard screen appears with an Client ID and Client Secret; copy these settings to corresponding fields below.
5. Add Redirect URL for OAuth in the following format:  
`https://<MyServerAddress>/Rep/Desktop/TabbedPages/ZoomOAuth2Redirect.aspx`.
6. Add a Whitelist URL in the following format:  
`https://<MyServerAddress>/Rep/Desktop/TabbedPages/ZoomOAuth2Redirect.aspx` and click **Continue**
7. Complete **Basic Information** as desired and click **Continue**.
8. Click **Continue** on the **Add Feature** screen.
9. Add the following scopes: **View and manage your meetings**, **View and manage your recordings**, **View your user information**, **View your profile information** and click **Continue**.
10. Your app is now ready to be used with iSupport.

Note: A Zoom account with SSO (such as Zoom Business or Zoom United Business) is required. The Zoom URL is case sensitive; when configuring it in the Zoom App Marketplace, ensure that it has the same capitalization as the iSupport Application URL on the Basics tab in the iSupport Global settings screen.

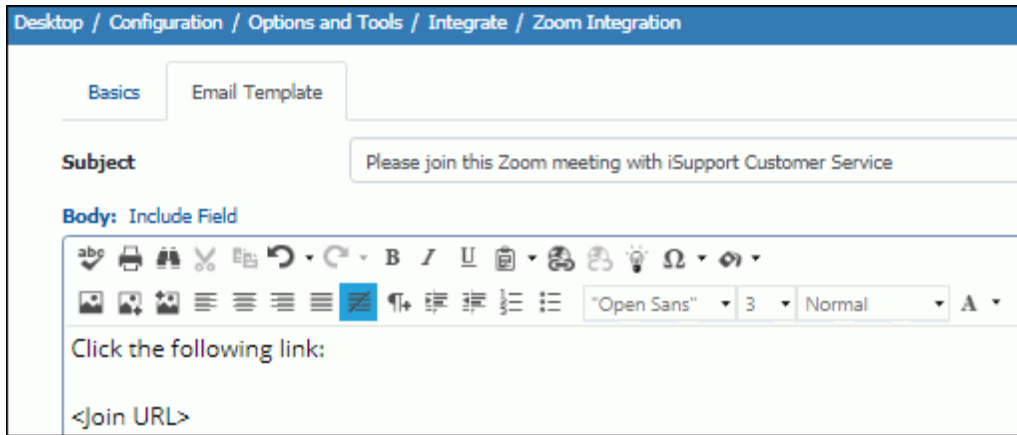
**Application Name**

**Client ID**

**Client Secret**

Note: A Zoom account with SSO (such as Zoom Business or Zoom United Business) is required. The Zoom URL is case sensitive; when configuring it in the Zoom App Marketplace, ensure that it has the same capitalization as the iSupport Application URL on the Basics tab in the iSupport Global settings screen.

Use the Email Template tab in the Zoom Integration screen to enter the subject and body of the email to be sent with a link to the meeting.



The screenshot shows a web interface for configuring Zoom integration. The breadcrumb trail at the top reads: Desktop / Configuration / Options and Tools / Integrate / Zoom Integration. There are two tabs: 'Basics' and 'Email Template', with 'Email Template' being the active tab. Below the tabs, there is a 'Subject' field containing the text 'Please join this Zoom meeting with iSupport Customer Service'. Underneath is a 'Body' section with the label 'Body: Include Field'. This section contains a rich text editor toolbar with various icons for text formatting (bold, italic, underline, link, unlink, list, indent, outdent, text color, background color) and font settings (font face: 'Open Sans', size: 3, style: Normal). Below the toolbar, the body text reads 'Click the following link:' followed by a placeholder '<Join URL>'.

Zoom meetings can be included in work item screens; add the Zoom Meetings field to a work item screen layout via the Layouts configuration screen.