

## LearningServer Microsoft Exchange Connector Version 2.6

### Overview:

The LearningServer Microsoft Exchange Connector allows your LearningServer site to communicate with your Microsoft Exchange Server. The purpose of this communication is to create, update, and cancel meeting requests for LearningServer Events.

### Main Functions:

- Create Meeting
  - o A meeting request is created the first time a user is enrolled to an event.
  - o All enrollees will receive a meeting request in their mailbox containing details of the Event Session.
- Update Meeting
  - o A meeting update is sent to enrollees upon a change to any event or session details such as location, date, and notes.
- Cancel Meeting
  - o A meeting cancel is sent to enrollees if the event or session is cancelled.
  - o If an enrollee is deleted from an event session or if they withdraw, they will receive a cancel meeting.

LearningServer communicates with Microsoft Exchange Server through the use of Web Services. After installing the LearningServer Microsoft Exchange Connector, a site administrator will need to provide connection details for the Exchange Server that will be used each time the Web Service is called.

### Areas in the Application:

#### 1. Exchange Meeting Request Controls by Administrator

The following section outlines the various places where the Exchange Meeting Request is controlled in the application. Currently only the Administrator has access to turning off or on the Exchange Meeting Request at the site level.

#### **System / Settings / Site Properties:**

When Exchange Meeting Requests have been enabled, the following field will appear on the System / Settings / Site Properties page:

**Exchange Meeting Request:** *Yes or No* (default value *No*)

This switch allows you to turn on or off the Exchange Meeting Requests per site level.

System / Settings functionality can only be performed by:

- Administrator (for the site level)

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Home | System | Learning | Users | Reports | Collaboration | Resources

**Settings**

Site Properties | User Authentication | Language | E-mail | Product Version

Modify

Organization: LearningServer

URL: 65.206.65.106:81

Directory Path: C:\inetpub\wwwroot\LearningServer\sites\Site1\

Content URL:

Landing Page: Authentication Page

Enforce Prerequisites: No

Enforce Prerequisites: No

Enable Course Keys: No

User Name Display Order: Last Name, First Name

CourseCode/Title Display: Course Title

MyLearning page layout: Show courses only

Learning Catalog Default View: Courses

Learning Catalog Event Display: List

Self-registration: No

Password Lookup: No

Certificate: None Preview

Supervisor Can Edit Hierarchy: Yes

**Exchange Meeting Request: Yes**

StoreFront: No

Date Created: Wednesday, October 21, 2009 5:44 PM

Last Modified: Thursday, December 03, 2009 12:46 PM

## System / Settings / Email:

When the Exchange Meeting Request is enabled, the following section will appear on the System / Settings / Email page:

### Exchange Server Connection Information:

This section maintains the connection information which is stored in the web.config file.

1. **Host (ewshost)** – Needs to be the “Fully Qualified Domain Name”
2. **User Name, Password, Email Address (ewsusername, ewspassword, ewsemail)** – is for the Administrator on the Exchange Server and is the active directory account information
3. **Exchange Web Service URL (ewsurl)** – only accessible after installation of Exchange Connector, this url is based on how Exchange is installed and can be tested before by Entering the url into a browser and seeing if the wsdl loads.  
(http://domainname/EWS/Exchange.asmx) – does not have to be the fully qualified name

The screenshot shows a web-based configuration interface for intralearn software. At the top, there are navigation tabs: Site Properties, User Authentication, Language, E-mail, and Product Version. Below these, there are several configuration sections:

- Auto Emails Generated From:** A text input field.
- Contact Us Email:** A text input field.
- Send Email As:** A dropdown menu currently set to "Plain Text".
- Modify:** A button.
- SMTP Connection Information:**
  - Host:** isc.intralearn.com
  - User Name:** A masked text input field.
  - Password:** A masked text input field.
  - Modify:** A button.
- Exchange Meeting Request Connection Information:** This section is highlighted with a red border.
  - Host:** external.isc
  - User Name:** A masked text input field.
  - Password:** A masked text input field.
  - Admin email address:** administrator@external.isc
  - Exchange Web Service URL:** http://external.isc/EWS/Exchange.asmx
  - Modify:** A button.

## 2. Exchange Meeting Request: Enrollment or Cancellation by Administrator, Supervisor or Instructor

The following section outlines the various areas where the Exchange Meeting Request functionality to enroll learners, remove learners or update an Event information can be found when the Exchange Meeting Request switch is set to **Yes** on the **System / Settings / Site Properties** section. In each section we will identify which roles have access to perform this functionality.

### Enrollment / Events:

Enrollment is one area where Learner(s) may be registered to an Event Session, this functionality allows 1 to many Learners to be enrolled or removed from 1 Event Session at a time. Below the image is a chart describing the various actions available and the expected results.

Enrollment functionality can be performed by:

- Administrator ( all learners)
- Instructor ( only for learners assigned to the Events which they are instructors to)
- Supervisor ( only for learners assigned to the Supervisors hierarchy level )

**Enrollment**

Courses Events

Search: [ ] - or - Find All

Title: MDEventSunday

Session: Boston - Dec 15 2009 - 1:00p Attendance Sheet Export to Excel

**Summary**

Max Seats	Total Enrollment	Scheduled	Completed	Waitlisted	Dropped	Seats Remaining
unlimited	2	2	0	0	0	unlimited

**Details**

Search: [ ] - or - Find All 1 of 1

Status	Learner	E-mail	Hierarchy	Job Title	Overall Grade	Date Added	Completed On	Required By	Action
Scheduled	Paetzold, Ken	kpaetzold@external.isc				12/6/2009 3:47 PM			<ul style="list-style-type: none"> <li>Action</li> <li>Add</li> <li>Mark as Complete</li> <li>Mark as Dropped</li> <li>Delete</li> </ul>
Scheduled	Goguen, Jerry	jgoguen@external.isc				12/6/2009 3:47 PM			<ul style="list-style-type: none"> <li>Mark as Complete</li> <li>Mark as Dropped</li> <li>Delete</li> </ul>

### Various Actions available in the Dropdown List:

Select: *“Add”* - 1 to \* Learner(s):

- Learner(s), will receive a Meeting Request email in their Outlook mailboxes
- If, Max Seats is not set to unlimited, then those learners who are waitlisted will not receive Meeting Request email.

Select: *“Mark as Dropped”* - 1 to \* Learner(s):

- Learner(s), who have been **“Dropped”** from the Event Session, will receive a Cancellation Meeting Request email in their Outlook mailboxes. The Learners will have to confirm the cancellation for the Meeting request to be removed from their Outlook mailbox.
- Any Waitlisted Learners removed from waitlist and enrolled due to openings now available, will then receive a New Meeting Request email in their Outlook mailbox.

Select: *“Delete”* - 1 to \* Learner(s):

- Learner(s), who have been **“Deleted”** from the Event Session, will receive a Cancellation Meeting Request email in their Outlook mailboxes. The Learners will have to confirm the cancellation for the Meeting request to be removed from their Outlook mailbox.
- Any Waitlisted Learners removed from waitlist and enrolled due to openings now available, will then receive a New Meeting Request email in their Outlook mailbox.
- If learner(s) were previously marked as **“Dropped”**, then the learner will not receive any Cancellation notice in their Outlook mailbox.

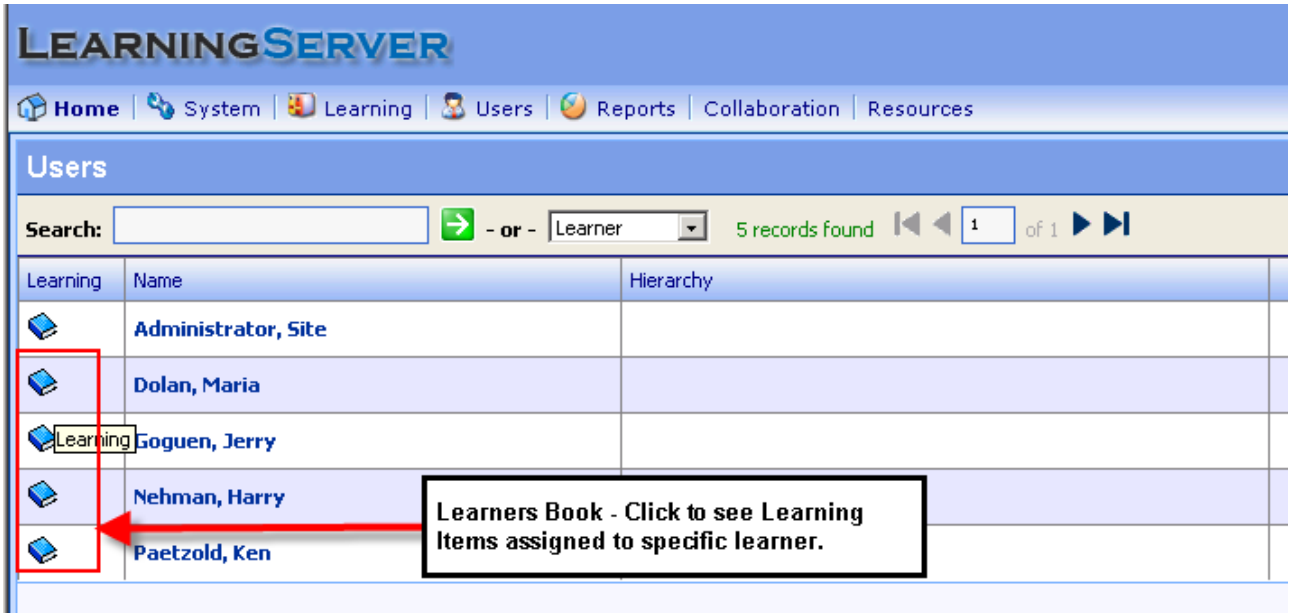
### Users / User Management / Learners Book / Events:

The Learners Book is another area where Learner(s) may be registered into an Event Session this functionality allows 1 to many Event Sessions to be enrolled or removed to one specific Learner at a time. Below the image is a chart describing the various actions available and the expected results.

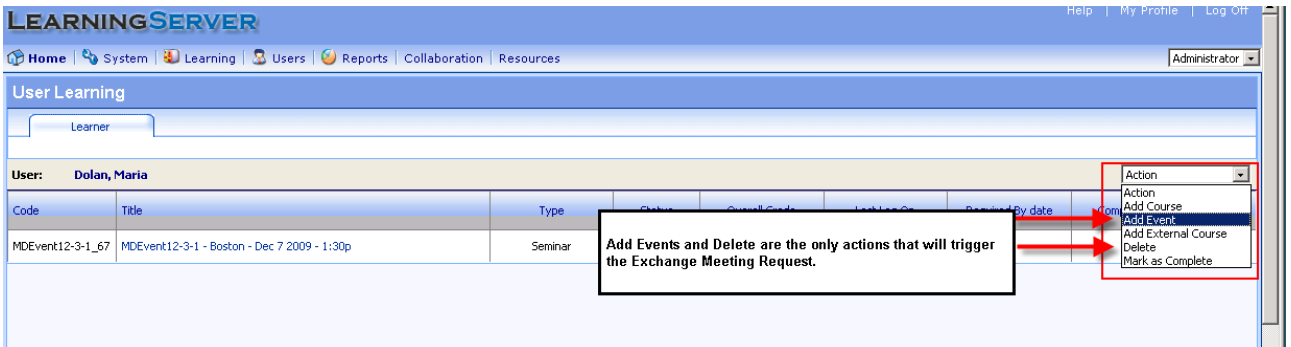
Learners Book functionality can be performed by:

- Administrator (for all learners)
- Supervisor (only for learners assigned to the Supervisors hierarchy level)

To locate the Learners Book, first go to the User management page and then select the Book beside the Learners name.



Next, select the Add Event from the Action Dropdown List if you wish to add 1 to many Event Sessions to this Learner. If you wish to remove the Learner from 1 to many Event sessions, you can select the “Delete” action from the dropdown list.



Select: “Add” - 1 to \* Learner(s) :

- Learner(s), will receive a Meeting Request email in their Outlook mailboxes
- If, Max Seats is not set to unlimited, then those learners who are waitlisted will not receive Meeting Request email.

Select: “Delete” - 1 to \* Learner(s):

- Learner(s), who have been “Deleted” from the Event Session, will receive a Cancellation Meeting Request email in their Outlook mailboxes. The Learners will have to confirm the cancellation for the Meeting request to be removed from their Outlook mailbox.

- Any Waitlisted Learners removed from waitlist and enrolled due to openings now available, will then receive a New Meeting Request email in their Outlook mailbox.
- If learner(s) were previously marked as **“Dropped”**, then the learner will not receive any Cancellation notice in their Outlook mailbox.

### 3. Exchange Meeting Request: Modify Event Session information by Administrator, Instructor

The following section outlines the various areas where the an Exchange Meeting Request email will be sent to those Learners enrolled to any of the Event Sessions when the Event or the Event Session information has been changed. In each section we will identify which roles have access to perform this functionality.

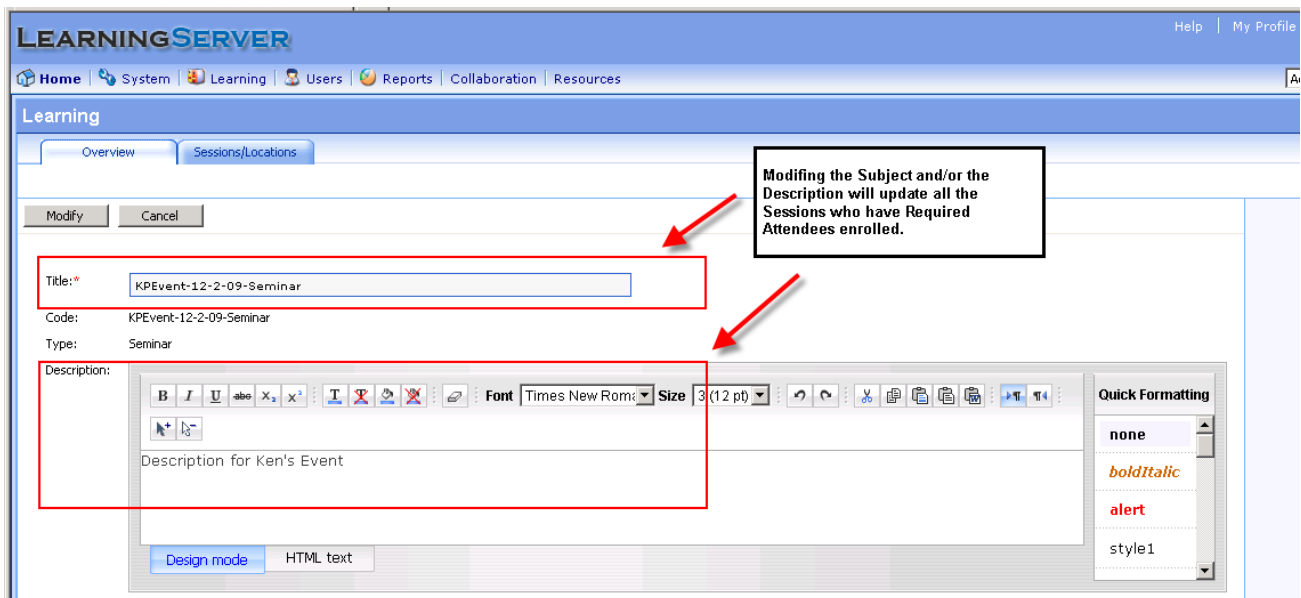
#### Updating the Parent Event:

When the Title of the Event or the Event description is modified, than an Exchange Meeting Request email will be sent for all the Event Sessions and those learners enrolled to those sessions.

The original meeting request will automatically be removed from those learners’ outlook calendar, and the new Meeting Request will appear in the learner’s outlook mailbox. Exchange automatically places the meeting into the calendar until the Learner accepts or declines the new request.

Course and Event Management / Event functionality can be performed by:

- Administrator ( all learners)
- Instructor ( only the users who have been assigned as the Instructor)



#### Updating the Individual Event Session(s):

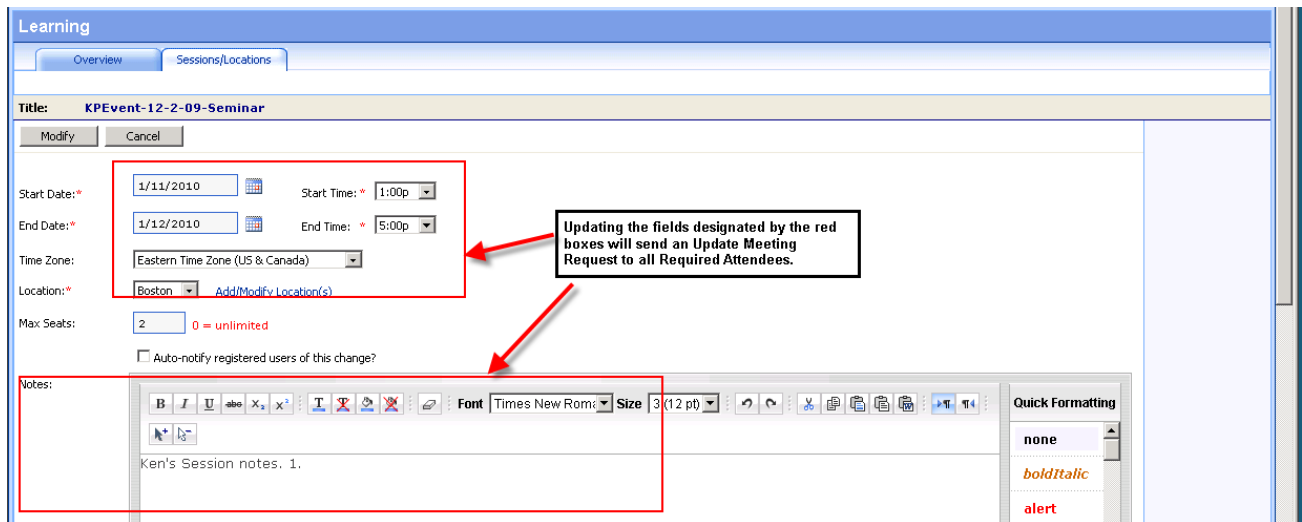
When an individual Event Session has been modified, than an Exchange Meeting Request email will be sent to all the learners enrolled to this Event Session. Only the following fields will trigger a new Exchange Meeting Request:

- Start Date
- End Date
- Start Time
- End Time
- Time Zone
- Location
- Notes

The original meeting request will automatically be removed from those learners' outlook calendar, and the new Meeting Request will appear in the learner's outlook mailbox. Exchange automatically places the meeting into the calendar until the Learner accepts or declines the new request.

Course and Event Management / Event / Sessions/Locations functionality can be performed by:

- Administrator ( all learners)
- Instructor ( only the users who have been assigned as the Instructor)



#### 4. Exchange Meeting Request: Deleting Event or Event Session(s) by Administrator, Instructor

The following section outlines the various areas where the Exchange Meeting Request functionality to delete an entire Event or just Event Sessions, can be found when the Exchange Meeting Request switch is set to *Yes* on the **System / Settings / Site Properties** section. In each section we will identify which roles have access to perform this functionality.

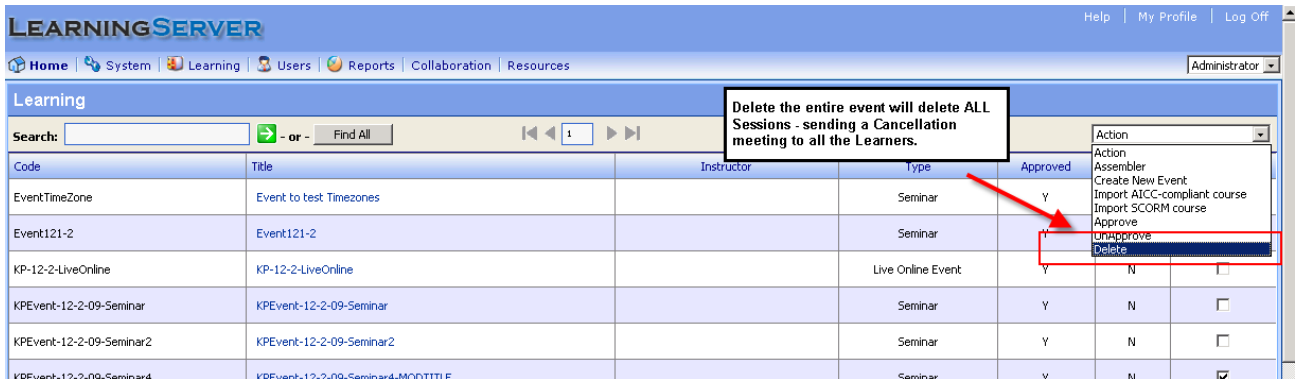
**Learning / Course and Event Management:** Deleting the entire Event from the Course and Event Management page allows the entire Event to be deleted from the application. This

behavior must be performed with extreme caution. Once an Event has been deleted there is no way to retrieve all the history for learners who have taken the Event.

Note: currently if an Event is set to Unapprove, the Exchange Meeting Request remains in the Learners Outlook calendar, it will only be canceled if the Event is deleted.

Course and Event Management functionality can be performed by:

- Administrator ( all learners)
- Instructor ( only for learners assigned to the Events which they are instructors to)



Select: *“Delete”* – all learners in all event sessions will get a Cancellation Meeting Request:

- Learner(s), who have been *“Deleted”* from the Event Session, will receive a Cancellation Meeting Request email in their Outlook mailboxes. The Learners will have to confirm the cancellation for the Meeting request to be removed from their Outlook mailbox.
- If learner(s) were previously marked as *“Dropped”*, then the learner will not receive any Cancellation notice in their Outlook mailbox.

**Learning / Course and Event / Sessions/Locations:** Deleting 1 to many Event Sessions: Course and Event Management / Sessions/Locations page allows the deletion of 1 to many Event Sessions. This behavior must be performed with extreme caution. Once an Event Session has been deleted there is no way to retrieve all the history for learners who have taken the Event.

Course and Event Management functionality can be performed by:

- Administrator ( all learners)
- Instructor ( only for learners assigned to the Events which they are instructors to)



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Learning

Overview Sessions/Locations

**When Session is Deleted - a Cancellation Meeting is sent to all the Required Attendees.**

Title: KPEvent-12-2-09-Seminar

Code	Location	Instructor	Start Date	End Date	Start Time	End Time	Time Zone	Max Seats	Y	Action
KPEvent-12-2-09-Seminar_54	Boston		1/11/2010	1/12/2010	1:00p	5:00p	Eastern Time Zone (US & Canada)	2	Y	<input checked="" type="checkbox"/>
KPEvent-12-2-09-Seminar_55	Orlando		1/27/2010	1/28/2010	1:30p	3:00p	Eastern Time Zone (US & Canada)	2	Y	<input type="checkbox"/>

Select: *“Delete”* – all learners in all event sessions will get a Cancellation Meeting Request:

- Learner(s), who have been *“Deleted”* from the Event Session, will receive a Cancellation Meeting Request email in their Outlook mailboxes. The Learners will have to confirm the cancellation for the Meeting request to be removed from their Outlook mailbox.
- If learner(s) were previously marked as *“Dropped”*, then the learner will not receive any Cancellation notice in their Outlook mailbox.

## 5. Exchange Meeting Request: Enrollment for the Learner

The following section outlines the various areas where the Exchange Meeting Request functionality works when a Learner is registering or removing themselves from an Event Session. This behavior will only be seen when the Exchange Meeting Request switch is set to *Yes* on the **System / Settings / Site Properties** section. The remaining functions can only be performed by a Learner.

### Learning Catalog → Events:

As a learner there are 2 ways a Learner can trigger the Exchange Meeting Request. On the main page of the Learning Catalog by clicking the Select link and then clicking the Enroll Now button which will bring up the Confirmation page. Once the Confirm button is clicked, this will trigger the call to Exchange to send out a Meeting Request to the Learners outlook mailbox and calendar.

The screenshot shows the 'Learning Catalog' page with a table of events. A callout box highlights the 'Select' link in the first row of the table.

Code	Title	Type	Status		Selected:
EventTimeZone_71	Event to test Timezones - Chicago - Dec 22 2009 Start Time Tuesday, December 22, 2009 1:00 PM Pacific Time Zone (US & Canada) End Time Tuesday, December 22, 2009 3:00 PM Pacific Time Zone (US & Canada)	Seminar		Select	Event to test Timezones - Chicago - Dec 22 2009
Event121-2_52	Event121-2 - Chicago - Dec 8 2009 Start Time Tuesday, December 08, 2009 1:30 PM Eastern Time Zone (US & Canada) End Time Tuesday, December 08, 2009 4:00 PM Eastern Time Zone (US & Canada)	Seminar		Select	
Event121-2_53	Event121-2 - Orlando - Dec 9 2009 Start Time Wednesday, December 09, 2009 3:30 PM Eastern Time Zone (US & Canada) End Time Wednesday, December 09, 2009 4:00 PM Eastern Time Zone (US & Canada)	Seminar		Select	
KP-12-2-LiveOnline_62	KP-12-2-LiveOnline - Dec 31 2009 Start Time Thursday, December 31, 2009 10:00 AM Eastern Time Zone (US & Canada) End Time Thursday, December 31, 2009 4:30 PM Eastern Time Zone (US & Canada)	Live Online Event		Select	
	KPEvent-12-2-09-Seminar - Boston - Jan 11 2010				

The Second way to trigger the Exchange Meeting Request is by clicking on the Event title, which will open a popup window with the event session information. At the top of the popup window is an “Enroll” button. Clicking on this button will trigger the Exchange Meeting Request for this specific Event Session. (“Outlook” button is disabled when Exchange is turned on)

### Exchange Meeting Request: Delete for the Learner

The following section outlines the how a Learner can withdraw from an event and trigger a Cancellation Meeting request to their Outlook Mailbox and Calendar. This behavior is only seen when Exchange Meeting Request switch is set to *Yes* on the **System / Settings / Site Properties** section. This functionality can only be performed by a Learner.

#### Withdraw:

A learner is allowed to Withdraw from an Event Session as long as that event has not expired or is started that day. Selecting Withdraw from the action dropdown list will trigger a cancellation Meeting Request to all the Event Sessions which were selected.

Note: Learners are only able to withdraw from an Event Session, prior to the day of the event. On the day of the event, if a Learner needs to be removed from the event, then the learner must do so by notifying the Instructor or Supervisor. Please check to make sure the reason why an Event Session does not appear on the page is because it either has expired or the Event is starting that day.

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Home | My Learning | Learning Catalog | Collaboration | Resources

**Withdraw**

Withdrawing from event will trigger a Cancellation Meeting Request.

Status	Title	Designation	Credit Hours	Type	Availability	Action
	Event to test Timezones - Chicago - Dec 22 2009 Start Time: Tuesday, December 22, 2009 1:00 PM 1:00p Pacific Time Zone (US & Canada) End Time: Tuesday, December 22, 2009 3:00 PM 3:00p Pacific Time Zone (US & Canada)			Seminar	Tuesday, December 22, 2009 – Tuesday, December 22, 2009	Withdraw

## Notes and Best Practices:

- Events with Max Seats: A Meeting Request will not be sent to Waitlisted learners. If Learners are moved from waitlist to enrolled, then the Exchange Meeting Request will be sent
- It is recommended that Email Alerts related to event enrollment (in System → Maintenance → Email Alerts) are turned to Approve = No. If these are set to yes, learners will receive both an Email from LearningServer and the Exchange Meeting Request email.
- When deleting a learner, ALL Meeting Requests that relate to LearningServer Events will be removed from the Learners Outlook Calendar with no option to restore.
- Learning Catalog – “Add to Outlook Calendar” button will be hidden if the Exchange Connector is INSTALLED and ENABLED in System → Settings.
- Outlook: If learners do not accept the original Meeting Request email, they will still receive future Meeting changes.
- Outlook: If a Learner has not accepted the original Meeting Request, and the Event Session has been updated, Exchange handles this by removing the Original Meeting Request from the mailbox and calendar. The Learner will only see the new Updated Meeting Request in their Outlook mailbox as well as in the Outlook Calendar.
- When Updating an Event or the Event Session the following will trigger a new updated Meeting requests for those learners enrolled.
  1. Event Subject and Description changes - this will issue a new Meeting Request in the outlook mailbox for all Event Session meetings.
  2. Event Start and End Dates / Event Start and End Times, Location, TimeZone or Session Notes changes for an Event Session - this will trigger a new Meeting Request for those learners enrolled to this Event Session. The Learners Outlook mailbox will receive the new Meeting request to be accepted or declined. Exchange automatically removes the old Calendar request and creates a new calendar event based on those