

d.velop

d.velop enterprise search for
Microsoft Exchange: Administrator

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1. d.velop enterprise search for Microsoft Exchange

1.1. Basic information on the application

This chapter contains general product information and conventions regarding documentation.

1.1.1. About d.velop enterprise search for Microsoft Exchange

An ECM system enables structured data storage. As a rule, information objects are not only present in structured in your ECM system, but are also created in other systems and platforms. For example, the correspondence in your Exchange server also contains a lot of information in e-mails that could be relevant for a business transaction. With enterprise search, you can overcome data silos and find information not just in your ECM system, but in your heterogeneous business landscape using providers.

The d.velop enterprise search for Microsoft Exchange search provider enables searches in Microsoft Exchange systems.

1.2. Installing and Uninstalling

This chapter contains information about the installation of d.velop enterprise search for Microsoft Exchange.

1.2.1. System requirements

Pay attention to the [general system requirements for d.velop products](#).

1.2.2. Installing the Microsoft Exchange search provider

You install the software exclusively with d.velop software manager. If an application is required for different products, the corresponding software packages are also installed automatically.

For further information on installing the software, see the d.velop software manager manual.

After the installation, call the **Search provider** dialog in the configuration to refresh the list of available search providers. Call this dialog again every time the configuration is changed in the search provider to update the configuration.

1.2.3. Uninstalling the Microsoft Exchange search provider

The software you installed using d.velop software manager can only be uninstalled with d.velop software manager. If the software to be uninstalled has dependencies with other software packages, you must resolve these conflicts accordingly.

For further information on uninstallation, see the d.velop software manager manual.

1.2.4. Installing updates of the Microsoft Exchange Search Provider

You can only update the software using d.velop software manager.

For further information on updates, see the d.velop software manager manual.

1.3. Configuring the Microsoft Exchange search provider

This chapter contains further information about the settings and configuration options.

1.3.1. Adding a Microsoft Exchange Connection

To enable searching of Microsoft Exchange, you must first configure the Microsoft Exchange server. In your Microsoft Exchange server, set up a user account with search permissions for every inbox. This

user account is used as a system user. This means that a configuration by every single user is no longer necessary. The authentication method for this option is always "Basic".

For the configuration, you require the URL for your Microsoft Web Services server.

This is how it works

1. Open **Exchange PowerShell**. You can find the PowerShell on the server of your Microsoft Exchange installation.
2. Execute the following command: **Get-WebServicesVirtualDirectory |Select name, *url* | fl**
3. Make a note of the URL.
4. Click **Configuration** on the d.3one start page.
5. Under **Enterprise search**, choose the entry **Search provider**.
6. Click the cog icon in the group **Microsoft Exchange** and select the entry **Microsoft Exchange connection**.
7. Under **Source system**, choose the entry **Microsoft Exchange server**.
8. Enter the URL for your Microsoft Web Services server.
9. Enter the port. This is usually port 443.
10. Enter the user name and password of the user you created for preparation as a system user.

You have successfully added the Microsoft Exchange search provider. Enable the search provider in search provider management so that your users can use the search provider.

1.3.2. Creating the Microsoft Exchange Online Access Data

To use the Microsoft Exchange Online search provider, you must first set up access. For this, the search provider needs an OAuth2 authentication. This provides an access point in your Azure client with which your users can authenticate themselves. You are in control of this access point.

This is how it works

1. Switch to the [Microsoft Azure Portal](#) and log in with a global account or user management administrator.
2. Open the Azure service **Azure active directory**.
3. Go to the area **Azure Active Directory > App registrations**.
4. Choose **New registration** to create a new app.
5. Provide a descriptive name (e.g. „d.velop enterprise search“).
6. Select **Accounts in this organizational directory only** as the supported account type.
7. Click **Register**.
8. Make a note of the values of **Application ID** and **Directory ID**.
9. Open the app you just created and go to **API permissions**.
10. Add the following application permissions as API permissions from the area **Office 365 Exchange Online**:
 - full_access_as_app
11. If necessary, assign administrator approval for the permission you just added.
12. Go to the **Certificates & secrets** area in your app.
13. Provide a descriptive name (e.g. "enterprise-search-Client-Secret").
14. Assign a validity period.
15. Note the key for the next configuration step. You cannot view the key afterwards.

You have now registered an app with the permissions you need for further configuration. You have also generated a key that you need to configure the search provider.

1.3.3. Adding a Microsoft Exchange Online Connection

This section tells you how to configure the connection to a Microsoft Exchange Online service.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Microsoft Exchange connection**.
3. For a connection to Microsoft Exchange Online, under **Source system**, choose the entry **Microsoft Office 365**.
4. Enter the directory ID, the application ID, and the API token.
5. Click **Save**.

You have successfully added the Microsoft Exchange Online provider. Enable the search provider in search provider management so that your users can use the search provider.

1.4. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at <https://dvelopacademy.keelearning.de/>.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: <https://kb.d-velop.de/>

Find the central imprint at <https://www.d-velop.com/imprint>.