

MT App Note 16053 (AN 16053)
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Importing Contacts into Mitel Connect

Description: This application note describes how to enable the import of local Outlook contacts, also called personal contacts, into the Mitel MiVoice Connect desktop application.

Environment:

Mitel MiCloud Connect or Mitel MiVoice Connect
Mitel Connect desktop application (for Windows and Mac)
Microsoft Exchange, Office 365, Outlook

Target Audience:

Mitel Partners
Mitel Partner Sales Engineers
Mitel Solution Architects
Mitel Connect users

The Mitel Connect desktop application can search and display local Outlook contacts. Contacts are displayed on the Contacts pane or from the main search bar. Contact information can be used within the Connect application to place calls, send instant messages, start screen sharing, create an email message, etc. This process works for both MiVoice Connect and MiCloud Connect.

Importing contacts into the Mitel Connect desktop application is automatic and only requires enabling the option. Local contacts are then displayed each time a search is performed.

Local contacts are also called personal contacts and are synonymous in this document.

See App Note 16021 “Connect Integration with Microsoft” for more complete information on how Mitel Connect integrates with Microsoft Outlook, Exchange, and other products.

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Enabling Local Contacts in Connect

One of the features of the Connect desktop application is to display the user's local contacts. Local contacts are not manually "imported" into Connect like other Unified Communications applications. Instead, the process is automatic and is performed by the Connect application itself. The user only needs to enable the option and the Connect system does the rest.

To enable local contacts on Windows, open the Connect application Settings. On the Outlook tab, check the "Sync my Outlook contacts" box. If desired, the specific contact folders to import can be checked.

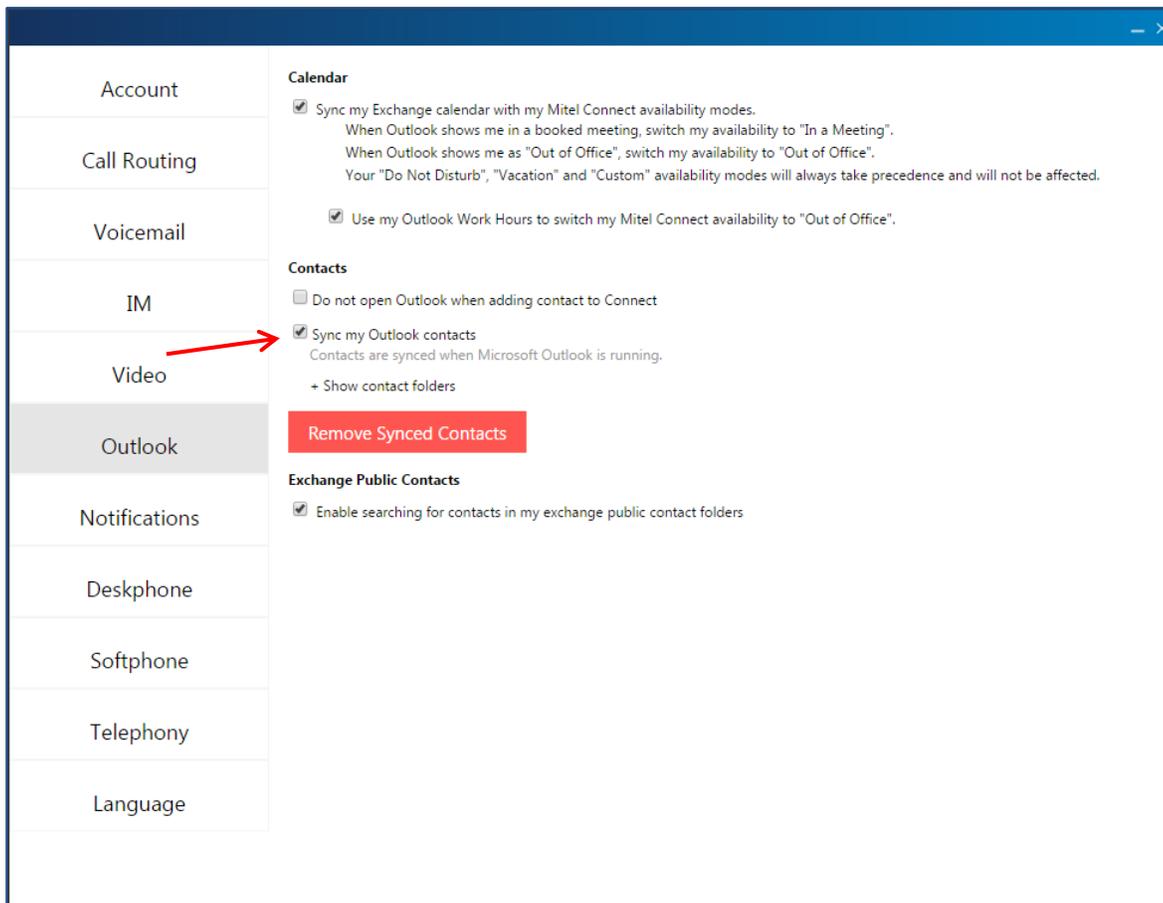


Figure 1 - Mitel Connect Contact Settings for Windows

For Windows, the Connect "add-in" modules must also be present in Outlook. This also happens automatically when Outlook is installed.

To enable local contacts on Mac, open the Connect application Preferences. On the Contacts / Outlook tab, check the “Sync my Mac Contacts” box.

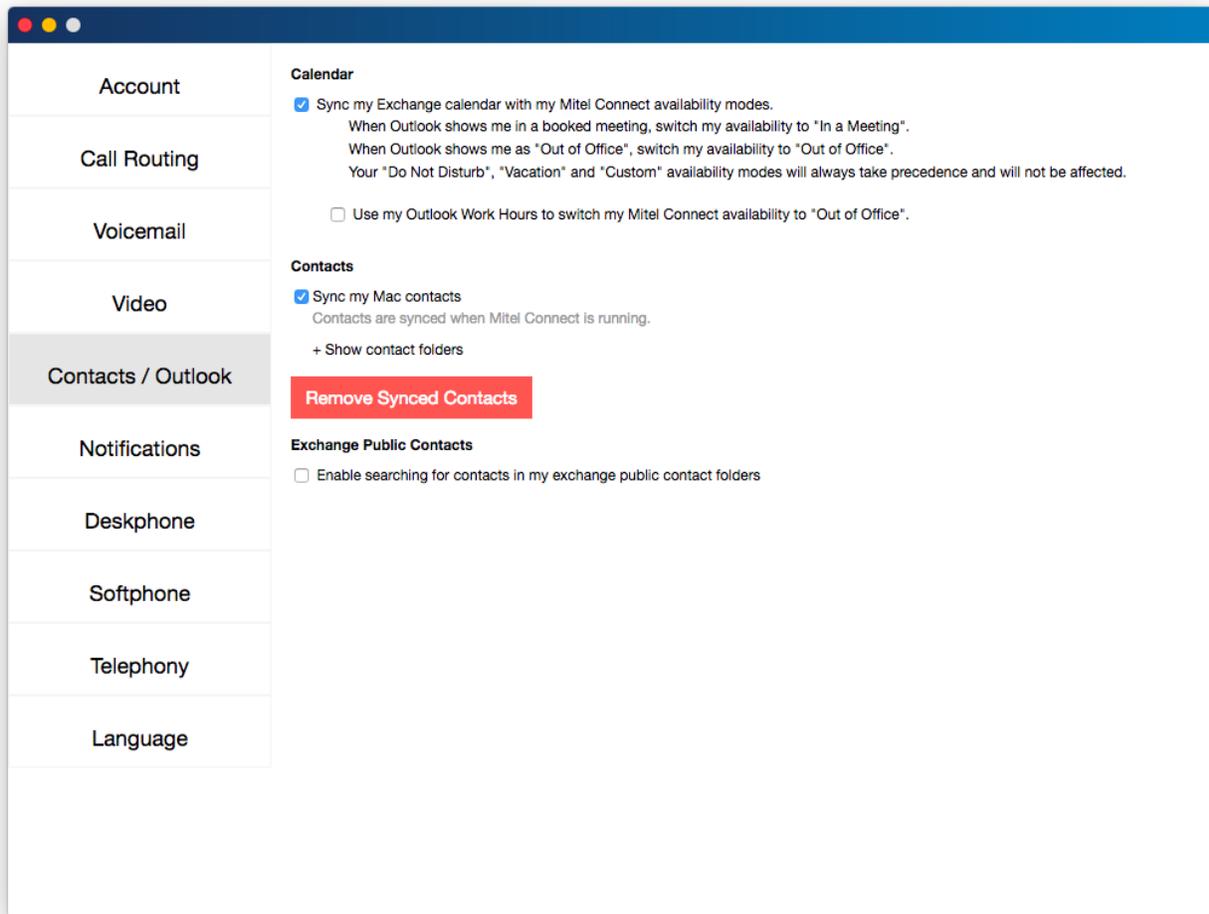


Figure 2 - Mitel Connect Preferences for Mac

Outlook for Mac doesn't use add-in modules to assist in contact import. Local Mac contacts are sent from directly from the Apple Contacts application to the Mitel Connect system for use by the Connect desktop application. See “Importing contacts for Mac” below for more information.

Once contact sync option has been enabled, the Connect desktop application will display the user's local contacts along with any other matching contacts. Clicking on a local contact will display the Connect “Contact Card” with all the contact information. This information can be used to place calls, send instant messages, start screen sharing, create an email message, etc.

How Local Contacts are imported into Connect

Contact information comes from the user's Exchange or Office 365 account. In order to get that information, Connect must communicate with Exchange / Office 365.

Connect uses Exchange Web Services (EWS) to access data from the Exchange and Office 365. EWS retrieves local contacts from the user's Exchange or Office 365 account, and sends that data to the Connect application. EWS is also used to retrieve user pictures (avatars) to display in the Connect "Contact Card" for Exchange users.

In order to use EWS and be able to import local contacts, Exchange / Office 365 integration must be enabled and configured in the Connect system either via MiVoice Connect Director or via BOSS for MiCloud Connect. Enabling Exchange / Office 365 integration is performed by the Mitel Connect administrator.

For more information on EWS and its integration with Connect, see App Note 16021 "Connect Integration with Microsoft".

Importing contacts for Windows

Outlook for Windows uses several plug-in (add-on) components to pass information from Outlook to the Connect desktop application. The "ShoreTelConnectContactUploadAddIn" plug-in is used to import local contacts to Connect. The plug-in module is installed into Outlook when the Connect application is installed on the user's desktop system.

When the Connect desktop application is started, this plug-in sends local contacts, also called personal contacts, from Outlook to the Connect system for use by the Connect desktop application. These local contacts are displayed when the user searches or if the local contact is part of a "favorite" or "group" on the Contacts pane.

This process works the same for MiVoice Connect and MiCloud Connect, and for Outlook running on Exchange or Office 365.

Importing contacts for Mac

Outlook for Mac does not use any plug-in modules. Local Mac contacts are stored in the Apple Contacts application (not in Outlook). The Apple Contacts application can interface directly with Exchange or Office 365. Local contacts are sent to the Connect system via the ShoreTel "UpLoadCMD" process.

UpLoadCMD runs outside of Outlook and sends contact changes directly to Connect. Connect can then access local contact data without having an Outlook plug-in.

Using Connect with Public Contact Folders

Contacts stored within an Exchange Public Folder are included in search requests from the Connect desktop application. When a user performs a search, the search returns information from the Global Address List (GAL) and the Connect system. Public Folders are included as part of the GAL search. There is no distinction between contacts which come from the GAL or from Public Folders. The Connect desktop application does not know if the search results came from the Exchange, LDAP, or Public Folders.

All matching contacts will be returned and displayed in the search results. Connect combines the data by matching the email address for each contact. The combined data for the user's search request is displayed in the Connect application in a single view. Up to 25 contacts are displayed in the search result.

Additional Resources

- [Mitel Connect Client User Guide](#)
- [MiVoice Connect System Administration Guide](#)

| Version | Date | Contributor | Content |
|---------|--------------|-------------|---------------------------|
| 1.0 | August, 2016 | W. Toigo | Original App Note |
| 2.0 | April, 2018 | W. Toigo | Update to Mitel branding. |