Everbridge-Office 365 Integration Guide

Everbridge Suite

February 2024

Configuration 4
Registering an Application in the Azure Portal 5
Configure the Office 365 connector in Everbridge Suite 6
Usage Overview 9
Matching Everbridge Suite and Office 365 Contacts 10
Matching Everbridge Suite Locations and Office 365 Meeting Rooms 11
Updating the Expected Location 12
Case Scenarios 13
Logging 15
Viewing and Using the Expected Location 17

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Configuration

The Everbridge Safety Connection Office 365 connector updates contacts' Expected Locations from Outlook meeting invites.

There are two distinct steps for configuring the Office 365 connector:

1. Registering an application in the Azure Portal. See Microsoft Learn for a tutorial.
2. Setting up the connector in the Everbridge Suite.

Registering an Application in the Azure Portal

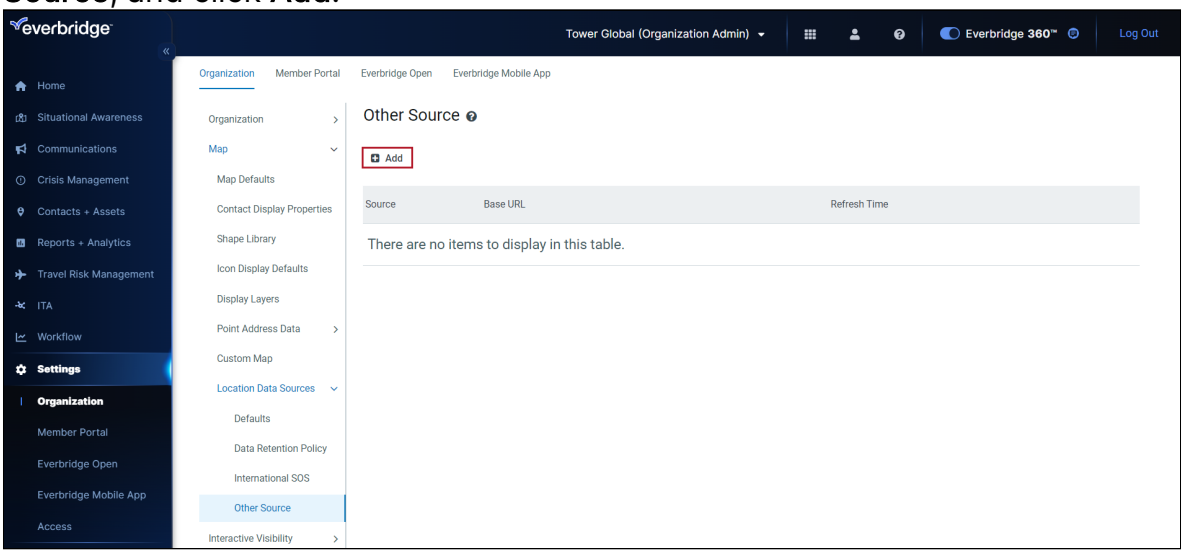
The Office 365 connector uses the Microsoft Graph API. This API requires an access token from **Microsoft Entra ID**, a cloud identity service obtained from an **Application ID** value, and the **Client Secret** key.

See Microsoft Learn for a full walk-through on registering an application to the Azure Portal. Note that some abilities are permission-based, so refer to Microsoft Graph Permissions Reference for more information.

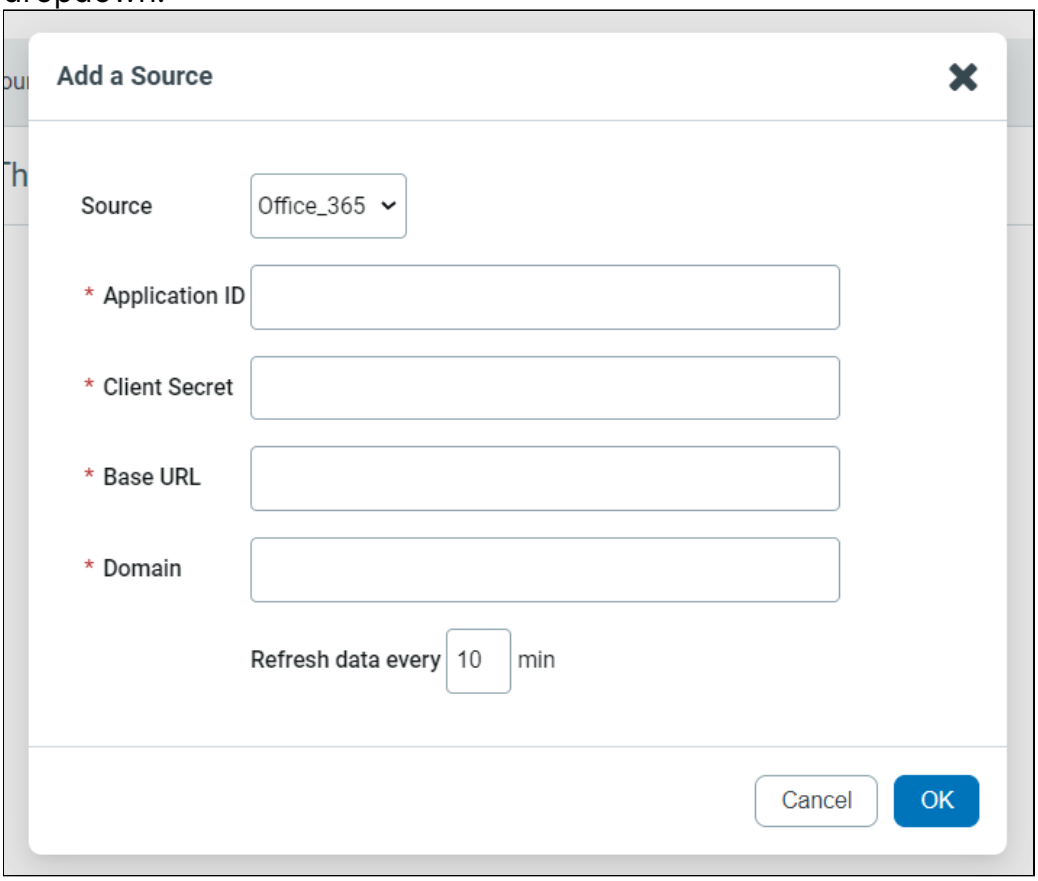
Configure the Office 365 connector in Everbridge Suite

Once your application has been registered, it's time to configure the Office 365 Connector within Everbridge Suite.

1. Navigate to **Settings** > **Organization** > **Map** > **Location Data Sources** > **Other Source**, and click **Add**.



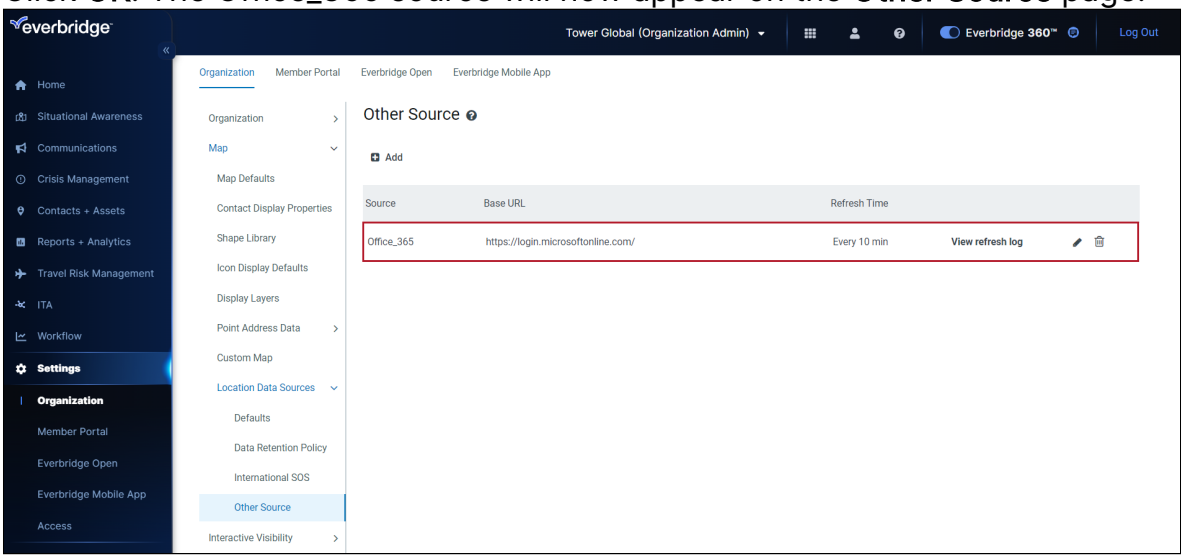
2. The **Add a Source** modal opens. Select **Office_365** from the **Source** dropdown.



3. Fill in the following fields:

Field	Value
Application ID	The Application ID value from the Azure portal.
Client Secret	The saved Client Secret value from the Azure portal.
Base URL	https://login.microsoftonline.com/
Domain	The [domain name] considered. For instance, *everbridge.onmicrosoft.com*.

4. Click **OK**. The Office_365 source will now appear on the **Other Source** page.



Usage Overview

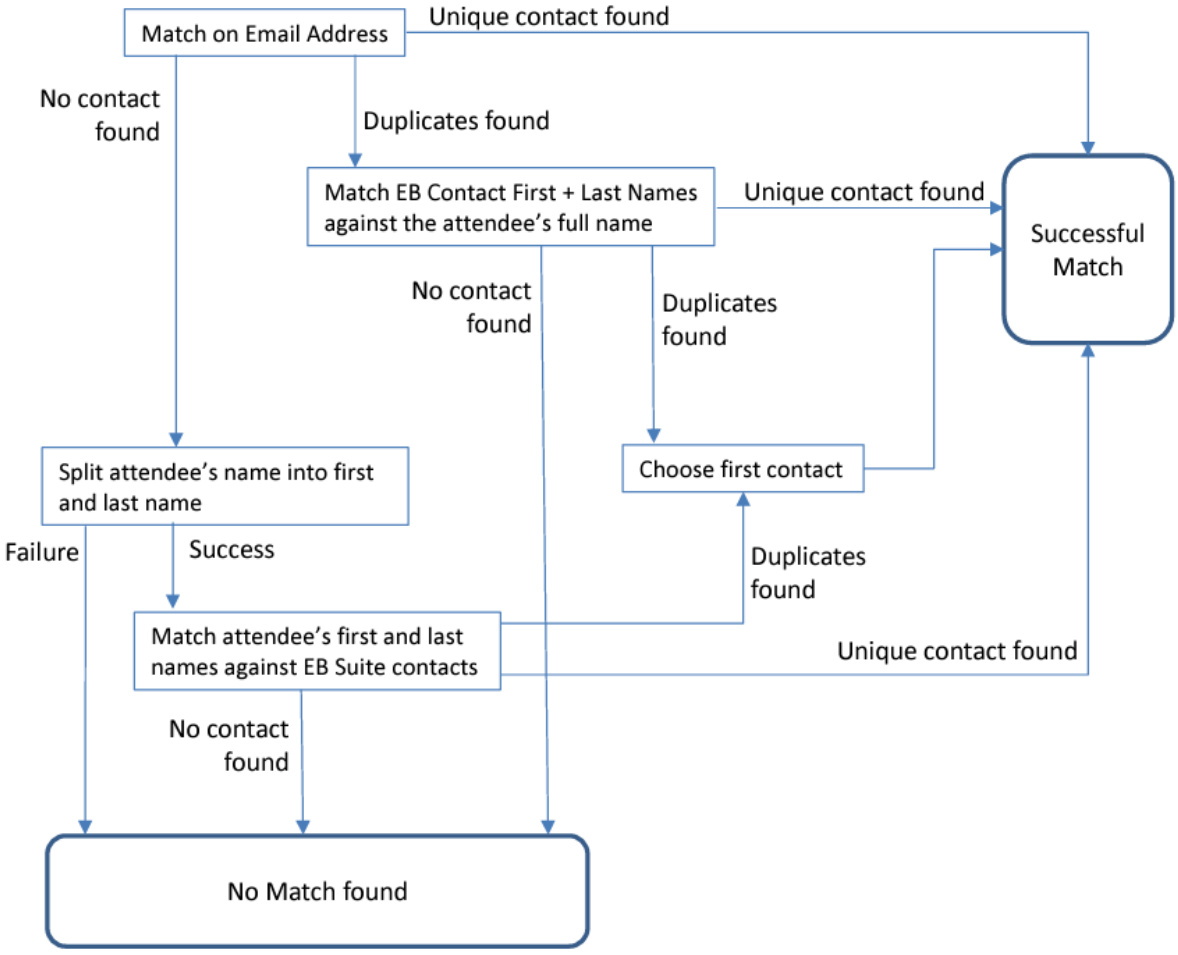
The connector is used to update the Everbridge Suite contacts' Expected Locations from Calendar meeting invites. It does not create any contacts or meeting rooms in Everbridge Suite. The contacts' Expected Locations are updated only when the two conditions below are met:

1. A positive match can be established across Everbridge Suite and Office 365 contacts in the Organization where the connector has been set.
2. The meeting room in Office 365 matches an Everbridge Suite location.

Matching Everbridge Suite and Office 365 Contacts

Contacts are primarily matched across the two systems using the email address as a common reference. The matching algorithm contains additional steps to provide solutions in corner-case scenarios when for instance:

- The domain name attached to the email is not the same in Everbridge Suite and Office 365. This might occur following M&A activities or when companies change their domain.
- Multiple contacts with the same email address are found in Everbridge Suite. Everbridge Suite does not check the uniqueness of each contact email address. This situation could be generated by discrepancies in the data source used to generate contacts or by keying mistakes in Everbridge Suite.



Matching Everbridge Suite Locations and Office 365 Meeting Rooms

All Office 365 meeting rooms have an email address attached to them. This email address is matched against the **External ID** property attached to any locations in Everbridge Suite.

Updating the Expected Location

For each meeting and each identified contact, the Expected Location is set in Everbridge Suite to the identified location corresponding to the meeting room for the duration of the meeting.

	Description
Outlook Meeting	**Location**: Newton Meeting Room **Start Time**: Wednesday, January 16th at 10:30 AM **End Time**: Wednesday, January 16th at 11:30 AM **Attendees**: • Theo.Garrison@everbridge.com • Aliyah.Hanson@everbridge.com
Everbridge Suite Location	**Location Name**: Newton Meeting Room **External ID**: Meeting.room.Newton@everbridge.com
Everbridge Suite Contact	Theo Garrison: • **First Name**: Theo • **Last Name**: Garrison • **Work Email**: Theo.Garrison@everbridge.com Aliyah Hanson: • **First Name**: Aliyah • **Last Name**: Hanson • **Work Email**: Aliyah.Hanson@everbridge.com
Everbridge Suite Expected Location	A new expected location will be created for Theo Garrison and Aliyah Hanson: • **Link to existing building**: Conference Room Newton in Burlington, MA • **Date Range Start**: Wednesday, January 16th at 10:30 AM • **Date Range End**: Wednesday, January 16th at 11:30 AM

Case Scenarios

The following case scenarios are considered and managed by the connector:

- **Forwarding a meeting invite to the meeting** - An expected location will be set for all new attendees added to the meeting invite matched in Everbridge Suite.
- **Adding invitees to a meeting invite** - An expected location will be set for all new attendees added to the meeting invite only if the operator selects the option '*Send updates to all attendees*' in the Outlook client. Note that on Microsoft Outlook Web, updates are only sent to added employees by default.
- **Deleting invitees from a meeting invite** - The expected location will be removed from the corresponding Everbridge Suite contacts only if the operator selects the option 'Send updates to all attendees in the Outlook client. Note that on Microsoft Outlook Web, updates are only sent to deleted employees by default.
- **Changing meeting date or time** - The corresponding Everbridge Suite expected locations will be updated.
- **Cancelling a meeting** - All corresponding Everbridge Suite expected locations will be deleted.
- **Group invite** - An expected location will be set for all attendees in the group matched in Everbridge Suite.
- **Declining a meeting** - Expected locations will be deleted for attendees declining a meeting invite.
- **Accepting or tentatively accepting a meeting** - These actions in Outlook have no impact on the expected locations.
- **Recurring meetings** - Expected locations will be created up to two months forward.

Other scenarios include:

- Meetings that have occurred in the past (before setting up the connector or were created in the past) are not considered.
- Everbridge Suite contacts are considered at the time the connector is run. Altering or creating new contacts after a meeting invite has been processed by the connector has no impact on expected locations.

- Accepting a meeting does not impact expected locations. By default, all attendees expected
  locations are updated unless they explicitly decline the meeting invite.
- Some meetings may include remote attendees. These will have their expected locations set
  to the meeting location for the duration of the meeting.

Logging

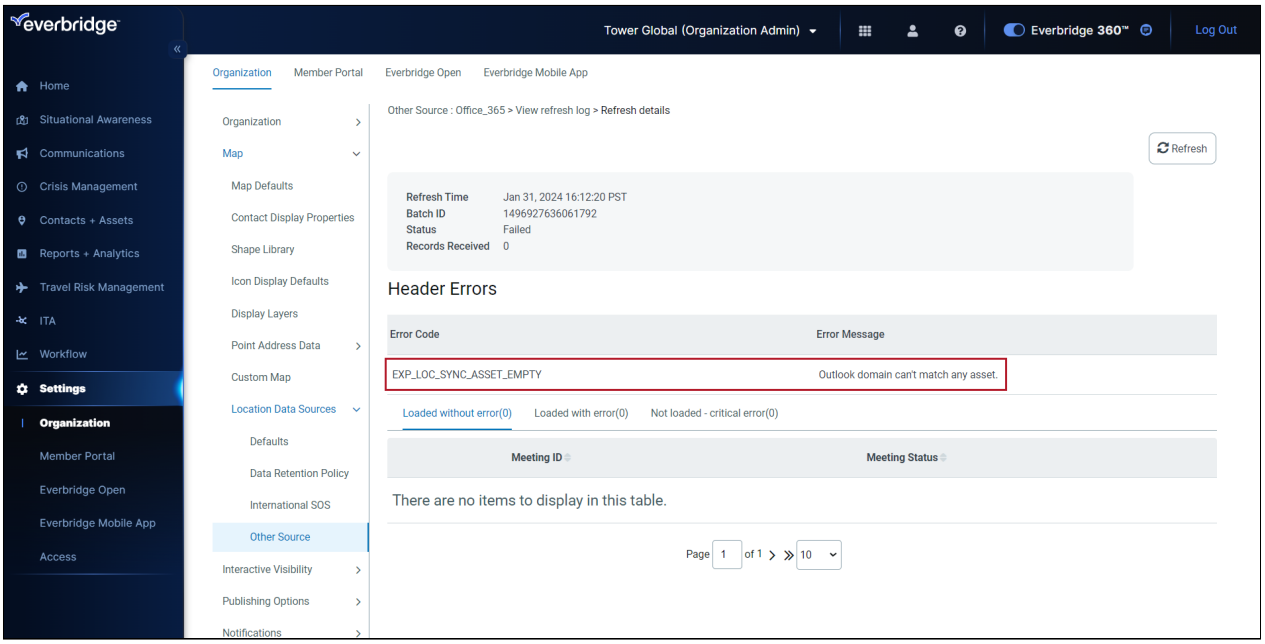
From the **Other Source** page in **Settings**, click **View Refresh Log**. The list of all attempts to connect to Office 365 is displayed.

Each line corresponds to one data load based on the refresh rate (in minutes) specified in the
configuration page of the connector.

Click the **View** icon to see the **Refresh Details** on each data load.

This page has three tabs for meetings loaded without errors, meetings loaded with errors, and
meetings not loaded due to a critical error. On all tabs, the list of all meetings with the Meeting ID
and status is displayed. The details of the meeting can be accessed by clicking the **View** icon.

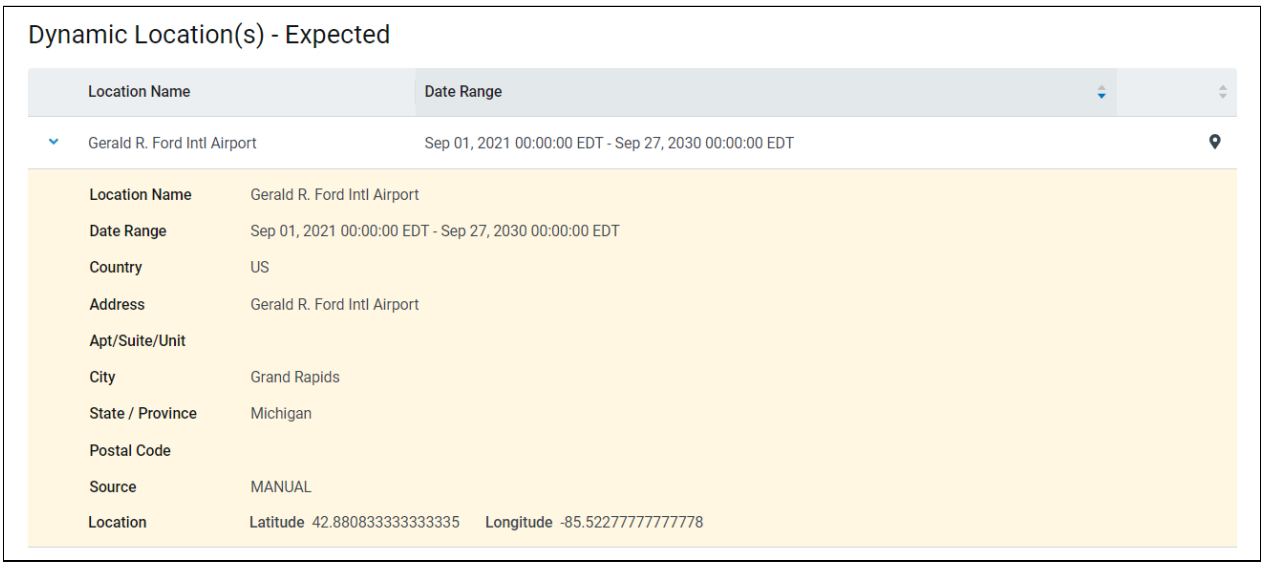
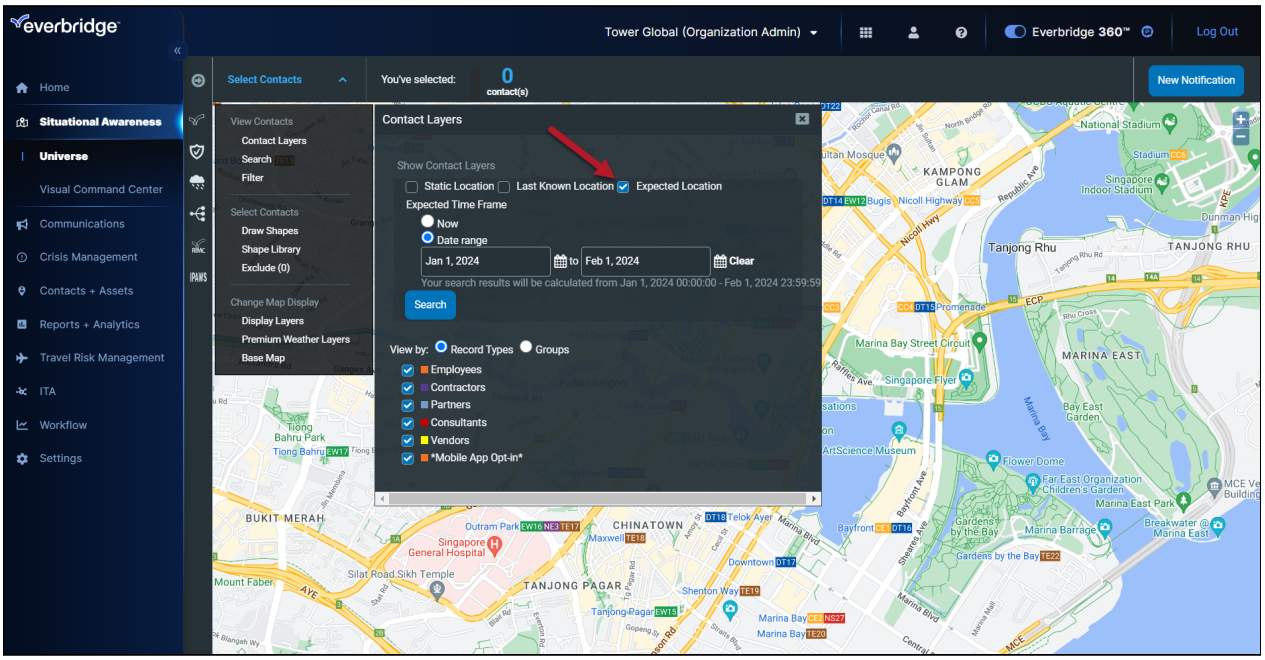
If the refresh process failed, the **Refresh Details** page will provide an error code and accompanying error message for troubleshooting purposes.



NOTE: The log will show a status of failed for a meeting if any of the attendees were not matched to an Everbridge Suite contact. Regardless of that status, all matched contacts will have their expected location set for that meeting.

Viewing and Using the Expected Location

The Expected Location appears on the **Contact Information** page in the **Dynamic Location(s) – Expected** section. Click the down arrow for each location to review its details:



The Expected Location is used to locate contacts in a specific area. For instance, on the Universe
view: