~~EXOHOL303:~~ Deploying Site Mailboxes with Exchange and SharePoint

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Lab: Deploying Site Mailboxes with Exchange and SharePoint

During this lab, you will familiarize yourself with creating, connecting to, and using site mailboxes.

Estimated time to complete: ***60 minutes***

Before You Begin
Verify that you are running the correct virtual machines.

What You Will Learn
After completing the exercises, you will be able to:

- Create a site policy.
- Add the Site Mailbox app to a Microsoft® SharePoint® site.
- Create a site mailbox.
- Use a site mailbox.
- Close a SharePoint site.

Scenario

As the Exchange administrator, you are preparing your organization for Microsoft Exchange Server 2013. You intend to use the new site mailboxes feature in your organization, and use site mailboxes for project-oriented tasks and group coordination.

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Exercise 1: Using Site Mailboxes

In this exercise, you will configure and connect to a site mailbox, and then work with documents in the site mailbox and the document library in SharePoint Server 2013.

In many organizations, information resides in two different stores—email in Microsoft Exchange and documents in SharePoint—with two different interfaces to access them. This causes a disjointed user experience and impedes effective collaboration. Site mailboxes allow users to collaborate effectively by bringing together Exchange email and SharePoint documents. For users, a site mailbox serves as a central filing cabinet, providing a place to file project email and documents that can only be accessed and edited by site members. Site mailboxes are surfaced in Microsoft Outlook® 2013 and give users easy access to the email and documents for the projects they care about. Additionally, the same set of content can be accessed directly from the SharePoint site itself.

Under the covers of a site mailbox, the content is kept where it belongs. Exchange stores the email, providing users with the same message view for email conversations that they use every day for their own mailboxes. SharePoint stores the documents, bringing document coauthoring and versioning to the table. Exchange synchronizes just enough metadata from SharePoint to create the document view in Outlook (that is document title, last modified date, last modified author, and size).

Site mailboxes require Exchange Server 2013 and SharePoint Server 2013 integration and configuration.

Virtual Machines

The following virtual machines will be used during this exercise:

- MBX1
- SP1
- CL1

Tasks

1. **Review and test partner application authorization.**
   a. Switch to MBX1, and sign~~ed~~ in as **Contoso\Administrator with the password Pa$$w0rd**.
   b. On the desktop, move the pointer to the lower left corner and then click **Start**. The Start screen preview will open when you point to and pause in the lower-left corner. You must point the mouse to the lower-left corner in order for the Start screen shortcut to appear. Alternatively, you can point to the lower-right corner, and then click **Start** from the Charms menu.
   c. On the Start screen, scroll right, and then click **Exchange Management Shell**.

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d. At the Windows PowerShell® command prompt, type the following, and press Enter.

```
Get-PartnerApplication
```

Review the partner applications that have already been configured.

e. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-PartnerApplication SharePoint* | FL
```

Review the settings for the SharePoint Enterprise partner application. This partner application was created using the following command from the C:\Program Files\Microsoft\Exchange\v15\Scripts directory.

.\Configure-EnterprisePartnerApplication.ps1 -ApplicationType Sharepoint -AuthMetadataUrl https://SP1/_layouts/15/metadata/json/1

The AuthMetadataUrl points to the SharePoint server in the organization.

f. Switch to SP1.

g. On the desktop, move the pointer to the lower left corner and then click **Start**.

h. On the Start screen, click **SharePoint 2013 Management Shell**.

i. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SPTrustedSecurityTokenIssuer
```

j. In the command output, locate **MetadataEndpoint**. This is the URL that SharePoint will use to retrieve OAuth tokens.

Leave the SharePoint 2013 Management Shell open. It will be used later in this lab.

2. Manage Site Mailbox provisioning policies.

a. Switch to MBX1, and the Exchange Management Shell.

b. In the Exchange Management Shell, at the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SiteMailboxProvisioningPolicy | FL
```

Review the default site mailbox policy.

c. At the Windows PowerShell command prompt, type the following, and press Enter.

```
New-SiteMailboxProvisioningPolicy -Name SM_ProvisioningPolicy
-IsDefault -IssueWarningQuota 9GB -ProhibitSendReceiveQuota 10GB
-MaxReceiveSize 50MB
```

d. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SiteMailboxProvisioningPolicy | FL
```

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Review the site mailbox policies and locate the default policy.

3. **Define a SharePoint site policy.**

   You can use site policies to help control site proliferation. A site policy defines the life cycle of a site by specifying when the site will be closed and when it will be deleted. When you close or delete a site, any sub-sites are also closed or deleted. If an Exchange mailbox is associated with a site, the mailbox is deleted from Exchange Server 2013 when the site is deleted.

   a. On MBX1, on the taskbar, click **Internet Explorer**.

   b. In the Address bar, type **https://SP1/sites/ProjectFalcon** and then press Enter.

      Wait for the page to load.

   c. In the upper-right corner, click **Settings** , and then click **Site Settings**.

   d. On the Site Setting page, under **Site Collection Administration**, scroll down, and then click **Site Policies**.

   e. On the Site Policies page, click **Create**.

   f. On the New Site Policy page, in the **Name** box, type **Project Falcon Site Policy**.

   g. Under **Site Closure and Deletion**, click **Close and delete sites automatically**.

   h. Under **Close Event**, in the **Site created date** box, type **1**. This will set the site to close automatically after 1 year.

   i. Under **Deletion Event**, in the **Site closed date** box, type **3**. This will automatically delete the site 3 months after the site has been closed.

   j. Under **Site Collection Closure**, select the **The site collection will be read only when closed** check box, and then click **OK**.

   k. In the breadcrumb navigation, click **Site Settings**.

   l. Under **Site Administration**, click **Site Closure and Deletion**.

   m. Next to Site Policy, click the **No Site Policy** menu, and then click **Project Falcon Site Policy**.

   n. Click **OK**.

   o. Under Site Administration, click **Site Closure and Deletion**.

   p. Review the site closure and deletion dates set based on the policy. Click **Cancel**.

4. **Add the Site Mailbox app to a SharePoint site.**

   a. In Internet Explorer, in the Project Falcon site, in the left navigation, click **Home**.

   b. In the left navigation, click **Site Contents**.

   c. Under **Lists, Libraries, and other Apps**, click **add an app**.

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d. On the Your Apps page, click **Site Mailbox**.

5. **Setup the site mailbox and share the team site.**

   a. On the Site Contents page, click **Site Mailbox**.

      Wait for the site mailbox to be created.

   b. On the Outlook Web App page, sign in as **Contoso\Administrator** with a password of **Pa$$w0rd**.

   c. On the Outlook Web App page, click **save**.

      Wait for the site mailbox set up to complete.

   d. On the site mailbox has been created page, click the **Go back to the SharePoint site for now** link.

   e. In the top right navigation, click **SHARE**.

   f. In the **Share 'Project Falcon'** dialog box, in the **Invite people to 'Edit'** box, type **SaraD**.

   g. Wait for the name to resolve, click **Sara Davis**, and then click **SHOW OPTIONS**.

   h. Click the **Select a group or permission level** menu, and then click **Project Falcon Owners [Full Control]**.

   i. Click **Share**.

   j. Close Internet Explorer.

6. **Synchronize the site mailbox.**

   Use the Update-SiteMailbox cmdlet to trigger a SharePoint synchronization. This command synchronizes document content membership and permissions into Microsoft Exchange. You may need to perform this action when troubleshooting document or membership synchronization issues. For the lab, site mailbox synchronization is being performed to accelerate the synchronization of SharePoint and Exchange.

   a. On MBX1, switch to the Exchange Management Shell.

   b. At the Windows PowerShell command prompt, type the following, and press Enter.

      ```
      Get-SiteMailbox
      ```

      Review the site mailboxes that exist in the organization.

   c. At the Windows PowerShell command prompt, type the following, and press Enter.

      ```
      Update-SiteMailbox -Identity SM-ProjectFalcon -FullSync
      ```

      Review the output of the command.

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7. Re-arm Office Professional Plus 2013.

The rearm steps are not necessary if you are continuing from an earlier lab where Office 2013 was already rearmed. If Office 2013 has already been rearmed, complete steps for signing in, and then skip to the next task.

a. Switch to CL1.

b. On the desktop, move the pointer to the lower left corner and then click **Start**.

c. On the Start screen, verify that Sara Davis is signed in. Her name will appear in the upper right corner.

d. On the Start screen, type **Command**.

e. In the results list, right-click **Command Prompt**.

f. In the apps bar, click **Run as administrator**.

g. In the **User Account Control** dialog box, click **Yes**.

h. At the command prompt, type the following, and press Enter.

```
CD C:\Program Files (x86)\Microsoft Office\Office15
```

i. At the command prompt, type the following, and press Enter.

```
OSPPREARM.exe
```

Wait for the command to complete.

j. Close the Command Prompt window.

8. Review a site document library.

a. On CL1, signed in as Sara Davis, and then on the taskbar, click **Internet Explorer**.

b. In the Address bar, type **https://SP1/sites/TailSpinToys** and then press Enter.

c. In the left navigation, click **Documents**.

Review the documents that already exist in the documents library.

d. Close Internet Explorer.

9. View a Site Mailbox in Outlook.

a. On the taskbar, click **Outlook 2013**.

b. The new site mailbox created in the Project Falcon site may take several minutes to display in Outlook 2013. The existing **Tailspin Toys** site mailbox will be used for the remainder of the lab.

In the folder pane, expand **Tailspin Toys**.

Review the folders located in the site mailbox. These default folders will be the same for the Project Falcon site mailbox.

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If Outlook is not responding or if you get an error that the Exchange server is unavailable, wait for 2-3 minutes. This may occur because the MBX2 mailbox server is not online during this lab.

10. Send an email to the site mailbox.

a. In Outlook, in the ribbon bar, click **New Email**.

b. In the **To** box, type **SM-TailSpinToys** and then press Ctrl+K to resolve the name.

c. In the **Subject** box, type **Welcome to our site mailbox** and then click **Send**.

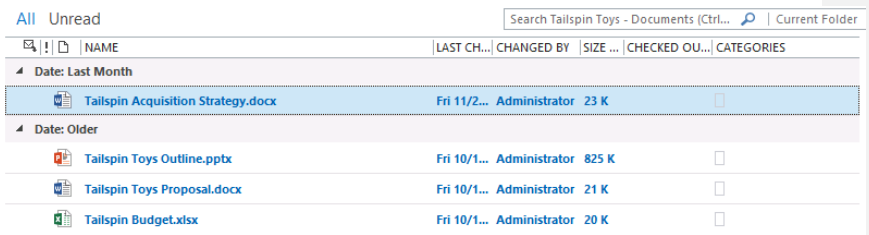
d. In the folder pane, in the **Tailspin Toys** mailbox, click **Inbox**, and verify that the email was received. You may have to wait 1-2 minutes for the email to be delivered.

11. Copy documents into a site mailbox.

a. In Outlook 2013, in the folder pane, under **Tailspin Toys**, click **Documents**.

Review the list of documents already in the document library on the SharePoint site.

If the Documents folder does not display similar to the following image, close and then reopen Outlook.



This is the document library you viewed in the Tailspin Toys site.

b. On the taskbar, click **File Explorer**.

c. In **File Explorer**, browse to C:\LabFiles.

d. From C:\LabFiles, drag the **Acquisition Strategy.docx** into the document library in the **Tailspin Toys** mailbox. You can drag the file to the Documents folder or into the documents list.

e. Switch to Outlook and the **Documents** folder.

Notice the document is being uploaded and checked into the document library. The document will remain italicized while it is in being uploaded.

f. In the folder pane, click Sara Davis' **Inbox**.

g. In the message list, scroll down and click the **Updated Budget for Tailspin Toys** email from **Tony Krijnen**.

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h. Drag the **Tailspin Budget-Update.xlsx** attachment to the **Documents** folder in the Tailspin Toys mailbox.

i. In the folder pane, under **Tailspin Toys**, click **Documents** and verify that the attachment has been added to the document library. If necessary, wait for the document to complete uploading.

j. In the documents list, right-click **Tailspin Toys Outline.pptx**, and then click **Forward**.

k. Review the new message that has been created and notice the document link for the Tailspin Toys Outline.pptx file. In the **To** box, type **AlexW** and then click **Send**.

l. On the taskbar, click **Internet Explorer**.

m. On the Favorites bar, click **Outlook Web App**.

n. Sign in to Outlook Web App as **Contoso\AlexW** with a password of **Pa$$w0rd**.

o. In the message list, click the email from **Sara Davis**.

You may have to wait for the message to arrive.

p. In the preview pane, point to the **Open Document** link. Notice the message does not contain an actual document attachment but a link to where the document is located.

q. Close Internet Explorer.

12. Edit a document from the site mailbox.

a. In Outlook 2013, in the Documents folder, double-click **Tailspin Budget-Update.xlsx**.

If necessary, close the **Welcome to your new Office** window.

b. In the **READ-ONLY** banner, click **Edit Workbook**.

c. In cell **A8**, type **Hello team**.

d. On the Quick Access Toolbar, click **Save** .

Notice at the bottom of the document that it is being uploaded to SharePoint.

e. Close Microsoft Excel®.

13. Review the document library and open the site mailbox in SharePoint Server 2013.

a. In Outlook 2013, in the folder pane under Tailspin Toys, right-click **Documents**, and then click **Open in Web Browser**.

b. On the Tailspin Toys page, click **Documents**.

Review the documents in the documents library and the newly added documents.

c. In the left navigation, click **Mailbox**.

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d. Click Outlook Web App, and then s~~s~~ign in to Outlook Web App as **Contoso\SaraD** with a password of **Pa$$w0rd**.

e. On the Outlook Web App page, click **save**.

The Outlook Web App view of the site mailbox is available to members of the SharePoint site when the site mailbox app is installed. This allows site members access to the site mailbox through their Internet browser.

Notice the breadcrumb navigation in the upper left, making it easy to move back to the team site.

f. Close Internet Explorer.

14. Review site mailbox properties and options.

a. In Outlook 2013, in the folder pane, right-click **Tailspin Toys**, and then click **Site Mailbox Properties**.

b. Sign in to Outlook Web App as **Contoso\SaraD** with a password of **Pa$$w0rd**.

c. On the **properties** tab, review the information for the site mailbox.

d. In the feature pane, click **users**.

On the user's tab, you can review site mailbox membership.

e. In the left navigation, click **sync status**.

On the **sync status** tab, notice the option to **start sync**. This executes the Update-SiteMailbox command.

Click **email me details**.

f. In the **information** dialog box, click **ok**.

g. Close Internet Explorer.

h. In Outlook, in the folder pane, click Sara Davis' **Inbox**.

i. In the message list, scroll up and click the **Diagnostics information for site mailbox Tailspin Toys** email and review the message content.

You may have to wait for the diagnostic email to arrive.

j. In the folder pane, right-click **Tailspin Toys**, and then click **Close "Tailspin Toys"**.

k. Close Outlook 2013.

l. On the taskbar, click **Internet Explorer**.

m. On the Favorites bar, click **Outlook Web App**.

n. Sign in to Outlook Web App as **Contoso\SaraD** with a password of **Pa$$w0rd**.

o. In the upper right, click **Settings** and then click **Options**.

p. In the feature pane, click **site mailboxes**.

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On the **my site mailboxes** tab, review the site mailboxes available for Sara Davis. Notice the **Show in Outlook** check box is not selected for the Tailspin Toys site mailbox.

q. In the site mailboxes list, select the **Tailspin Toys** check box**.**

r. In the upper right, click **Sara Davis**, and then click **Sign out**.

s. Close Internet Explorer.

t. On the taskbar, click **Outlook 2013**.

u. In the folder pane, notice that the **Tailspin Toys** site mailbox has been added back into the Outlook profile.

v. Close Outlook 2013.

15. Close a site and site mailbox.

a. Switch to MBX1 and the Exchange Management Shell.

b. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SiteMailbox
```

Review the output of the command. Notice the names of the site mailboxes and the ClosedTime column.

c. On the taskbar, click **Internet Explorer**.

d. In the Address bar, type **https://SP1/sites/ProjectFalcon** and then press Enter.

e. In the upper-right corner, click **Settings** , and then click **Site Settings**.

f. On the Site Setting page, under **Site Administration**, click **Site Closure and Deletion**.

g. Next to Site Closure, click **Close this site now**.

Review the banner information indicating the site deletion date and that the site is now read only.

h. Click **OK**.

i. Close Internet Explorer.

j. Switch to SP1 and the SharePoint 2013 Management Shell.

k. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SPTimerJob -Identity ProjectPolicyTeamMailboxJob | FL
```

In the output of the command, review the schedule for the job.

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l. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SPTimerJob -Identity ProjectPolicyTeamMailboxJob | Select-Object
-ExpandProperty Description
```

Review the description for the job.

m. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Start-SPTimerJob -Identity ProjectPolicyTeamMailboxJob
```

n. At the Windows PowerShell command prompt, type the following and press Enter.

```
Get-SPTimerJob -Identity ProjectPolicyTeamMailboxJob | FL
```

In the output of the command, locate **LastRunTime**. Verify that the **LastRunTime** reflects a current date and time. If it does not, periodically run the Get-SPTimerJob command again until the LastRunTime value is updated.

o. Switch to MBX1 and the Exchange Management Shell.

p. At the Windows PowerShell command prompt, type the following, and press Enter.

```
Get-SiteMailbox
```

In the output of the command, notice that the **SM-ProjectFalcon** site mailbox has been closed as a result of closing the SharePoint site and the SharePoint timer job being run.

When closed, the Project Falcon site mailbox will automatically be removed from view in Outlook 2013.

q. Switch to CL1 signed in as Sara Davis.

r. On the taskbar, click **Internet Explorer**.

s. On the Favorites bar, click **Outlook Web App**.

t. Sign in to Outlook Web App as **Contoso\SaraD** with a password of **Pa$$w0rd**.

u. In the upper right, click **Settings** and then click **Options**.

v. In the feature pane, click **site mailboxes**.

In the list of site mailboxes, notice that the Project Falcon site mailbox is listed as closed and no longer available for selection.

w. Close Internet Explorer.

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