Time Matters and Office 365 Modern Authentication Setup

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NOTICE: These instructions include details of the settings behind our research and successful testing at multiple client sites. We've made our best effort to provide accurate information here, but be aware we may have missed something. P|T developers created the TM code and are the ultimate authority on how TM accesses the 365 Hosted Exchange servers. So far, P|T has not shared those details, so we're doing our best to help the community with this document. Use your own judgement on the viability of these settings and any potential security risks. You are ultimately responsible for any issues that arise from attempting this setup. In YouTube style, this information is provided for entertainment purposes only.

Enable 'Modern Authentication' - 365 Admin Console

https://admin.microsoft.com/Adminportal/Home

Log in to the "Microsoft 365 admin center" and click "Settings | Org settings" from the left menu.



Click "Modern Authentication" in the list.



NOTE: You should consider whether or not to disable these basic authentication protocol options. The risk is some users or apps might still depend on them. Here's an article to help you decide: https://lazyadmin.nl/office-365/modern-authentication-office-365

O Search ß 5 ۲ Microsoft 365 admin center = Services Security & privacy Organization profile Modern authentication Modern authentication in Exchange Online provides you a variety of ways to increase security in your organization with features like conditional access and multi-factor authentication (MFA). When you turn on modern authentication, Outlook 2013 for Windows or later will require it to sign in to Exchange Online Name 1 mailboxes. Basic authentication is the less secure method used by older client applications. Microsoft Viva Insights (formerly MyAnalytics) Microsoft recommends that you turn off basic authentication for your organization. You can either enable security defaults in the Azure portal to turn off basic authentication for all protocols, or use the controls below to turn it off for Microsoft 365 Groups specific protocols. Learn more about basic authentication Modern authentication View basic authentication sign-in reports in the Azure portal Learn more about modern authentication Multi-factor authentication News Turn on modern authentication for Outlook 2013 for Windows and later (recommended) Office installation options ③ Before you turn off basic authentication for protocols, view your sign-in reports in the Azure portal to make sure people in your organization aren't using them. п Office on the web Allow access to basic authentication protocols Outlook client Includes Exchange Web Services. MAPI over HTTP. Offline Address Book and Outlook Anywhere protocols Exchange ActiveSync (EAS) Used by some email clients on mobile devices. Autodiscover Used by Outlook and EAS clients to find and connect to mailboxes in Exchange Online. IMAP4 Used by IMAP email clients. POP3 Used by POP email clients. Authenticated SMTP Used by POP and IMAP clients to send email messages. Exchange Online PowerShell Used to connect to Exchange Online with remote PowerShell. Learn more

Create an "Enterprise App" entry - 365 Admin Console

Click "Azure Active Directory" under the "Admin Centers" section of the left menu.

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A new tab opens to the "Azure Active Directory admin center" <u>https://aad.portal.azure.com</u>

Click "Enterprise applications" in the left menu. NOTE: You may have to select "All Services" then pick "Enterprise applications" from the list on the right.

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Click "+ New application"

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Click "+ Create our own application"



Enter whatever name you want to use. This could be "Time Matters" or "TM-Exchange Sync" or whatever you like.

Keep the default "Integrate any other..." option and click <Create>

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ж	Dashboard > Enterprise applications All applications >	Create your own application
EE	Browse Azure AD Gallery	
E		R Got feedback?
* * *	+ Create your own application R Got feedback? The Azure AD App Gallery is a catalog of thousands of apps th When deploying an app from the App Gallery, you leverage pr application here. If you are wanting to publish an application y can file a request using the process described in this article.	If you are developing your own application, using Application Proxy, or want to integrate an application that is not in the gallery, you can create your own application here.
	A Search application Single	
	Cloud platforms	What are you looking to do with your application? Configure Application Proxy for secure remote access to an on-premises application Register an application to integrate with Azure AD (App you're developing)
	Amazon Web Services (AWS)	Integrate any other application you don't find in the gallery (Non-gallery) Create

Save the "Application ID" value for the TM Exchange Configuration Utility.



Click "Properties" under the "Manage" section of the left menu.

Set these options as shown and click <Save>.

Azur	e Active Directory admin center		R © © R	
*	Dashboard > Enterprise applications Time Matters Pro Enterprise Application	All applications > Browse Azure AD Gal	ery > Time Matters	3
*	Coverview Coverview Deployment Plan Colognose and solve problems Manage U approximate	E Save X Discard Delete View and manage application settings sign-in settings, and user visibility setti Application Administrator roles. Learn If this application resides in your tenan Enabled for users to sign-in? ①	Got feedback? for your organization. Editing properties like display information, ngs requires Global Administrator, Cloud Application Administrat more. t, you can manage additional properties on the application regis	, user toc, tration.
	Properties Owners Roles and administrators	Name * 〇 Homepage URL 〇	Time Matters Test	~
	 Users and groups Single sign-on Provisioning Application proxy 	Lego	TM Select a file	3
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Create the "Client Secret"

Click "Azure Active Directory" then "App registrations" under the "Manage" section of the left menu.



Click <View all applications in the directory> if your TM application entry isn't visible.

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88	A Groups	P Start typing a display name or application (dient)	ID to	filter t	these r		⁺ <mark>∵</mark> Add filters
	External Identities	This account isn't listed as an ow		Fany	applic	ations	in this directory.
	8 Roles and administrators	View all applic	ations	in th	e direc	tory	

Click your TM application in the list.



Save the "Tenant ID" value for the TM Exchange Configuration Utility.

Click the "Add a certificate or secret" link.

Azur	Azure Active Directory admin center				ø	۲	0	R
*	All services > App registrations > Time Matters	\$	Enter in TM-Exchange Configuration Utility "Tenant ID" field.					
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Click "+ New client secret"

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	Authentication Certificates & secrets	No client secrets ha	ve been created for th	his application.	¢			

Enter a name for your client secret and choose an active period with an expiration date.

NOTE: The "Expires" dropdown list ranges from 3 to 24 months. The "Custom" option doesn't extend that beyond 24 months. Regardless of the period you choose, I suggest you add a reminder to your calendar so you can create a new secret and update the TM Exchange Configuration Utility before it expires.

Azure	Active Directory admin center		Q	🖉 🐵 📀	R
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Å	Quickstart toker using	is at a web a certifica		3 months	
	💉 Integration assistant			12 months	
	Manage	Anterio		18 months	
	Branding & properties	Applicate		24 months	
	Authentication Corr	tificates (C		Custom	
	Certificates & secrets	Add	Cancel		
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Save the "Application Password" value for the TM Exchange Configuration Utility.



Update TM-Exchange "Configuration Utility" settings

Launch the "Configuration Utility" from the Windows Start left menu.



Enter the 3 values saved in various steps above, and click <Test>

🕹 Tin	e Matters Exchange Synch	ronization Configura	ation ? ×
Exchange Synchr	onization Setup	PCLaw Tin	ne Matters
This utility will configure	e synchronization between Time	Matters and Microsoft Ex	change.
Before proceeding, ma	ke sure that		
 Microsoft Exchange i No previous version o your network 	s properly installed and accessib of the Time Matters Exchange Sy	le on your network inchronization service is i	installed and running on
Please provide the Ex	change Server name. Typically th	is will be the server's na	me or IP address.
Server Name	outlook.office365.com		
Use 'Modern' A	uthentication		
Client ID	459689d1		
Tenant ID	ec424ea9		
Application Password	JE8Q~i2B_		Test
		< <u>B</u> ack	vext > Cancel

You should get a "Connection Successful" result.

🛍 Tin	ne Matters Excha	inge Synchronization Co	nfiguration	? ×
Exchange Synchr	onization Setup	PCLaw	Time Ma	atters
This utility will configure	e synchronization be	tween Time Matters and Micro	osoft Exchange	
Before proceeding, ma	ike sure that			
 Microsoft Exchange i No previous version o your network 	s properly installed a of the Time Matters I	and accessible on your networ Exchange Synchronization ser	k vice is installed an	d running on
Please provide the Ex	change Server name	e. Typically this will be the serv	er's name or IP ad	dress.
Server Name	outlook.of	Test Result		
Use "Modern' Au Client ID	uthentication 459689d1	Connection Successful		
Tenant ID	ec424ea9			
Application Password)E8Q~i2B	OK	Test	
	and a second sec			
		< Back	Next >	Cancel
		There		

Setup App Permissions - 365 Admin Console

A successful test on the 1st page of the TM Exchange "Configuration Utility" wizard is only a piece of the puzzle. Synchronization fail until permissions are setup properly for the newly added "Enterprise App". To confirm this, <Next> through the utility pages until you see the list of users on the "Match Users to Mailboxes" page.

Open a user and click <Test Connection> should return an error like this.

FR 50		PCLaw Time Matters
8	User Mailbox Syncl	hronization Form
Time Mat	ters Information	Time Matters Exchange Synchronization
Staff	VIC	Connection to outlook.office365.com Failed. Please verify the exchange information and ensure that the server is in an active state.
Usernan	Using Modern Authent	tication
User Sync Syncl Syncl	Test Contronization	tacts added to Time Matters as Private this added to Time Matters as Private o's added to Time Matters as Private

Add Required "Enterprise App" Permissions

If you are still on the "Enterprise application" page for your app, click "Permissions" from the left menu and notice no permissions are listed. Click "Application registration" to jump to the "API permissions" sub-page of the "App registration" page.



Another navigation option is to click "Azure Active Directory" then "App registrations" under the "Manage" section of the left menu. Click <View all applications in the directory> if your TM application entry isn't visible. Click your TM application in the list, then "API Permissions" in the left menu.

Once on the "API Permissions" page, click "+ Add a permission".



Click "APIs my organization uses", type "office 365" in the search field and choose "Office 365 Exchange Online".

Azure Active Directory admin center			Ð	P	۲	0	R
* ==	> Enterp 	Request API permissions					
*	Search Overview Quickstart	Microsoft APIs APIs my organization uses My APIs Apps in your directory that expose APIs are shown below					
	Manage	Name Office 365 Exchange Online	A 0	ococcc	tion (cl	lient) IC 0-Off1-c	:e00-00
	Branding E Authentice	Office 365 Management APIs Office 365 Search Service	6	539358 688875	0-1805	-4401- c-4c72-	95e8-9 893c-3

Choose "Application Permissions" because TM-Exchange sync is an app running as a service, not an actual user.

Find and check the selected permissions as shown here.

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» 	All services >	Request API permissions > < All APIs > Office 365 Exchange Online >
* * *	Search Overview Quickstart Integratior Manage	https://ps.outlook.com What type of permissions does your application require? Delegated permissions Your application needs to access the API as the signed-in user. Select permissions
	 Branding ξ Authentica Certificate: Token cont 	Start typing a permission to filter these results Permission Admin consent required Other permissions (1)
	 API permis Expose an 	 ✓ full_access_as_app ⊙ Use Exchange Web Services with full access to all mailboxes ✓ Calendars (1)
		Calendars.Read ① Yes Read calendars in all mailboxes Calendars.Read.All ① Yes Read calendars in all mailboxes
		Calendars.ReadWrite.All ③ Read and write calendars in all mailboxes
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		Add permissions Discard

The permissions have been added but an Admin must still grant permission to activate them.

Click "Grant Admin consent", then <Yes>, and look for the "Grant consent successful" message.



Here's what the permissions should look like once setup is complete.

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» Da	ashboard > Time Matters Per	rmissions >	Time Matters						
4	Time Matters	API per	missions 🖈 …						×
×	🚫 Refresh 🖗 Got fe app. This column may n	edback? ot reflect the v	alue in your organization, or in organizations where t	his app will	be used.	Learn	more		
1	Configured permissions Applications are authorized to permissions should include al	o call APIs wh II the permissi Grant admin	en they are granted permissions by users/admin: ions the application needs. Learn more about per consent for Law Office Systems	s as part of missions ar	the cons nd conse	ient p int	rocess.	. The list of configured	
	API / Permissions name	Туре	Description	Admin co	nsent re	q	Statu	5	
	Calendars.ReadWrite.Al	Application	Read and write calendars in all mailboxes	Yes			0	Granted for Law Office S_	
	Contacts.ReadWrite	Application	Read and write contacts in all mailboxes	Yes			0	Granted for Law Office S_	
	full_access_as_app	Application	Use Exchange Web Services with full access	Yes			0	Granted for Law Office S_	
	Tasks.ReadWrite	Application	Read and write tasks in all mailboxes	Yes			0	Branted for Law Office S_	

To view and manage permissions and user consent, try Enterprise applications.

Restart the "Time Matters Exchange Synchronization" Service – Local Server

Run the "services.msc" applet on the server where the your "Time Matters Exchange Synchronization" service is installed. Select the service and click the Restart icon, Or click Stop, wait, then click Start.

My Dashboard File Action View	Help	Services	X	
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🔍 Services (Local)	Services (Local)			
	Time Matters Exchange	name	Description	
	Synchronization Stop the service <u>Restant</u> the service Description: Provides access to Time Matters product data for Exchange Sure/transition	Concept Scheduler	Enables a user to configure and sch	
		C TCPRP NetBIOS Helper	Provides support for the NetBIOS o	
		Ca Telephugy	Provides Telephony API (TAPI) sup	
		Themes	Provides user experience theme ma	
		C Thread Ordering Server	Provides ordered execution for a gr	
		C Time Broker	Coordinates execution of backgrou	
		G Time Matters Exchange Synchronization	Provides access to Time Matters pr	
		C Timeslips D8 Server Service	Handles communication between	
	-	C TMMobWinService	TimeMatters Mobility Service	

Test the connection from a specific user from the TM Exchange "Configuration Utility"

Open the "Configuration Utility", <Next> through the utility pages until you see the list of users on the "Match Users to Mailboxes" page.

Open a user and click <Test Connection> should return a success message like this.

8	User Mailbox Synchronization Form ? X						
Time Matters Information							
User ID	CLS 💌						
Staff	CLS						
Exchange S	erver Information						
Username							
	Time Matters Exchange Synchronization						
Successfully connected to: outlook.office365.com.							
User Synchr	OK hivate						
Synchronize Events Mark Events added to Time Matters as Private							
Synchronize ToDo's Mark ToDo's added to Time Matters as Private							
1	QK Cancel						

Confirm synchronization is working properly

NOTE: It takes the TM-Exchange sync process a while to catch up after it's been offline for a while. This could be minutes, hours or overnight, depending on how much data there is to update. How much time is impacted by size of the firm, activity level and amount of time the sync was offline. Be patient if you don't see records appearing right away. Check back in an hour, or possibly the next morning for larger firms.

Each time the "Time Matters Exchange Synchronization" service is restarted the schedule prepares to sync in 60 seconds.

All sync activity is saved to a log file named "Exchange Synchronization.txt" here:

"C:\ProgramData\LexisNexis\Exchange Synchronization\Logs"

Open this log in Notepad and scroll to the bottom to see the latest activity. Pay attention to the date and time stamps on each line to navigate the content.

As the log fills up the system renames the log file adding a datestamp, then creates a new "Exchange Synchronization.txt" file on the next activity event. For example:

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File Home Share View	ne New Pro	perties	 Q lect all lect none rert selection Salart
(+) * * Exchange Synchroniza	tion > Loos	v C Search L	005 8
Name	Date modified	Туре	Size ^
Exchange Synchronization.txt	10/4/2022 1:59 AM	Text Document	81 KB
Exchange Synchronization.txt20221003	10/3/2022 11:59 PM	TXT20221003 File	1,211 KB 🔳
Exchange Synchronization.txt20221002	10/2/2022 11:59 PM	TXT20221002 File	444 KB
Exchange Synchronization.txt20221001	10/1/2022 11:59 PM	TXT20221001 File	444 KB
Exchange Synchronization.txt20220930	9/30/2022 11:59 PM	TXT20220930 File	444 KB
Exchange Synchronization.txt20220929	9/29/2022 11:59 PM	TXT20220929 File	444 KB
Exchange Synchronization.txt20220928	9/28/2022 11:59 PM	TXT20220928 File	700 KB
Exchange Synchronization.txt20220927	9/27/2022 11:59 PM	TXT20220927 File	962 K8
Exchange Synchronization.txt20220926	9/26/2022 11:59 PM	TXT20220926 File	496 KB
Exchange Synchronization.txt20220925	9/25/2022 9:09 PM	TXT20220925 File	847 KB
Exchange Synchronization.txt20220924	9/24/2022 11:59 PM	TXT20220924 File	958 KB
Exchange Synchronization.txt20220923	9/23/2022 11:59 PM	TXT20220923 File	962 KB
31 items 1 item selected 80.5 KB	A 233 23633 44.00 Pk 4	TVT101101173.	nen un
Type: Text Document, Size: 80.5 KB, Date modified	d: 10/4/2022 1:59 AM	80.5 KB 📌 🤇	Computer

If the log file becomes too full to easily navigate you can stop the service, manually rename the current log and restart the service. Now the log file will only contain current sync activity.