

Solution Brief

Five Ways to Sync the Global Address List to Smartphones

Your company—like most—probably stores critical contact information in a Global Address List (GAL). Although, this data is often vital to the organization, there's a problem—most companies do not have a good way to sync the GAL to smartphones. Given that we rely on our smartphones on a daily basis, the fallout from this situation can be costly.

Here are the top five reasons to implement a GAL sync solution:

- 1) **Productivity.** Up-to-date contact data on users' phones gives them freedom to work effectively wherever they need to.
- 2) **Efficiency.** It's a waste of time for 50 people to manually update Jane Smith's number when she gets a new phone. The less time staff members spend struggling to manage contact data, the better.

- 3) **Better, more meaningful caller ID.** While reverse lookup and caller ID can help you avoid answering unwanted calls, it has some other benefits, too. Example: knowing that your boss is calling, even though he has a new mobile phone number.

- 4) **It cleans up your users' mobile address books.** Think about all the contact records for terminated employees. Without GAL sync, employees can end up with hundreds of useless phone numbers and email addresses on their phones. Mirroring the GAL on users' phones makes this problem—and those records—go away.

- 5) **It eliminates reliance on constant connectivity.** What happens when you need an important phone number, but you have no cell service? An offline address book can save the day—especially in emergency situations where landlines may be operational but Internet and cellular services are down.

Looking for a solution? Start here.

There are both off-the-shelf and do-it-yourself (DIY) solutions for GAL sync. With the caveat that DIY can be high maintenance and rather inelegant, here are some DIY options:

- **Copy GAL contacts to users' contact folders.** Select contacts in the GAL (using either Shift+ or Ctrl+ to select multiple entries at once) and go to **File** → **Add to Contacts**. This will add the GAL entries to the contact folder. Then you can use ActiveSync to sync those contacts to smartphones. The catch? You will be prompted to confirm that you want to sync each duplicate contact. Also, you'll have to repeat this process every time there's a change to the GAL; otherwise, address books will become rife with missing and obsolete contacts.
- **Use CSVDE to export AD objects to a .csv file and import them into the users' contacts.** Caveat emptor: this is an extra step that's not scalable for large numbers of users. You'll still be stuck with having to repeat this process every time there's a change to the GAL, or the users' contacts will go stale.
- **Write a Powershell script to sync contacts.** This solution has drawbacks similar to those with CSVDE—it's labor-intensive and not scalable.
- **Use the Outlook Social Connector.** This is not as easy as it sounds. It's difficult to tell when the Social Connector is running and what it's syncing. It

offers users only minimal control over the sync (for example, it cannot add or delete contacts). Lastly, the Outlook Social Connector is notorious for screwing up data in the Notes field.

- **A ready-made, off-the-shelf solution.** You don't have to do it yourself. There are a handful of tools on the market that can handle GAL sync. Each has its pros and cons.

Next, we'll cover key points to consider if you **go with an off-the-shelf product.**

Selecting an off-the-shelf solution

Here are some important criteria to consider if you decide to use third-party software to sync your company's GAL to mobile phones:

- **Is it automated?** Avoid solutions that require a manual sync every time there's a change to the company GAL. Look for a set-it-and-forget-it solution.
- **Is it scalable?** Solutions that require you to sync each user's contacts one by one quickly become unwieldy if you have more than a few users. Look for a product that syncs contacts *en masse* to all users.

The screenshot shows a configuration window titled "Edit(All Employees)". It contains the following elements:

- List Name:** A text box containing "All Employees".
- Description:** An empty text box.
- Source: Mandatory Contacts:** A section with a "Select..." button, a "Delete" button, and a "Members..." button. Below these buttons is a list box containing "DL All itrezzo".
- Checkboxes:** Three checkboxes are located below the source list box:
 - Include DLs as mandatory contacts
 - Include contacts with no email address
 - Push disabled accounts
- Target: Authorized Recipients:** A section with a "Select..." button, a "Delete" button, and a "Members..." button. Below these buttons is a list box containing "DL All itrezzo".
- Buttons:** "Save" and "Cancel" buttons are located at the bottom right of the window.

Figure 1. Setting the source contact data and the target recipients of updated contact data in a company named itrezzo.

- **Can it do incremental updates?** Let's say you have a list of 100 contacts targeted to 100 smartphone users. What happens when you change one

phone number? Without incremental updates, you'd have to re-sync all 100 contacts to all 100 users, for a total of 10,000 updates. With incremental updates, you'd only have to sync the one change—for a total of 100 updates. Fewer updates mean less time and less likelihood of error. Furthermore, incremental updates can save money. For example, imagine an employee traveling abroad using an expensive international roaming plan. The less data they use, the better.

- **Is it future-proof?** Not every contact-sync solution works with Exchange 2013, Exchange 2016, and Office 365. So consider the platform you use today—*and* what you'll be using tomorrow. For example, solutions that use MAPI won't work with Office 365 or Exchange Server 2016.
- **Is the vendor supportive?** Access to tech support can drastically affect the experience of using any product. So, as you shop, make sure to ask about what kind of support is offered and the days and times it's available.
- **Can it clean up a complicated mess?** In general, by the time a company is shopping for a contact-sync solution, it already has a GAL that's overflowing with legacy contacts, test mailboxes, and/or service accounts. Look for a solution that can purge legacy contact folders and obsolete contacts and eliminate duplication.
- **Does it give you the option to target specific lists to specified users? Can it filter at the field level?** If your company finds it necessary to tailor contacts lists to specific groups or individuals,

this becomes an important feature. It's handy to have a product that gives you this level of control.

- **Is it secure?** You probably don't want a solution that pokes holes in the firewall. Why not leverage the security afforded by ActiveSync, since you're using it anyway?

The risks of two-way sync

Some vendors tout two-way sync as a selling point. While it might sound appealing, two-way sync can cause data collisions—when more than one person is modifying the same contact—and mismatches. With two-way sync, it is nearly impossible to sync deletions, which results in legacy/obsolete contacts.



Figure 2. Two-way sync can be a double-edged sword.

Best practices

Once you've selected a solution, you'll need to do some groundwork before you begin syncing. The best place to start is identifying the exact contacts from the GAL that you need - and the ones you don't. Consider the following:

- **Test mailboxes.** IT often creates several test mailboxes to help them do their job more effectively. No one wants these to end up on their phones.

- **Special-purpose and shared mailboxes.** Sometimes a workgroup will share a mailbox to answer emails, or share content. You may wish to exclude these from your GAL sync.

- **Conference rooms.** It's not unusual for conference rooms to have unique mailboxes. It's usually impractical and unproductive to sync these contacts to smartphones. You can't see the free/busy status of a conference room from a smartphone, in any case, so syncing them brings no advantage.

- **Organizational units (OUs).** Some companies have OUs in Active Directory contacts for vendors, partners, subsidiaries, disabled users, service accounts, and the like. You may find that some users need these contacts and others find them distracting.

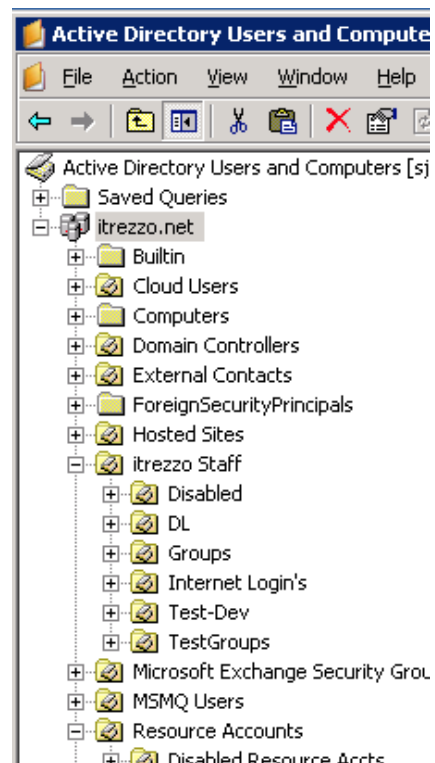


Figure 3. It's valuable to have a simple, point-click method to specify which contacts are excluded from the source, as well as from the target recipients.

- **Distribution groups.** Do you want to sync distribution groups to your users' smartphones? All groups, or just certain groups?
- **Accurate contacts.** Is the GAL up to date? Do you have procedures in place to apply frequent staff contact changes to AD? After all, if there is an outdated mobile phone number, it will end up on the smartphones of hundreds or thousands of users. It's a good idea to define a consistent strategy for keeping GAL contacts up to date.
- **Are there contact-privacy issues?** Is there information you don't want in the GAL—i.e. home phone numbers—but need to have on smartphones?

Set your targets

After you've cleaned out your GAL and decided what to sync, it's time to identify the target users. Think through the following:

- **Who needs the contacts?** You may not want to sync every contact to every smartphone user in your organization. For example, you might have a list of emergency contacts that you want to distribute to floor wardens alone. Assigning users to automated groups (such as "Floor Wardens," for example) will eliminate the manual effort and minimize your margin of error.
- **What platform do they use?** For example, Mac users don't usually get an offline copy of the GAL. Wouldn't it be ideal to give those users a replica of the GAL in their contacts?

- **Which Outlook Contact folder should you use?** As you're probably painfully aware, ActiveSync only synchronizes contacts that reside in users' personal Outlook contacts folder (and not from the GAL). Syncing GAL contacts to the default Outlook folder is probably fine for a small company. However, you can be sure that users don't want hundreds or thousands of company contacts mixed in with their personal contacts. The solution? Specify a subfolder—*Staff* or *GAL*—and keep the GAL separate from the default contacts folder.
- **Do you want to avoid duplicate contacts?** What if the user already has some GAL contacts on their phone? It might not be the best idea to wipe them out. For example, a user may have entered personal contact information for a coworker (and that information isn't in the GAL). You may not want to delete their GAL contacts, but the iPhone address book may recognize these as duplicate contacts. In most cases, the solution is to merge the GAL information into the existing contact to avoid creating duplicates.

We hope this guide will be helpful to you in deciding on a GAL sync solution. If you have questions or would like to talk through your sync scenario, we can help. Visit our website at www.itrezzo.com, check out our [blog](#), or call us at (408) 540-5020 and ask to speak to a contact-management guru.

From the itrezzo team

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