Connecting Microsoft

Connecting Outlook Calendar (per member, Microsoft 365) and OneDrive (per workspace), Teams meeting behaviour, coexistence with Google, and the Reconnect required banner.

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What Microsoft connection unlocks

Microsoft 365 offers two integrations on the platform: Outlook Calendar and OneDrive. The integrations are wired to the same overall scaffolding as Google: Outlook Calendar is per-member, OneDrive is per-workspace, both follow the OAuth + encrypted-refresh-token pattern, both surface a Reconnect required banner when their tokens go stale. Connecting Outlook Calendar lets the platform read freebusy intervals from your Outlook calendar and write events with attendees and (when your Microsoft tenant has the right license) a Teams meeting link. Connecting OneDrive lets the platform provision the same RCIC App folder tree on your OneDrive that it would on Google Drive, with the same routing semantics across Transfer Room, Active File Review, Secure PDF Tools, and PDF Sign.

Which Microsoft account types are supported

The platform supports Microsoft 365 work and school accounts (the paid Microsoft 365 Business, Enterprise, and Education tiers) and personal Microsoft accounts (outlook.com, hotmail.com, live.com). Calendar works on all of them. Teams meeting auto-provisioning requires Teams for Business licensing on the account; personal Outlook accounts and Microsoft 365 tenants without a Teams license get the calendar event without a Teams URL (the platform degrades gracefully). OneDrive works on all Microsoft 365 work and school accounts; personal OneDrive accounts (the free 5 GB tier) also work but their storage cap is reached quickly by Transfer Room files.

Connecting Outlook Calendar from My Profile

Open My Profile, scroll to the Calendars card, and click Connect Outlook Calendar. You are redirected to Microsoft's OAuth consent screen where you sign in (if not already), review the permissions the platform requests (Calendars.ReadWrite, offline_access, User.Read), and approve. You bounce back to My Profile with Outlook listed as a calendar slot (Primary or Secondary depending on whether you had an existing connection). The Microsoft refresh token rotates on every refresh per Microsoft's policy; the platform persists the new refresh token immediately on every refresh so the next refresh always uses the latest token.

Teams meeting behaviour

When your Outlook account is your Primary calendar AND your service is configured as online or hybrid, the platform tries to provision a Teams meeting at calendar-event creation time. Microsoft returns the Teams join URL synchronously in the create response (unlike Google Meet's eventual-consistency window) so no re-fetch is needed. If your Microsoft account lacks Teams licensing, the create call fails with a clear error from Microsoft; the platform catches it and falls back to creating the calendar event without a Teams URL (you arrange the meeting out of band). The booking confirmation email always tells the client whether a Teams URL is present or whether you will follow up with meeting details.

Primary versus Secondary with Microsoft and Google together

Many teammates run both a Microsoft 365 work calendar and a Google personal calendar. The platform supports both connected at the same time: one is Primary (the calendar that receives the full event with attendees and conferencing on every booking), the other is Secondary (the calendar that receives a busy-block mirror so the slot shows occupied on both calendars). Both contribute freebusy intervals to your booking page availability check. The Primary versus Secondary choice is independent of which provider it is; you can have Outlook as Primary and Google as Secondary, or Google as Primary and Outlook as Secondary. Whatever you pick, Make Primary on the other calendar's card swaps the roles atomically.

Connecting OneDrive from Settings

OneDrive lives on the Integrations card on Settings, alongside Google Drive. The two are mutually exclusive at the tenant level: your workspace has either a Google Drive connection or a OneDrive connection, not both at once. To switch from Google Drive to OneDrive (or vice versa), disconnect the current provider first, then click Connect Microsoft OneDrive. Microsoft's OAuth consent screen handles the authorisation flow; you sign in to the Microsoft account that should own the OneDrive folder tree (typically the firm's shared account), review the permissions (Files.ReadWrite, offline_access, User.Read), and approve. The platform creates the RCIC App root folder on your OneDrive at first use.

> **Note**: Calendar and OneDrive are separate OAuth grants, not one consolidated permission. Connecting Outlook Calendar does NOT auto-connect OneDrive, and disconnecting OneDrive does NOT affect your calendar connection. Each integration manages its own tokens and its own scope.

The RCIC App folder tree on your OneDrive

The folder tree on OneDrive mirrors the Google Drive layout exactly: same RCIC App root, same Clients / <client name> / <agreement reference> case-folder layout for Transfer Rooms, same Ad-hoc Transfer Rooms / <room name> / <YYYY-MM-DD> for ad-hoc rooms, same Secure PDF Tools / <YYYY-MM-DD> for Save-to-Drive output,

same Secure PDF Tools / Signed PDF files / <YYYY-MM-DD> for PDF Sign envelopes. The platform never writes outside the RCIC App root folder. If you ever migrate from Google Drive to OneDrive (or back), historical files stay on the prior provider; only new module-generated files land on the new provider going forward.

Scopes and permissions

Calendar uses Calendars.ReadWrite plus offline_access (so the refresh token works after your session expires) plus User.Read (so the platform knows which mailbox the token belongs to). OneDrive uses Files.ReadWrite plus offline_access plus User.Read. As with Google, these scopes are the minimum needed for the use case; the platform does not request anything broader (no Mail.Read, no Contacts, no full-drive Files.ReadWrite.All on OneDrive). You can review and revoke the platform's access at any time from your Microsoft account's connected apps page, which acts as a kill switch independent of disconnecting from inside RCIC App.

The Reconnect required banner

Microsoft refresh tokens can fail for the same reasons Google ones can (password change, multifactor reset, administrator revocation, account disabled). When the platform tries to refresh and gets a hard rejection from Microsoft, the corresponding connection card flips to amber Reconnect required: per calendar on My Profile, on the OneDrive card in Settings. The OneDrive card preserves the connected email and the last known error message so you have context for the prompt. Save-shaped operations across modules continue to queue gracefully; they retry once you click Reconnect, sign back into Microsoft, and the platform re-stores the fresh refresh token.

Disconnecting

Disconnect Outlook Calendar from the Calendars card on My Profile; the platform clears its stored Microsoft tokens immediately for that slot. Disconnect OneDrive from the Integrations card on Settings; the platform stops writing new files to OneDrive but the existing folder tree and contents stay on your OneDrive (the platform never

deletes Drive content on disconnect). Disconnecting one provider does not affect the other; if you only want to swap which Microsoft account is connected, disconnect first then reconnect with the desired account.