Exchange synchronisation

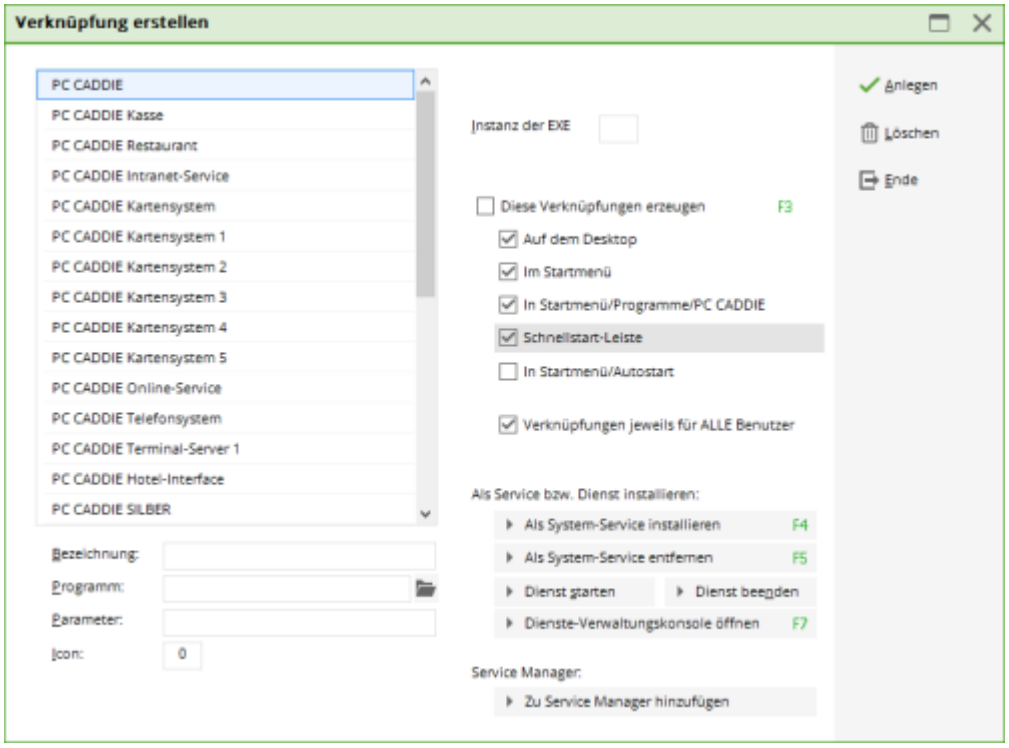
This module synchronises timetable areas in PC CADDIE with your Outlook calendar. All appointments that are newly created or changed are automatically transferred to the other medium. So you always have the most important appointments in view!

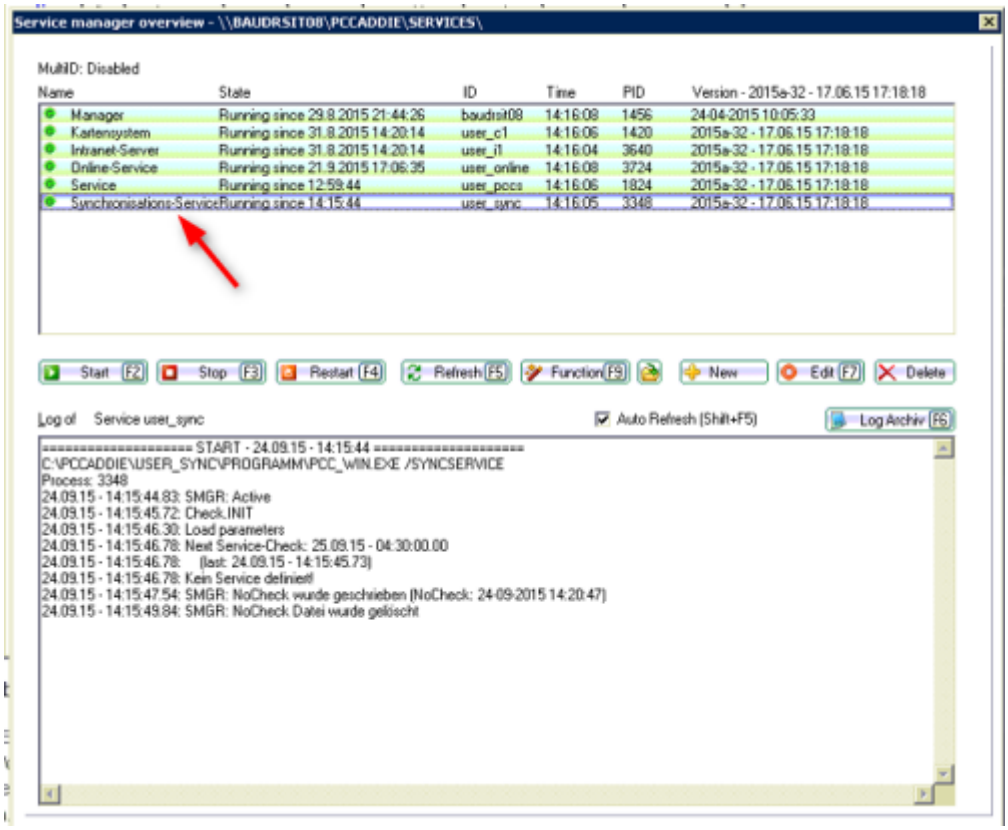
Step 1: Installation of services and special parameters

The Exchange interface requires two services to be installed in PC CADDIE.

Installation of synchronisation service:

Via macro „lnk“ the **synchronisation service** macro:



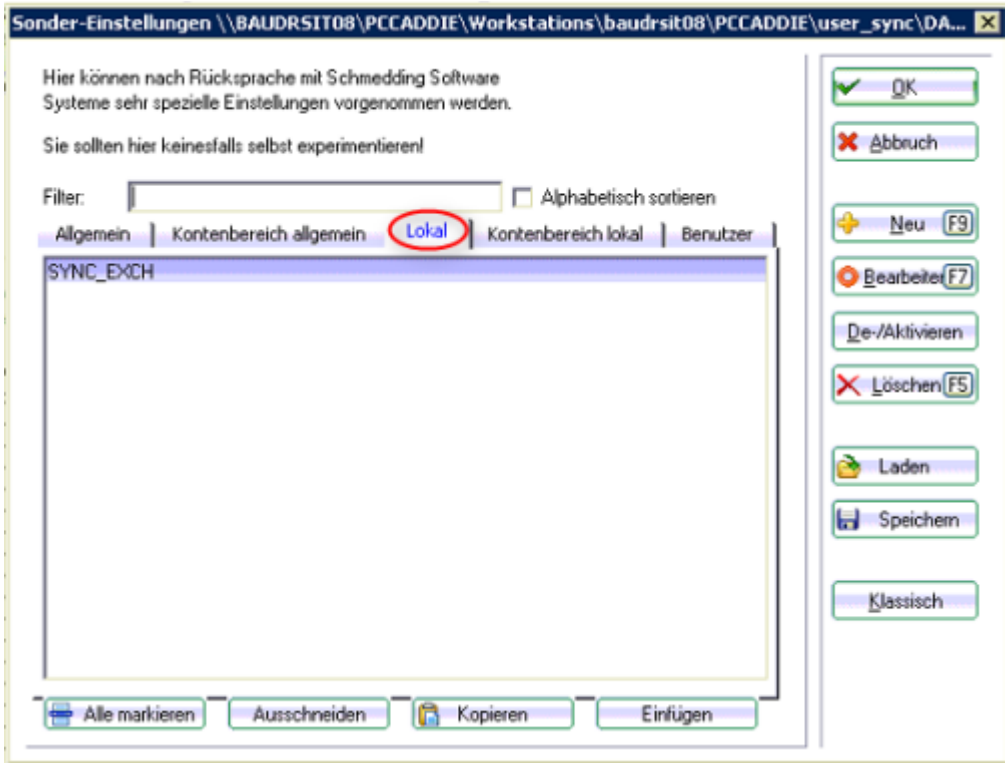


Enter special parameters:

Via the button **FUNCTION** and **XtraGet** the special parameter *SYNC_EXCH* of the tab **LOCAL** tab can now be entered.

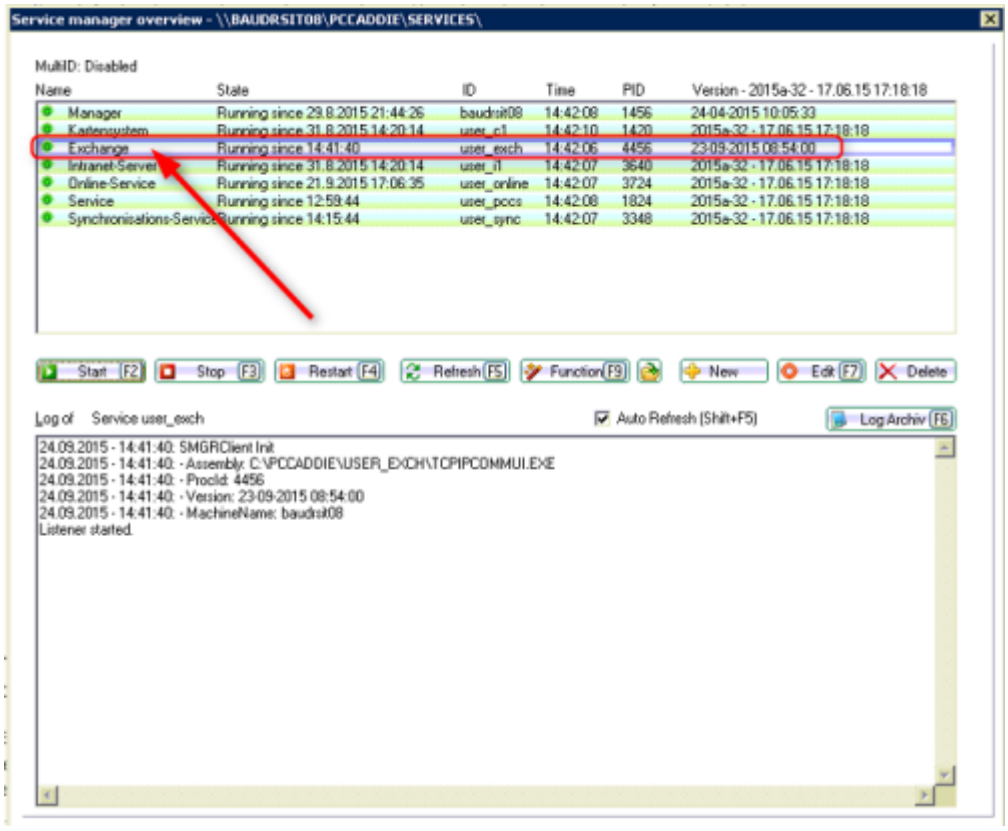






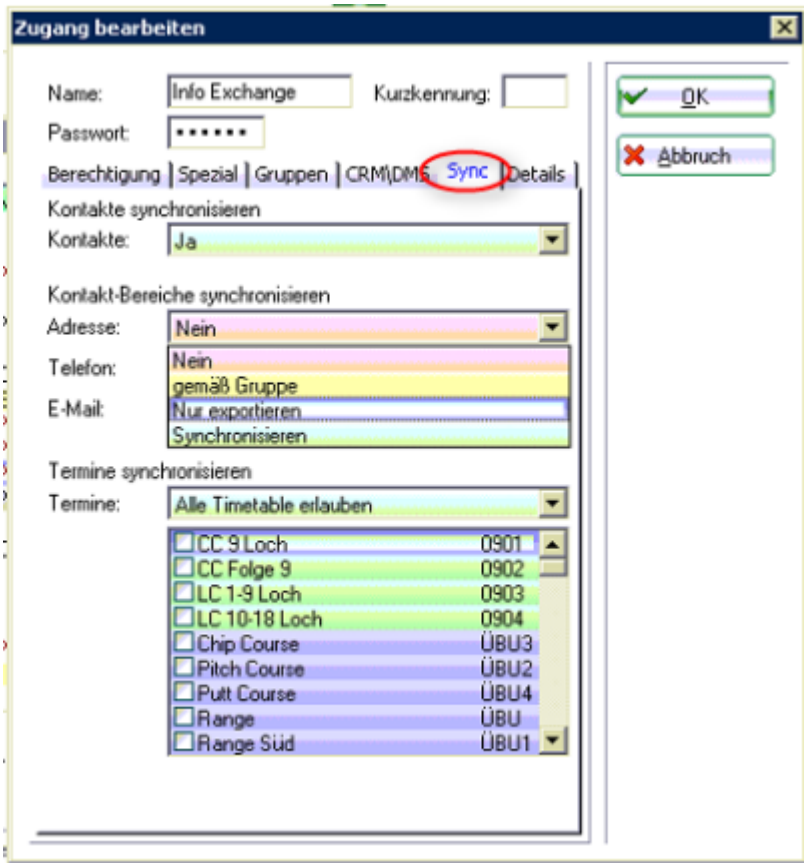
Installation Exchange Service:

At the moment, this service still has to be installed manually by a technician. In future, however, this service will service will also be installed via the „lnk“ macro.



Step 2: Settings in the password management

The Exchange account is always installed for a PC CADDIE user. To do this, the settings for each user must be set and adjusted in the password management (SYNC tab):



The settings are possible as follows:

Kontakt:		
Kontakt	Ja	Hier kann ausgwählt werden, ob der User die auf dem Exchange-Server angelegten Kontakte abgleichen darf
	Nein	

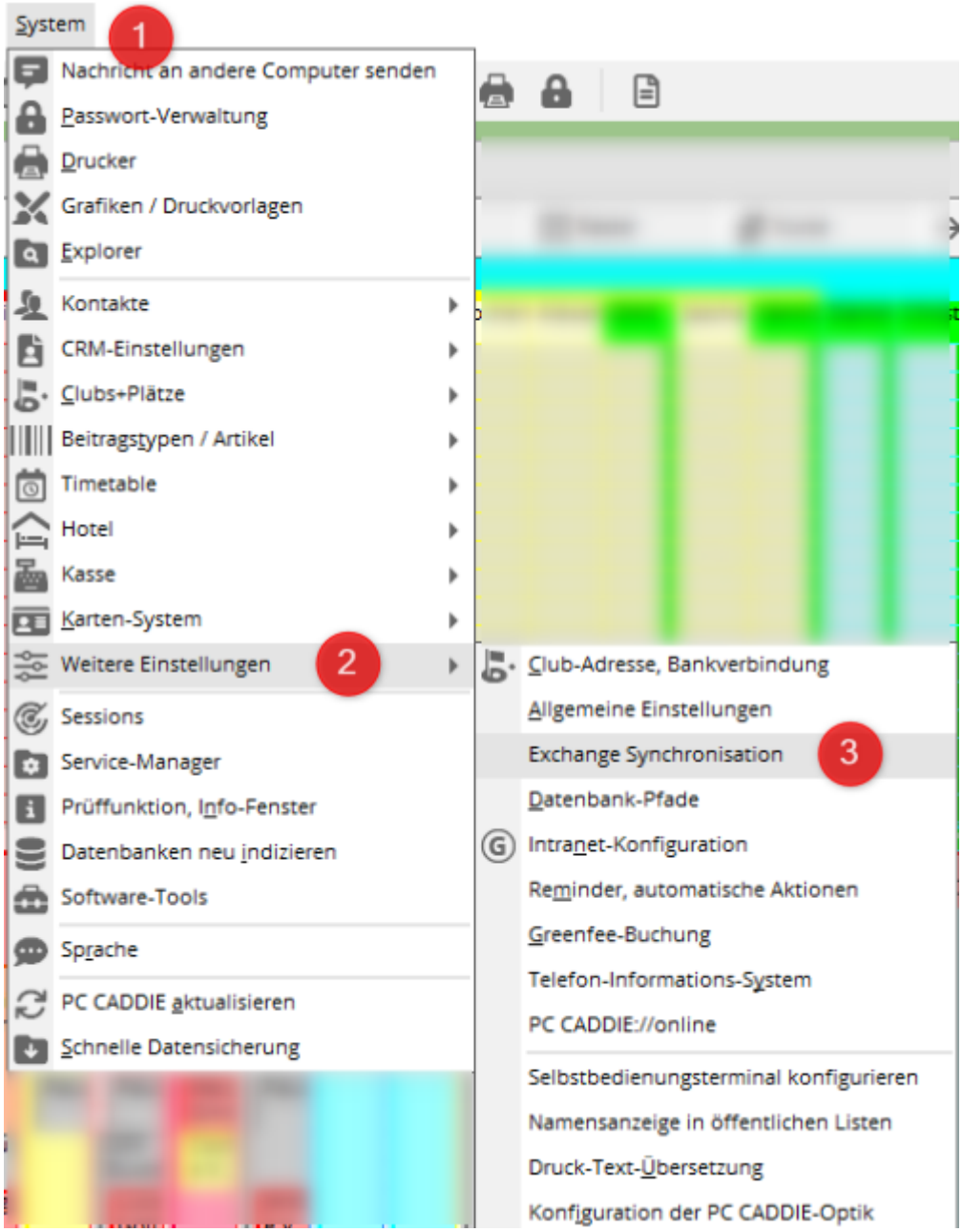
Kontaktbereiche synchronisieren:			
Kontakt Bereiche	**Adresse**	Nein	Es darf kein Abgleich durchgeführt werden
	Telefon	Gemäß Gruppe	Gruppeneinstellungen
	E-Mail	Nur exportieren	Es darf ein Export von PC CADDIE zum Exchange-Server stattfinden
		Synchronisieren	Es darf ein wechselseitiger Abgleich stattfinden von PC CADDIE zum Exchange-Server und zurück

Termine synchronisieren:		
Termine	Nein	Es dürfen keine Termine sychronisiert werden
	Gem. Gruppe	Gruppeneinstellungen
	Alle Timetable Bereiche	Es dürfen alle Timetable Bereiche sychronisiert werden
	Nur eigene Bereiche erlauben	Es dürfen nur die eigenen Bereiche synchronisiert werden
	Nur folgende Bereiche erlauben	Es darf nur der ausgewählte Timetable Bereich synchronisiert werden: 

However, these settings in the password management only regulate the authorisations, e.g. whether synchronisation is permitted for the contacts. They do not regulate the actual synchronisation. This is still set separately separately in the Exchange interface.

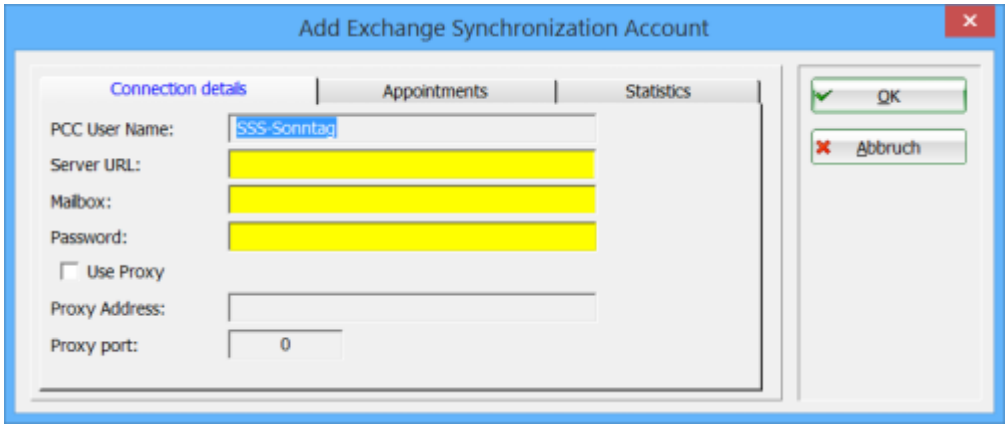
Step 3: Configure the Exchange interface:

The Exchange interface is called up via the menu item:



Calling up the interface for the first time:

When the interface is called up for the first time, the following window appears in which the basic settings must be made:



Required information for the Installation are:

PCC user name: (the user registered in PC CADDIE appears here)

Server URL: the EWS address must be entered here (EWS = Exchange Web Service)

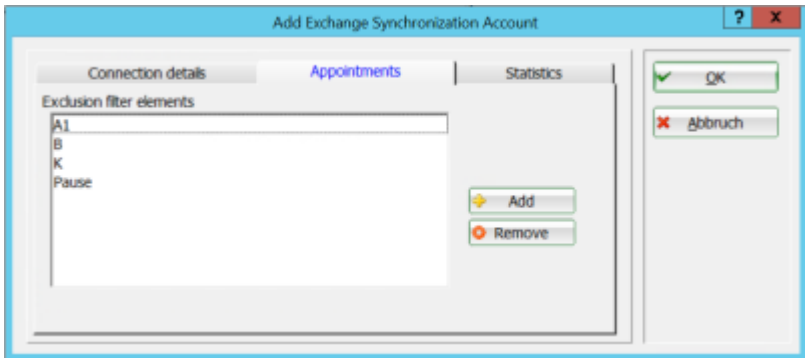
Mailbox:

Password:

Further setting options:

APPOINTMENTS:

Entries for an Exchange synchronisation can be removed here. Entries can be added using the „+ADD“ button.



There are various ways in which you can set additional exception rules here. You can also work with the help of an * (asterisk). This then acts as a placeholder.

Example 1: **Test** ⇒ Enter the word **test** in the box. All entries with this word are no longer synchronised.

Example 2: ***Test** ⇒ Enter this combination ***Test** and all entries ending with the word „Test“ will no longer be synchronised.

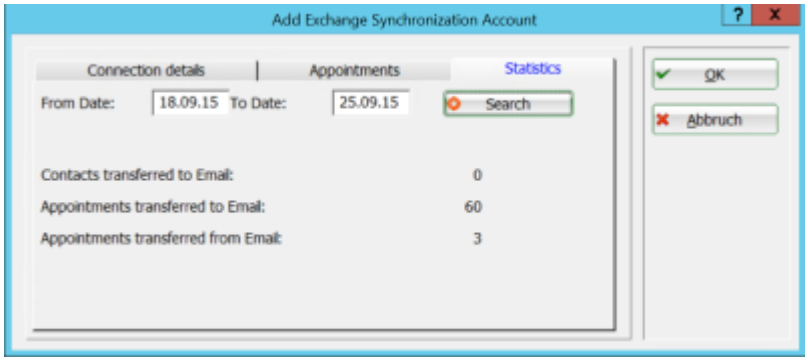
Example 3: **Test*** ⇒ Enter the combination **Test*** and all entries beginning with „Test“ will no longer be synchronised.

Example 4: **Test*Test** ⇒ If you enter this combination, all entries beginning or ending with „Test“ are no longer synchronised.

However, only one placeholder can be used per filter - a combination is not possible.

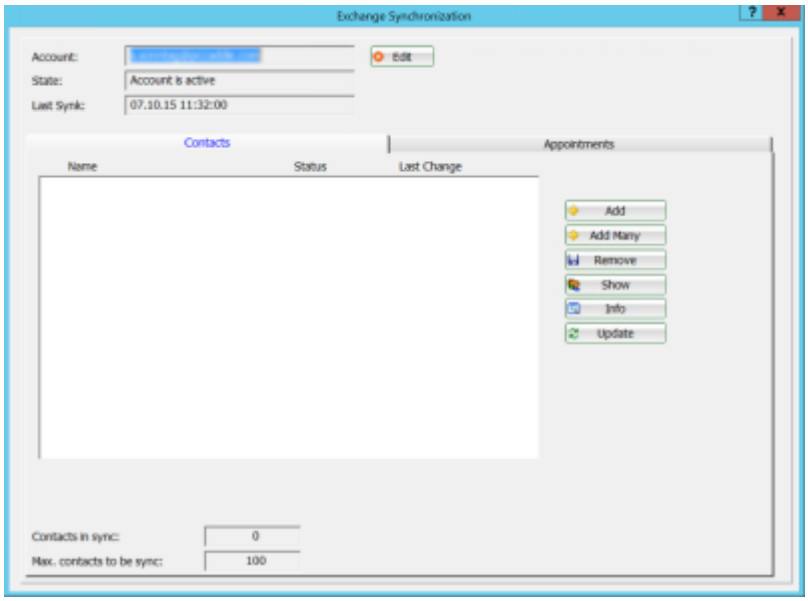
STATISTICS:

In the statistics, you can display the number of synchronised entries for a specific time period for a specific period:



Calling up the interface (after the basic setting):

If you open the interface again after the basic setting, the following window appears:

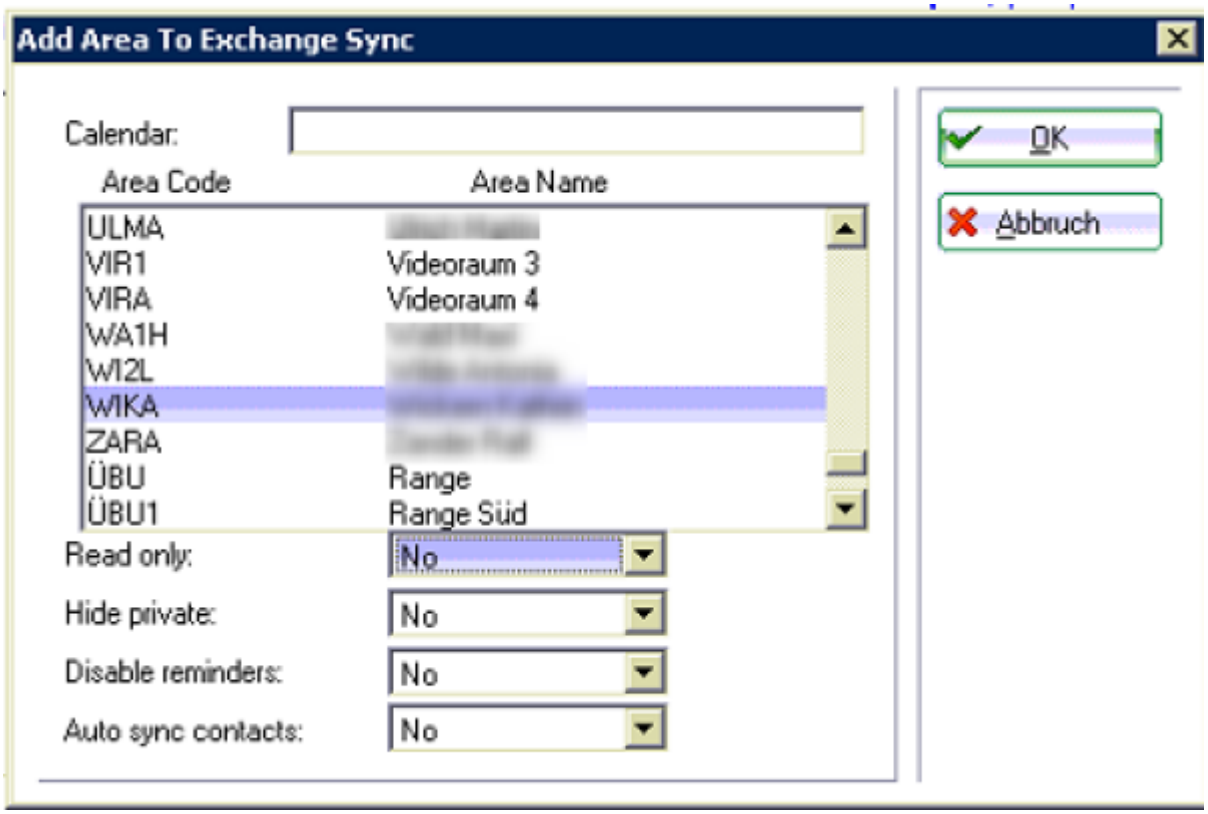


(1) CONTACTS tab:

In the CONTACTS tab, you can use the „+ADD“ button to button to add contacts that were created on the Exchange server and are now to be synchronised with PC CADDIE. All other contacts that were created on the Exchange server are not synchronised.

(2) APPOINTMENTS tab:

In the APPOINTMENTS tab, you can use the „+ADD“ button to select the desired calendars from the calendars available in PC CADDIE and make settings:

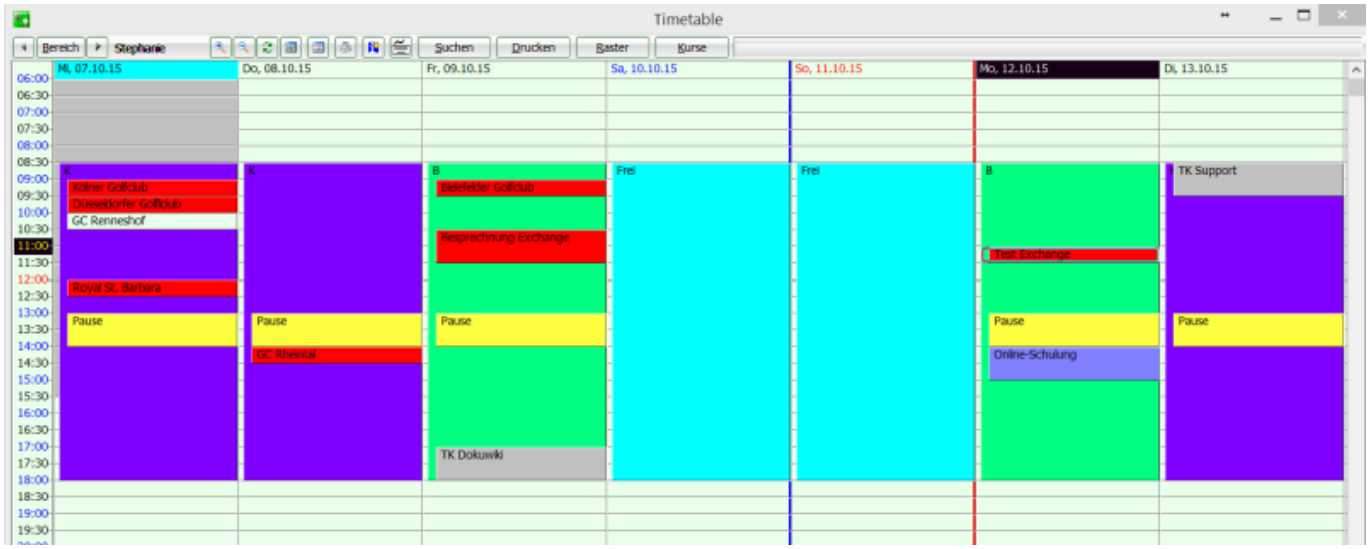


These settings can be made for the user:

Read only:	Yes	Überträgt nur Termine von PC CADDIE nach Exchange. Änderungen werden von Exchange nicht übernommen
	No	Termine synchronisieren sich in beide Richtungen. Äderungen werden in beide Richtungen übertragen
Hide private:	Yes	Private Termine werden nicht von Exchange zu PC CDDIE importiert.
	No	Keine Einschränkungen für private Termine.
Disable reminders:	Yes	Erstellt in Outlook automatisch, wiederkehrende Erinnerungen
	No	
Auto sync contacts:	Yes	Wenn Personen im Timetable gebucht werden, sollen die Kontakte automatisch zur Synchronisation hinzugefügt werden
	No	

Step 4: Settings on end devices

The display of a calendar can look as follows in the PC CADDIE Timetable:

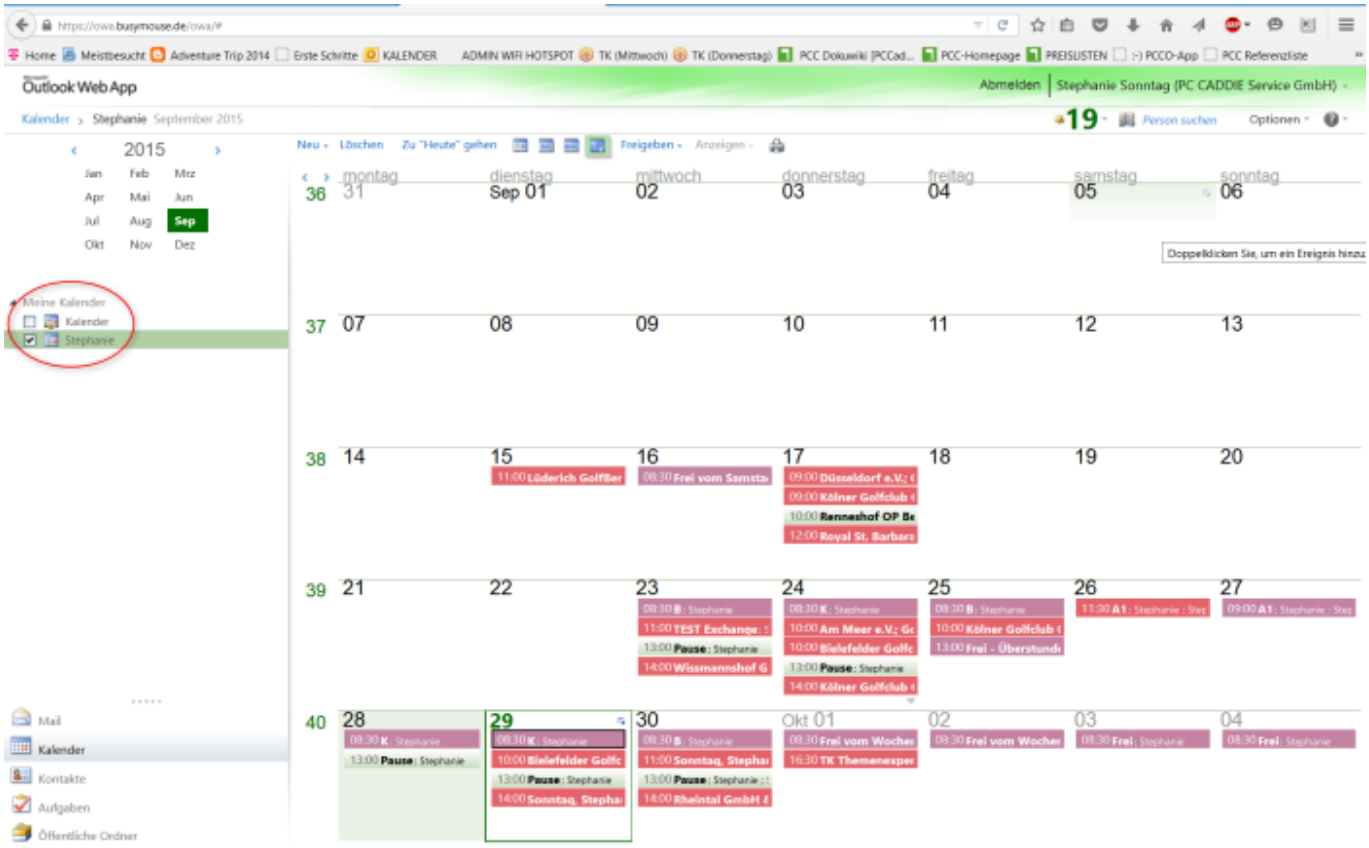


This calendar can then look like the following on different end devices:

Calling up the calendar via a browser

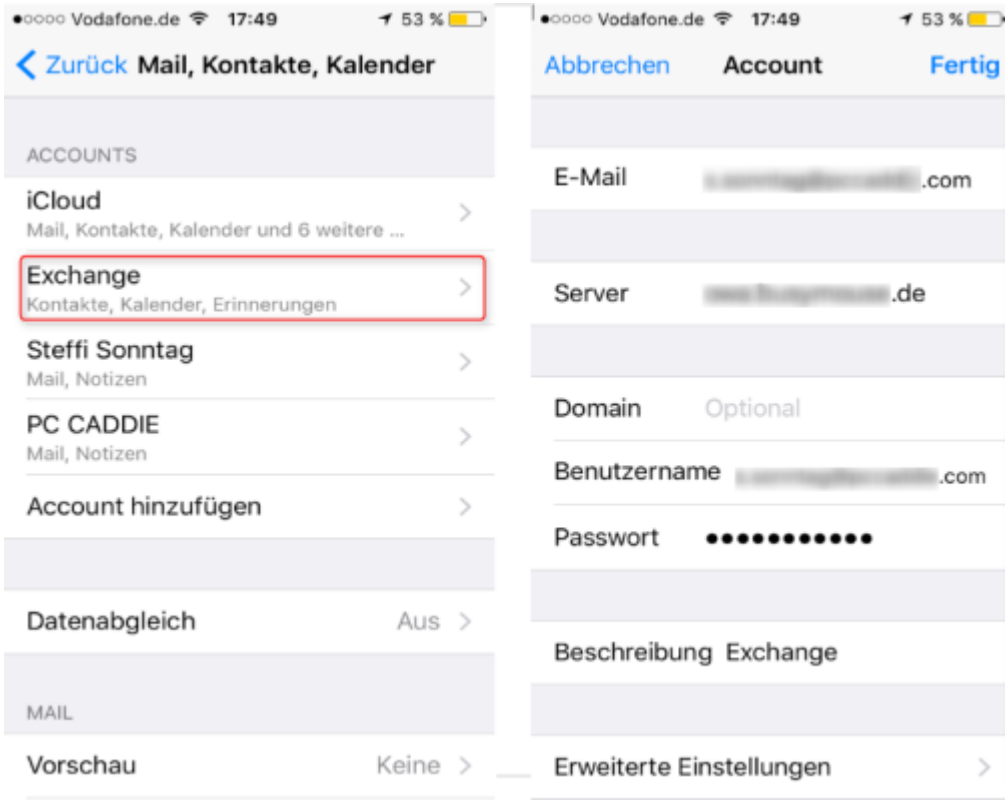
After logging on to the Exchange server via the browser, you get a view of your own calendar with the appointments entered in PC CADDIE:





Settings for Iphone/Ipad

You can make the corresponding settings for Iphone or Ipad and also set the calendar here set the calendar



and the appointments are synchronised with PC CADDIE here too:

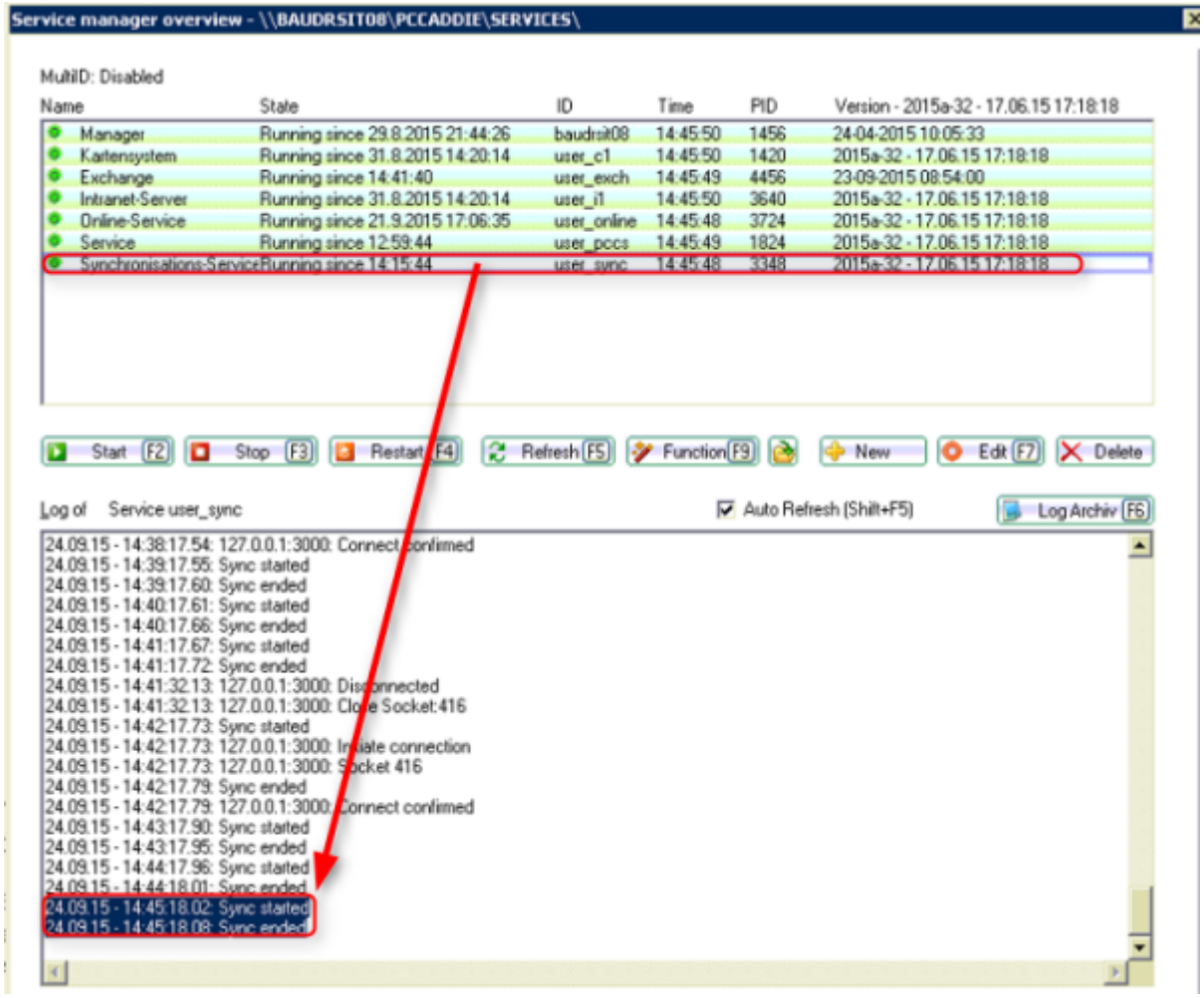




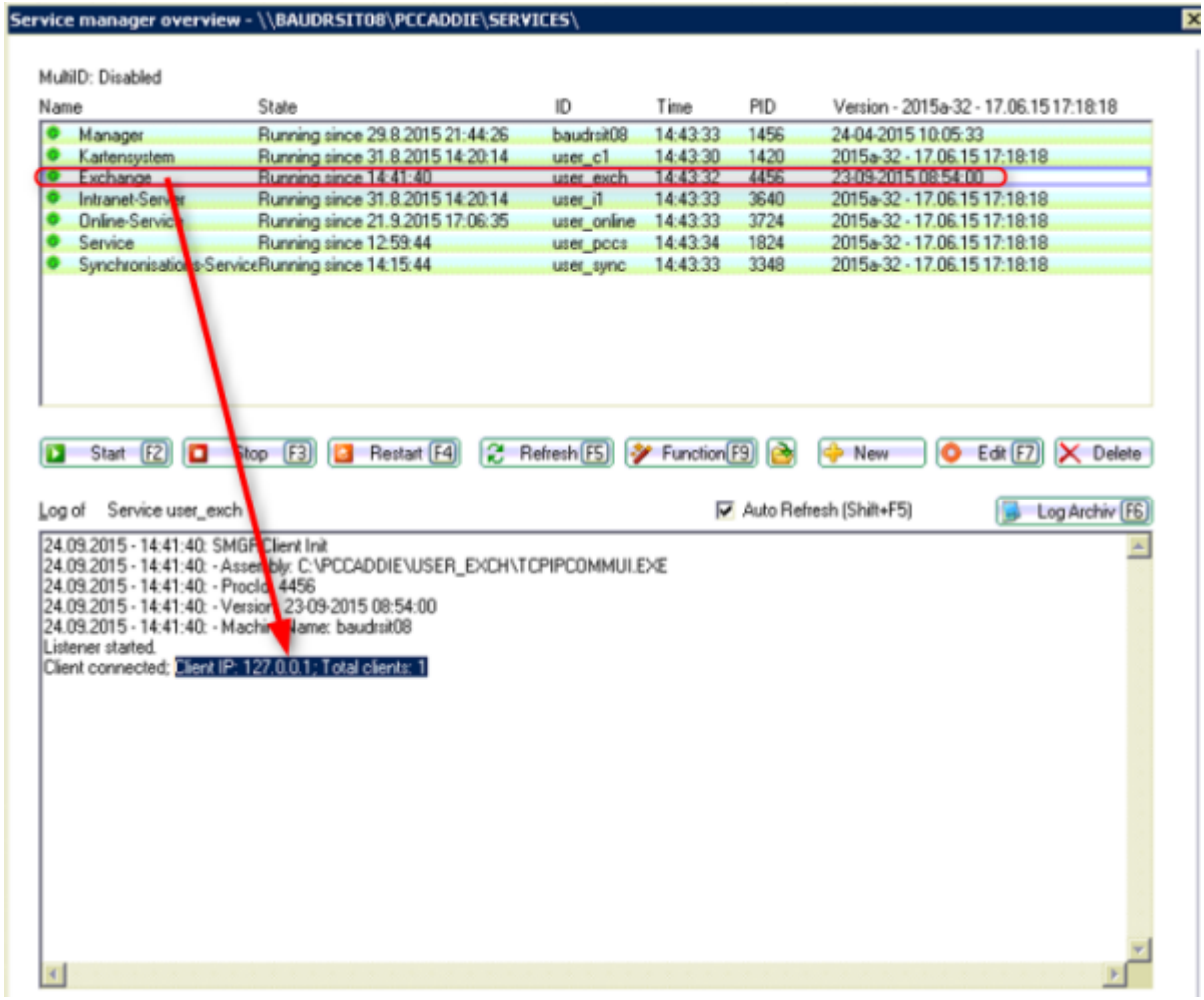
Are all services running correctly?

Here are screenshots of services running correctly:

If the synchronisation service is running correctly, the lines ... Synch started ... Synch ended should appear:



This line must be found in the Exchange service:



Hint

If there are problems with the synchronisation, an automatic system ensures that there is a maximum of 10 attempts for synchronisation. The synchronisation process is then terminated automatically. However, the user has the option of resetting these messages via a reset.

Screenshot (Active items for Exchange Sync)

By default, the synchronisation attempt is cancelled after 10 attempts. However, the number of attempts can also be set individually using special parameters.