

# Exchange Synchronization

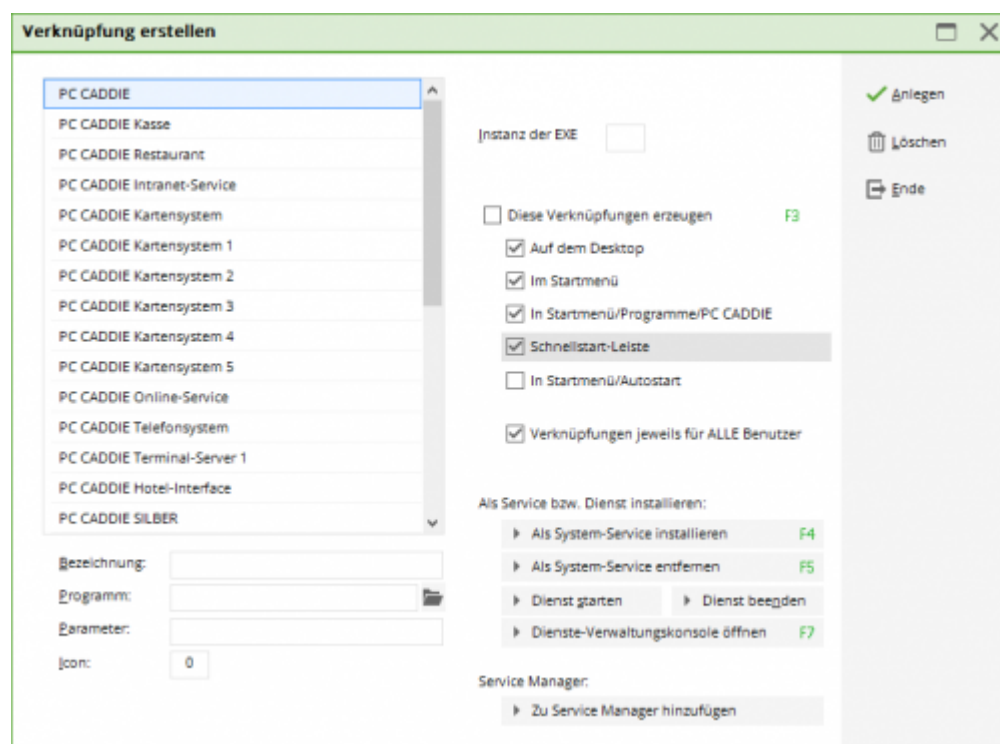
This module synchronizes PC CADDIE timetable areas with your Outlook calendar. Any appointments that are created or changed in one environment are automatically transferred to the other one. So you can always have access to the most important dates!

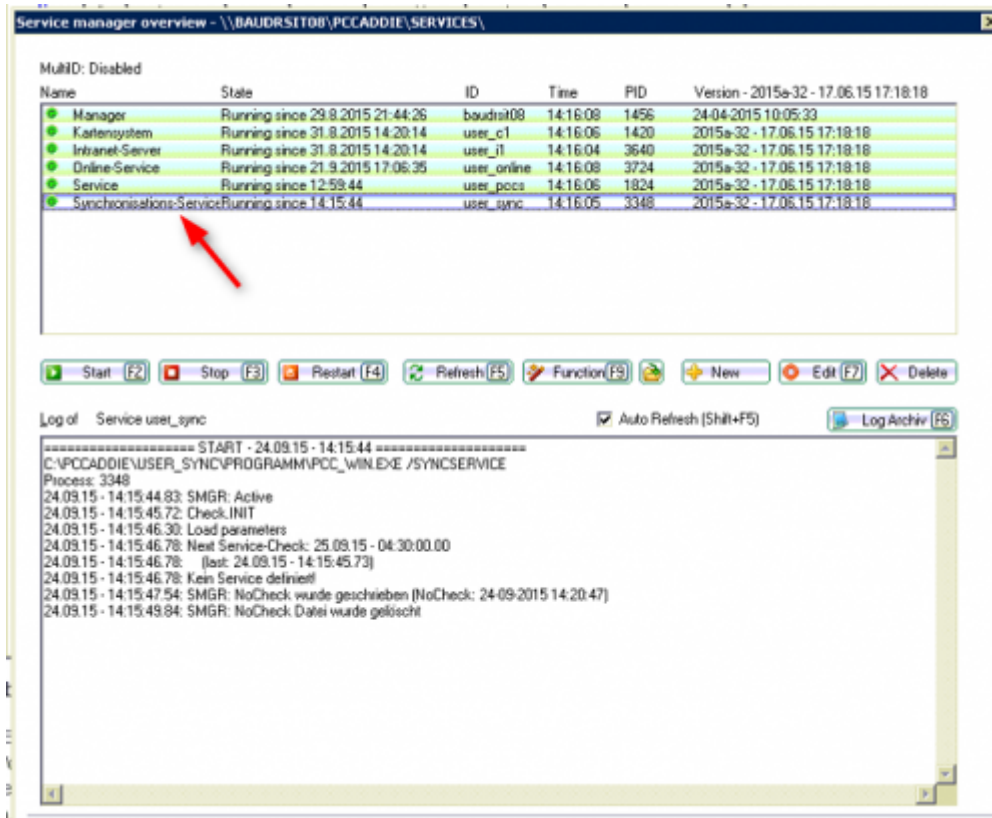
## Step 1: Facility services and special parameters

The PC CADDIE Exchange interface requires establishing two services.

### Installation Synchronization-Service:

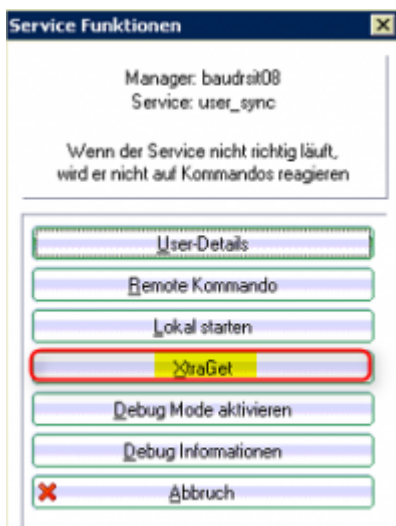
Install the **Synchronization-Service** via the „lnk“ macro:

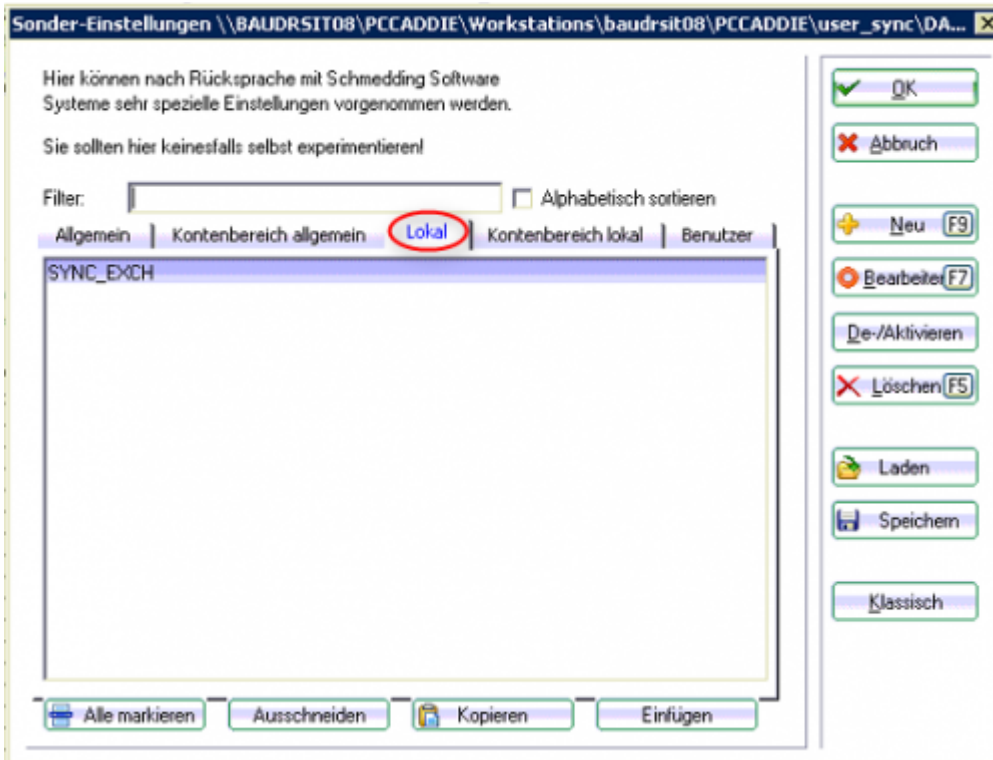




## Add a special parameter:

The special parameter `SYNC_EXCH` from the tab **LOCAL** can be set using the buttons **FUNCTION** and **XtraGet**.

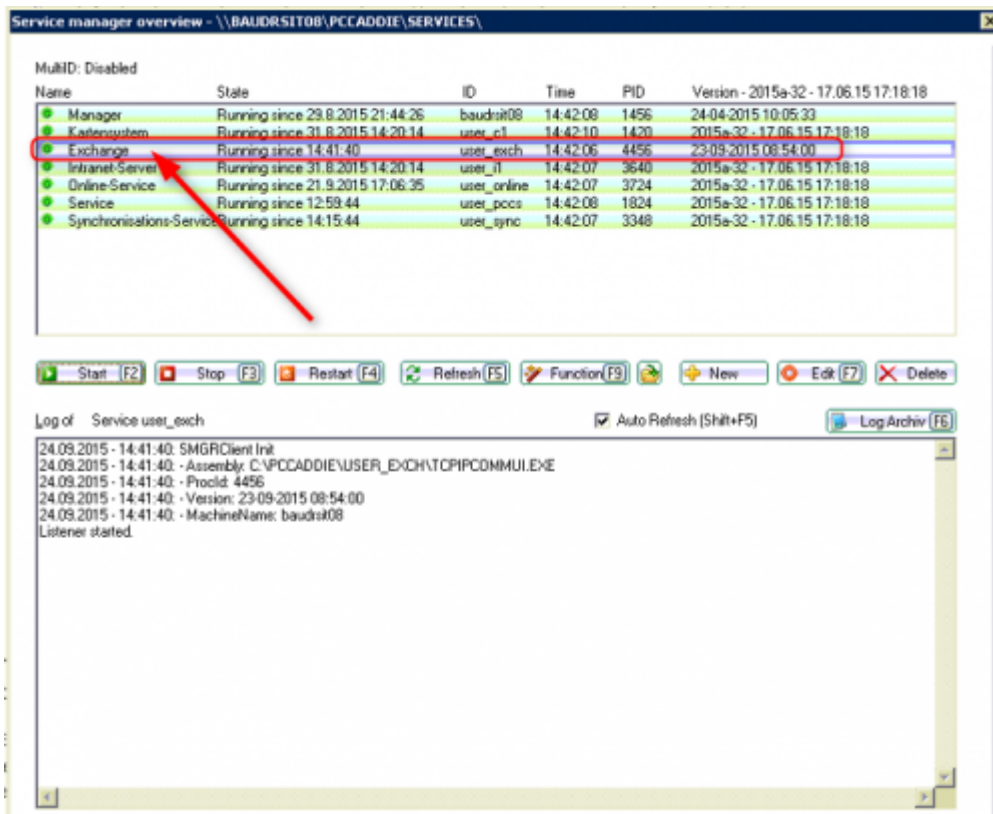




## Installation Exchange Service:



Currently, this service needs to be installed manually by a technician. In the future it will also be possible to install this service via the „lnk“ macro.



## Step 2: Password management settings



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

The possible settings are as follows:

Kontakt:		
<b>Kontakt</b>	Ja	Hier kann ausgewählt werden, ob der User die auf dem Exchange-Server angelegten Kontakte abgleichen darf
	Nein	

Kontaktbereiche synchronisieren:			
<b>Kontakt Bereiche</b>	<b>Adresse</b>	Nein	Es darf kein Abgleich durchgeführt werden
	<b>Telefon</b>	Gemäß Gruppe	Gruppeneinstellungen
	<b>E-Mail</b>	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 synchronisiert werden
	Gem. Gruppe	Gruppeneinstellungen
	Alle Timetable Bereiche	Es dürfen alle Timetable Bereiche synchronisiert 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:



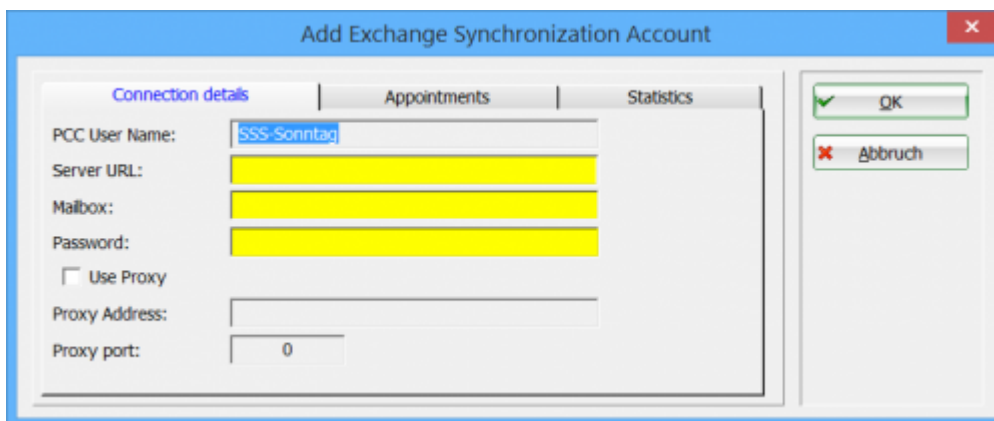
**!** However, the settings made in the password management govern only the permissions - for example if a synchronization of the contacts is allowed. But they do not control the actual exchange, which is set separately in the Exchange interface.

### Step3: Configuring the Exchange interface:

The Exchange interface is accessible via the menu item:

#### Initial calls to the interface:

The following window opens when the interface is invoked for the first time; you can make here the basic settings:



The required fields are:

**PCC-User Name:** the user currently logged-in appears here

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

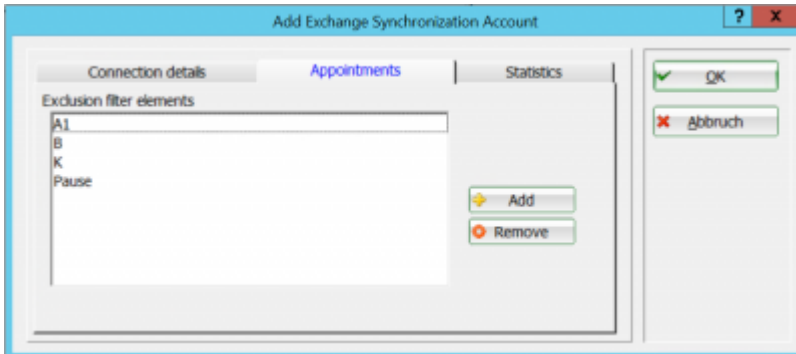
**Mailbox:**

**Password:**

## Other settings:

### APPOINTMENTS:

You can remove items from the exchange using this tab, or add new entries after pressing the „+ADD“ button.



There are different options for setting additional exceptions. In addition, you can use the \* (asterisk) as a placeholder.

Example 1: **Test** ⇒ Enter the word **Test**, and all the entries containing this word are no longer synchronized.

Example 2: **\*Test** ⇒ Enter the combination **\*Test**, and all the entries ending with the word „Test“ are no longer synchronized.

Example 3: **Test\*** ⇒ Enter the combination **Test\***, and all the entries beginning with the word „Test“ are no longer synchronized.

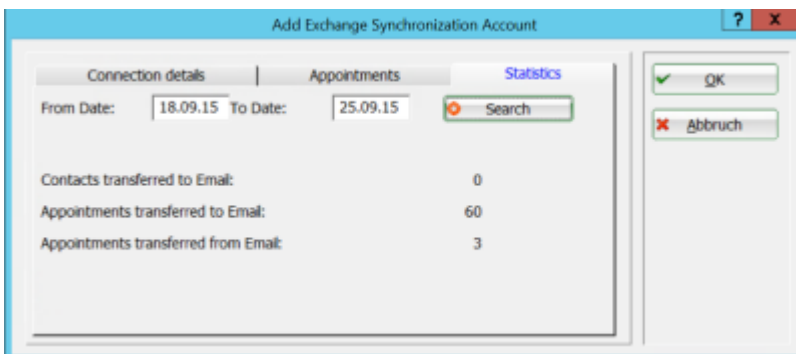
Example 4: **Test\*Test** ⇒ If you enter this combination, all the entries beginning or ending with the word „Test“ are no longer synchronized.



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

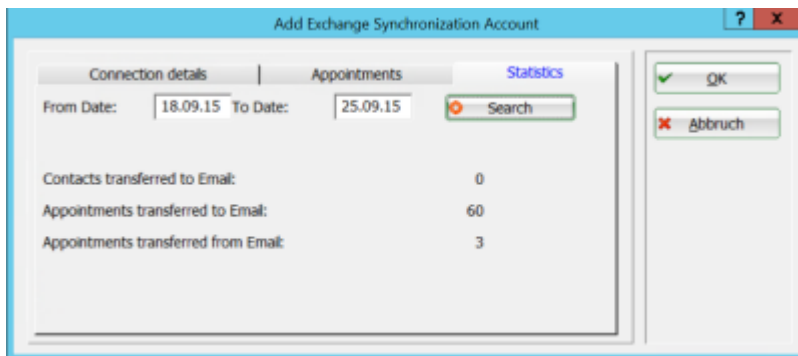
### STATISTICS:

You can see the number of synchronized entries for a certain period using the statistics.



## Accessing the interface (after the initial setting):

The following window opens if you access the interface after the initial settings:

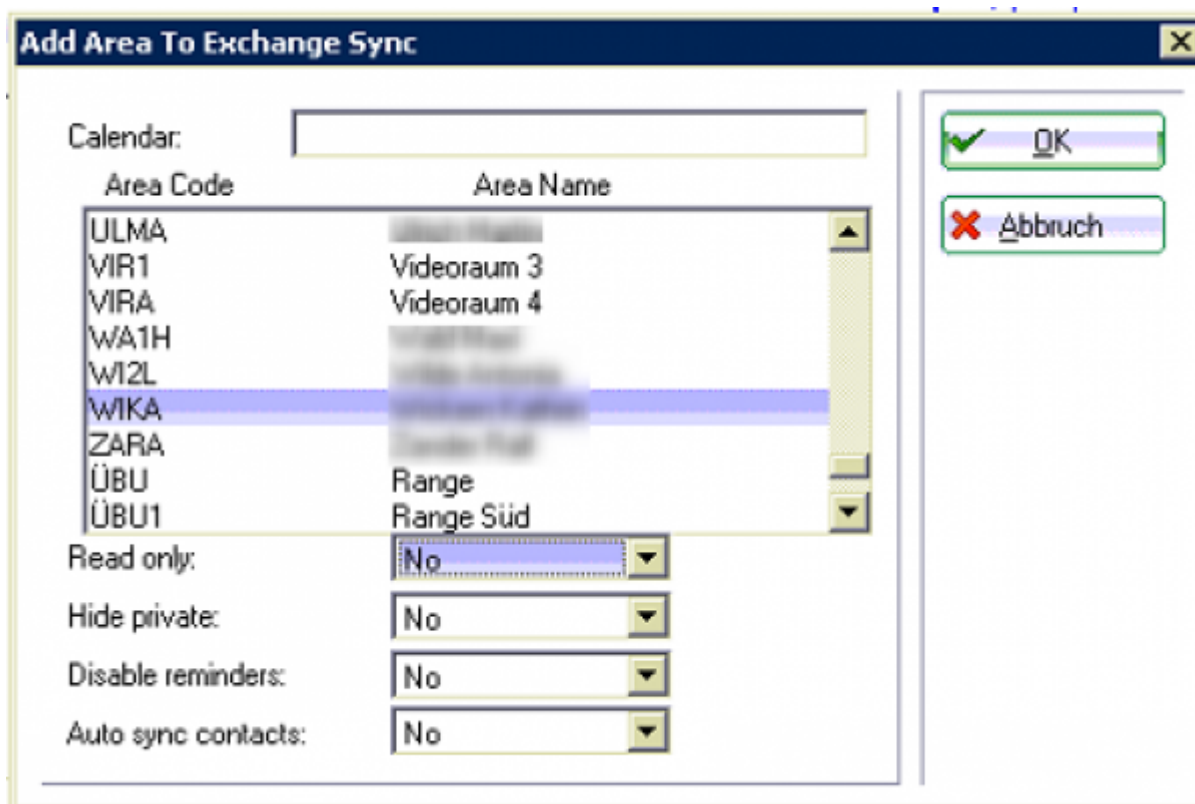


### (1) CONTACTS tab:

In the CONTACTS tab you can use the „+ADD“ button to synchronize with PC CADDIE contacts that were were created on the Exchange server. Any other contacts created on the Exchange server will not be synchronized.

### (2) APPOINTMENTS tab:

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

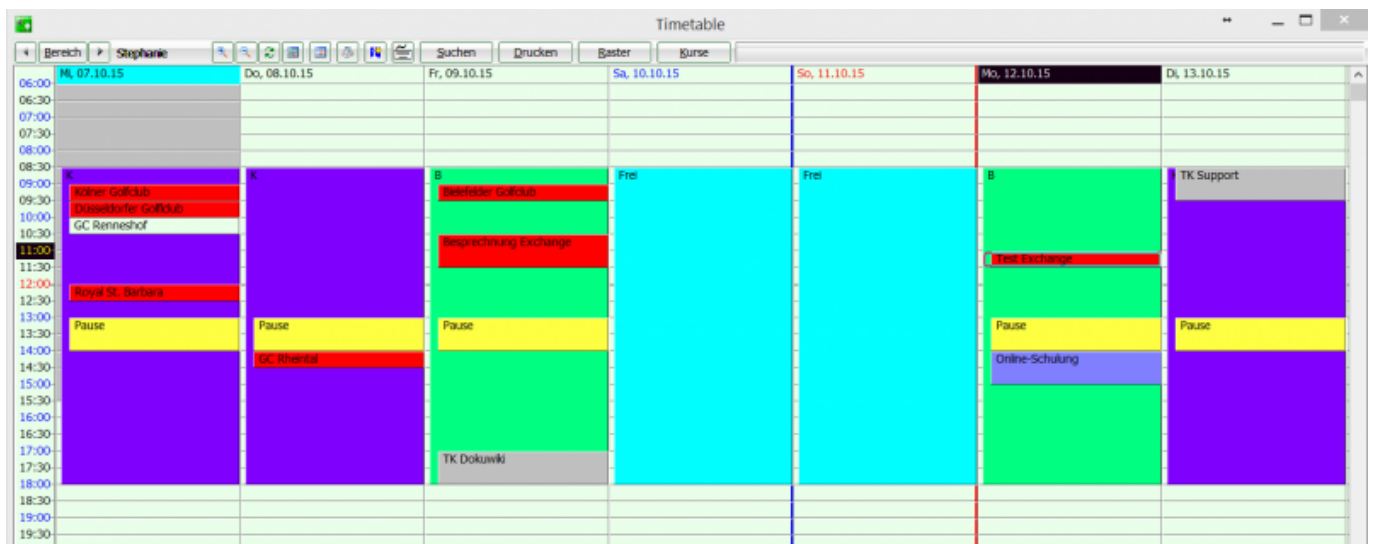


These settings can be made for the user:

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

## Step 4: Terminals settings

The calendar may appear in PC CADDIE Timetable as follows:

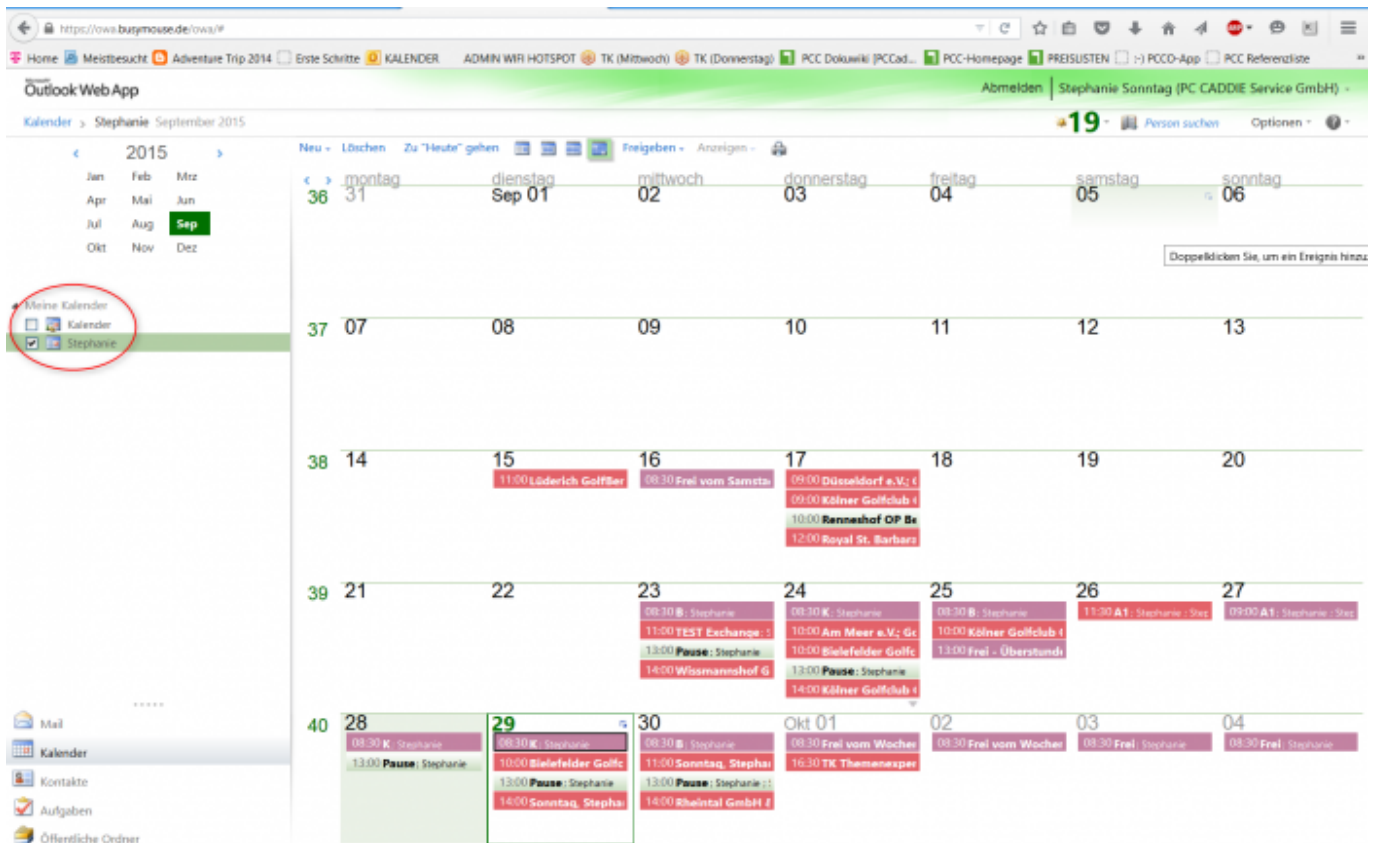


This calendar can then look differently for different devices:

## Calendar's representation in web browser

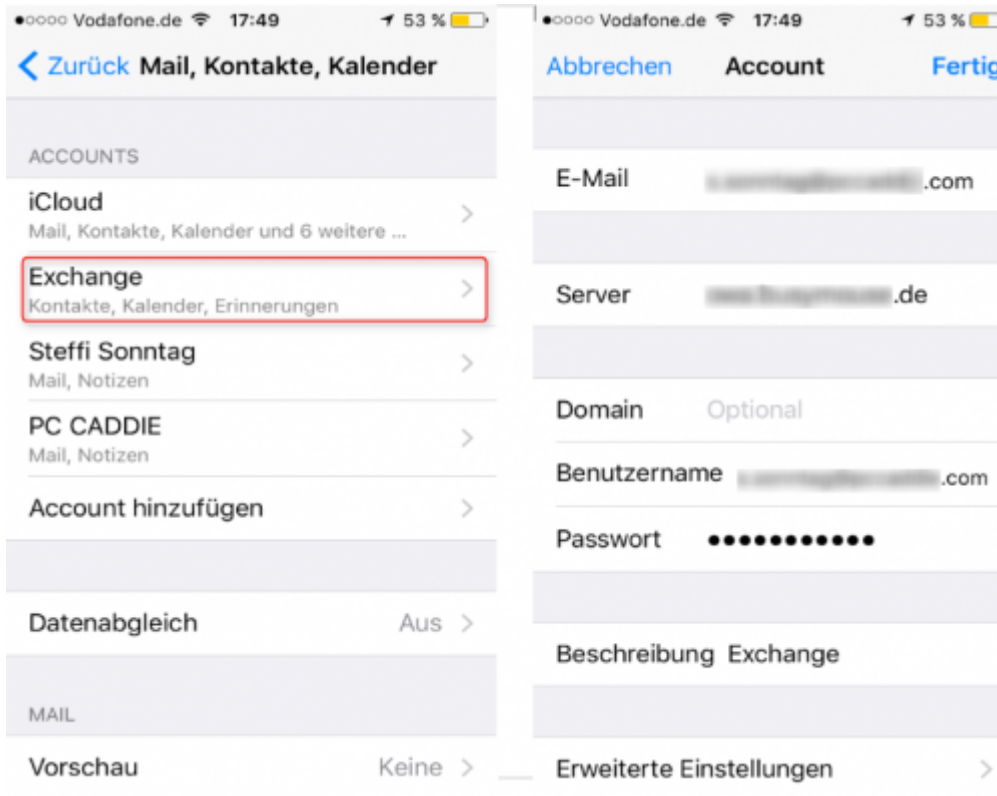
After logging in to the Exchange Server via the browser, you will see the following representation of your own calendar, with the appointments registered in PC CADDIE:



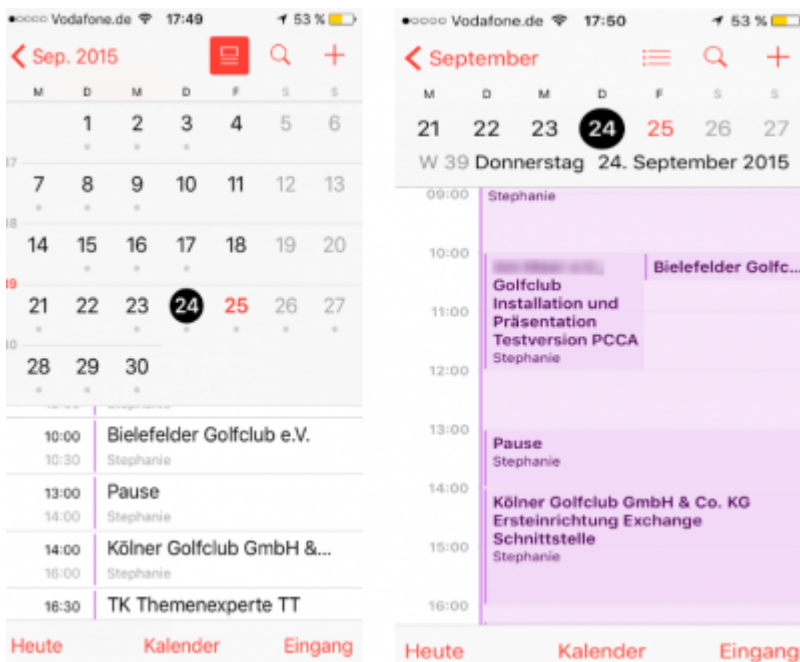


## Settings for iPhone/iPad

You can make the appropriate settings for seeing your calendar on iPhones and iPads as well



and also synchronize your appointments with PC CADDIE:

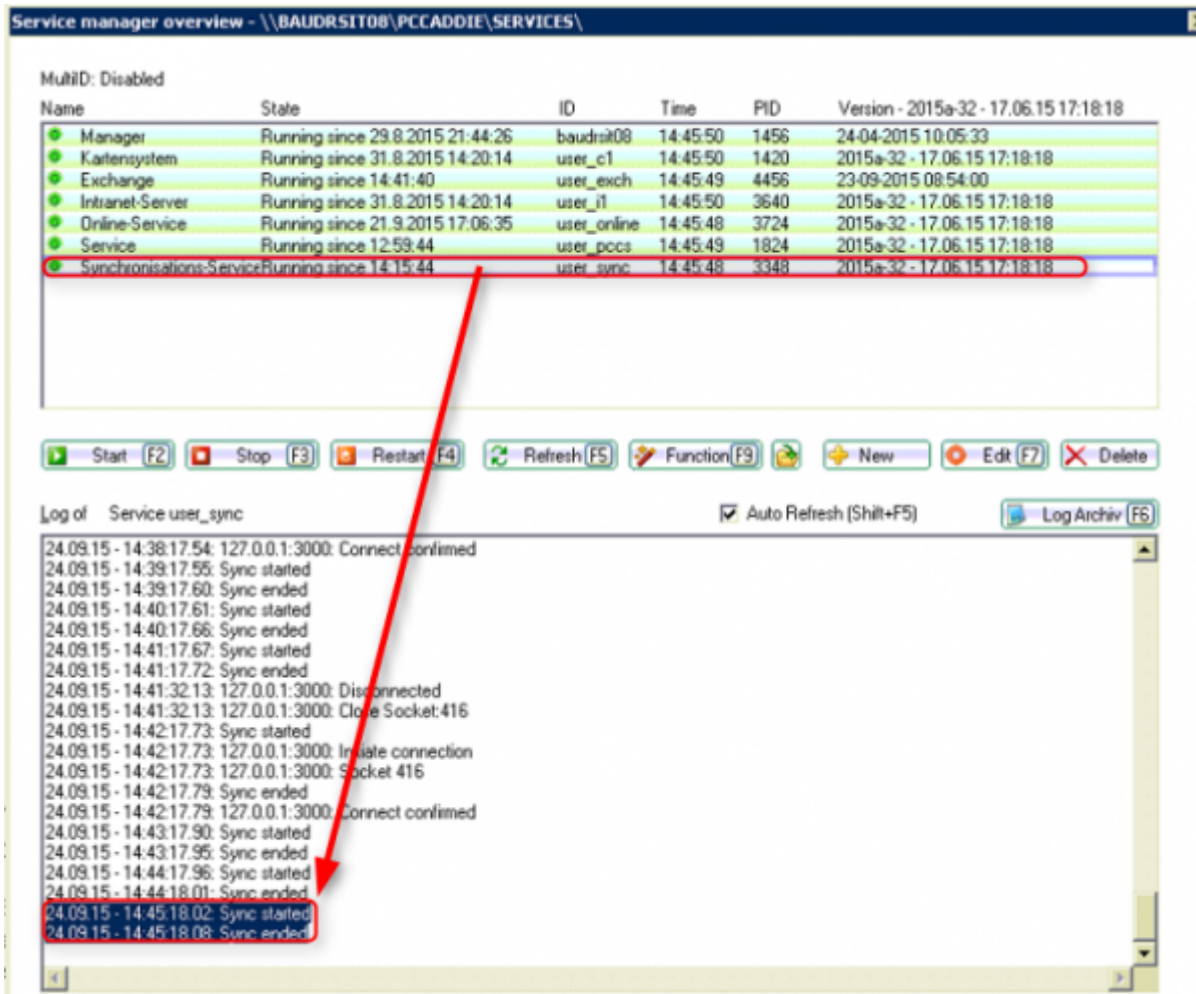


## Are all services running correctly?

Here are some screenshots of properly running services:

- You should see the the lines
- ... Synch started
- ... Synch ended

at the bottom of the window, if the Synchronization service is running properly:



You should see the line marked in the following screenshot if the Exchange service is running properly:

Service manager overview - \\BAUDRSIT08\PCADDIE\SERVICES\

MultID: Disabled

Name	State	ID	Time	PID	Version - 2015a-32 - 17.06.15 17:18:18
Manager	Running since 29.8.2015 21:44:26	baudrsit08	14:43:33	1456	24-04-2015 10:05:33
Kartensystem	Running since 31.8.2015 14:20:14	user_c1	14:43:30	1420	2015a-32 - 17.06.15 17:18:18
Exchange	Running since 14:41:40	user_exch	14:43:32	4456	23-09-2015 08:54:00
Intranet-Server	Running since 31.8.2015 14:20:14	user_il	14:43:33	3640	2015a-32 - 17.06.15 17:18:18
Online-Service	Running since 21.9.2015 17:06:35	user_online	14:43:33	3724	2015a-32 - 17.06.15 17:18:18
Service	Running since 12:59:44	user_pcca	14:43:34	1824	2015a-32 - 17.06.15 17:18:18
Synchronisations-Service	Running since 14:15:44	user_sync	14:43:33	3348	2015a-32 - 17.06.15 17:18:18

Start (F2) Stop (F3) Restart (F4) Refresh (F5) Function (F9) New Edit (F7) Delete

Log of Service user\_exch  Auto Refresh (Shift+F5) Log Archiv (F6)

```

24.09.2015 - 14:41:40: SMGF Client Init
24.09.2015 - 14:41:40: - Assembly: C:\PCADDIE\USER_EXCH\TCPIPCOMMUI.EXE
24.09.2015 - 14:41:40: - Procid: 4456
24.09.2015 - 14:41:40: - Version: 23-09-2015 08:54:00
24.09.2015 - 14:41:40: - Machine Name: baudrsit08
Listener started
Client connected: Client IP: 127.0.0.1 - Total clients: 1

```

## Note

A maximum of ten attempts are automatically made if there are problems with the exchange, then the operation is terminated. However, the user has the possibility restart the process after resetting the system.

Screenshot (Active items for Exchange Sync)



By default, the exchanged is canceled after 10 attempts. The number of attempts can also be set individually via special parameters.