

# User Guide: Exchange sync

Deploying CAS genesisWorld together with Microsoft Exchange and Outlook



## Copyright

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# CAS CRM

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## Contents

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1	Introduction.....	5
1.1	Examples for users.....	5
1.2	Benefits.....	6
1.3	Impact.....	6
2	System requirements and settings.....	8
2.1	Microsoft Exchange Server settings.....	8
2.2	Settings for CAS genesisWorld.....	9
2.2.1	Starting services in the Server Manager.....	9
2.2.2	Preparing the deployment of Exchange sync.....	10
2.2.3	Registering a license.....	12
3	Setting up Exchange sync in the Management Console.....	13
3.1	General tab.....	13
3.2	Creating and editing Exchange Server.....	15
3.3	Setting up the OAuth2 authentication for Exchange Online.....	18
3.4	Map tab.....	20
3.5	Addresses tab.....	22
3.6	Creating and editing a synchronization task for addresses.....	24
3.7	Appointments tab.....	26
3.8	Converting appointments.....	29
3.9	Changing more settings in the Management Console.....	32
3.9.1	Hiding the change log tab for appointments.....	33
3.9.2	Enable address synchronization for users.....	35
3.9.3	Setting up synchronization for individual users.....	36
3.10	Log tab.....	39
4	Changes of behavior via Exchange sync.....	40
4.1	Addresses in CAS genesisWorld.....	40
4.2	Addresses in Microsoft Exchange.....	41
4.3	Appointments in Microsoft Exchange.....	42
4.4	Appointments in CAS genesisWorld.....	45
5	Switching to Exchange sync.....	49
5.1	CAS genesisWorld instead of Microsoft Outlook for	

	appointments.....	49
5.2	Using Microsoft Outlook instead of CAS genesisWorld for appointments.....	50
6	Implementing Exchange sync - a checklist.....	52
6.1	Checklist of technical requirements.....	52
6.2	Checklist of organizational requirements.....	52
6.3	Preparations.....	53
6.4	Activating appointment synchronization.....	54
6.5	FAQs.....	55
7	Allocating fields.....	57
7.1	Address: Field mapping.....	57
7.2	Appointments: Field mapping.....	59
8	Working with Exchange sync as a user.....	61
8.1	Addresses.....	61
	8.1.1 Setting up personal address synchronizations.....	61
	8.1.2 Unidirectional and bidirectional synchronization of addresses.....	62
	8.1.3 Working with addresses.....	64
	8.1.4 Notes field.....	67
8.2	Appointments.....	67
	8.2.1 Working with appointments.....	68
	8.2.2 Delegating appointments.....	71
	8.2.3 Creating appointments in the name of the delegating user.....	72
	8.2.4 Invitation status tab.....	73
	8.2.5 Private/confidential appointments.....	74
	8.2.6 Automatically link appointments with addresses.....	75
	8.2.7 Notes field.....	75
	8.2.8 Other changed functions in CAS genesisWorld.....	75
	8.2.9 Current limitations of appointment management.....	77

# 1 Introduction

The Exchange sync module allows you to use CAS genesisWorld and Microsoft Exchange/Microsoft Outlook together for the organization of addresses and appointments.

Exchange sync can be used either for just addresses and appointments or for both data record types.

Data synchronization is performed automatically between CAS genesisWorld and Microsoft Exchange. CAS genesisWorld is the leading system for addresses, whereas Microsoft Exchange is the leading system with appointments. Consequently, there are a number of differences from the default in CAS genesisWorld, these differences are covered in more detail here.

The advantages of CAS genesisWorld are combined with the advantages of Microsoft Exchange/Microsoft Outlook.

You require a license for the Exchange sync module.

Topics in this chapter	
1.1	Examples for users..... 5
1.2	Benefits..... 6
1.3	Impact..... 6

## 1.1 Examples for users

In larger companies, not all departments use the same systems. Exchange sync ensures seamless cooperation by enabling CAS genesisWorld and Microsoft Exchange or Microsoft Outlook to be used together. Exchange sync synchronizes data from addresses and appointments between CAS genesisWorld and Microsoft Exchange. What this means for you, is that you always have a complete customer dossier even if your workforce do not all work with CAS genesisWorld.

You can recognize a typical Exchange sync user case by the following characteristics:

- You have a lot of users who work with Microsoft Outlook.
- CAS genesisWorld is to be deployed as the CRM system.
- However, not all users will need to work with CAS genesisWorld, usually only a number of specific departments will require access.

- The usual work procedures using Microsoft Outlook are to be retained.
- You wish to ensure a uniform and shared appointment and address management system.

## 1.2 Benefits

Using Exchange sync all the employees can work together seamlessly with ease despite using different software:

- All employees work with the same data.
- This enables shared appointment management.
- As a consequence, a complete customer dossier is created, although not everyone works with CAS genesisWorld.
- Double data maintenance for addresses and appointments is unnecessary.
- And working in a familiar environment is retained.

## 1.3 Impact

All software has its own data management principles, or triggers specific requirements. Besides exchanging appointments and address data records between CAS genesisWorld and Microsoft Exchange, the Exchange sync module also ensures that both programs are compatible with each other.

In the process, CAS genesisWorld works with appointments in a similar way to Microsoft Exchange. The functional adjustments mainly concern automatic processes for the assignment of rights to appointments.

### Special features of appointments

- If appointments are created or changed via the synchronization between CAS genesisWorld and Microsoft Exchange, then mandatory fields are not checked in appointments. More information is available here: [Checking mandatory fields](#).
- All the changes made to a data record are logged on the **Change log** tab in CAS genesisWorld. As the change log of the appointment organizer is leading in the data record, sensitive information on the organizer could be recorded in the change log. Thus, we recommend that you hide the change log. You can find more information in the following section "Changing more settings in the Management Console", page 32.
- Notification and action service rules have to be checked for appointments. You will not be able to create rules that change appointment participants. You can find more information in the following section "Preparing the deployment of Exchange sync", page 10.

- Appointment actions also have to be checked. You will not be able to create actions that change appointment participants. You can find more information in the following section "Preparing the deployment of Exchange sync", page 10.
- When using Exchange sync, other modules and integrations may be affected. For a list of all potential impacts [hilfe.cas.de](https://hilfe.cas.de) see the **Working with several modules** page [Exchange sync](#).

## 2 System requirements and settings

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Deploying Exchange sync is only possible with specific versions of Microsoft Exchange Server and Microsoft Outlook. You will find a list of supported systems here: [Supported platforms](#).

For CAS genesisWorld the Microsoft SQL Server is required as the database system.

Microsoft Exchange Web services are used to exchange data between CAS genesisWorld and Exchange sync.

### Topics in this chapter

2.1	Microsoft Exchange Server settings.....	8
2.2	Settings for CAS genesisWorld.....	9

### 2.1 Microsoft Exchange Server settings

If you are using a standard Microsoft Exchange Server installation, you have to ensure that the following conditions have been met:

- The Microsoft Internet Information Services (IIS) are running.
- The Exchange Server can be accessed.

The Microsoft Exchange Server requires a Windows or Microsoft Exchange user who has rights to the mailboxes of other users.

All users can subscribe to public folders. In this case, the user with the role: **Impersonation** requires **Change** and **Delete** rights.

#### Creating an Impersonation role with Microsoft Exchange

The **Impersonation** role is required for the synchronization. With this the user can log on using the name and rights of the respective user for the synchronization. Thus, the user adopts the identity of the other user temporarily.

You may find that setting up the **Impersonation** role varies slightly depending on the version of the Exchange Server you are using.

The documentation of the Exchange sync module only describes the respective functions in CAS genesisWorld as well as the interactions and direct interfaces between both systems. The functions of Microsoft Exchange or Microsoft Outlook will not be described in detail in this document. To find out how you can set up the **Impersonation** role for your system, please see the respective help documentation from Microsoft.

You will find more information in the Microsoft online help under [Configuring a change of identity](#).

For the synchronization, it is enough to have access via the **Impersonation** role. More explicit rights to user mailboxes are unnecessary.

To ensure data protection, you should create a user account for the user who has the **Impersonation** role. Additionally, you should also ensure that an e-mail account has been fully configured and enabled for this user, because access tests using this e-mail account will be performed.

## 2.2 Settings for CAS genesisWorld

The following settings have to be made in CAS genesisWorld to use Exchange sync.

If you are deploying Exchange sync for the first time in your company, you can use the deployment checklists to help you with the preparations, see "Implementing Exchange sync - a checklist", page 52.

### Topics in this chapter

2.2.1 Starting services in the Server Manager.....	9
2.2.2 Preparing the deployment of Exchange sync.....	10
2.2.3 Registering a license.....	12

### 2.2.1 Starting services in the Server Manager

#### CAS service "Web Services"

Check whether the **Web Services** service has been started in the CAS genesis-World Server Manager. If the service is not running, then you cannot use the Exchange sync functionality. Start the service.

More information is available here: [Services tab](#).

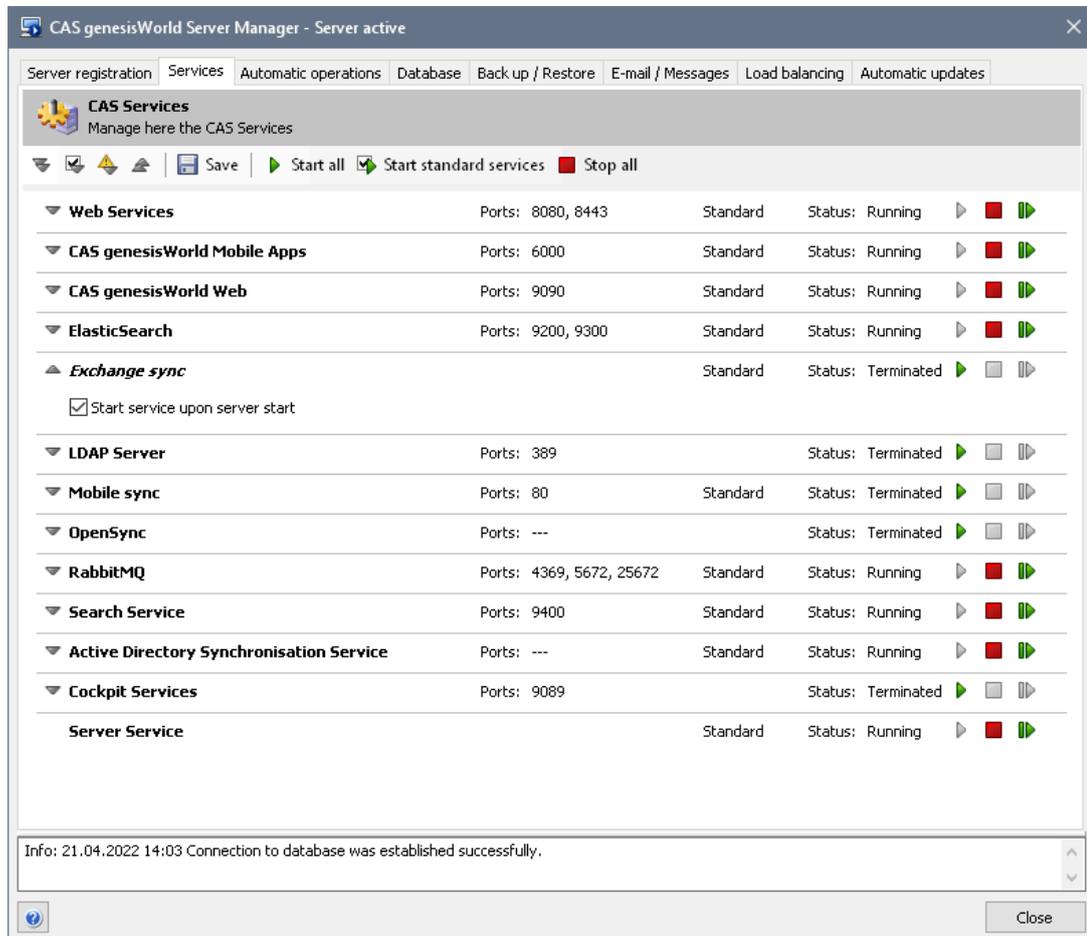
#### CAS service "Exchange sync"

The synchronization with Exchange sync also has to be started in the Server Manager.

#### Start the synchronization with Exchange sync in the Server Manager

1. In the Server Manager, open the **Services** tab.
2. Start the **Exchange sync** service.

### 3. Activate the **Start service upon server start** option.



## 2.2.2 Preparing the deployment of Exchange sync

Before you start changing the settings for Exchange sync, you have to check and, if necessary, correct settings in CAS genesisWorld.

### User e-mail addresses

In CAS genesisWorld you have to ensure that an e-mail address has been entered for every user in the **User Management** area of the Management Console. Users cannot change these e-mail addresses. The e-mail address is essential to synchronization and data record allocation functions, and therefore has to be identical for the respective user in both CAS genesisWorld and in Microsoft Exchange.

You can check whether the e-mail addresses are identical in CAS genesisWorld and Microsoft Exchange in the **Assignment** area of the Management Console. You can find more information in the following section "Map tab", page 20.

If the e-mail addresses are not identical, you need to change the e-mail addresses of the respective users in the Management Console. More information is available here: [User management area](#).

### Rules for appointments in the notification and action service

If the Exchange sync module is deployed for the purpose of appointment synchronization, then Microsoft Exchange is the leading system. You can find more information in the following section "Appointments tab", page 26.

In this case, appointment notifications are also sent from Microsoft Exchange. Therefore, you should check the appointment rules in the CAS genesisWorld notification and action service.

#### Checking appointment rules

1. Open the **Management Console**.
2.  Select the **Rules** area.
3. To avoid duplicate notifications, deactivate or delete any existing **Notification rules** for appointments.
4. Deactivate or delete existing **Rules for actions** that automatically change appointments under specific circumstances.
5. Deactivate or delete rules that create new appointments depending on other data records types.

#### Note

After you have activated Exchange sync for appointments, you can create new notification rules for appointments if required, for example, for specific CAS genesisWorld fields or linking appointments.

However, after you have activated Exchange sync for appointments, you can no longer create new appointments using the notification and action service. Furthermore, the notification and action service must not change the participants of existing appointments. Otherwise, unwanted side effects can occur as soon as Exchange sync has been activated for appointments.

### Actions in the CAS genesisWorld Desktop Client

Users with the necessary rights can create or apply actions in the desktop client. As Microsoft Exchange is the leading system for appointments, the participants of an appointments must not be changed using actions when Exchange sync is deployed.

#### Note

You cannot create new actions if the actions change appointment participants. If existing actions continue to change appointment participants, inconsistent data can occur in CAS genesisWorld.

#### Changing appointment actions

1. Open the **desktop client**.
2. Open the view in which actions are possible, for example, the task list.
3.  Click **Action** in the **Tools** menu.
4. Select **Other actions**. The **Action** window will open.
5. Check all of your saved and public appointment actions and alter these so as to prevent any participants from being changed.

#### Note

If other users possess the corresponding right to create actions, ask the respective colleagues to check their own private actions as well. The actions need to be altered so as to prevent any participants from being changed.

### 2.2.3 Registering a license

Once you have completed all the preparatory work, you can register the license.

#### Note

To register the Exchange sync license, you have to enter an e-mail address for every CAS genesisWorld user. This e-mail address has to be identical with the e-mail address you are using for Microsoft Exchange.

#### Registering a license

1. You can register your license in the **Licenses** area of the Management Console.
  2. Activate the license for the respective user.
- ✓ Once the licenses have been registered, the new **Exchange sync** area will be visible in the Management Console.

### 3 Setting up Exchange sync in the Management Console

After registering the license, you can set up the connection to the Microsoft Exchange Server in the Management Console.

#### Procedure

1. Open the **Management Console**.
2.  Select the **Exchange sync** area.
3. Make the necessary changes to the settings.

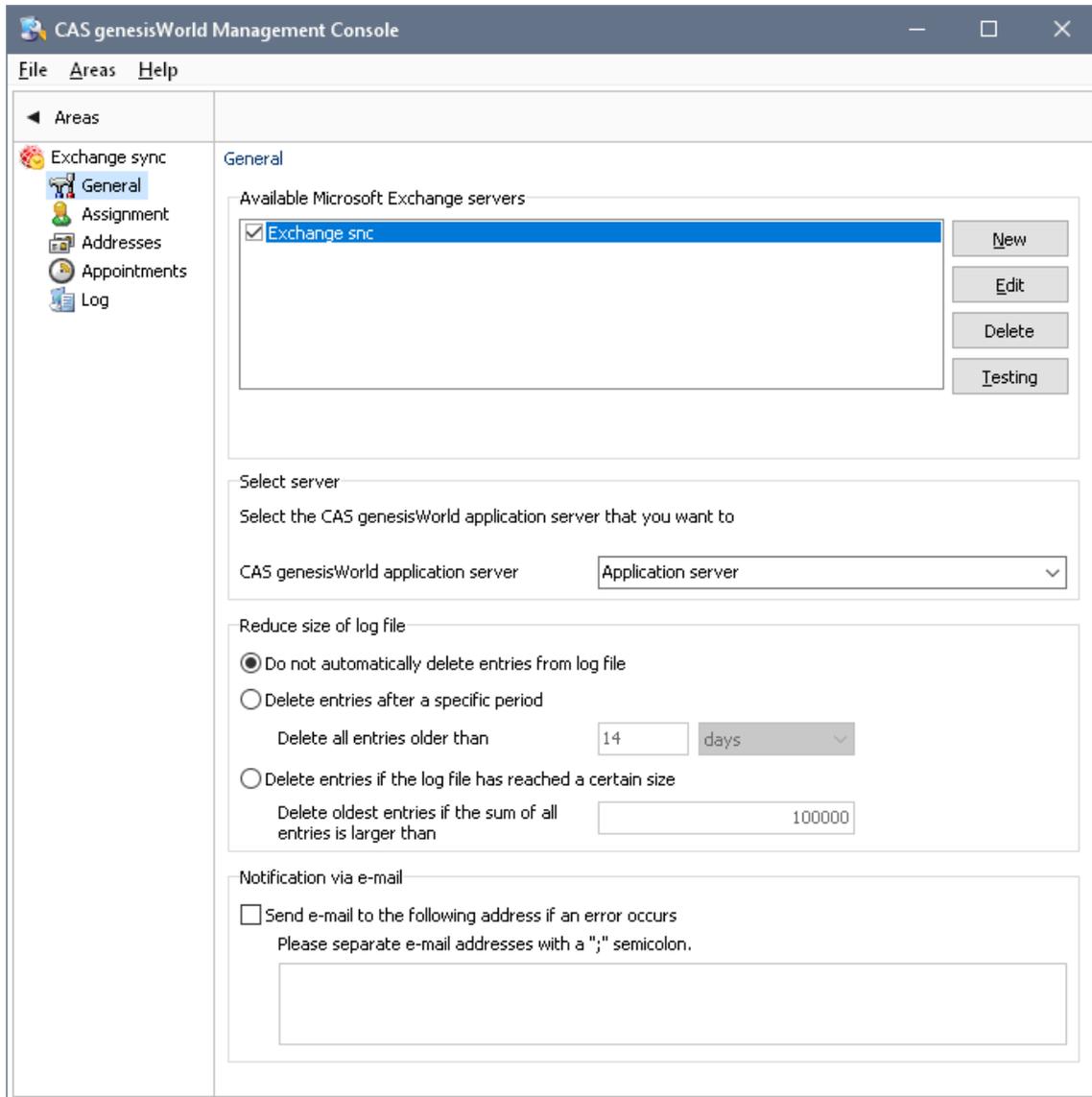
#### Topics in this chapter

3.1	General tab.....	13
3.2	Creating and editing Exchange Server.....	15
3.3	Setting up the OAuth2 authentication for Exchange Online.....	18
3.4	Map tab.....	20
3.5	Addresses tab.....	22
3.6	Creating and editing a synchronization task for addresses.....	24
3.7	Appointments tab.....	26
3.8	Converting appointments.....	29
3.9	Changing more settings in the Management Console.....	32
3.10	Log tab.....	39

#### 3.1 General tab

This tab offers the following options:

- Record access information for Exchange Servers
- Select the CAS genesisWorld Application Server
- Manage logging
- Manage e-mail notifications for errors



### List of all available Microsoft Exchange Servers

In this block you record the logon information for the desired Microsoft Exchange Server. This is required by CAS genesisWorld to log on to Microsoft Exchange Servers and perform synchronizations.

If your company deploys multiple independent Microsoft Exchange Servers, you can set up a simultaneous synchronization with those servers.

Then, Exchange sync identifies the corresponding Microsoft Exchange Server in CAS genesisWorld for each user, and synchronizes the data with the Microsoft Exchange Server.

If the user sets up an individual synchronization, the contacts are automatically synchronized with the Microsoft Exchange Server of the respective user.

You can find more information in the following section "Creating and editing Exchange Server", page 15.

### Select server

Define which CAS genesisWorld Application Server should be used for the synchronization.

### Reducing the size of log files

In the log file, the creation, updating, or deletion of data records during synchronization is recorded. The log file can become very extensive. If you define a setting which reduces the size of the log file, then the log file size is reduced during the first logon to the Exchange Server and subsequently on a daily basis.

Field	Description
<b>No automatic editing of logs</b>	Select this option for an unabridged log.
<b>Delete entries after a specific period. Deleting all entries which are older than</b>	All entries which are older than the time period you defined are deleted.
<b>Deleting log entries as of a specific number</b>	If the sum of all entries exceeds the defined limit, the oldest entries are deleted.

### Notification via e-mail

Define whether e-mail notifications are sent if errors occur during synchronization. The CAS genesisWorld notification service is used for this.

Enter the e-mail addresses you wish to send a notification to. Use a semicolon to separate multiple e-mail addresses.

## 3.2 Creating and editing Exchange Server

This is how you configure access to an Exchange Server.

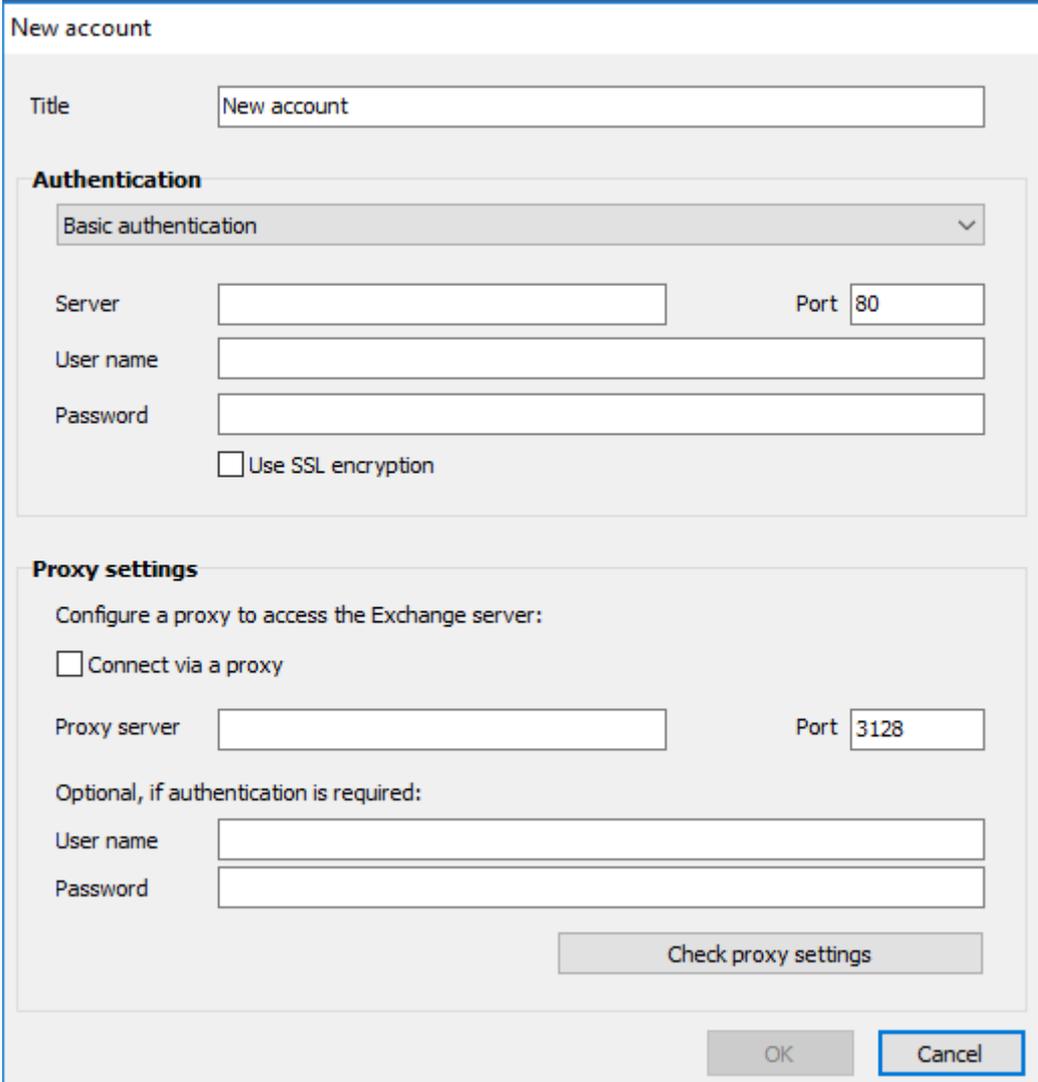
### Procedure

1. Open the **Management Console**.

2.  Select the **Exchange sync** area.
  3. Open the **General** tab.
  4. Click **New** or select an available Exchange Server and then select **Edit**.
- ✓ The editing window will open.

If you create new access to a Microsoft Exchange Server, then the window will be titled **New access**. If you edit existing access, then the window will be titled **Edit Exchange access**. Otherwise, the windows have the same structure.

Depending on the authentication method you selected, the input fields will adapt accordingly.



**New account**

Title

**Authentication**

▾

Server  Port

User name

Password

Use SSL encryption

**Proxy settings**

Configure a proxy to access the Exchange server:

Connect via a proxy

Proxy server  Port

Optional, if authentication is required:

User name

Password

**New account**

Title

**Authentication**

Directory ID (Tenant)

Application ID (Client)

Secret ID

Field	Description
<b>Title</b>	Enter a name for the connection.
<b>Authentication: Basic authentication</b>	
<b>Server</b>	Enter the name of the Microsoft Exchange Server into the network.
<b>Port</b>	Depending on the network settings, it might be necessary to use a port other than the default.
<b>User name</b>	Enter the user to whom you have granted the <b>Impersonation</b> role and access rights to the various accounts. This user account is used by Exchange sync to log on to the Microsoft Exchange Server. You can find more information in the following section "Microsoft Exchange Server settings", page 8.
<b>Password</b>	Enter the password for the specified user.
<b>Using SSL encryption</b>	Enable this option to use SSL for the transfer of data.
<b>Authentication: OAuth2 authentication for Exchange online</b>	

Field	Description
<b>Directory ID (tenant)</b>	Enter the directory ID. You can find more information in the following section "Setting up the OAuth2 authentication for Exchange Online", page 18
<b>Application Id (client)</b>	Enter the application ID. You can find more information in the following section "Setting up the OAuth2 authentication for Exchange Online", page 18
<b>Secret ID</b>	Enter the secret ID. You can find more information in the following section "Setting up the OAuth2 authentication for Exchange Online", page 18
<b>Proxy settings</b>	
<b>Establishing a connection via a proxy</b>	Enable this option if the connection should be made via a proxy. Otherwise, no other entries are necessary in this block.
<b>Proxy server</b>	Enter the URL for the proxy server.
<b>Port</b>	Enter the proxy server port.
<b>User name</b>	If necessary, enter the user name for the logon to the proxy server.
<b>Password</b>	Enter the password for the specified user.
<b>Checking proxy settings</b>	Using this button, you can test the access to the proxy server.

### 3.3 Setting up the OAuth2 authentication for Exchange Online

#### Note

The OAuth2 authentication is only available if you use Exchange Online.

To use OAuth2 authentication for Exchange Online, you have to register Exchange sync in the Azure Active Directory and create an authentication token.

## Registration

Next you need the values for the **Application ID** and **Directory ID**. Microsoft describes the necessary procedure for this in more detail here:

[Learning program: Registering an app with Azure Active Directory](#)

### Note

- You should only follow these instructions up to and including step 5 (Entries on the **Manifest** tab).
- When entering the **Supported account types** you should use the **Accounts in this organizational directory only** option.
- Enter the following value for **Redirect URI (optional)**:  
`urn:ietf:wg:oauth:2.0:oob`
- After registering successfully, you will see an overview page which includes the following values which you have to copy:
  - **Directory ID (tenant)**
  - **Application ID (client)**

## Configuring the API rights

### Procedure

1. In the **Azure Active Directory Admin Center** select the **API permission** tab.
2. Select **Add permission**.  
The **Request API permission** window will open.
3. Select the **APIs used by my organization** tab.
4. Select the **Office 365 Exchange Online** entry.
5. Select **Delegated permissions**.
6. In the **EWS** section select the **EWS.AccessAsUser.All** entry and then **Add permissions**.  
The permission is then added.
7. Now, select **Add permission** again.  
The **Request API permission** window will open.
8. Select the **APIs used by my organization** again.
9. This time select **Application permission**.
10. In the **Other permissions** section, select the **full\_access\_as\_app** entry and then **Add permissions**.  
The permission is then added.

11. Select **Grant admin consent for <company name>**.

✓ The API permissions will be configured.

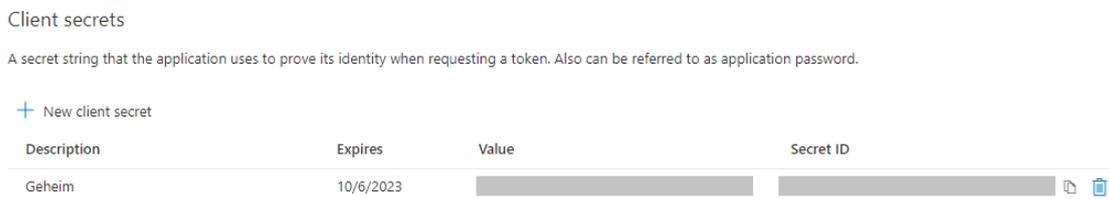
### Creating an authentication token

Next you have to create an authentication token. To do this, follow only steps 6 through 8 in the following Microsoft instructions.

[Only configuring app authentication](#)

Here you will receive the so-called **Secret ID**.

The secret ID, which you have to enter in the Management Console, has a **green** frame as you can see in the figure.



This value is only visible after creating the secret client key. After refreshing the page, it can no longer be copied and you will have to create a new key.

### Setting up OAuth2 authentication

When setting up new access to an Exchange Server in the Management Console, select the **OAuth2 authentication for Exchange online** entry, under **Authentication** and enter the three named words there.

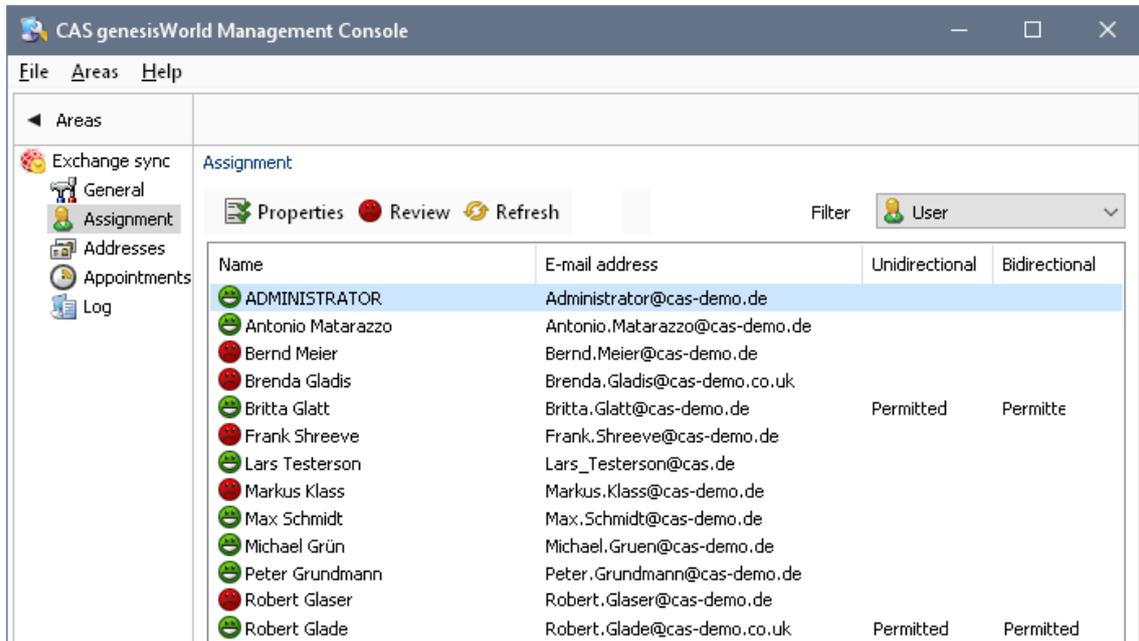
You can find more information in the following section "Creating and editing Exchange Server", page 15.

## 3.4 Map tab

To ensure that appointments and addresses can be synchronized between both systems, you have to ensure that an e-mail address has been entered for each CAS genesisWorld user. The user e-mail addresses have to be identical in CAS genesisWorld and Microsoft Exchange.

The Microsoft Exchange account is mapped via the user's e-mail address to the CAS genesisWorld user.

When calling the **Map** tab, the system checks automatically if the e-mail addresses from the CAS genesisWorld accounts in Microsoft Exchange can be found. The results of the check are displayed via a red or green smiley.



Element	Description
<b>Properties button</b>	Using this button, you edit the e-mail property of the highlighted account in CAS genesisWorld.
<b>Check button</b>	Using this button, you check if the e-mail address for the highlighted CAS genesisWorld account exists in Microsoft Exchange.
<b>Refresh button</b>	The whole view is refreshed, that means, all the listed e-mail addresses are checked again.
<b>Filters</b>	Selecting a view for filtering of the account. You have the following options: <b>Users</b> , <b>Resources</b> and <b>Deactivated entries</b> .

### Table columns

Column	Description
<b>Name</b>	Name of the respective user or resource in CAS genesis-World.
<b>E-mail address</b>	E-mail address of the account in CAS genesisWorld

Column	Description
<b>Unidirectional</b>	Display if unidirectional synchronization is permitted.
<b>Bidirectional</b>	Display if bidirectional synchronization is permitted.
<b>Notes</b>	Notes on the results of the check.

### Correcting e-mail addresses

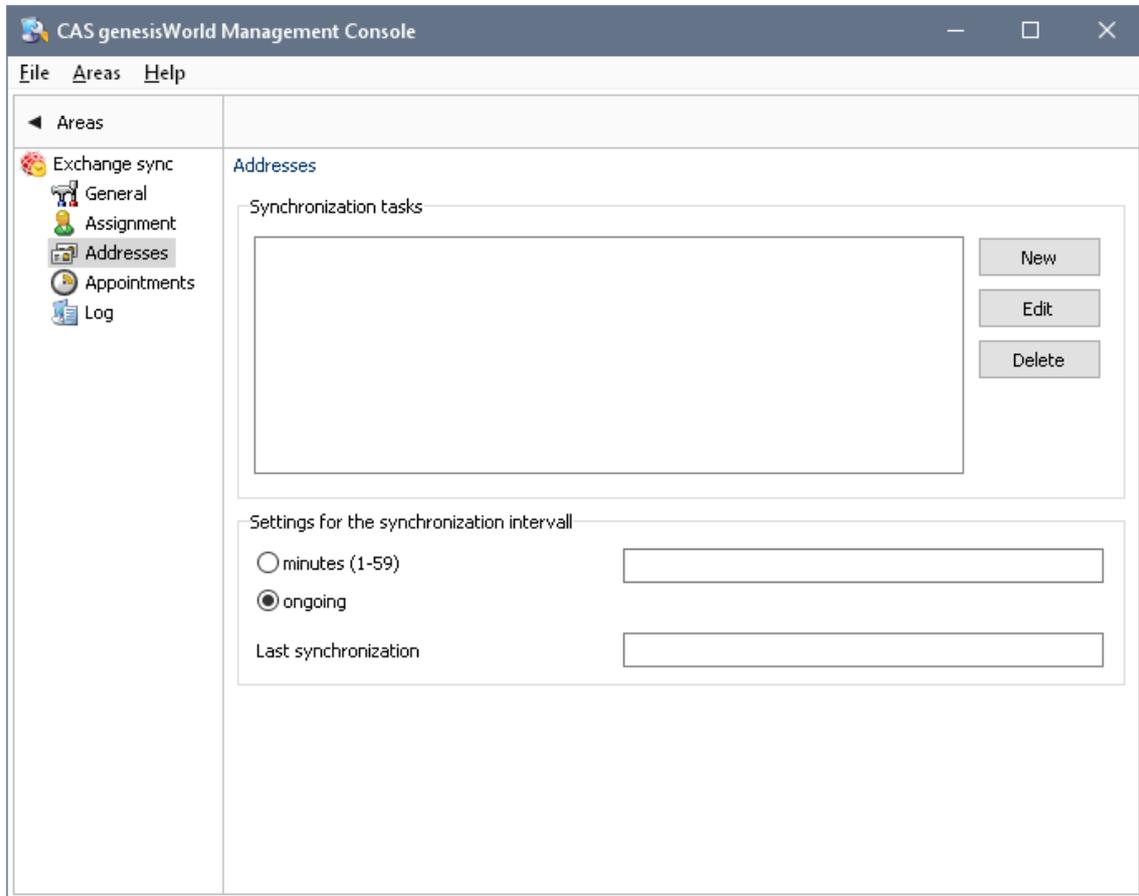
#### Procedure

1. Select a user.
2.  Select **Properties**.
3. You can correct them in CAS genesisWorld registered e-mail address.

### 3.5 Addresses tab

On the **Addresses** tab, you define whether addresses are also synchronized with a public Microsoft Exchange folder.

If you create a new folder for this, this folder has to be located on the first level, below the default folder: **Public folder**. Deeper levels are not supported.



### Synchronization tasks

In the **Synchronization tasks** block, you can create, edit and delete synchronization tasks. You can find more information in the following section "Creating and editing a synchronization task for addresses", page 24.

### Settings for the synchronization interval

Here you can enter the time intervals in which address synchronization should be performed.

Field	Description
<b>in minutes (1-59)</b>	If you select this option, you can enter the desired synchronization interval in minutes.
<b>ongoing</b>	This option ensures on ongoing synchronization.

Field	Description
<b>Time of last synchronization</b>	This field logs the time of the last synchronization.

### 3.6 Creating and editing a synchronization task for addresses

In the **Management Console** open the **Exchange sync** area and then the **Addresses** tab.

#### Creating a new synchronization task

1. In the **Synchronization** task block, click **New**.  
The **New synchronization task** window opens.
  2. Enter the respective data and click **OK**.
- ✓ The synchronization task was created.

#### Editing a synchronization task

1. Select an entry, in the **Synchronization tasks** block.
  2. Click **Edit**.  
The editing window will open.
  3. Enter the respective data and click **OK**.
- ✓ The synchronization task you changed has been saved.

Field	Description
<b>Title</b>	Enter a title.
<b>Microsoft Exchange Server</b>	Select the desired Microsoft Exchange Server. If you select a Microsoft Exchange Server with OAuth2 authentication, the <b>Account for public folders</b> field will automatically appear in the window. You will find more information here: "General tab", page 13 and "Setting up the OAuth2 authentication for Exchange Online", page 18.
<b>Account for public folders</b>	Here you can enter the e-mail address of the Exchange account, which you wish to use to access the public folders of the Exchange Server. The respective Exchange account must have reading and editing access rights to the public folders of the Exchange Server.

Field	Description
<b>Target folders in Microsoft Exchange</b>	Select the Microsoft Exchange target folder. If you create a new folder for this, this folder has to be located on the first level, below the default folder: <b>Public folder</b> . Deeper levels are not supported.
<b>Address selection in CAS genesis-World</b>	☒ Here you use a filter to define which public addresses from CAS genesisWorld should be synchronized.
<b>Enabling bidirectional synchronization</b>	Enable this option to set up bidirectional synchronization of addresses. If the option is disabled, the addresses are synchronized unidirectionally. You can find more information in the following section "Unidirectional and bidirectional synchronization of addresses", page 62

### 3.7 Appointments tab

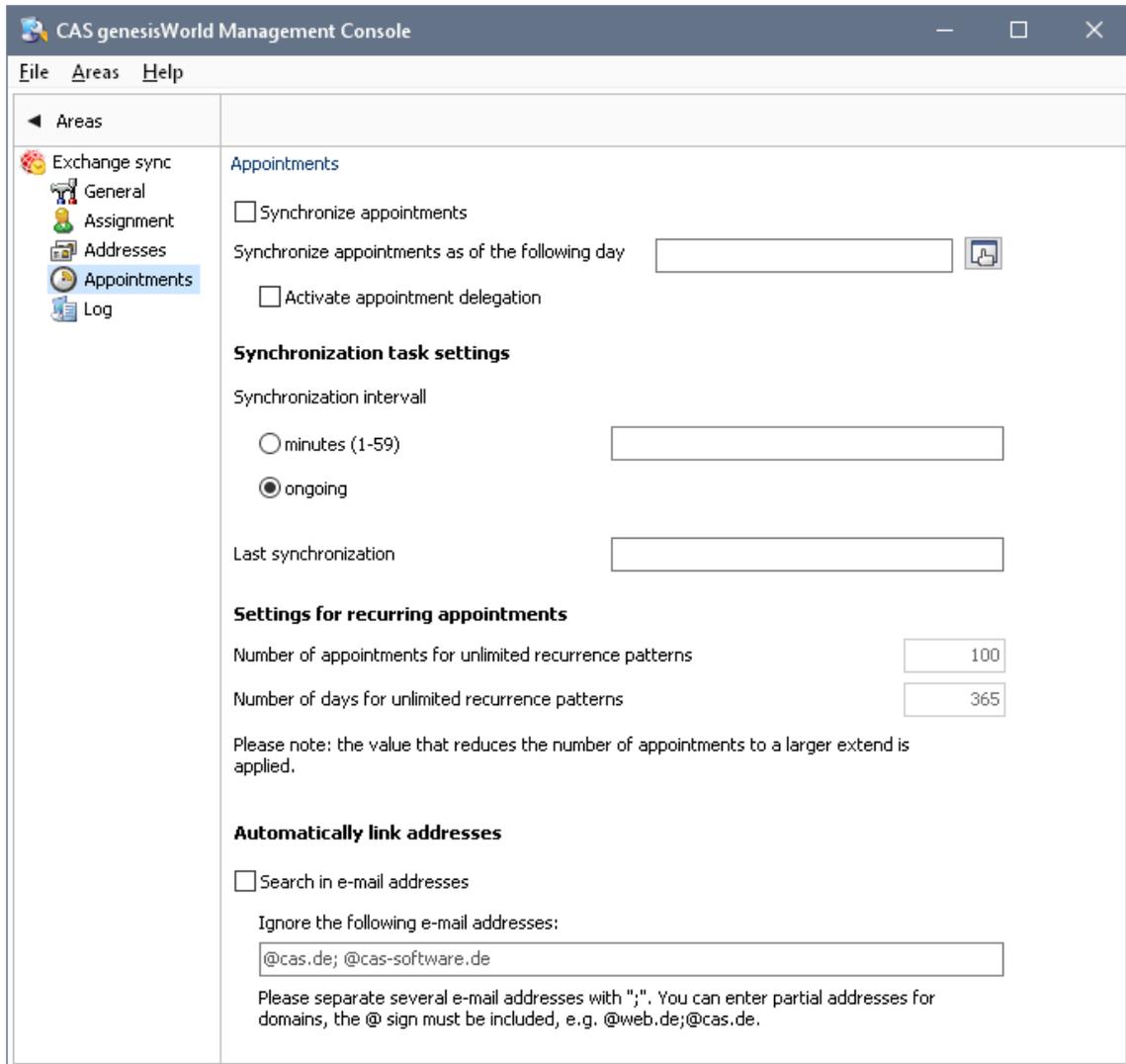
On this tab you can set whether appointments should be synchronized and, if so, how the synchronization should be performed. Through synchronization, all appointments are included from a specific time point, thus you cannot define a filter for appointments.

#### Note

- Finish changing all the settings you wish to use before you enable the **Synchronize appointments** option.
- As soon as appointment synchronization is enabled, the standard functions in CAS genesisWorld for appointments change. As of this point in time, any newly created or converted appointments will already conform to the Microsoft Exchange conditions. The conversion cannot be undone. This new behavior applies to all conversions and for all new appointments as of the set time.

You can find more information in the following sections

- "Appointments in Microsoft Exchange", page 42
- "Appointments in CAS genesisWorld", page 45



Field	Description
<b>Synchronizing appointments</b>	Only enable this option when you can have finished changing your settings. As soon as you enable this option, the conversion and synchronization of the appointments will start. The appointments will be synchronized bidirectionally.
<b>Synchronizing appointments as of the following day</b>	Here you define the day from which you wish to synchronize appointments. Existing appointments in CAS genesisWorld which fall in the set time, have to be converted before they can be synchronized.

Field	Description
<b>Enabling appointment delegation</b>	Enable this option to allow the delegation of appointments. After the first synchronization, you can enable and disable this option as many times as you like. You can find more information in the following section "Delegating appointments", page 71

### Synchronization task settings

Here you can define the time intervals for the transfer of new and changed appointments.

Field	Description
<b>Synchronization interval in minutes (1-59)</b>	If you select this option, you should also enter the synchronization interval in minutes.
<b>ongoing</b>	Selecting this option starts an ongoing synchronization.
<b>Time of last synchronization</b>	The time of the last synchronization is logged here automatically.

### Recurring appointment settings

In Microsoft Exchange you can create infinite appointment recurrences. This is not possible in CAS genesisWorld. As soon as the defined limit values have been reached, the recurrences in CAS genesisWorld are extended by exactly one new appointment. The recurrence is therefore continuously extended.

The limit values set here are fixed defaults and cannot be changed.

In recurring appointment settings, the limit value which more strongly restricts the number of appointments applies.

Field	Description
<b>The number of appointments which infinite recurrences should reach in the future</b>	This has been defined, so that infinite recurrences can only reach a maximum of 100 appointments in the future.

Field	Description
<b>Number of days which infinite recurrences should reach in the future</b>	This has been defined, so that infinite recurrences can only reach a maximum of 365 days in the future.

### Automatically linking addresses

In this section, you will enable the search via e-mail addresses to automatically link synchronized appointments with the appointment participants.

Field	Description
<b>Searching via e-mail addresses</b>	When selecting this option, all the e-mail fields are searched which are delivered with the standard version of CAS genesisWorld. If additional e-mail fields were inserted into the <b>Address</b> data record type, for example, with the Form & Database Designer, then these additional e-mail addresses are not searched.
<b>Ignore the following e-mail address</b>	In this field you can specify the exception. For example, if appointments should not be linked to employees of your company, but only with external contacts.

## 3.8 Converting appointments

Before making it possible to synchronize appointments between CAS genesis-World and Microsoft Exchange, you should ensure that any existing appointments are converted.

### Procedure

1. In the **Management Console** open the **Appointments** page in the **Exchange sync** area.
  2. Now, change the settings as described here: "Appointments tab", page 26.
  3. First of all, select the **Synchronize appointments** option.
- ✓ The conversion of available appointments will begin. Please note the following hints.

**Please note**

If you enable the **Synchronize appointments** option, then the converting of existing appointments in CAS genesisWorld will start. In the process, all the appointments are included which were created before enabling synchronization in CAS genesisWorld and which should be synchronized with Microsoft Exchange.

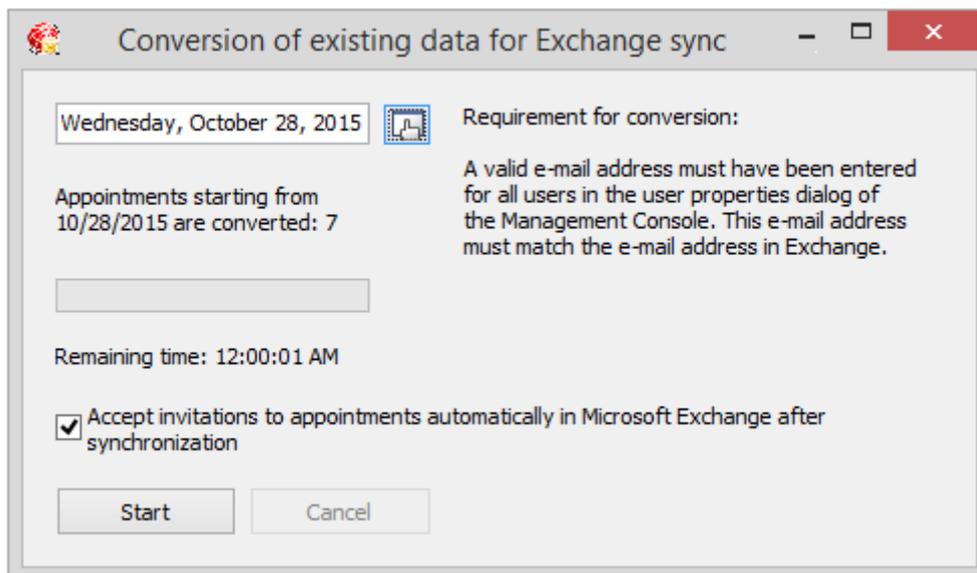
The synchronization of appointments can only be started if all the appointments have been converted. The conversion of the appointments concerned cannot be reversed.

If, after converting, you establish that new appointments have been created or available appointments have been edited for the desired time period, then the **Synchronized appointments** option will be disabled automatically. Enable the **Synchronize appointments** option again to convert the respective appointments.

While appointments are being converted, working with appointments in CAS genesisWorld is only possible to a limited extent. During the conversion, no appointments are transferred from CAS genesisWorld to the Microsoft Exchange Server. Changes to appointments are thus only transferred after the initial synchronization.

**Running the converting wizard**

When you enable the **Synchronize appointments** option for the first time, the **Conversion of existing data for Exchange sync** window will open.



1. Check the start time for the conversion and make any changes if you need to. The start time for the conversion is adopted automatically from the **Synchronize appointments as of the following day** field.
2. You should define whether users should **Accept invitations to appointments automatically in Microsoft Exchange after synchronization**. During converting, this option invites all the appointment participants in CAS genesisWorld to the respective appointment in Microsoft Exchange and the invitation is accepted automatically. This option is activated by default.
3. Select **Start**.

### Automatic actions when converting

When converting different automatic actions are executed so that the editing of appointments in CAS genesisWorld and in Microsoft Exchange is consistent.

- If groups are entered as appointment participants in CAS genesisWorld, then the groups are replaced by the respective members of the group as participants.
- If the **All (public)** participant has been entered in an appointment, then the participant is replaced by all current CAS genesisWorld users as participants.
- Different participant rights to an appointment are adapted. Every appointment participant receives full access rights to this appointment.
- Appointments in Microsoft Outlook have to have a mandatory organizer for the appointment. When converting, the organizer is defined according to specific rules. In order for the participant of an appointment to become an organizer, they require full rights to the appointment and a registered e-mail address.

If the creator of the appointment can be identified, then they become the organizer of the appointment.

Sometimes it will not be possible to identify the creator of an appointment, for instance, if a user has married and changed their name. The field in question here **Created by** does not have a connection to user names in CAS genesisWorld. In such cases, the user who last changed the appointment becomes the organizer.

If the named condition cannot be met, then a random participant becomes the organizer of the appointment. In the process, participants with full rights are preferred.

- When converting the appointments, all participants apart from the organizer are reset to the **invited** status.

During the subsequent synchronization, all participants of a converted appointment will be re-invited to Microsoft Outlook. These invitations have to be accepted again by all participants.

If you enable the **Accept invitations to these appointments automatically in Microsoft Exchange after synchronization**, then Microsoft Exchange automatically sends acceptance notifications for the respective appointments. Despite the automatic acceptances, the participants still receive all invitations via e-mail.

- If the maximum external access right for appointments is greater than read-only, then the external access right is reduced to **Read-only** during the conversion.

If you have enabled appointment delegation, then the external access rights for the delegating user and the delegating recipient will differ from the defaults described here.

You can find more information in the following section "Delegating appointments", page 71.

- If **confidential** has been entered as the maximum external access right, then the external access right is set to **private** during the conversion. Private appointments continue to remain private.

The external access right **confidential** in CAS genesisWorld is not possible for appointments when using Exchange sync.

### Possible errors

- An appointment is not converted and thus also not synchronized if only participants are entered for whom either no e-mail or an incorrect e-mail address has been entered in CAS genesisWorld.
- If an appointment only has groups, with no users, as its participants, then this appointment will not be converted and thus also not synchronized.
- If an appointment only has resources as its participants, then this appointment will not be converted and thus also not synchronized.

## 3.9 Changing more settings in the Management Console

Check and correct the rest of the settings for appointments and addresses in the Management Console.

These settings will only become available once you have registered a license. You can find more information in the following section "Registering a license", page 12.

## Topics in this chapter

3.9.1	Hiding the change log tab for appointments.....	33
3.9.2	Enable address synchronization for users.....	35
3.9.3	Setting up synchronization for individual users.....	36

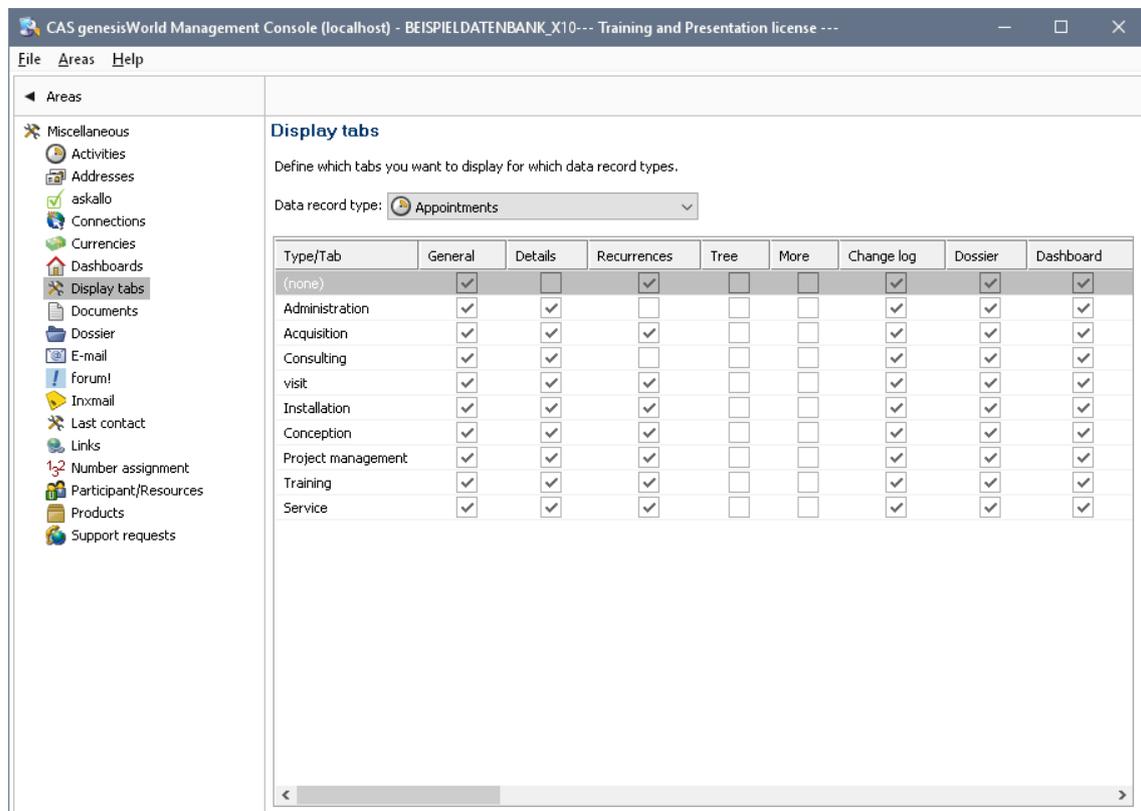
### 3.9.1 Hiding the change log tab for appointments

All data record changes are logged on the **Change log** tab in the data record window.

When deploying Exchange sync some system specific changes will also be logged. Additionally, the organizer's change log for an appointment is leading, thus, attendee changes are either not logged or only in part. As the change log of an organizer is leading, participants may under certain circumstances find confidential entries from the organizer in the change log, if for instance, they are invited to an appointment later.

Thus we recommend you hide the change log.

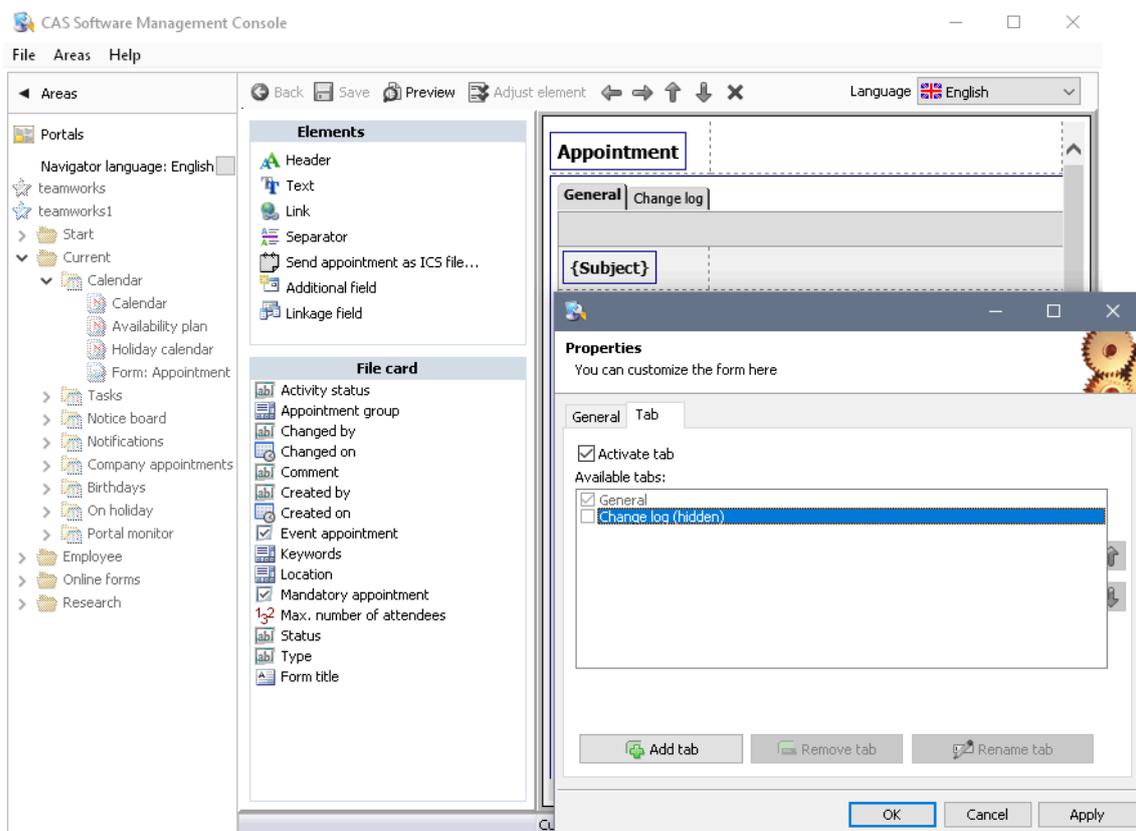
### Hiding the Change log tab in CAS genesisWorld



## Procedure

1.  In the **Management Console**, open the **Miscellaneous** area.
  2. Open the **Display tabs** tab.
  3. Select the **Appointments data record type**.
  4. Deactivate the checkbox for the **Change log** tab for all types of appointments.
- ✓ The **Change log** tab is hidden for appointments.

## Hiding the Change log tab in teamWorks



## Procedure

1. Open the **Portals** area of the **Management Console**.
2. Select **Appointment form**.
3. Select **Edit page**.
4.  Click **Customize element**.  
The **Properties** window opens.

5. Open the **Tab** folder.
6. Deactivate the **Change log** checkbox.
- ✓ The **Change** log tab is hidden for teamWorks.

### 3.9.2 Enable address synchronization for users

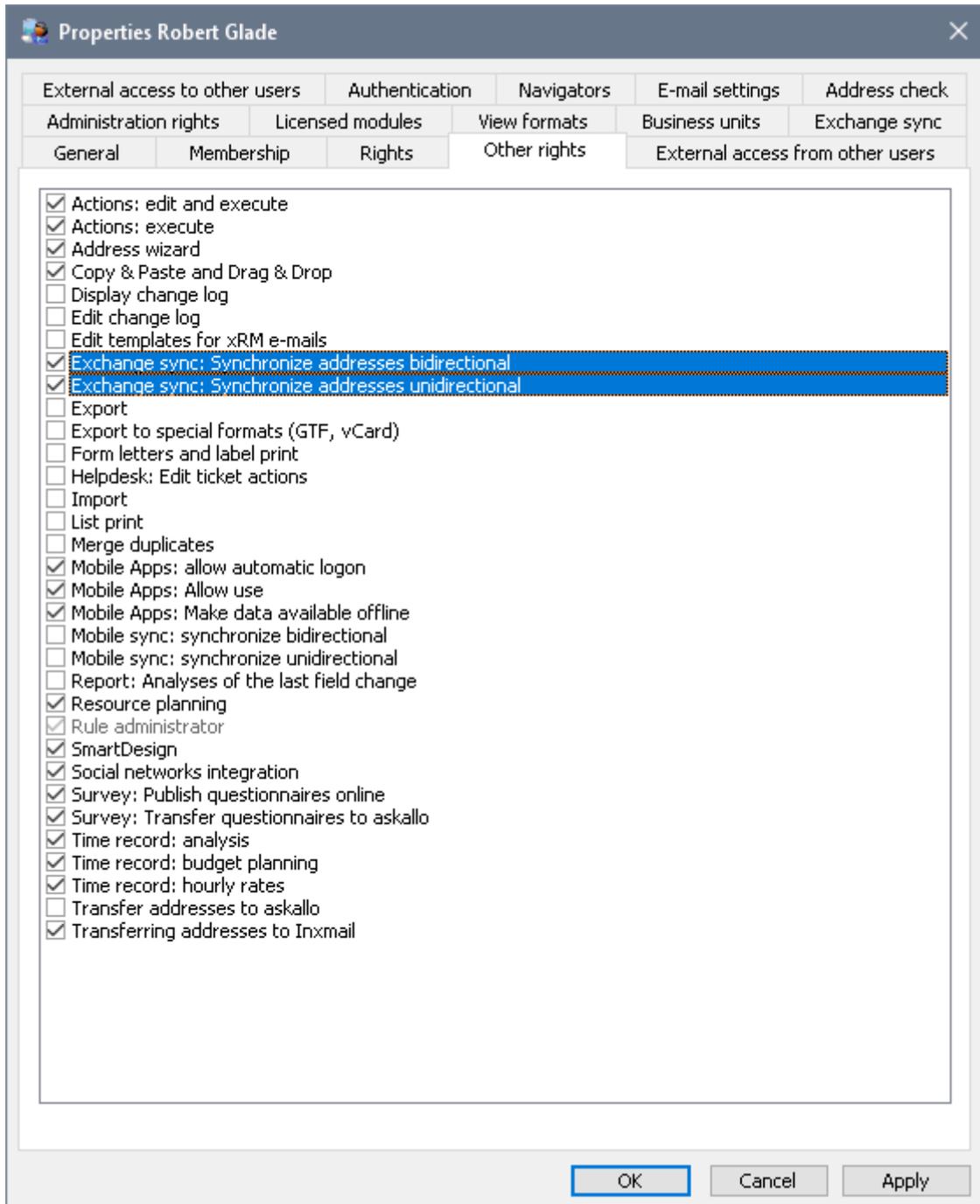
Users require specific rights to synchronize private address in CAS genesisWorld.

#### Procedure

1. Open the **User management** area in the **Management Console**.
2. Select the **Users** tab to edit the rights of individual users or the **Groups** tab to edit groups.
3. Highlight the desired user or group.
4.  Select **Properties**.
5. Select the **Other rights** tab.
6. Enable the Exchange sync options according to the following table.
7. Now select **OK**.
- ✓ The selected options have been activated for the selected users or groups.

Option	Description
	If the option is enabled, the user can synchronized addresses bidirectionally between CAS genesisWorld and Microsoft Exchange. When selecting this option, the option for the unidirectional synchronization is also enabled automatically.
<b>Exchange sync: Synchronizing addresses unidirectionally</b>	If the option is enabled, the user can synchronized addresses unidirectionally from CAS genesisWorld to Microsoft Exchange.

As soon as you enable at least one of the two rights, the **Exchange sync** tab is displayed in the **Properties** window for the respective user.



### 3.9.3 Setting up synchronization for individual users

As administrator, you can set which addresses can be synchronized between CAS genesisWorld and Microsoft Exchange for individual users.

The respective users should create their own personal folders for contacts in their Microsoft Exchange account.

Users who wish to synchronize their personal addresses, require an address view in a navigator in CAS genesisWorld.

The settings on the **Exchange sync** tab of the Management Console and corresponding settings of users in the desktop client **Settings** window overwrite each other - the last setting is always valid.

#### Procedure

1. Open the **User management** area of the Management Console.
2. Select the desired user.
3.  Select **Properties**.
4. Open the **Exchange sync** tab.
5. Change your settings according to the following table.

Field	Description
<b>Do not synchronize addresses</b>	On selecting this option, any private user addresses are not synchronized.
<b>Synchronize addresses of this view</b>	On selecting this option, you will have to state which <b>View</b> is to be synchronized and from which user <b>Navigator</b> it should be taken.
<b>Navigator</b>	Select a user <b>Navigator</b> .
<b>View</b>	Select a <b>View</b> with addresses. The addresses of this view are transferred to Microsoft Exchange that is bidirectionally synchronized. Make sure you take the specifics of synchronizing addresses into account. You can find more information in the following section "Setting up personal address synchronizations", page 61.
<b>Adopting changes from Microsoft Exchange to CAS genesisWorld</b>	Selecting this option results in a bidirectional synchronization.

Field	Description
<b>Target folders in Microsoft Exchange</b>	Select the associated target folder in Microsoft Exchange.

Properties Robert Glade

General Membership Rights Other rights External access from other users  
 External access to other users Authentication Navigators E-mail settings Address check  
 Administration rights Licensed modules View formats Business units Exchange sync

Define here which data you want to synchronize between CAS genesisWorld and Microsoft Exchange.

Addresses

Data records to be synchronized

Do not synchronize addresses

Synchronize this view's addresses

Navigator Robert Glade

View Sales Partner

Adopt changes from Microsoft Exchange to CAS genesisWorld

Additional settings

Microsoft Exchange target folder

OK Cancel Apply

### 3.10 Log tab

This tab displays the progress of the synchronization.

	Button	Description
	Refresh	Stopping and starting the log display.
	Displaying information	Displaying and hiding log entries of the <b>Information</b> type.
	Displaying warning messages	Displaying and hiding log entries of the <b>Warning message</b> type.
	Displaying error messages	Displaying and hiding log entries of the <b>Error message</b> type.
	Deleting log entries	This deletes the content of the log after confirming a security prompt.
	Copying highlighted cells	Copies the highlighted cells to the clipboard.

## 4 Changes of behavior via Exchange sync

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When Exchange sync is enabled for addresses or appointments, this will result in different changes of behavior in CAS genesisWorld and Microsoft Exchange.

### **Behavior with addresses**

CAS genesisWorld as the CRM system is also the lead system when dealing with addresses.

More information is available here:

- "Addresses in CAS genesisWorld", page 40
- "Addresses in Microsoft Exchange", page 41

### **Behavior with appointments**

With appointments, Microsoft Exchange is the leading system. CAS genesisWorld thus adapts its behavior when working with appointments to that of Microsoft Exchange/Microsoft Outlook. To include business logic, you will need Microsoft Exchange Server.

Appointments are synchronized using the standard user calendar in Microsoft Outlook. The appointments from the Microsoft Outlook standard calendar are transferred to CAS genesisWorld. Appointments from CAS genesisWorld are transferred to the Microsoft Outlook default calendar.

Appointments from additional calendars in Microsoft Outlook are not transferred to CAS genesisWorld and appointments from CAS genesisWorld are not transferred to additional calendars.

More information is available here:

- "Appointments in Microsoft Exchange", page 42
- "Appointments in CAS genesisWorld", page 45

### 4.1 Addresses in CAS genesisWorld

As CAS genesisWorld is the leading system for addresses, no changes of behavior occur with addresses in CAS genesisWorld.

Some automatic processes in CAS genesisWorld can either not function at all, or function differently as the synchronization takes place via the application server.

#### **Mandatory fields**

If an address is changed by the synchronization or newly created, then mandatory fields are not checked.

### **Automatic address check**

If you create new addresses in Microsoft Exchange or change existing ones, then the autocomplete function for postal data cannot be supported. This includes, for example, entering a town/city when the postal code is known, or entering a salutation.

When you create new addresses, or change existing ones in CAS genesisWorld, then the autocomplete function for address checking is supported.

### **Setting the permitted and preferred contact method**

If an address is created or changed in Microsoft Outlook, then the respective values for the preferred contact type cannot always be entered correctly by CAS genesisWorld during synchronization.

## **4.2 Addresses in Microsoft Exchange**

As CAS genesisWorld is the leading system for addresses, this can result in the following changes of behavior for addresses in Microsoft Exchange.

### **Behavior with unidirectional synchronization**

When a user changes a contact in Microsoft Outlook, which can only be synchronized unidirectionally from CAS genesisWorld to Microsoft Exchange, CAS genesisWorld resets these changes at the next synchronization. Changes to a contact are thus only possible in CAS genesisWorld.

If during unidirectional synchronization in Microsoft Outlook a contact is created in a suitable folder, then this contact is deleted again by the synchronization. Creating contacts in suitable folders is thus only possible in CAS genesisWorld.

### **Behavior during bidirectional synchronization**

The filter conditions defined in CAS genesisWorld are taken into account when keeping addresses in CAS genesisWorld views and in Microsoft Exchange folders synchronized. In the process, the following special issues may arise:

- If an address is changed in Microsoft Outlook, the changes are transferred to CAS genesisWorld.  
If the changed address no longer corresponds to the filter conditions for the view, then the address will, of course, no longer be displayed in the CAS genesisWorld view.  
At the next synchronization, the address is deleted from the Microsoft Exchange folder. The address will continue to be available in CAS genesisWorld.
- The same principle applies when creating new addresses.

In Microsoft Outlook a new contact is created which does not conform to the filter conditions of the view in CAS genesisWorld. At the next synchronization, the contact is transferred from the folder to CAS genesisWorld.

However, because the address does not conform to the filter conditions for the view in CAS genesisWorld, the address is subsequently deleted from the Microsoft Exchange folder during the next synchronization. The address will continue to be available in CAS genesisWorld, however, it will not be displayed in the synchronization view.

### **Restricting rights to addresses**

If a CAS genesisWorld user does not have change rights to the respective addresses, that is, they have rights to some of the fields and then change these addresses/fields in Microsoft Outlook, then these unauthorized changes from CAS genesisWorld are reset at the next synchronization.

The rights system from CAS genesisWorld is thus taken into account.

### **Synchronizing fields between companies and contact persons**

If the administrator enables the synchronization field for companies and associated contact persons in the **Miscellaneous** area of CAS genesisWorld Management Console, then these settings will also be taken into account by the synchronization.

Thus, for instance, if a user in Microsoft Outlook changes the fields for a contact person, which can only be changed via the associated company, then CAS genesisWorld resets these unauthorized changes during the synchronization.

If a synchronous value for a company address in Microsoft Outlook is changed, then CAS genesisWorld adopts the value for both the company and the associated contact persons at the next synchronization.

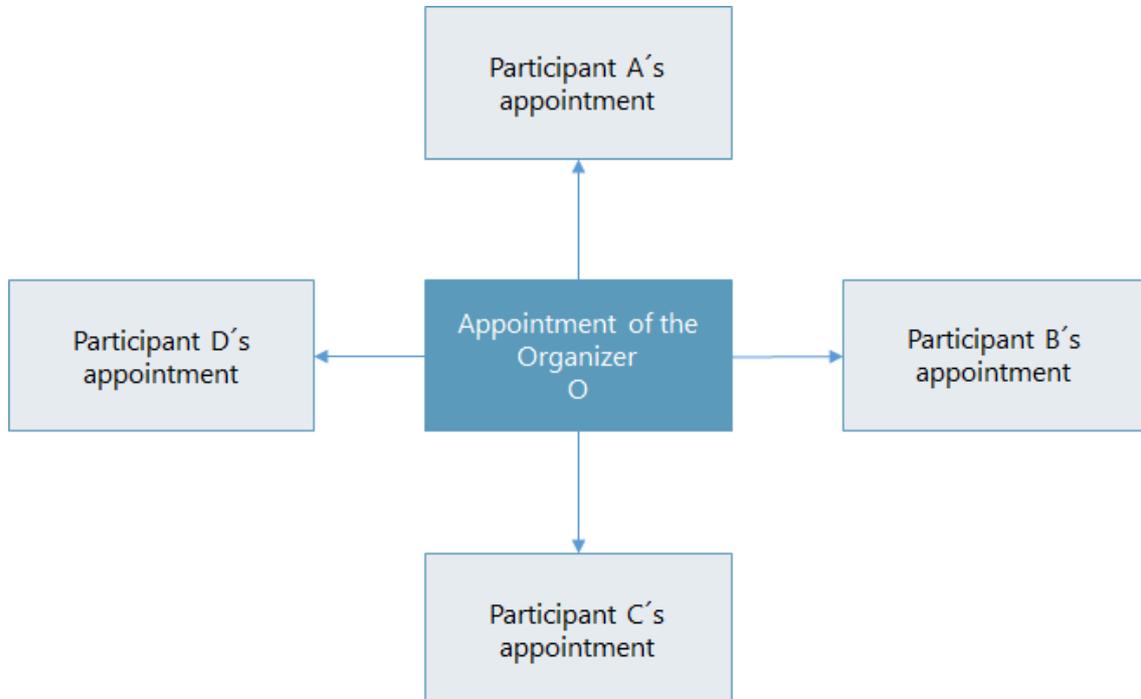
## **4.3 Appointments in Microsoft Exchange**

As Microsoft Exchange is the leading system for appointments, no changes of behavior occur when working with appointments. In Microsoft Exchange information on appointments is communicated via e-mail. This is why it is essential that each appointment participant has an e-mail address.

The organizer and all appointment attendees are sent a copy of the appointment. These copies then belong to each of the respective participants and can be edited or even deleted by them.

The exchange of data between the participants of an appointment is based on star-shaped forwarding. Originating from the organizer of the appointment,

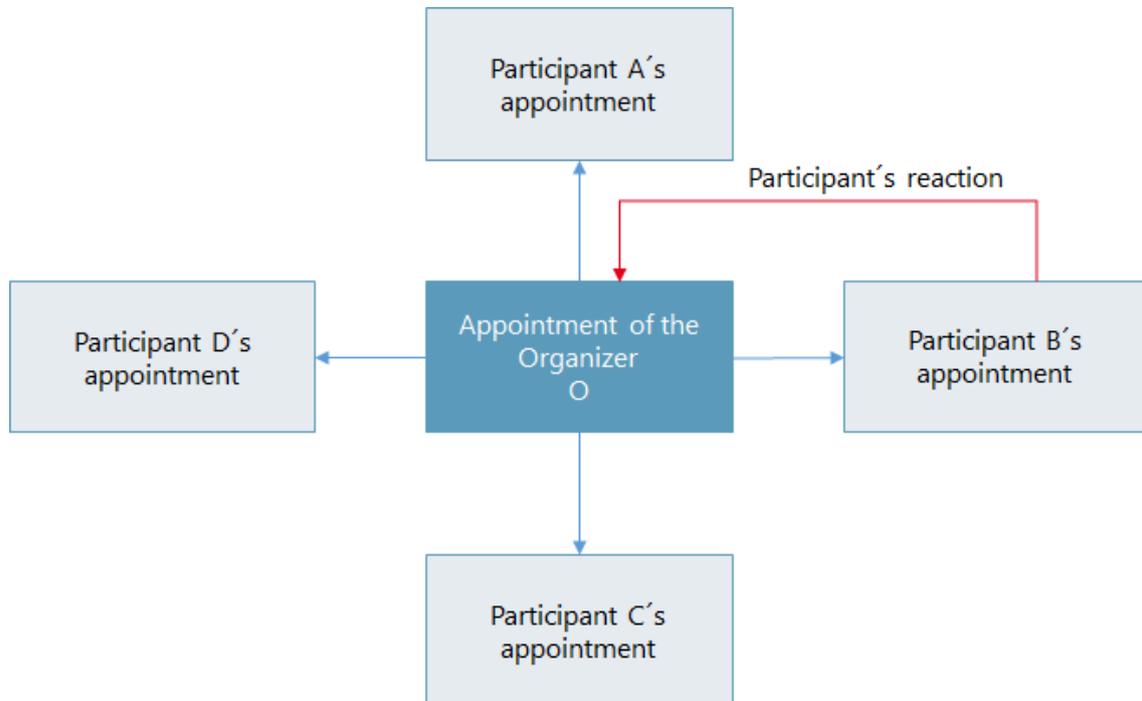
information on creating, inviting, changes or deletions/cancellations is sent to the various participants using star-shaped forwarding.



Participant responses are communicated to the organizer, for instance, this could be a reaction to an invitation or somebody suggesting a new time. Other than the factors listed above, participants cannot communicate additional information to the organizer.

### **Appointment invitations**

Appointment management from Microsoft Exchange has been designed for cross company use, so that appointment invitations and any associated reactions can also be communicated externally. Consequently, participants can only be invited to appointments. Organizers cannot add people as attendees.



When a participant reacts to an invitation, for example, by accepting, declining or suggesting an alternative time, then this response is communicated to the organizer. The other appointment participants are not affected by this and are therefore not sent any notifications.

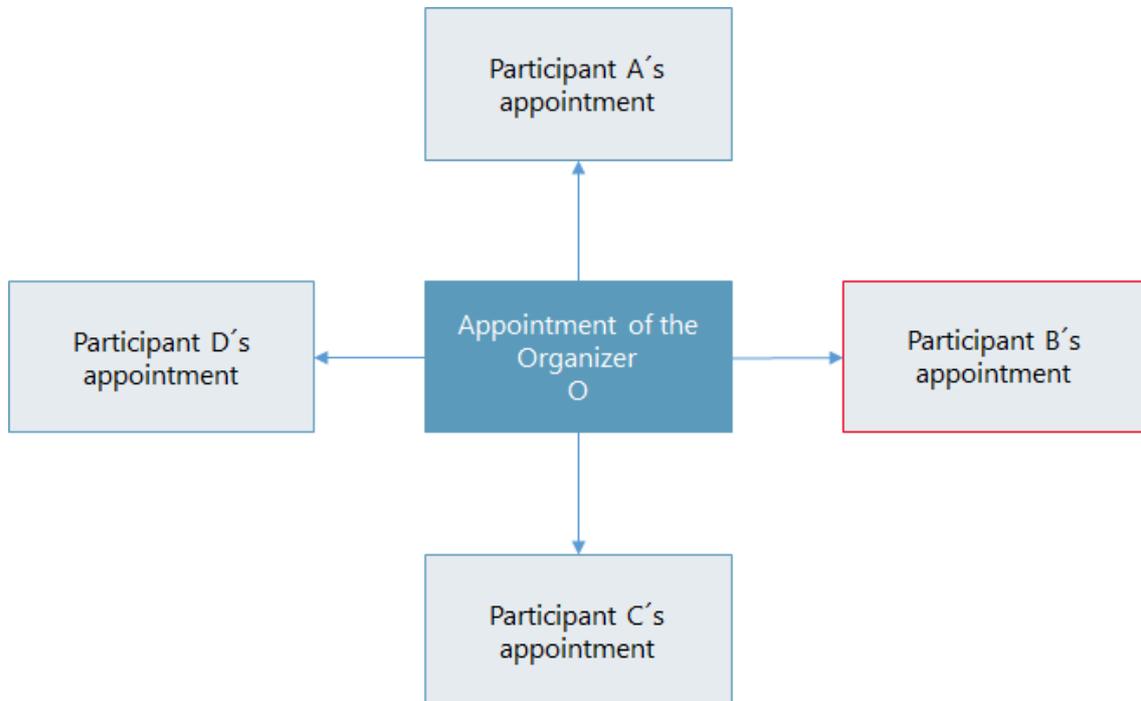
### Important information

- The organizer of the appointment always communicates with all the appointment participants.
- However, each participant only communicates with the appointment organizer.
- Participant reactions are not communicated to other participants.

### Different information for individual participants

Appointment participants may have different information displayed in an appointment, there are a number of reasons for this.

- The information on an appointment is sent asynchronously via e-mail.
- An appointment always belongs to the respective participant, so that each participant can change and save their own appointment.
- Any changes made by the organizer always take precedence, so that any previously made manual changes by the participant can be lost.



### Microsoft Exchange Server

Microsoft Exchange Server creates and analyses any e-mails required for appointment management.

So when a participant receives an invitation, this invitation is automatically analyzed and an appointment is then created in the participant's calendar.

When a participant reacts to an invitation, or if the appointment is updated by the organizer, then this information is also automatically adopted in the organizer's appointment and thus in the participants appointments.

## 4.4 Appointments in CAS genesisWorld

Because Microsoft Exchange is the leading system for appointments and CAS genesisWorld is aligned with the behavior of Microsoft Exchange, then the behavior of appointments in CAS genesisWorld can deviate from the default behavior.

### Checking mandatory fields

When an appointment is changed or newly created by synchronization, then mandatory fields are no longer checked.

### Shadow appointments

As long as the appointments for all participants are identical, then an appointment is created in CAS genesisWorld for all participants. All users, including the organizer, thus access the same appointment.

If just one participant changes the appointment, then a separate appointment is created for this participant - a so-called shadow appointment. The change made will not be communicated to the organizer or other participants and will only be visible to the participant who made the change. As soon as the organizer changes the original appointment, the participant's shadow appointment will disappear and is overwritten by the appointment which the organizer changed.

If the organizer no longer changes the original appointment, then the participant's shadow appointment is maintained.

When an organizer changes an appointment, then the changes apply for all participants. Shadow appointments are overwritten by any changes the organizer makes and in CAS genesisWorld all the participants access the same appointment again.

### Appointment permissions

Every participant has full rights to the appointment, which means they can make changes.

If appointment delegation has not been enabled, then any changes will always have to be executed by the participants or the organizer. In CAS genesisWorld appointments cannot be edited by other users. Consequently, the **maximum external access right** in CAS genesisWorld that can be allocated for an appointment is **Read**.

If appointment delegation has been enabled, then other users will be allowed to make changes to an appointment. The person receiving delegation rights has full access to the appointments of the delegating user, as long as the appointments in question are not private appointments. You can find more information in the following section "Delegating appointments", page 71.

### Changing appointments

- Changes made by the organizer

When an organizer changes an appointment, then this change is synchronized to Microsoft Exchange. After synchronization, the change is forwarded to the different participants by the Microsoft Exchange Server.

- **Changes made by an attendee**

If a participant changes an appointment, then this change is synchronized to Microsoft Exchange. After synchronization, the respective appointment is thus updated for this participant in Microsoft Exchange.

#### Note

Not all appointment fields in CAS genesisWorld are included in the synchronization. If a participant or organizer changes a non-synchronous field in CAS genesisWorld, then the data record will appear unchanged to Microsoft Exchange and will therefore not be synchronized.

You will find more information in the table of synchronized fields, see "Appointments: Field mapping", page 59.

### Inviting participants

If you use Exchange sync, the **Select participants** functions and associated button is no longer available in appointments. Participants are invited to appointments and have to accept or decline the invitation. You can manage these invitations via the **Invitations** tab in appointment data records.

Invitations in CAS genesisWorld require an e-mail address as in Microsoft Outlook. Participants can be selected from contacts in the Microsoft Outlook global address book and from addresses or users in CAS genesisWorld.

### Responding to invitations

In CAS genesisWorld users invited to appointments can also accept or decline the invitations. You can find more information in the following section "Working with appointments", page 68.

Accepting or declining an appointment in CAS genesisWorld changes the appointment data record. This change is transferred to Microsoft Exchange with the next synchronization.

All other steps are realized in Microsoft Exchange: the accepting or declining of an appointment is available in Microsoft Exchange after the appointment has been synchronized, and an e-mail is sent to the organizer.

### Synchronized and non synchronized appointment fields

For appointments specific fields are synchronized between CAS genesisWorld and Microsoft Exchange. You can find more information in the following section "Appointments: Field mapping", page 59.

In both CAS genesisWorld and Microsoft Outlook, you will find more fields available for appointments, which users can view and change using the respective

programs. Changes to an appointment are always executed according to the same principle, regardless of which appointment fields have been changed in CAS genesisWorld. Whether an appointment field is only available in CAS genesisWorld, is not relevant.

Changes to a non-synchronized field in CAS genesisWorld will not affect the respective appointment in Microsoft Outlook.

- Changes made by the organizer

If a non-synchronous field is changed by the organizer in CAS genesisWorld, then a shadow appointment is created temporarily for the organizer. After the next bidirectional synchronization, the participants appointments are replaced by the organizer's appointment. Afterwards the data of all involved is identical again.

- Changes made by a participant

If a non-synchronous field in CAS genesisWorld is changed by a participant, then a shadow appointment is created for this participant. The change for this participant will only take place locally. If the organizer of the appointment now makes some changes, then the organizer's appointment overwrites all local participant changes after the next synchronization.

### **Appointment dossier**

All appointment participants access the same appointment dossier, independent of whether or not shadow appointments have been created.

If an appointment is linked with another data record in CAS genesisWorld, then this link is displayed for all participants and users with the respective access rights.

Also all possibly available shadow appointments for an appointment are displayed in the dossier.

It is worth noting that with recurring appointments: an appointment participant can change the recurrence pattern for the recurring appointment for themselves. Then the appointment dossier between the participant's changed appointment and the organizer's appointment is no longer kept synchronized. If the organizer updates the series afterwards, then organizer's dossier takes precedence when consolidating the appointments.

## 5 Switching to Exchange sync

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Depending on your starting point, there are a few specifics you should know about when deploying Exchange sync. This especially applies if you switch your appointment management from one software to the other.

- Deploying CAS genesisWorld and Exchange sync simultaneously:  
This is the simplest scenario. If you follow the instructions in this documentation, you do not need to keep any further specifics in mind.
- Using CAS genesisWorld instead of Microsoft Outlook for appointments:  
You can find more information in the following section "CAS genesisWorld instead of Microsoft Outlook for appointments", page 49.
- Using Microsoft Outlook instead of CAS genesisWorld for appointments:  
You can find more information in the following section "Using Microsoft Outlook instead of CAS genesisWorld for appointments", page 50
- Using Exchange sync in conjunction with other modules:  
Interdependencies can occur when using Exchange sync in combination with other modules. For more information on this [hilfe.cas.de](http://hilfe.cas.de) see the **Working with several modules** page [Exchange sync](#).

### Topics in this chapter

5.1	CAS genesisWorld instead of Microsoft Outlook for appointments.....	49
5.2	Using Microsoft Outlook instead of CAS genesisWorld for appointments.....	50

### 5.1 CAS genesisWorld instead of Microsoft Outlook for appointments

If up until now, appointments have been managed by Microsoft Outlook, then there are only a few things you need to note when switching to CAS genesisWorld.

After the first synchronization, all the appointments for all the users are available in CAS genesisWorld. All appointment participants in Microsoft Outlook are also entered as appointment participants in CAS genesisWorld.

### Necessary steps before switching

1. Create a back-up of your database.
2. Check which appointment rules have been set up, or will have to be set up using the CAS genesisWorld notification service. You can find more information in the following section "Preparing the deployment of Exchange sync", page 10.

You will find more information on the notification and action service here: [Rules area](#).

## 5.2 Using Microsoft Outlook instead of CAS genesisWorld for appointments

If up until now, your appointments have been managed with CAS genesisWorld, then there are a number of things you need to be aware of before switching to Microsoft Exchange. After switching, Microsoft Exchange becomes the leading system for appointments, thus many of the standard functions from CAS genesisWorld will change.

The first time you synchronize your appointments, all your appointments from CAS genesisWorld are transferred to Microsoft Exchange. In the process, all the participants of these appointments will be invited by Microsoft Exchange.

These invitations are fundamental to Microsoft Exchange, and permit the respective appointments to be created in the user's calendar.

As invitations fundamentally send e-mails this means that users will receive a lot of e-mails.

### Note

If you enable the **Accept invitations to appointments automatically in Microsoft Exchange after synchronization** option, then Exchange will send automatic acceptances for the respective appointments to all participants.

You can find more information in the following section "Appointments tab", page 26

We recommend you inform your users of this beforehand, so that they are prepared for the large number of invitations they will receive after the switch.

### **Necessary steps before switching**

1. Administrators should heed the system requirements, see "System requirements and settings", page 8.
2. Inform yourself of the special issues with appointments:
  - "Appointments in Microsoft Exchange", page 42
  - "Appointments in CAS genesisWorld", page 45
3. Create a back-up of your database.
4. Enable appointment synchronization and define the respective settings, see "Appointments tab", page 26.

## 6 Implementing Exchange sync - a checklist

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The following checklists have been put together to help you when implementing Exchange sync in your company.

- "Checklist of technical requirements", page 52
- "Checklist of organizational requirements", page 52
- "Preparations", page 53
- "Activating appointment synchronization", page 54

Before making any changes you should check whether your company's technical and organizational requirements match those of Exchange sync.

If at this stage you are in anyway unsure, or have any questions, then please contact your CAS Partner.

### 6.1 Checklist of technical requirements

Technical requirements	Met
The Exchange sync service requires resources. Does your hardware structure include and provide a CAS genesisWorld Application Server for background services?	
Are you using add-on modules from CAS genesisWorld, which prevent or restrict the simultaneous use of Exchange sync?	
Are appointment customizations available?	
Are you using Microsoft Exchange Server 2010 or later?	
The web services from Microsoft Exchange have to be enabled. Is this the case?	
You have to ensure that access via Microsoft Outlook Web Access is possible. Is this the case?	

### 6.2 Checklist of organizational requirements

Organizational requirements	Met
Have you checked what the advantages and disadvantages are of using Exchange sync?	

Organizational requirements	Met
Have you read the documentation on Exchange sync and followed-up on any questions or points which were unclear with your CAS partner?	
Did all the persons responsible in your company agree to granting extensive rights to the Microsoft Exchange role <b>Impersonation</b> ?	
Were all the user case scenarios for appointment management checked with CAS genesisWorld and if necessary were new processes defined?	
Are all your users prepared for the changes of behavior in Exchange sync? Have they been given the necessary information or a training session?	

## 6.3 Preparations

### Preparations in Microsoft Exchange

Preparation	Met
Has the <b>Impersonation</b> role been set up for synchronization?	
Have you allocated all of the necessary rights for the <b>impersonation</b> role to CAS genesisWorld user accounts in Microsoft Exchange?	
Is the user account for the <b>impersonation</b> role active? The role is activated when the user logs on to, for example, Microsoft Outlook Web Access and opens the calendar or contact folder.	

### PreparationsCAS genesisWorld

Preparation	Met
Have you entered a valid e-mail address for all activated or deactivated users respectively?	

Preparation	Met
Have you entered a valid e-mail address for all activated or deactivated resources respectively?	

**Preparations for avoiding duplicates**

Preparation	Met
Have users transferred Microsoft Exchange appointments via the CAS Add-In to CAS genesisWorld? Exchange sync re-transfers these appointments, which can result in duplicates.	

**6.4 Activating appointment synchronization**

When activating synchronization, any appointments concerned are converted. The conversion cannot be undone. The conversion and the first synchronization can also take some time to complete.

Check	Met
Do you have a current backup of the CAS genesisWorld database?	
If appointments have to be transferred from CAS genesisWorld to Microsoft Exchange: Would a backup of data from Microsoft Exchange be sensible and, if so, have you scheduled one?	
Have you entered the logon data for Microsoft Exchange into the CAS genesisWorld Management Console?	
Have you registered the CAS genesisWorld Application Server, which you are going to use for the synchronization, in the Management Console?	
Have you carried out a successful connectivity test?	
Did you check if an e-mail address has been entered for all users and resources in CAS genesisWorld?	

Check	Met
Are the CAS genesisWorld web services in the Server Manager including Exchange sync enabled?	
We do not recommend that you convert and synchronize all of your appointments from recent months or even years, due to the potentially huge data loads. Before you synchronize all the appointments from a specific time point – did you check if the time point was relatively close to the current date?	

## 6.5 FAQs

### **What is the Impersonation role and how do I set it up?**

The **Impersonation** role is a management role in Microsoft Exchange. The user with this role logs on to Microsoft Exchange in the name of other users and can then execute actions for those users.

In Microsoft Exchange, you can define which users, groups, or domains the user with the **Impersonation** role can access.

The documentation of the Exchange sync module only describes the respective functions in CAS genesisWorld as well as the interactions and direct interfaces between both systems. The functions of Microsoft Exchange or Microsoft Outlook will not be described in detail in this document. You can find further information in the corresponding Microsoft documentation.

You can find more information in the following section "Microsoft Exchange Server settings", page 8

### **Even though I have entered a current date in the Start field, several thousand appointments are synchronized. Why?**

As soon as a recurrent appointment occurs within the selected period, the entire series of appointments must be synchronized to ensure data consistency.

### **Can I use the Replication functions for appointment synchronization in conjunction with Exchange sync?**

You can use replication in connection with Exchange sync for synchronizing appointments. Appointments can be synchronized with a replication task.

Interdependencies can occur when using Exchange sync in combination with other modules.

For more information [hilfe.cas.de](https://hilfe.cas.de) see the [Working with several modules](#) page [Exchange sync](#).

**Not all recurring appointments are synchronized from Microsoft Exchange to CAS genesisWorld. Why?**

The data in Microsoft Exchange could be inconsistent, for example, if the appointments do not contain an end date or time value. These data are thus no longer included by the synchronization.

If you want to synchronize the excluded data, you need to enter all necessary information in the respective data records. CAS Software AG can offer assistance by providing an analytical tool if required.

**Although Exchange sync has been configured correctly, users still receive the Unauthorized (401) error message when synchronizing and attempting to connect to Microsoft Exchange. Why?**

To establish a connection, you have to ensure that standard authentication has been activated in the IIS Manager. You will find these settings in the ISS Manager under [EWS](#).

## 7 Allocating fields

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The following tables will give you an overview of the fields which are kept synchronous between Microsoft Exchange and CAS genesisWorld.

Customizing synchronized fields is not yet possible

### Topics in this chapter

7.1	Address: Field mapping.....	57
7.2	Appointments: Field mapping.....	59

### 7.1 Address: Field mapping

The listed names are the physical names of the database fields. Administrators can look up the relevant translations for the field names in the Management Console of CAS genesisWorld.

CAS genesisWorld	Microsoft Exchange
ADDRESSTERM	0x3a45
ADRNUMBER	0x3a4a
BIRTHDAY	Birthday
CASFUNCTION	JobTitle
CHRISTIANNAME	GivenName
COMPNAME	CompanyName
ContactImage	ContactPicture
COUNTRY1	Business;CountryOrRegion
COUNTRY2	Other;CountryOrRegion
COUNTRY3	Home;CountryOrRegion
DEPARTMENT	Department
FAXFIELDSTR1	BusinessFax

CAS genesisWorld	Microsoft Exchange
FAXFIELDSTR2	OtherFax
FAXFIELDSTR3	OtherTelephone
FAXFIELDSTR4	HomeFax
FAXFIELDSTR5	TtyTddPhone
gwFUNCTION2	Profession
GWSTATE1	Business;State
GWSTATE2	Other;State
GWSTATE3	Home;State
MAILFIELDSTR1	EmailAddress1
MAILFIELDSTR3	EmailAddress3
MAILFIELDSTR5	EmailAddress2
NAME	Surname
NOTES2	FormattedNotes
PHONEFIELDSTR1	Pager
PHONEFIELDSTR10	CompanyMainPhone
PHONEFIELDSTR2	MobilePhone
PHONEFIELDSTR3	CarPhone
PHONEFIELDSTR4	BusinessPhone
PHONEFIELDSTR5	BusinessPhone2
PHONEFIELDSTR6	Isdn
PHONEFIELDSTR7	HomePhone

CAS genesisWorld	Microsoft Exchange
PHONEFIELDSTR8	HomePhone2
PHONEFIELDSTR9	AssistantPhone
POBOX1	0x3a2b
POBOX2	0x3a5e
STREET1	Business;Street
STREET2	Other;Street
STREET3	Home;Street
TITLE	Generation
TOWN1	Business;City
TOWN2	Other;City
TOWN3	Home;City
WWWFIELDSTR1	BusinessHomePage
WWWFIELDSTR3	0x3a4c
WWWFIELDSTR5	0x3a50
ZIP1	Business;PostalCode
ZIP2	Other;PostalCode
ZIP3	Home;PostalCode

## 7.2 Appointments: Field mapping

The listed names are the physical names of the database fields. Administrators can look up the relevant translations for the field names in the Management Console of CAS genesisWorld.

CAS genesisWorld	Microsoft Exchange
DURATION	Duration
END_DT	End
GISDESCRIPTION	Location
KEYWORD	Subject
NOTES2	FormattedNotes
START_DT	Start
START_DT_ORIG	OriginalStart
WHOLEDAY	IsAllDayEvent

## 8 Working with Exchange sync as a user

---

Exchange sync can only be used in different ways, for instance: only for addresses, only for appointments or for both addresses and appointments. Depending on how you are using Exchange sync, a number of changes of behavior will occur in the CAS genesisWorld.

### Behavior with changes to data records

If two users change the same data record simultaneously in CAS genesisWorld and in Microsoft Outlook, then the following rule applies:

- For addresses, the changes in CAS genesisWorld are leading, because this is the leading system for addresses.
- For appointments, Microsoft Outlook is leading, because this is the leading system for appointments.

### Topics in this chapter

8.1	Addresses.....	61
8.2	Appointments.....	67

### 8.1 Addresses

However, the procedures used for addresses in CAS genesisWorld remain unchanged, because this is the master address system. Seamless synchronization between both systems occurs when users finish making the necessary settings and a few specifics are taken into account.

### Topics in this chapter

8.1.1	Setting up personal address synchronizations.....	61
8.1.2	Unidirectional and bidirectional synchronization of addresses.....	62
8.1.3	Working with addresses.....	64
8.1.4	Notes field.....	67

#### 8.1.1 Setting up personal address synchronizations

Users can configure a private address synchronization. This user driven synchronization is performed in addition to the global synchronization which is set up by your administrator in the Management Console.

Users define which addresses are to be synchronized in the CAS genesisWorld Desktop Client. Addresses are selected by means of a view.

1. First of all, in the CAS genesisWorld Desktop Client, you have to define the desired list view with addresses.
2. On **Tools** menu, click **Settings**.
3. Now, switch to the **Exchange sync** tab.
4. Enable the **Synchronize addresses in this view** option.
5. Select a navigator and the previously created view.  
The navigator needs to be stored in the database.
6. Now, select a folder for the Microsoft Outlook contacts or addresses from the **Target folder in Microsoft Exchange** drop-down list.  
This folder should already exist in Microsoft Outlook.

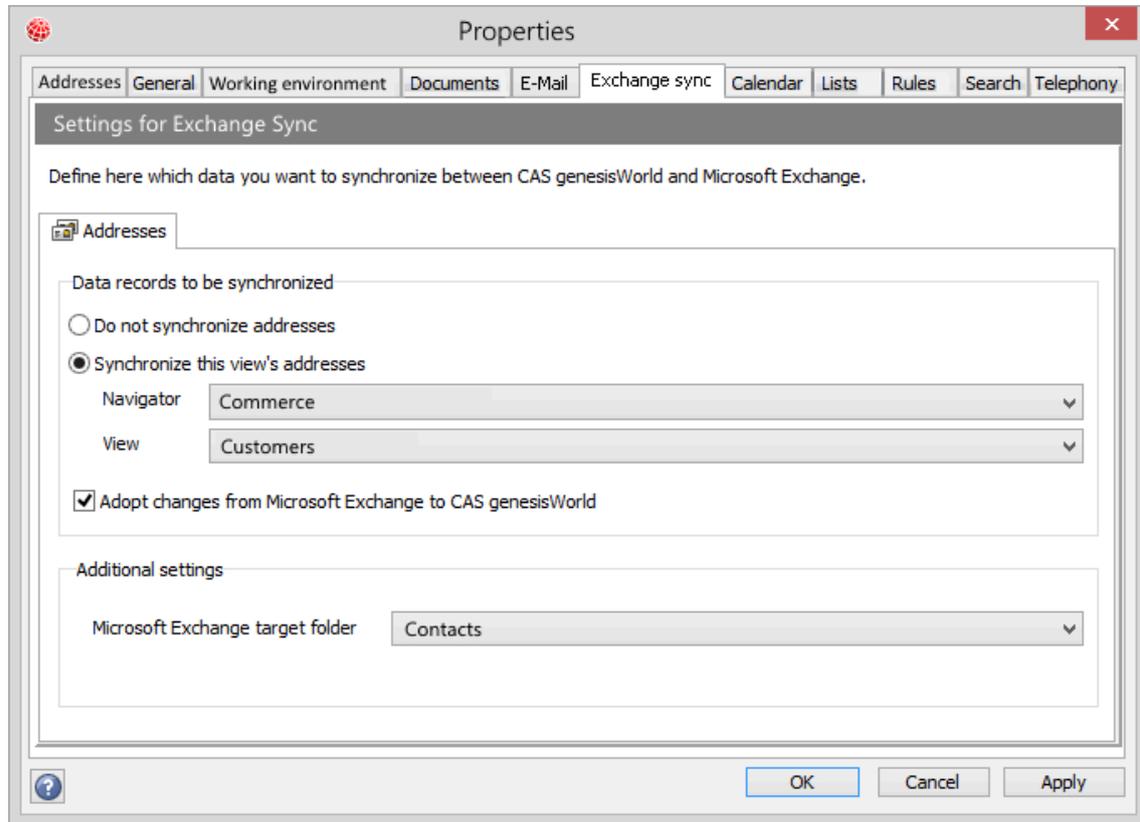
#### Note

Users will only be able to set up a personal address synchronization and access the respective functions if they have been given the sufficient permissions from the administrator.

In some cases, your administrator will already have set up the address synchronization in the Management Console. The settings on the **Exchange sync** tab in the Management Console and the respective user settings in the **Settings** window of the desktop client overwrite one another – the last setting is always valid.

### 8.1.2 Unidirectional and bidirectional synchronization of addresses

Using the **Adopt changes from Microsoft Exchange to CAS genesisWorld**, you define whether addresses should be synchronized unidirectionally or bidirectionally.



### Unidirectional synchronization

If the **Adopt changes from Microsoft Exchange** to CAS genesisWorld option has been deactivated, then unidirectional synchronization is enabled.

In the process, data from CAS genesisWorld is transferred to Microsoft Exchange. Changes in Microsoft Exchange are not synchronized back to CAS genesisWorld.

If you changed a data record in Microsoft Exchange, then this change will be overwritten at the next synchronization by the data record from CAS genesisWorld.

When a data record is created in Microsoft Exchange in the respective private folder for contacts, then this folder is removed again at the next synchronization.

If you have deleted a contact from the private contacts folder, then this contact is created again at the next synchronization.

### Bidirectional synchronization

If the **Transfer changes from Microsoft Exchange to CAS genesisWorld** option has been enabled, then bidirectional synchronization is active.

The data from CAS genesisWorld are transferred to Microsoft Exchange. In addition, your changes and, if applicable, any newly created data records from Microsoft Exchange are transferred back to CAS genesisWorld.

### Special considerations with bidirectional synchronization

Generally, all addresses are synchronized that are displayed in the respective list view. These addresses are selected in the properties of the view using static and dynamic filters.

If an address in CAS genesisWorld, no longer conforms to the filter conditions, then it will be removed in Microsoft Exchange.

You can also create contacts in Microsoft Exchange. These new contacts may not correspond to the view properties for synchronization. In the process, the following special issues may arise:

- An **Address is changed in Microsoft Outlook**. The changes are transferred to CAS genesisWorld.

If the changed address no longer corresponds to the view filter conditions, then the address will no longer be displayed in the view in CAS genesisWorld.

At the next synchronization the address is deleted from the Microsoft Exchange folder.

The address will continue to be available in CAS genesisWorld.

- The same principle also applies when **Creating new addresses**.

In Microsoft Outlook a new contact is created which does not conform to the filter conditions of the view in CAS genesisWorld.

At the next synchronization, the contact is transferred from the folder to CAS genesisWorld.

If the address does not correspond to the filter conditions of the view in CAS genesisWorld, then the address will be deleted from the Microsoft Exchange folder at next synchronization.

The address will continue to be available in CAS genesisWorld, however, it will not be displayed in the synchronization view.

### 8.1.3 Working with addresses

You might find the following hints useful when working with addresses.

#### Topics in this chapter

Interplay of rights system with addresses.....	65
Setting an address in CAS genesisWorld as a private address.....	66

Deactivated addresses in CAS genesisWorld.....	66
Deleting addresses in CAS genesisWorld.....	67
Working with addresses in Microsoft Exchange.....	67

### Interplay of rights system with addresses

As a user you can create addresses or contacts as usual in CAS genesisWorld.

When working with addresses, CAS genesisWorld is the leading system. Synchronization can undo any changes made to addresses through Microsoft Exchange. If, for example, you change an address or the individual fields of an address in Microsoft Outlook, to which you only have read rights or restricted rights, then these changes will be undone in Microsoft Exchange at the next synchronization.

Microsoft Outlook can contain contacts in the public address book. These correspond to public addresses in CAS genesisWorld. Only the respective user has access to the contacts in private folders in Microsoft Outlook. However, this user can grant other Microsoft Outlook users access to this folder.

Rights for addresses in CAS genesisWorld are organized in another manner: Addresses can be user sensitive. Users can set access rights for addresses by means of user sensitivity. If addresses are not user sensitive, then all addresses are public. Moreover, addresses in CAS genesisWorld can also be made private.

### Behavior with non user sensitive addresses

- If the contact is created in a private address book by Microsoft Exchange, then the address is created using the **All (public)** participant by the respective user in CAS genesisWorld.
- If the contact is created by Microsoft Exchange in the public address book, then the address is created with the **All (public)** participant by the **Exchange sync** alias in CAS genesisWorld.

### Behavior with user sensitive addresses

- If the contact is created in a private address book by Microsoft Exchange, then the respective user creates this address in CAS genesisWorld and simultaneously becomes an address participant.
- If the contact is created in a public address book by Microsoft Exchange, then the address is created with the **All (public)** participants by the **Exchange sync** alias in CAS genesisWorld.

### Behavior with addresses that can be privatized

- If the contact is created by Microsoft Exchange in a private address book, then the address is created using the **All (public)** participant by the respective user in CAS genesisWorld.
- If the contact is created by Microsoft Exchange in the public address book, then the address is created with the **All (public)** participant by the **Exchange sync** alias in CAS genesisWorld.

### Setting an address in CAS genesisWorld as a private address

As a user, if you set an address as private in CAS genesisWorld, then this address will only be visible to you.

If the address was previously synchronized by the global synchronization, then it will not be captured by the respective filter conditions after being set to private, and will subsequently be deleted from the public address book in Microsoft Exchange.

If the address was previously synchronized by other users, then the address will no longer be displayed for the respective users in Microsoft Exchange after being set to private and after the next synchronization.

#### Note

If a contact in Microsoft Exchange is marked as a private contact, this will not have an affect on the rights of this address in CAS genesisWorld.

### Deactivated addresses in CAS genesisWorld

Before a synchronization, the system does not check whether an address has been deactivated in CAS genesisWorld. No special settings are required to ensure that deactivated addresses are synchronized between CAS genesisWorld and Microsoft Exchange.

Your administrator uses a filter to specify whether disabled addresses should be synchronized to a public folder or during personal address synchronization. Please contact your administrator for more information.

So as a user with the necessary permissions for navigators, you can also change the view filter conditions for personal address synchronization. You can find more information in the following section "Setting up personal address synchronizations", page 61

You can use the view's filter conditions to define whether addresses are to be synchronized or not.

#### Note

Administrator and user settings overwrite each other when synchronizing private addresses. The last setting always applies.

### Deleting addresses in CAS genesisWorld

If an address is deleted in CAS genesisWorld, then the address is also deleted in Microsoft Exchange.

### Working with addresses in Microsoft Exchange

CAS genesisWorld is the leading system for addresses. Any changes made to addresses, to the rights of an address, or the deleting of addresses are, where applicable, undone by the synchronization with CAS genesisWorld. If, for example, you change the rights to an address in Microsoft Outlook, then the change is undone and reverted to its original value at the next synchronization.

### Setting Microsoft Exchange contacts as private

If a contact in Microsoft Exchange is marked as a private contact, this will not have an affect on the rights of this address in CAS genesisWorld.

### Deleting contacts in Microsoft Exchange

CAS genesisWorld is the leading system for addresses. Thus, addresses can only be deleted in CAS genesisWorld, regardless of whether these addresses were synchronized with Microsoft Exchange or not.

If in Microsoft Exchange, an address is deleted by a user, then this address will be available again after the next synchronization in Microsoft Exchange.

#### 8.1.4 Notes field

The content of the **Notes** field is synchronized between both systems. Because notes are formatted differently in CAS genesisWorld and in Microsoft Exchange, information could be lost, for example, if photos are copied into notes.

#### Note

To ensure that all information is maintained, you should only enter content into the **Notes** field in text format.

## 8.2 Appointments

No user settings are necessary for the synchronization of appointments.

The administrator sets a time in the Management Console from which appointments are kept synchronized between CAS genesisWorld and Microsoft Exchange. In the process, all appointments from the CAS genesisWorld users are included and the synchronization is always bidirectional.

Appointments are synchronized using the standard user calendar in Microsoft Outlook. The appointments from the Microsoft Outlook standard calendar are transferred to CAS genesisWorld.

Appointments from CAS genesisWorld are transferred to the Microsoft Outlook default calendar.

#### Note

When you create appointments in additional calendars in Microsoft Outlook, then these appointments will not be transferred to CAS genesisWorld. Appointments from CAS genesisWorld are also not transferred to the additional calendars in Microsoft Outlook.

### Topics in this chapter

8.2.1	Working with appointments.....	68
8.2.2	Delegating appointments.....	71
8.2.3	Creating appointments in the name of the delegating user.....	72
8.2.4	Invitation status tab.....	73
8.2.5	Private/confidential appointments.....	74
8.2.6	Automatically link appointments with addresses.....	75
8.2.7	Notes field.....	75
8.2.8	Other changed functions in CAS genesisWorld.....	75
8.2.9	Current limitations of appointment management.....	77

## 8.2.1 Working with appointments

All appointment participants have full rights to their respective appointments and can thus edit or delete them.

### Editing an appointment as the organizer

- If you **change** the appointment as the organizer, the appointments of the other participants are also changed by the synchronization.  
The invitation status is reset.

- If you **delete** an appointment as an organizer, then **anceled** is displayed for all other participants in the Subject field of the appointment after the synchronization.

### **Editing appointments as the participant or attendee**

- If you **change** an appointment as a participant, the changes only apply to your appointment.  
Those changes are overwritten if the organizer changes the appointment at a later time.
- If you **delete** an appointment as a participant, a cancelation is sent to the organizer.

### **Creating appointments**

If you as a user create a new appointment in CAS genesisWorld, then you automatically also become the appointment organizer.

You can invite contacts from Microsoft Outlook, addresses from CAS genesisWorld, CAS genesisWorld users, or any other person to the appointment by entering the respective e-mail addresses. As an organizer, you can see the invitation responses of the invited participants on the **Invitation status** tab - similar to Microsoft Outlook.

Persons invited in CAS genesisWorld are always added to the appointment as **required participants** in Microsoft Outlook.

An invitation as optional participant is not possible in CAS genesisWorld. Optional participants from Microsoft Outlook are displayed in CAS genesisWorld as the required participants would be.

If you deploy Exchange sync and enter a resource as an appointment participant, the Subject of the resource is not automatically entered in the **Location** field.

### **Creating appointments in the CAS genesisWorld team calendar**

If you create a new appointment in the CAS genesisWorld desktop client team calendar, then all users or members of a group are automatically invited to the appointment. The respective users are displayed immediately on the Invitation status tab. You can find more information in the following section "Invitation status tab", page 73.

You will find more information on the team calendar in the CAS genesisWorld desktop client here: [Team calendar: sharing calendar views](#)

## Reactions to invitations in CAS genesisWorld

If participants have been invited to an appointment, they can accept, decline, or tentatively accept the invitation. All responses to invitations can be submitted in both CAS genesisWorld as well as Microsoft Outlook, that is: accept, decline and tentatively.

The invitation responses are adopted in the calendar of the organizer if the organizer loads the corresponding e-mails.

- In Microsoft Outlook, you can choose whether the organizer gets an e-mail after you have given your invitation response.
- You do not have this choice in CAS genesisWorld, if you react to an invitation, then the organizer will always receive an e-mail.

### Note

The documentation of the Exchange sync module only describes the respective functions in CAS genesisWorld as well as the interactions and direct interfaces between both systems. The functions of Microsoft Exchange or Microsoft Outlook will not be described in detail in this document. You can find further information in the corresponding Microsoft documentation.

## Invitation responses via appointment data records

If you respond to an invitation via the appointment data record, the organizer will receive an e-mail notification about your response after the next synchronization. The organizer can view responses on the [Invitation status](#) tab in the appointment data record.

1. As an invited participant, open the appointment window, for example, via the calendar.
2. Click [Accept](#), [Decline](#), or [Tentatively](#) in the toolbar.  
If you decline the invitation, the appointment window closes and the appointment is no longer displayed in your views.

## Invitation responses via the e-mail client

In the CAS genesisWorld e-mail client, you will receive an e-mail from the organizer if you are invited. This e-mail contains a ICS file which is the format used for the appointment when sending as an attachment.

If you respond to an invitation via the CAS genesisWorld e-mail client, the organizer will receive an e-mail notification about your response after the next synchronization. The organizer can view responses on the [Invitation status](#) tab in the appointment data record.

1. Open the respective e-mail.
2. Select the desired invitation response.  
After accepting an invitation, you will see the appointment displayed in your calendar in Microsoft Outlook and in CAS genesisWorld.
3. Click **Cancel** if you do not want to respond to the invitation.  
In this case, your invitation will remain active.

### Invitation responses for recurring appointments

You can respond to invitations to recurring appointments in CAS genesisWorld if the appointments in the series are available in CAS genesisWorld after a synchronization.

As soon as the appointments of a series are displayed in your CAS genesisWorld calendar, you can respond to the invitations.

1. Open a random recurring appointment in the CAS genesisWorld calendar.
2. Click **Accept**, **Decline**, or **Tentatively** in the appointment toolbar.
3. Choose whether your response is valid for only the current data record or all data records in the appointment series.

## 8.2.2 Delegating appointments

Using the appointment delegation functions, you can edit appointments in calendar views in the CAS genesisWorld desktop client in the name of another user.

Directly below the toolbar, a hint is displayed which informs you that you are planning and editing appointments in the name of the selected user.

The following settings and requirements have to be defined and met to use the appointment delegation functions.

### Settings and requirements in CAS genesisWorld

- The **Activate appointment delegation** option must be enabled in the Management Console.  
You can find more information in the following section "Appointments tab", page 26
- The calendar view in CAS genesisWorld must display appointments.  
Define the corresponding settings in the **Properties** of the calendar view.  
You can find more information in the following section [Calendar view properties](#).

- The appointment delegation is only active if exactly one other participant is selected in the team calendar and the delegating user has at least the **Edit, duplicate, delete** external access right to the other user.

### Settings and requirements in Microsoft Exchange

Notification e-mails informing users of changes to appointments are sent in the name of the delegating user via Microsoft Exchange. Thus, e-mail recipients will receive a notification that the organizer has changed the appointment.

In Microsoft Exchange, grant the **Editor** delegation access right to the user to whom you want to delegate.

### Access rights with activated appointment delegation

When the appointment delegation functions have been activated, your access rights to appointment data records depend on your role in the appointment delegation, that is, whether or not you are the one delegating or receiving delegation rights.

- **Delegating user**

As the delegating user, you grant other users the right to create and manage appointments in your name.

Delegating users are automatically entered as the organizer of the appointment data record which the user receiving delegation rights has created. As the organizer, delegating users have **Full rights** to the respective appointment data records.

To all other appointments of the user receiving delegation rights, you only have the access rights or external access rights given to you by the corresponding user or your administrator.

You can find more information in the following section [Access rights levels](#)

- **User receiving delegation rights**

Users receiving delegation rights have been granted permission to create and manage appointments in the name of the delegating user.

Users receiving delegation rights have **Full rights** to all appointment data records of the delegating user.

Other users cannot edit private appointments.

## 8.2.3 Creating appointments in the name of the delegating user

This is how you create an appointment in CAS genesisWorld, in the name of the delegating user.

## Procedure

1. Open a calendar view which displays appointments in the CAS genesisWorld Desktop Client.
2. Open the **Team calendar** for the delegating user.  
More information is available here: [Team calendar: sharing calendar views](#)
3. Create a new appointment.  
The user receiving delegating rights is not automatically entered as an appointment participant. If the user receiving delegation rights is supposed to participate in the appointment, they need to be invited via the **Invitations** tab.
4. Select the **Invitations** tab.
5. Invite the desired participant to the appointment.

### 8.2.4 Invitation status tab

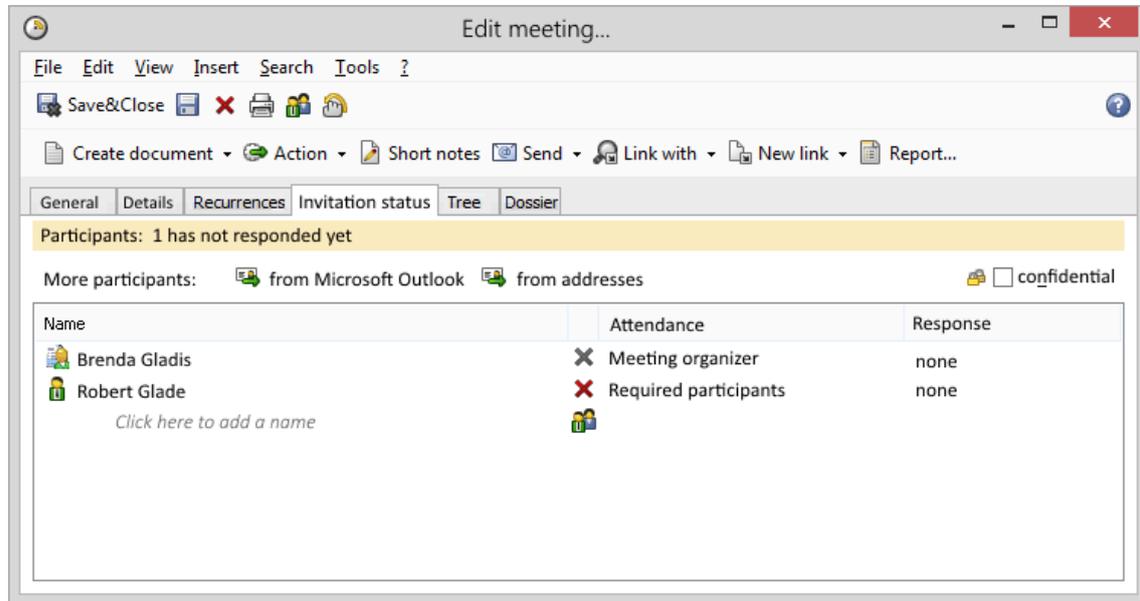
On the **Invitation status** tab, all the appointment participants are displayed, even the external participants. For external participants, the e-mail address is displayed, if these participants are not CAS genesisWorld users.

As appointment participants, they can see all the people who have been invited, but not whether or not these people have accepted or declined the invitation.

As organizer of the appointment, you can see all those invited and whether or not they have accepted or declined your invitation.

### Inviting more participants

As organizer of the appointment, you can invite more participants using the **Other participants** button via the list, as well as contacts from Microsoft Outlook and addresses from CAS genesisWorld.



## Procedure

1. Click this icon in the last empty cells of the list to open the **Select participants** window from CAS genesisWorld.
2. In the **Select participants** window select the users or groups from CAS genesisWorld who you would like to have as appointment participants. When you select a group, the members of the group are added to the appointment as participants.
3. If you enter an e-mail address in the last line, then this person will also be invited as a participant.

### 8.2.5 Private/confidential appointments

Some appointments contain sensitive information which has to be protected. For these appointments, you can use the **Private** option in Microsoft Outlook.

In CAS genesisWorld external access rights are restricted with the **Private** option.

- If you enable the **Private** option in **Microsoft Outlook**, then for this appointment in CAS genesisWorld the **Private** option will also be enabled, this ensures that the appointment is only visible to the participant.  
The appointment is thus only visible for participants.
- If as organizer of an appointment in **CAS genesisWorld**, you enable the **Private** option, then the **Private** option will be active for the appointment in Microsoft Exchange.

It is no longer possible to use the external access right **Confidential** in CAS genesisWorld when using Exchange sync for appointments.

The organizer defines external access rights for an appointment. Additional participants cannot change this external access right.

### 8.2.6 Automatically link appointments with addresses

If an appointment is transferred to CAS genesisWorld by the synchronization process, then the system searches the address data records in CAS genesisWorld for the participant e-mail addresses.

Any addresses found which have identical e-mail addresses are linked automatically to the appointment.

If afterwards, a participant is removed from the appointment, or the e-mail address in an address data record is changed, then these links are not deleted.

Your administrator has to change settings in the Management Console so that the participants in CAS genesisWorld are automatically linked with the respective addresses. Exceptions are also possible. Please contact your administrator for more information.

### 8.2.7 Notes field

The content of the **Notes** field is synchronized between both systems. Because notes are formatted differently in CAS genesisWorld and in Microsoft Exchange, information could be lost, for example, if photos are copied into notes.

#### Note

To ensure that all information is maintained, you should only enter content into the **Notes** field in text format.

### 8.2.8 Other changed functions in CAS genesisWorld

When using Exchange sync for appointments, other appointment related functions change in CAS genesisWorld, particularly those for automatic processes.

#### **Premium Edition: accepting appointment participants from a parent project**

If a primary link to a project is entered for a newly created appointment in CAS genesisWorld, then none of the participants from the parent project are transferred for the appointment.

## Notification and action service

If as rule administrator, you create a new action, then no more appointments can be created via this action. You cannot create new actions if the actions change appointment participants.

If you want to change an existing appointment using an action, then this action must not change the appointment participants. If existing actions continue to change appointment participants, inconsistent data can occur in CAS genesis-World.

## Actions

- Creating **New appointments** via an action:  
As the organizer of the new appointment, you will see that the current user is always registered. You cannot add more participants to an appointment using actions in the desktop client.
- Changing **existing appointments** via an action:  
It is no longer possible to change participants using an action.

You cannot create new actions and cannot use existing actions if the actions change the participants of an appointment.

If existing actions continue to change appointment participants, inconsistent data can occur in CAS genesisWorld.

## Appointment templates

When Exchange sync is active for appointments, you can select and save appointment templates. Additionally, existing appointments can be saved as templates.

Users from CAS genesisWorld entered as participants, are saved with the template and thus have automatic access to the template. Additional users can access templates and use them to create a new appointment if they have sufficient rights to the respective data record to do so.

If a template is selected, then the template participants are not transferred to the newly created data record. Instead the current user is entered as the participant. Any further participants you wish to have, will have to be entered manually.

## Appointment functions that have been removed

In CAS genesisWorld different functions for working with appointments are removed by Exchange sync when enabling **Synchronize appointments**. This includes among others:

- Inviting linked addresses
- Sending e-mail to participants
- Displaying all the data records of this recurrence in a list
- Display the calendar view for participants for a selected appointment in the **Tools** menu or in the Context menu.
- Duplicating appointments
- **Transform to** function
- Activities, such as, a task or a process can no longer be transformed into an appointment.
- Appointments can no longer be transformed into other activities.

### 8.2.9 Current limitations of appointment management

This section describes the current limitations of appointment management in CAS genesisWorld, if you are using Exchange syncn.

- Accepting or declining invitations to recurring appointments:  
Accepting or declining a recurring pattern of appointments is only possible in the CAS genesisWorld calendar and not in the CAS genesisWorld e-mail client.
- Inviting other participants when you are the participant of an appointment:  
Currently, this is not possible in CAS genesisWorld. Appointment invitations can only be sent by the appointment organizer.  
When appointment delegation is enabled, then the delegation recipient can send invitations in the name of the organizer.  
You can find more information in the following section "Delegating appointments", page 71.
- Changing the external access rights of an appointment as a participant:  
Currently, this is not possible in CAS genesisWorld. Only appointment organizers can set up non-standard external access rights. Any changes made by participants in Microsoft Outlook are displayed correctly in CAS genesisWorld.  
Even if appointment delegation is enabled, only the organizer can set deviating external access rights. Delegation recipients cannot change the external access rights.
- Transforming an appointment into a recurring series:  
Existing appointments cannot be transformed into recurring appointments afterwards.