

User Guide: Mobile sync

CRM Data on the move



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1 Introduction

Mobile sync enables seamless synchronization with mobile devices of **Appointments**, **Addresses**, **Tasks** or **Holidays**. Before you visit a customer, or whenever you are out of the office, you can simply "take" all the relevant data with you.

You use configurable views to define the data you wish to synchronize, for example: Appointments within a specific time period, addresses with specific characteristics or tasks of a certain category.

How does synchronization work?

If you have an online connection then all changes will be synchronized. This synchronization can also be performed bidirectionally.

When using bidirectional synchronization, any changes you made on your mobile device and any changes made in CAS genesisWorld are compared and synchronized. When synchronization is finished, you will have the same data on both your mobile device and in CAS genesisWorld.

Besides manual synchronization, you can also set specific intervals during which your data is synchronized automatically.

Synchronization is performed via WLAN or the mobile data connection of your mobile device. SSL encryption is used for sensitive company data eliminating any risks of a data breach, see "[Protect your data](#)", page 7.

Your benefits at a glance

- Mobile sync ensures seamless synchronization between your mobile device and CAS genesisWorld.
- With Mobile sync you can use your existing apps for appointments, addresses and so on, because the data is integrated into these apps. This means you do not have to install any separate apps.
- The easy synchronization keeps your data current regardless of whether you are on the move or in the office.
- Bidirectional synchronization saves you the extra effort of double data handling.

Important information

- In principle, you can synchronize all of the following data record types: **Addresses**, **Appointments**, **Tasks** and **Holidays**. However, you can only synchronize the data record types that your mobile device supports.

Using filters, you can select the data record type and the data records that you wish to synchronize.

- Not all the fields from CAS genesisWorld will be transferred to your mobile device when synchronizing. Field assignment is set for Mobile sync, see "[Assignment of the fields](#)", page 33.

Please contact your administrator for more information.

- The **Holiday** data record type can only be transferred unidirectionally from CAS genesisWorld to your mobile device.

Holiday entries on your mobile device are displayed as appointments.

- Due to software patent restrictions, the Mobile sync server cannot be installed and set up in the USA.

However, the use of Mobile sync by a mobile device is allowed in the USA.

- When using Mobile sync, other modules and integrations may be affected. For a list of all potential impacts hilfe.cas.de see the **Working with several modules** page [Mobile sync](#).

2 Protect your data

When working with sensitive and personal data, it is especially important to protect and secure this data.

Protected data transfer

Mobile sync offers two options for data transfer: In addition to unencrypted data transfer in HTTP, there is also encrypted data transfer in SSL. For this, however, you will require a valid SSL certificate.

You can find more information in the following chapter: [Online Help Server Manager: Using a reverse proxy.](#)

Note

Some devices require special signed certificates. Otherwise, you may receive a warning message when using an integrated certificate. If you do not want to have to ignore the error message, then you should install signed certificates.

Backups

We recommend that you backup your data before you install Mobile sync. This ensures that you will have a current backup of your relevant data.

If you are using Mobile sync successfully, we strongly advise against using Mobile sync in conjunction with a backup mechanism with external software. Let Mobile sync manage your data exclusively.

If you use backups to transfer data to your mobile device, then the synchronization could potentially fail due to incorrect assignments. As a result, you could be left with duplicate entries and altered data.

If, despite these risks, you still have to import a backup, then you should delete the data before the next synchronization.

3 Which data records are synchronized?

In the CAS genesisWorld Desktop Client you can define which data you want to synchronize. You select the data records using list views, these views allow you to automatically include new and changed data records either from yourself or colleagues.

Before you define the special settings for Mobile sync, you need to create views for **Addresses**, **Appointments**, **Holidays** and **Tasks**. These list views display the data which you wish to synchronize.

The maximum amount of data you can synchronize is limited, there are a couple of reasons for this: On the one hand, mobile devices have limited storage capacity. On the other, a maximum of 7000 data records per data record type can be synchronized server side. Please take these limitations into account when selecting the data you wish to synchronize.

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3.1 Creating list views

In the CAS genesisWorld Desktop Client create a list view for each data record type which you would like to synchronize.

In principle, you can synchronize **Addresses**, **Appointments**, **Tasks** and **Holidays**.

Tip

The list views you create will only display the data records which you are allowed to access. Likewise with synchronization, only those data records will be included to which you have access rights.

Synchronizing over views is only possible with the list view. Other views are not supported.

Procedure

1. In the **File** menu select the **New/View** option.
2. Select the **List view** view as the type.
3. First of all, select what you wish to create a list for, for example, for addresses, contact persons, companies, individual contacts or tasks and so on.
4. Select a name for the view, the **view format** you wish to use, the **filter conditions** you wish to use and any other relevant settings.

The procedure used is the same as when creating a view.

You can find more information in the online help for users on the following page:

[Creating new list views](#)[Online help for the desktop client:](#)

5. Save the Navigator with the new views.

You might find it useful to create a new folder for these views that could be called, **Synchronize**.

Before you can use the list view for Mobile sync, you have to save the navigator with the views for Mobile sync in the database.

3.2 Mobile sync settings

You should ensure the necessary settings have been made before you start the synchronization via your mobile device.

1. In the **Tools** menu, click **Settings**.
2. Select the **Mobile sync** tab.
3. Make the necessary changes to the settings.

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3.2.1 Unidirectional or bidirectional synchronization?

You can make individual settings for the different data record types. The procedure is the same in both cases.

Click on the corresponding tab to define the settings for the respective data record type.

Tip

Bidirectional synchronization is possible for the following data record types: **Addresses**, **Appointments** and **Tasks**. Holidays cannot be synchronized bidirectionally.

No matter the type of synchronization, you will need the associated rights to perform them.

Please contact your administrator for more information.

In CAS genesisWorld you can set unidirectional or bidirectional synchronization via the **Adopt changes from the mobile device to** option in the **Data records for synchronization** area.

- If the **option is deactivated**, then the default setting is **unidirectional synchronization**. This is the default setting.

During unidirectional synchronization, the data is transferred from CAS genesisWorld to your mobile device, but not in the other direction.

Thus, if you changed a data record on your mobile device, then this change will be overwritten by the data record from CAS genesisWorld at the next synchronization.

- If this **option has been activated**, then **bidirectional** synchronization will be active.

Changes on the mobile device are thus now also transferred to CAS genesisWorld. This also applies to any newly created data records.

You can define rights for new data records. The settings in this area are the same as for the **Address** and **Task** data record types.

Additionally, you can enable the **Adopt settings from the mobile device** option for the **Appointments** data record type to adopt the settings of your mobile device.

You can select the maximum level of external access rights you wish to use when creating new data records.

3.2.2 Address settings

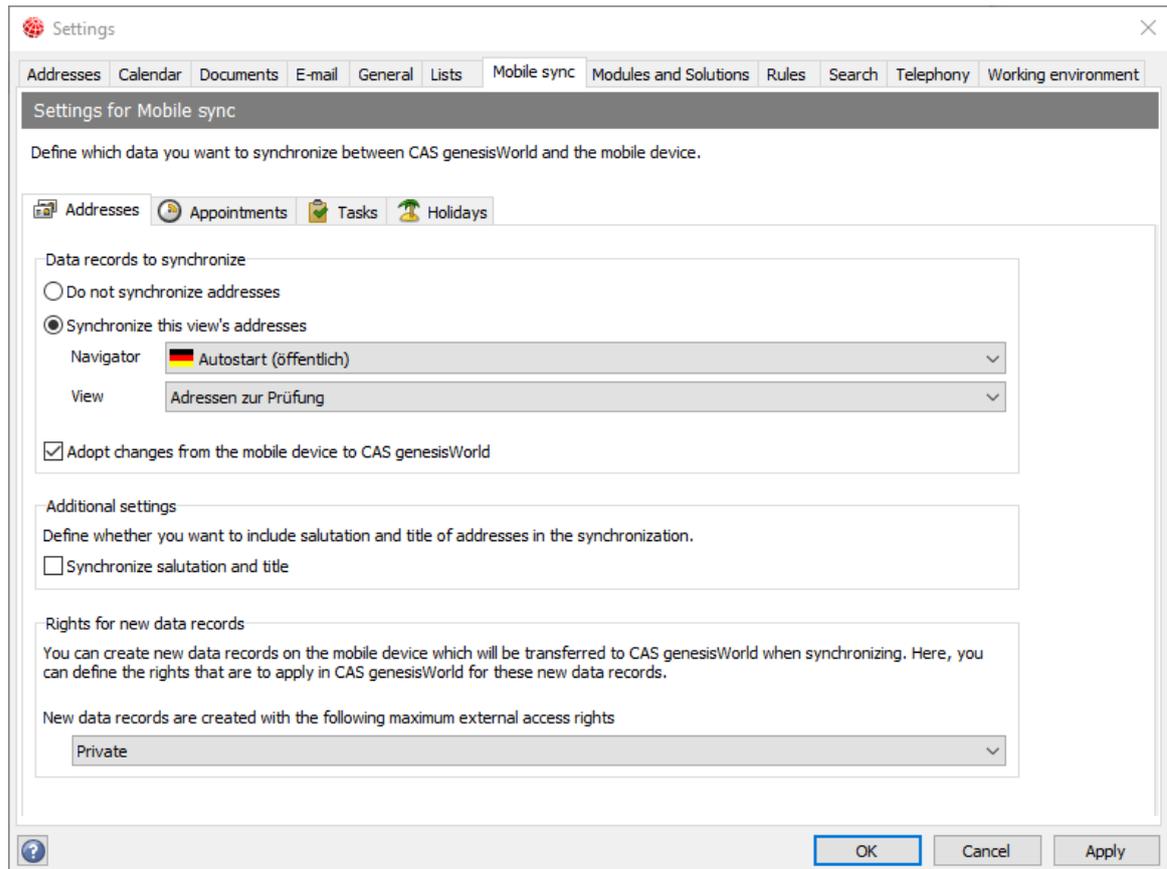
In the desktop client select the **Tools/Settings** menu item.

1. On the **Mobile sync** tab, open the **Addresses** tab
2. Enable the **Synchronize addresses in this view** option.
3. Select the desired Navigator from the respective drop-down list.
4. Select the desired View with the Addresses you wish to synchronize from the respective drop-down list.

Tip

If you are working with iOS, then you should avoid synchronizing the **Form of address** and **Title** fields. In this way, the contact lists remain easy to read on the iPhone.

To do this, deactivate the **Synchronize title and form of address** option in the **More settings** block.



3.2.3 Appointment properties

In the desktop client select the **Tools/Settings** menu item.

For appointments we recommend the **Synchronize appointments from this time slot** option.

1. Open the **Appointments** tab which you can find on the **Mobile sync** tab.
2. Choose one of the following options.
 - Once you have enabled the **Synchronize appointments from this time slot** option, you should then select the time frame for the synchronization.

With this option, it is possible that other data is transferred with each synchronization.

- If you activated the **Synchronize appointments in this view** option, then you should select a **Navigator** and the desired **View** from the respective drop-down lists.

Settings

Addresses Calendar Documents E-mail General Lists **Mobile sync** Modules and Solutions Rules Search Telephony Working environment

Settings for Mobile sync

Define which data you want to synchronize between CAS genesisWorld and the mobile device.

Addresses Appointments Tasks Holidays

Data records to synchronize

Do not synchronize appointments

Synchronize appointments from this period: days back days ahead

Synchronize appointments of this view:

Navigator **Autostart (öffentlich)**

View **Gelöschte Termine**

Adopt changes from the mobile device to CAS genesisWorld

Rights for new data records

You can also create new data records on the mobile device which will be transferred to CAS genesisWorld when synchronizing the next time. Here, you can define the rights that are to apply in CAS genesisWorld for these new data records.

New data records are created with the following maximum external access rights

Private

Apply setting of mobile device

OK Cancel Apply

3.2.4 Task settings

In the desktop client select the **Tools/Settings** menu item.

1. On the **Mobile sync** tab, open the **Tasks** tab.
2. Select one of the following options:
 - If you enable the **Synchronize uncomplete tasks for which I am entered as editor** option, then only the respective tasks will be synchronized.
 - If you have enabled the **Synchronize tasks in this view** option, then you should select the desired Navigator and the desired View from the respective drop-down lists.

3.2.5 Holiday settings

In the desktop client select the **Tools/Settings** menu item.

1. Open the **Holidays** tab on the **Mobile sync** tab.
2. Select one of the following options:
 - If you have enabled the **Synchronize holidays from this period** option, then you have to select a time frame for the synchronization. With this option, it is possible that other data is transferred with each synchronization.
 - If you activate the **Synchronize holidays from this view** option, then you subsequently need to select the desired Navigator and the desired View from the respective drop-down lists.

Tip

Bidirectional synchronization is not possible with holidays.

3.3 Changing the selection of data records automatically

The selection of data records for synchronization via list views is dynamic; this is because new data records can be added or changed and they may no longer correspond to the original list view criteria.

If a data record in CAS genesisWorld no longer corresponds to the properties of the list view, then the data record is deleted from the mobile device at the next synchronization.

Special considerations with bidirectional synchronization

You can also create data records on mobile devices. These data records do not necessarily correspond to the properties of the list view for the synchronization.

If you create a data record on your mobile device which does not match the filter set then, just as before, it will also be synchronized and kept on your mobile device.

And, if after the first synchronization, the data record is included in the defined filter set, then as of that point it will be treated the same as the other data records. This means, that it will also be removed from the mobile device if it is not included in a suitable filter set later.

Example

A time slot for appointments is equal to -90 to +30 days. You now wish to create a new appointment on your mobile device that is to take place in 6 months' time.

The appointment is added to the static set, which means, it is immediately synchronized and stays on your mobile device.

4 Configuring mobile devices for Mobile sync

You configure mobile devices for Mobile sync in the settings of your respective mobile device.

Note

As the functionality of each device can differ, we only explain the most common steps for Android and iOS. The actual steps can differ on your mobile device. Inform yourself about the appropriate setup in the instructions of your mobile device.

Please note that various further settings can be defined for the data that is to be synchronized on the mobile device, for example, explicit releases of specific data. If necessary, inform yourself in the instructions of your mobile device.

Android and other operating systems

1. Open the settings of your mobile device and select the page for account management.
Many mobile devices have a search function in their settings. If you enter the word "accounts" in the search field, you often find the page for account settings.
2. Select **Add account** or similar functions.
3. Select **Exchange ActiveSync** as the account type.
Depending on the device, the account type can also be called **Exchange** or **Microsoft Exchange ActiveSync**.
4. Enter an e-mail address.
The e-mail address is a mandatory field on the mobile device, but does not further affect the logon to the CAS genesisWorld server. You do not have to enter the e-mail address that is connected to your CAS genesisWorld user account.
If you have already set up an Exchange account on your mobile device, you cannot reuse the same e-mail address. In this case, you can enter any e-mail address, for example, mail@example.com.
5. Enter your CAS genesisWorld password or the service password.
You enter your user name in a later step.
6. Click **Manual setup** or a similar option and enter the remaining logon data for CAS genesisWorld. You can find more information on the required access data below.

iOS as of version 12

Note

If you use an earlier iOS version than iOS 12, the instruction for Android and other operating systems applies.

Procedure

1. Open the settings of your mobile device and select **Mail > Accounts**.
2. Tap **Add account**.
3. Select **Microsoft Exchange** as the account type.
4. Enter an e-mail address and if required a description.
The e-mail address is a mandatory field on the mobile device, but does not further affect the logon to the CAS genesisWorld server. You do not have to enter the e-mail address that is connected to your CAS genesisWorld user account.
If you have already set up an Exchange account on your mobile device, you cannot reuse the same e-mail address. In this case, you can enter any e-mail address, for example, mail@example.com.
5. Select **Next**.
6. Enter your CAS genesisWorld password or the service password.
You enter your user name in a later step.
7. Select **Next**.
8. Enter the remaining logon data for CAS genesisWorld.

Logon data for CAS genesisWorld

The following logon data is required for Mobile sync to work correctly. The table applies to all mobile devices. The description on the mobile device may vary.

Description in CAS genesisWorld	Name on the mobile device (examples)	Examples for entries
Server	Server or Exchange server	demo.cas.de
Tenant	Domain	demo

Description in CAS genesisWorld	Name on the mobile device (examples)	Examples for entries
User name	User name or User	Robert Glade Some mobile devices only offer one field to enter domain and user. In those cases, enter the data in the form of domain\user, for example, demo\Robert Glade .
Password	Password	Your password If you use the two-factor authentication, you need to enter the Service password . You can set up service passwords in the Settings app. You can find more information in the following section: " Service passwords ", page 29
Port	Connection number or port	With SSL: 443 Without SSL: 80 In many cases, the port is identified automatically. Therefore, the Port field is not available on all mobile devices.

Note

If you are using iOS, then you have to enable **SSL**.

SSL is optional for Android devices. We recommend that you also use SSL for Android devices to enable the encrypted transfer of data.

In some cases, the Exchange ActiveSync settings contain further fields. Those fields are usually optional for CAS genesisWorld and can be filled with any data if a value must be entered. An example for such a field is the account name for the account management on the mobile device.

5 The principles of synchronizing data

Not all the CAS genesisWorld functions can be displayed on mobile devices. This is why synchronization has to follow certain principles.

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5.1 The features of synchronizing existing data.

You probably already have existing data on your mobile device such as contacts and appointments. After you have set up Mobile sync and depending on your mobile device, this existing data is not synchronized to CAS genesisWorld.

Existing data for iPhone, Android and Windows

Mobile devices which use iOS, Android or Windows assign contacts and appointments to a specific account, for example, Local, Exchange, Google or MobileMe.

All of the data you want to synchronize with Mobile sync has to be allocated to the Mobile sync account.

If, after configuring Mobile sync, you set the Mobile sync account as your default account on your mobile device, then any new contacts and appointments are automatically assigned to the Mobile sync account.

To ensure correct assignments, you have to make sure that all contacts are created in **All contacts** in the Contacts app. You should also create the Mobile sync account as the default account in the desired calendar. Otherwise, all new appointments are assigned to the default account, which was set up for the respective calendar.

Note

With some mobile devices you may not be able to assign existing data to an account. Existing contacts and appointments are not synchronized to CAS genesisWorld after Mobile sync has been configured.

Please contact your administrator for more information.

The first time you synchronize, the synchronized data is removed from the mobile device before being sent back to the mobile device through synchronization. This behavior is intentional. This prevents any data loss.

If you delete your Mobile sync account on your iPhone, then all your addresses and appointments which were synchronized with CAS genesisWorld will also be deleted.

5.2 Addresses

The following principles underlie the synchronization of addresses.

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5.2.1 Allocating fields

If, on your mobile device, you create a new address and only enter a company name, then CAS genesisWorld creates an entry for a company.

Likewise, when you enter first and second names on your mobile device, CAS genesisWorld creates an individual contact.

The address fields on mobile devices are not identical with those in CAS genesisWorld. For example, in CAS genesisWorld company address data records do not have a field for private telephone numbers. This is why certain changes occur when synchronizing from mobile devices to CAS genesisWorld.

- If, on the mobile device, the **Fax (business)** field is empty, CAS genesisWorld inserts the contents of the **Fax (private)** field into this empty field.
- Similarly, if the field for a company telephone number is empty on the mobile device, CAS genesisWorld searches in other fields for a telephone number and uses the first entry it can find.
- And if the **E-mail (central)** field is empty on the mobile device, then CAS genesisWorld searches in other fields for e-mail addresses and then uses the first suitable entry it can find.

Companies and contact persons

Most mobile devices check whether duplicates exist during synchronization. Whilst checking the program searches for duplicate field values.

Since many fields of companies and the respective contact persons are the same they will not be detected as duplicates. These potential duplicates will be merged into one address by many mobile devices, this often gives the impression that some addresses may not have been transferred.

Tip

When using an Android phone you can see the associated address by switching into the editing mode for one of these addresses.

Special rules: iPhone

When entering e-mail addresses into addresses on an iPhone, no particular order is supported. However, when synchronizing with CAS genesisWorld we recommend that you always use the same assignment.

Before every synchronization, Mobile sync restores the original order so that the CAS genesisWorld fields can be entered into same fields again on the iPhone.

The following criteria apply to new address data records on iPhones if the e-mail addresses are to be transferred to CAS genesisWorld:

- A data record is regarded as a company when it does not include a name and surname, but instead a company name was entered.
In this case, the **E-mail (central)** field is completed.
- If the data record is a business contact and a company name has been entered, then the following fields are completed in turn: **E-mail (business)**, **E-mail (private)** and **E-mail (central)**.
- Individual contacts on the other hand, are regarded as those that have a name and surname, but no company name.
In this case the following will be filled out in turn: **E-mail (private)**, **E-mail (business)** and **E-mail (central)** fields.

5.2.2 Deactivated addresses

Addresses which have been deactivated in CAS genesisWorld are not synchronized. If the list view in the Windows client contains deactivated addresses, then these will not be transferred to the mobile device.

5.2.3 Address search

Using your mobile device you can search all the addresses from CAS genesisWorld without having to save these addresses to your mobile device.

In the process, all the available addresses in CAS genesisWorld are searched and any search hits are transferred to your mobile device. This allows you to display addresses via the search which are not available in your contact list.

Enter several characters into the search field.

Principles of searching for addresses

If SmartSearch has been configured on the same application server as Mobile sync, then this server is used when searching for addresses, otherwise the search will behave in the usual manner.

Address searches now operate according to the following rules:

- First of all, all the individual contacts are included.
- Individual contact searches make use of the following fields:
First name, Last name, Title, Company name and Telephone number
- In the process, the program checks whether the content of any of these fields begins with the characters you entered.
After you have entered your character, the program completes your entry with a percentage symbol (%).
- Now, the content of the following field: **Company name** is included.
- If you use the '@' symbol when searching, then your search will be extended automatically to include e-mail fields:
 - This applies especially to the individual contact e-mail fields: **E-mail (business), E-mail (business 2), E-mail (private), E-mail (private 2), E-mail (central)**.
 - The format for organizations is **E-mail (central)**.
- Initially, all of the search results for individual contacts are displayed.
The maximum possible number of search results is limited and depends upon your mobile device.
- If your search turns up fewer addresses than the maximum allowed, the program also includes any organizations found and also displays them.

Example

You want to search for an address and enter the following: **Cle**.

The search hits will include all addresses whose fields: **First name, Last name, E-mail (business, business 2, private, private 2, central)** begin with **Cle**. Examples of possible individual contact search hits could be: Clementine Mayer, Kai Clementano, richard.lion@clearexample.com and so on.

The search hits show five individual contacts. Thus, all organizations whose **Company name** and **E-mail (central)** fields begin with the **Cle** characters are also displayed. An example of this would be the **Clearoffice** organization, whose e-mail address is as follows: **info@clearexample.com**.

Note

Some mobile devices will let you save search results. Unfortunately, this function can lead to duplicates in CAS genesisWorld, because the saved addresses are treated like new contact data.

So if you are using bidirectional synchronization you should not use this function.

5.3 Appointments and tasks

The following principles underlie synchronization and the synchronization of appointments and tasks.

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5.3.1 Invitations to appointments

When you create an appointment in CAS genesisWorld, the participants of the data record are usually selected via the **Select participants** window.

You can also invite participants to an appointment in this way. Participants who have been invited to an event in CAS genesisWorld can initially accept or decline. Participants can only change appointments once they have confirmed the appointment and have been granted the necessary rights to make changes.

On mobile devices this intermediate step cannot be displayed.

This appointment is thus transferred to the invitee's mobile device and can now be edited depending on the rights they have been granted, without them having to accept or decline.

Changes made to the appointment on the mobile device will be transferred to CAS genesisWorld during the next synchronization.

5.3.2 Notifications for recurring appointments

CAS genesisWorld can inform you of the imminent end of a recurring appointment. This type of notification is not possible on mobile devices.

5.3.3 Appointment and task reminders

If a user enters, changes or deletes a personal reminder for an appointment or a task on a mobile device, it will always be changed once synchronized with CAS genesisWorld.

The following rules set out the transfer requirements for reminders from CAS genesisWorld to mobile devices in the following cases:

- When a personal reminder is entered for a user, it is also transferred to the mobile device.
- If a personal reminder for a user has not been entered, but instead a general reminder for all participants has been entered, then this too will be transferred.

Example

For example, an appointment in CAS genesisWorld has a general and a personal reminder. You delete the reminder on your mobile device. After the next synchronization, the personal reminder has also been deleted in CAS genesisWorld. However, the next time you synchronize your mobile device the general reminder from CAS genesisWorld is transferred back to the mobile device.

5.3.4 Processing status of tasks

The processing status of a task on a mobile device can be set to either Completed or Open. In CAS genesisWorld it is possible to display processing status or task progress as a percentage.

If in CAS genesisWorld a **Due (end)** has not been entered for a task, then the mobile device uses the date from the **Start** field and inserts it into the **Due (end)** field. This is because the **Due date** fields must be filled out on mobile devices.

The following rules are used when transferring the editing status from CAS genesisWorld to a mobile device:

- When synchronizing from CAS genesisWorld to your mobile device, any tasks which have a processing status of less than 100% are displayed as **Not completed**.
If the percentage value is set at 100%, then the processing status on the mobile device is set to **Completed**.
- On the other hand, when synchronizing from a mobile device to CAS genesisWorld the percentage value for processing status will only be set to 100% if **Completed** has been selected on the mobile device.
In all other cases, the processing status for tasks displayed as a percentage value will not be changed in CAS genesisWorld.

5.3.5 Moving tasks

In CAS genesisWorld it might be that the start date for a task is entered after the due date. This occurs if for example, a task has not been completed and is automatically

deferred to the next day. On mobile devices, however, the due date always has to fall after the start date.

This is why the due date on mobile devices can sometimes deviate from the date in CAS genesisWorld.

The due date displayed on the mobile device is calculated by taking the difference between the start and due dates in CAS genesisWorld.

Example

For example, in CAS genesisWorld the **Start** of a task has been entered as January 3 and the **Due date (end)** as January 1. And on the mobile device the start was entered as January 3, and the due date as January 1. However, the original **Due date (end)** field set to January 1 is not changed when synchronizing back to CAS genesisWorld.

5.4 Principles of CAS genesisWorld

The following conventions apply to special CAS genesisWorld functions and also to the following data record types: **Addresses**, **Appointments**, **Tasks** and **Holidays**.

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5.4.1 Data record rights

When compared with CAS genesisWorld, some mobile devices have different rights categories. When synchronizing data between mobile devices and CAS genesisWorld the following assignments are used for these differing categories.

- **0 - Normal:** This is used when a user has been granted the **Normal** right to a new data record on a mobile device, in CAS genesisWorld the user is granted full external access rights to this data record.

With existing data records, user's external access rights remain the same as long as they are set to a higher rights level than **Read**.

Otherwise, external access has to be changed to full.

- **1 - Personal:** If **Personal** rights have been granted for a data record on a mobile device, then the user is granted the **Read** external access right in CAS genesisWorld for this data record.

- **2 - Private:** If **Private** rights have been granted for a data record on a mobile device, then the user is granted the **Confidential** external access right in CAS genesisWorld for this data record.
- **3 - Confidential:** If **Confidential** rights have been granted for a data record on a mobile device, then the user is granted the **Private** external access right in CAS genesisWorld for this data record.

5.4.2 Data record participants

The participants are transferred bidirectionally between CAS genesisWorld and the mobile device.

Note

Participants and resources are only synchronized if they themselves have an e-mail address in CAS genesisWorld.

Participants cannot remove themselves from a data record.

5.4.3 Input help

In CAS genesisWorld only preset values can be selected when using some specific input assistance options. Thus values which deviate from these default values cannot be entered into fields using these input assistance options.

The following principles are applied when using Mobile sync for input assistance fields.

- Mobile sync communicates with the Web Service and in the process transfers values which are not available or possible in CAS genesisWorld as input values for fields which use input assistance options.

The approach ensures that no data is lost.

- Hierarchical input assistant options can be displayed and used on mobile devices.

This data is displayed as text on mobile devices, this is because the displays on mobile devices cannot be controlled by CAS genesisWorld.

- Input assistant options are available in several languages. On mobile devices, input assistant options are displayed in the language that is being used for CAS genesisWorld.

This can only work if your administrator has loaded the correct language version for the input assistance options into CAS genesisWorld.

Please contact your administrator for more information.

5.4.4 Language

Only one language is used, when synchronizing between CAS genesisWorld and a mobile device.

Note

After the first synchronization between CAS genesisWorld and the mobile device the only way you can change the language is by setting up new access on the mobile device and by performing a new synchronization.

Procedure

1. Before you carry out your first synchronization, log on to the CAS genesisWorld Desktop Client in the language you wish to use.
2. You can then perform the first synchronization.

5.4.5 Data record notes

The **Notes** field for data records synchronized from CAS genesisWorld is displayed on mobile devices. If the **Notes** field for a synchronized data record is empty, users can make entries via their mobile device. In addition, entries can be made for data records that have been created on mobile devices. These changes are included in synchronizations between mobile devices and CAS genesisWorld.

Note

If the **Notes** field already contains entries in CAS genesisWorld, they can be changed on the mobile device, however, these changes are not transferred to CAS genesisWorld when synchronizing.

5.5 Deleting data records from the mobile device

If an address is deleted on the mobile device and you are using bidirectional synchronization, then this address will also be permanently deleted from the synchronization set, however, the address itself will remain in CAS genesisWorld.

If you delete an appointment or a task, then the appointment or task is also deleted on the mobile device as well as in CAS genesisWorld. This behavior deviates from the desktop client, but is the same as for the web- and mobile clients.

5.6 Logical checking in CAS genesisWorld

You can perform various logical tests in the desktop client using the Management Console and Form & Database Designer module or CAS partner customizations.

This includes, for example, mandatory fields, mandatory primary links, special fields with specific checks and much, much more.

Such tests are not available on mobile devices, and are not taken into account on mobile devices when creating or editing data records.

6 Specifics of certain functions

When working with Mobile sync there are some specific functions in CAS genesisWorld which have their own particular features.

You will find all the important information you need to know regarding these changes of behavior and functional restrictions here.

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6.1 User sensitive data records

User sensitivity in CAS genesisWorld refers to the fact that you can grant rights to data records and enter participants.

Tip

User sensitivity is set by your administrator in the **Database** area of the Management Console.

Please contact your administrator for more information.

Changing user sensitivity

If a data record type is user-sensitive, participants can be entered for corresponding data records. Changing a user sensitive data record type to a non-user sensitive data record type, prevents the participant settings in CAS genesisWorld from being used and any existing settings will no longer be valid.

You will still be able to define rights for specific data records on mobile devices. If, however, such a data record is then synchronized with CAS genesisWorld, then no participants are entered in CAS genesisWorld. After renewed synchronization to a mobile device, data records will not contain participants or rights.

Adding participants

If a data record type is user sensitive you can add the CAS genesisWorld users as participants to the respective data records in CAS genesisWorld. You can also add participants to data records on your mobile device, but not remove them.

Please note the following characteristics:

- On your mobile device, users are organized according to their e-mail addresses. As administrator, you should ensure that all CAS genesisWorld users' e-mail addresses have been saved in the Management Console.
- If there are multiple matches for an e-mail address, then the search for the user continues on the mobile device using their name as a search parameter instead. Otherwise, the user whose e-mail address appears at the top of the list is used.
- If you remove a participant from a data record on your mobile device, the same participant will not be removed from the data record in CAS genesisWorld and the changes you made are overwritten at the next synchronization.
Basically, you cannot remove participants from data records on your mobile device.
- You can assign multiple e-mail addresses to a contact on your mobile device.
If you now wish to add such a contact to a data record as a participant, then you will have to select the participant by means of their e-mail address, which is saved in CAS genesisWorld for the respective user.

6.2 Special invitation management features

With invitation management activated, unknown participants will be converted into external participants in CAS genesisWorld.

If invitation management is not activated, then unknown participants in CAS genesisWorld will be removed from the data record. This change will be transferred to the mobile device at the next synchronization.

Tip

Your administrator activates invitation management in the Management Console.

Please contact your administrator for more information.

You can find more information on invitation management here: [Online help for the desktop client: Einladungen zu Terminen](#)

Example

For example, on your mobile device you add a participant to an appointment and then synchronize the appointment to CAS genesisWorld. This participant is not recognized as a user in CAS genesisWorld and is subsequently invited to the appointment via e-mail.

6.3 Synchronizing data via multiple Exchange accounts

Some mobile devices allow you to set-up multiple Exchange accounts. This enables you to do a number of things, for example, synchronize addresses with CAS genesisWorld and synchronize e-mails with a Microsoft Exchange Server.

Note

You should only ever use one Exchange account to synchronize data record types such as tasks, appointments and addresses. Duplicates can occur when synchronizing, for example, addresses with CAS genesisWorld and with a Microsoft Exchange Server.

Make sure you do not synchronize the same e-mail address with an Exchange account and CAS genesisWorld since this may also cause duplicates.

6.4 Multitenancy

Please note the following steps are necessary when working with multitenancy and several databases.

- As a user, you have to logon through your mobile device using your CAS genesisWorld username and password.
- In the **Domain** field, enter the name of the database you want to use for the data synchronization.
Alternatively, enter the name of the database before the username, for example, **Database/Username**.
- In CAS genesisWorld, one database is always set as the default database.
If you do not specify an alternative database then you will be automatically logged on to the default database.

6.5 Service passwords

Using service passwords, you can use the data synchronization via Mobile sync if you have activated the two-factor authentication.

You define service passwords in the **Settings** app in CAS genesisWorld Web.

Procedure

1. Open the **Settings** app and click **Two-factor authentication**.
✓ The **CAS genesisWorld Authentication Server** page opens.
2.  Click the button in the **Active service passwords** block to add a new password.
3. Select the **Service**, for example, Mobile sync.
4. Enter a **Name** and then click Save.
✓ The service password is generated and displayed. For security reasons, the service password is only displayed once.

5. Enter the service password when setting up Mobile sync on your mobile device.

 Using the button, you can copy the service password to the clipboard.

7 Prerequisites, licenses and rights

The following settings have to be completed by your administrator. Bidirectional synchronization in Mobile sync requires a license. Users also require the necessary rights from their administrator to be able to access the functions of Mobile sync.

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7.1 Requirements

To use Mobile sync, the **Web Service** service has to be running.

Tip

- Additionally, to use Mobile sync you have to configure a reverse proxy. Administrators can find more information on how to set up the Web service and Mobile sync services here: [Online Help Server Manager: Services tab](#)
- On some mobile devices, especially those running older Android versions, the change to a newer version of the synchronization protocol will not be acknowledged. If your synchronization does not start, then delete the respective account on your mobile device and set it up again using the same access data.

7.2 Licenses

The Standard Edition of CAS genesisWorld includes a license for unidirectional synchronization free-of-charge.

To completely synchronize your data, that is, to bidirectionally synchronize data between your mobile device and CAS genesisWorld you require a Mobile sync license.

The corresponding license is entered by the administrator in the **Licenses area** of the Management Console and can be activated for specific users.

7.3 Rights

All users of Mobile sync require the necessary license for both unidirectional and bidirectional synchronizations between mobile devices and CAS genesisWorld.

Your administrator will perform all the necessary settings in the Management Console.

Even if a license has been unlocked for a user, you can still manage the synchronization as an administrator using the respective rights. Using this method, you can deny a user synchronization rights for security purposes and only allow unidirectional or bidirectional synchronization.

Unidirectional synchronization

Users only require the necessary rights for unidirectional synchronization.

Procedure

1. Open the **User management** area of the Management Console.
2. Now, open the **Users** tab.
3. Select one or more users.
4. Click the **Properties** button on the toolbar.
5. Select the **Other rights** tab.
6. Activate the **Mobile sync: Unidirectional synchronization option**.

Bidirectional synchronization

For bidirectional synchronization you have to ensure that the **Mobile sync** license has been registered for the user or users. Additionally, users require the necessary rights to perform synchronizations.

Procedure

1. Open the **User management** area of the Management Console.
2. Now, open the **Users** tab.
3. Select one or more users.
4. Click the **Properties** button on the toolbar.
5. Select the **Other rights** tab.
6. Activate the **Mobile sync: Bidirectional synchronization** option.

Overwriting user settings

In the settings for Mobile Sync, users can select views from their private navigator. This is then displayed for the administrator under user properties in the Management Console.

As long as the administrator sees the **<user's private view>** entry in the **Navigator** field of the user properties on the **Mobile sync** tab, then the user's setting is not overwritten when the properties are saved.

If the administrator changes and saves this entry in the Management Console, then the user's settings are overwritten.

8 Assignment of the fields

The following table shows you the CAS genesisWorld fields and their allocations to fields on your mobile device.

Fields on the mobile device	Name in CAS genesisWorld	Name in the database of CAS genesisWorld
AccountName	-	-
Alias	-	-
Anniversary	-	-
AssistantName	-	-
AssistantPhoneNumber	Phone (secretary)	PhoneFieldStr9
Base64 encoded JPG picture	Image	Image
Birthday	Birthday	Birthday
Body	Notes	Notes2
Business2PhoneNumber	Phone (business 2)	PhoneFieldStr5
BusinessAddressCity	Location	Town1
BusinessAddressCountry	Country	Country1
BusinessAddressPostalCode	Postal code	Zip1
BusinessAddressState	State/Region	gwState1
BusinessAddressStreet	Street	Street1
BusinessFaxNumber	Fax (business)	FaxFieldStr1 (non-organisations)
FaxFieldStr5 (organisations)	-	-
BusinessPhoneNumber	Phone (business)	PhoneFieldStr4
CarPhoneNumber	Phone (mobile 2)	PhoneFieldStr3

Fields on the mobile device	Name in CAS genesisWorld	Name in the database of CAS genesisWorld
Categories	Category	Category
Children\Child	-	-
CompanyMainPhone	Phone (central)	PhoneFieldStr10
CompanyName	Company	CompName
CustomerId	Number	AdrNumber
Department	Division	Department
Email1Address, Email2Address,Email3Address	E-mail (central), E-mail (business), E-mail (private)	MailFieldStr5, MailFieldStr1, MailFieldStr3
FileAs	First name + last name or company (if completed)	First name + last name or compName
FirstName	First name	FirstName
Home2PhoneNumber	Phone (private 2)	PhoneFieldStr8
HomeAddressCity	Town (private)	Town3
HomeAddressCountry	Country (private)	Country3
HomeAddressPostalCode	Postal code (private)	Postal code 3
HomeAddressState	State/Region(private)	gwState3
HomeAddressStreet	Street (private)	Street3
HomeFaxNumber	Fax (private)	FaxFieldStr4
HomePhoneNumber	Phone (private)	PhoneFieldStr7
IMAddress	Instant Messaging	ImFieldStr1
IMAddress2	ICQ-Number	ImFieldStr2
IMAddress3	Skype user name	ImFieldStr4

Fields on the mobile device	Name in CAS genesisWorld	Name in the database of CAS genesisWorld
JobTitle	Function	CASFunction
LastName	Name	Name
MiddleName	-	-
MobilePhoneNumber	Phone (mobile)	PhoneFieldStr2
OfficeLocation	-	-
OtherAddressCity	Town (delivery)	Town2
OtherAddressCountry	Country (delivery)	Country2
OtherAddressPostalCode	Postal code (delivery)	Postal code 2
OtherAddressState	State/Region(delivery)	gwState2
OtherAddressState	Street (delivery)	Street2
PagerNumber	Phone (pager)	PhoneFieldStr1
RadioPhoneNumber	-	-
Spouse	-	-
Suffix	Title	TITLE
Title	Title	ADDRESSTERM
Webpage	Homepage	WWWFieldStr5 (non-organisations)
WWWFieldStr1 (organisations)	-	
WeightedRank	-	-
YomiFirstName	-	-
YomiLastName	-	-

Assignment of the fields | Mobile sync

Fields on the mobile device	Name in CAS genesisWorld	Name in the database of CAS genesisWorld
YomiCompanyName	-	-