OpenSync

Connecting solutions easily

CAS SOFTWARE

CAS Software AG

CAS-Weg 1 – 5

76131 Karlsruhe, Germany

0721 9638 - 0

info@cas.de

www.cas-crm.com

Contents

1   Introduction

With the **OpenSync** module, you can create universal connections to third-party systems for CAS genesisWorld, for example, to an ERP system. Thereby, you can integrate synchronization solutions in CAS genesisWorld according to your company's individual requirements.

Using **OpenSync**, you can create synchronization tasks for the desired third-party systems in the CAS genesisWorld Management Console. Each new synchronization task can be configured individually and thereby customized to your requirements.

Which data is exchanged between CAS genesisWorld and other systems can be defined using a variable configuration.

For each synchronization task, you can define the synchronization direction, conflict solution strategies, a synchronization interval, and specific filter criteria. Synchronizations via OpenSync can be unidirectional or bidirectional.

A protocol for the individual synchronization tasks clearly displays the status and success of the last executions.

Possible systems to be connected

You can individually configure which systems can be connected via OpenSync.

> If you want to set up a database or third-party system integration, you need a customized **ConnectionBridge** for the respective system. CAS Software AG or your CAS Partner provides you with the required **ConnectionBridge**. For further information, contact your CAS Partner or CAS Software AG.

Your benefits

- In cooperation with your CAS Partner, you can configure OpenSync according to the individual requirements of your company.

- OpenSync can be used for integrating various systems.

- OpenSync enables a high performance by an incremental synchronization of both systems.

- The synchronization of CAS genesisWorld and integrated systems can be unidirectional or bidirectional.

- With an intuitive interface, you can quickly and easily create and manage synchronization tasks.

2   Requirements for OpenSync

Before you can use the OpenSync module, you have to ensure that the following requirements have been met.

Licenses

The **OpenSync** module requires a separate license. If you do not have the corresponding license, you cannot access the **OpenSync** area in the Management Console.

> The **OpenSync** area is also displayed if you have a license for a module that uses OpenSync. With a license for such a module, you can only set up a connection to the corresponding third-party application in the **OpenSync** area.

✓ Enter the corresponding license in the Management Console.

You can find further information in the online help of the Management Console on the Licenses area page.

Services

The **OpenSync** service must be started in the **Server Manager** on the desired Application Server.

> If you use more than one Application Server, the **OpenSync** service must only be started on one of the Application Servers.

You will find further information in the online help for the Server Manager on the Services tab page.

When starting the service, an entry is added to the database and the **OpenSync** area can be accessed in the Management Console that uses the respective database.

Individually configured ConnectionBridge

To integrate a database or a third-party system in CAS genesisWorld via OpenSync, you need a customized **ConnectionBridge** for the respective system. CAS Software AG or your CAS Partner provides you with the required **ConnectionBridge**. For further information, contact your CAS Partner or CAS Software AG.

3   Creating synchronization tasks

When you open the **OpenSync** area in the Management Console, you see an overview of all existing synchronization tasks.

You create new synchronization tasks using the synchronization wizard.

You can create several synchronization tasks for the same system. Thereby, you can, for example, create one synchronization task for addresses and another synchronization task for opportunities.

You can save a new synchronization task in the synchronization wizard at any time. Even if you have not yet completed the setup of a synchronization task, your entries remain and you can continue configuring the synchronization task at a later time.

＋ Click the button to create a new synchronization task.

With this button, you return to the overview of all synchronization tasks.

3.1 System selection

Depending on your configuration, you define the systems to be connected in the **System selection** area.

The **System**, **Version**, and **ConnectionBridge** fields in the **System to be connected** and **CAS genesisWorld** areas are automatically filled with the data of the corresponding configuration.

For further information, contact your CAS Partner or CAS Software AG.

✓ Define a **Subject** for the synchronization task.

3.2 Connection

In the **Connection** area, you set up the connection between both systems.

In the left block, you enter the necessary data for the system to be connected. Which information you need to enter depends on the configuration of the **ConnectionBridge**.

For example, you must enter your Evalanche access data as well as the desired tenant ID and pool ID if you want to establish a connection to Evalanche.

For further information, contact your CAS Partner or CAS Software AG.

✓ Fill in the desired fields.

CAS genesisWorld

In the **CAS genesisWorld** block, you see with which database the system to be connected is synchronized. The database to which you have logged on with the Management Console is automatically entered in the **Database** field.

If the name of the database has been changed with the Database Wizard, existing synchronization tasks can no longer be executed. In this case, you must open the desired synchronization task for editing and select the changed name of the database in the **Database** drop-down list, see "Managing synchronization tasks" on page 9.

3.3   Assignments

The **Assignments** area and all corresponding areas are only displayed if you can define data record assignments for the synchronization task. For some third-party systems, assignments are fixed and the **Assignments** area is not displayed when creating the synchronization task.

In the **Assignments** area, you see all possible assignment pairs for data records from both systems to be connected under **Available assignments**.

Which assignment pairs are available depends on your OpenSync configuration. For further information, contact your CAS Partner or CAS Software AG.

☑ Select the desired assignment pairs.

For each selected pair, the Assignments area of the synchronization wizard is extended by one sub area.

Configuring assignment pairs

✓ Select whether the synchronization should be executed unidirectional or bidirectional.

If you select a unidirectional synchronization, you can additionally define the synchronization direction.

With a **Filter**, you define that only specific data records from the system to be connected or CAS genesisWorld are synchronized.

✓ Select the desired **Field assignment**.

You can define different field assignments for each configured assignment pair. For further information, contact your CAS Partner or CAS Software AG.

✓ Select the desired **Strategy**.

With the selected strategy, you define which system wins in case of conflict. If, for example, the Name field is changed in both systems and CAS genesisWorld has been defined as the winning system, the respective value in CAS genesisWorld is adopted in the connected system.

✓ Repeat the process for all desired assignment pairs.

Filter types and filter parameters

If you only want to synchronize specific data records of a data record type, you can define a filter. Different filter types are available for OpenSync.

For each filter type, you can define specific filter parameter values. Thereby, you can, for example, define a postal code filter parameter with the specific value "76137".

Subsequently, only data records that contain the defined postal code are synchronized.

Filter settings

Filter
SQL WHERE condition

Condition to limit the synchronized records
zip1 = '76137'

OK   Cancel

You can define one filter for CAS genesisWorld and the system to be connected respectively.

Two filter types are available for OpenSync: SQL Where clauses and key-value pairs. Which filter types and filter parameter can be defined depends on the individual **ConnectionBridge** configuration. For further information, contact your CAS Partner or CAS Software AG.

Defining filters may require SQL knowledge.

3.4   Execution

In the **Execution** area, you define the synchronization interval for the synchronization task.

✓ In the **Execution plan** drop-down list, select whether the synchronization is **Continuous**, happens at an **Interval**, or at a specific time as **Daily execution**.

✓ Select the **Time unit** that is to be used for the synchronization.

You can choose between **Hours** and **Minutes**.

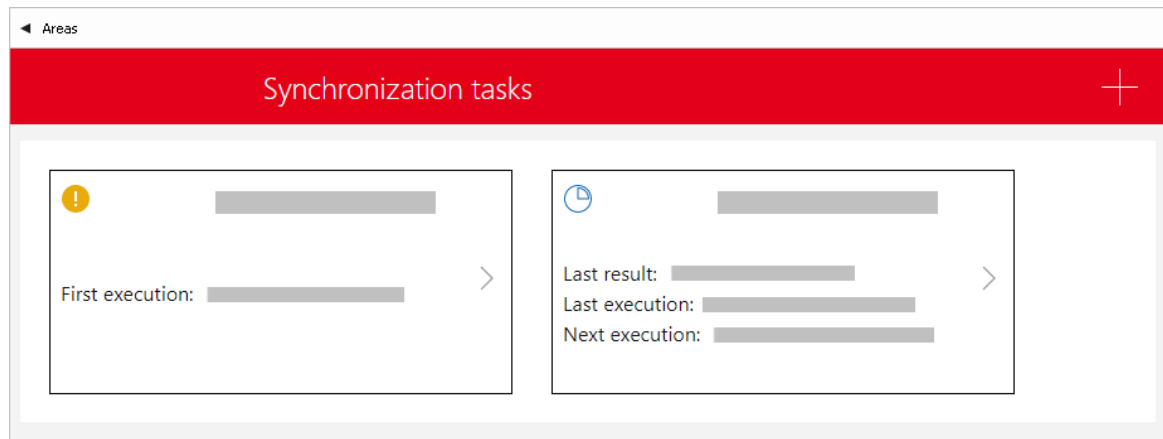✓ Select the desired value in the **Interval** drop-down list.

Which values can be selected in the drop-down list depends on the time unit you selected.

4   Managing synchronization tasks

In the overview of all existing synchronization tasks, you manage your synchronization tasks.

This icon marks synchronisation tasks which have never been executed in the overview.

4.1.1   Open detailed overview

If you click a synchronization task in the synchronization task overview, you open the detailed overview of the selected synchronization task.

Clicking **Back** returns you to the last page you opened.

With this button, you return to the overview of all synchronization tasks.

Execution plan active

If the synchronization task is active, you see the time of the next planned execution in the upper area of the detailed overview.

✓ If you deactivate the **Execution plan active** option, the synchronization task is no longer active and is no longer synchronized at the set interval.

Editing synchronization tasks

Click the button to open the synchronization wizard in the System selection area and edit the desired synchronization task.

Deleting synchronization tasks

Click the button to delete the desired synchronization task.

If you delete a synchronization task, all metadata referring to the corresponding task are also deleted.

As a result, if you create a new synchronization task, the task is identified as new and all data in the synchronization set are synchronized. There is no duplicate check during this synchronization and duplicates may be created.

Manually starting synchronization tasks

You can also start each synchronization task manually. It does not matter whether the synchronization task is active at the time.
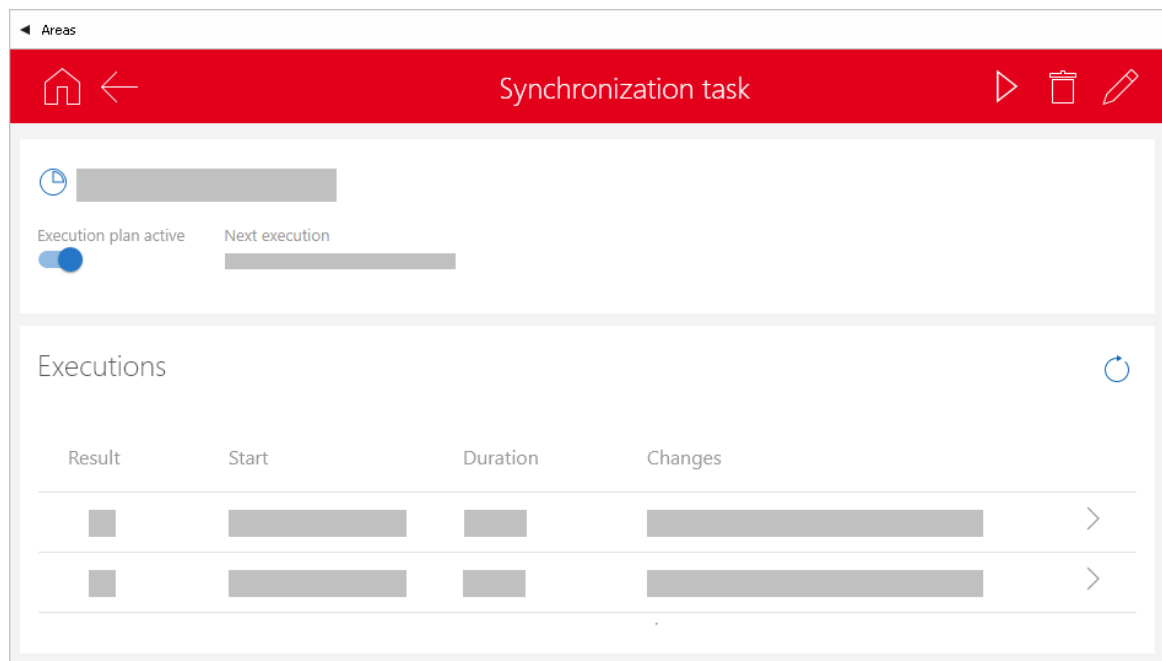
If the synchronization task is active, the manual synchronization is automatically queued in the list of executions.

▷ Click the button to manually start the synchronization task.

4.1.2   Executions

Under **Executions**, you find a protocol of the last synchronization task executions. The list is updated automatically, but can be updated manually as well.

⟳ Click the button to update the list of executions.

✓ Click an execution to open the corresponding protocol containing detailed information on the execution.

Displayed information

In the list, you see

- the result of the last execution,

- the starting time of the next synchronization,

- the history of all completed synchronizations, and

- the status of the running synchronization.

Synchronization results

In the protocol of synchronization task executions, you can see at a glance whether the different executions have been successful.

Executions with a **Successful synchronization** are marked with this icon.

Executions are marked with this icon in case of the **Synchronization running**.

Executions are marked with this icon in case of a **Failed synchronization**.