BMS Calendar Sync

Guide

April 30, 2018

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Contents

Introduction.....1
Calendar Sync Creation.....1
Calendar Sync Options.....5
Calendar Sync Mode of Action.....5
Enabling the Calendar Sync with Exchange Hosted Servers.....7

Introduction

The guide explains the “Calendar Sync" feature in the BMS Home module. This feature will allow a BMS user to automatically and securely sync their “My Calendar” items with a linked Calendar on Office 365, Exchange, Outlook.com, Google, or iCloud. Calendar items added to “My Calendar” will be added to the linked calendar, and items added to the user’s linked calendar will be added to “My Calendar.” The Calendar Sync uses the Cronofy Calendar API.

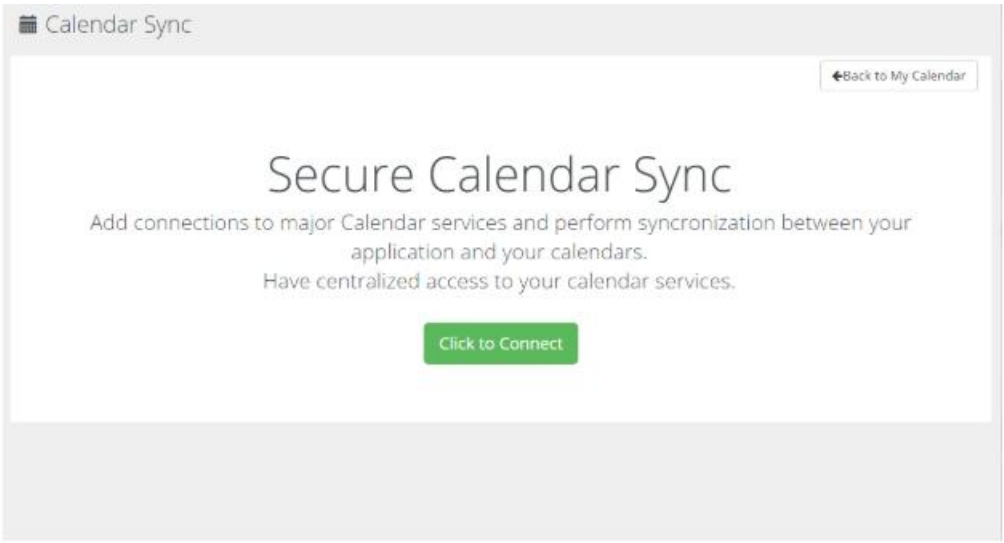
The document explains how to setup an integration to your online linked email calendar.

The guide covers the following topics related to Calendar Sync:

- Calendar Sync Creation
- Calendar Sync Options
- Calendar Sync Events (Two way)

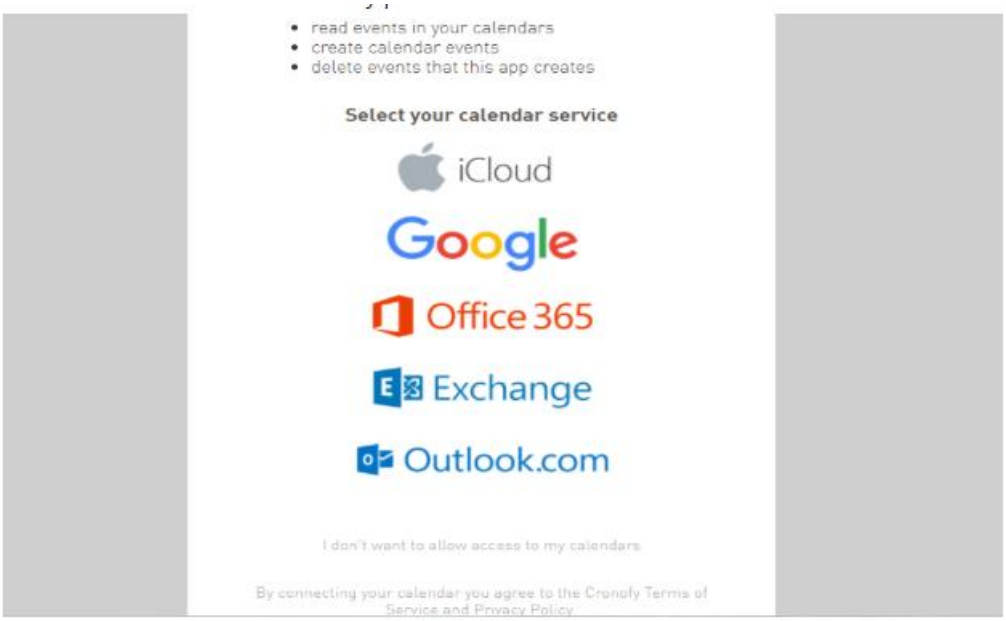
Calendar Sync Creation

1. Login to BMS.
2. Navigate to Home > My Calendar.
3. Click on the “Calendar Sync” button on the top right of the page.
   You will be directed to the Calendar Sync page.



Calendar Sync Page

4. To create an integration, click on “Click to Connect”.
   You will be directed to the Cronofy portal.

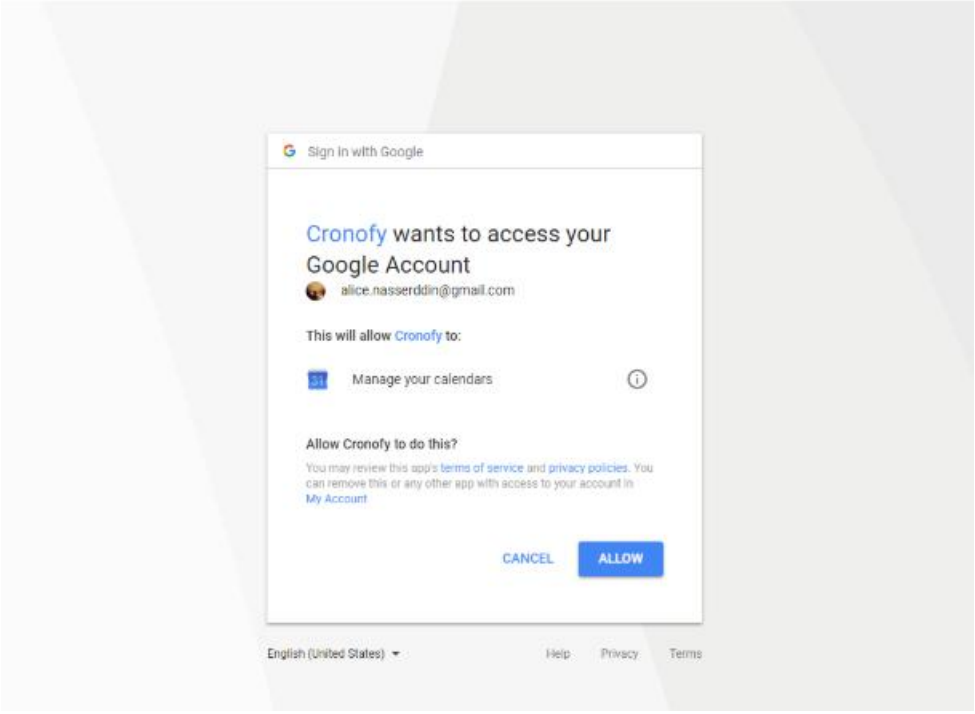


Cronofy Portal

5. Select the calendar service you wish to connect to. There are five types you can choose from: iCloud, Google, Office 365, Exchange (on-premise), and Outlook.com.

6. Once you select a type, you will be directed to enter your email credentials.

7. Once verified, you will need to allow Cronofy to access your selected email account and therefore perform the sync later.



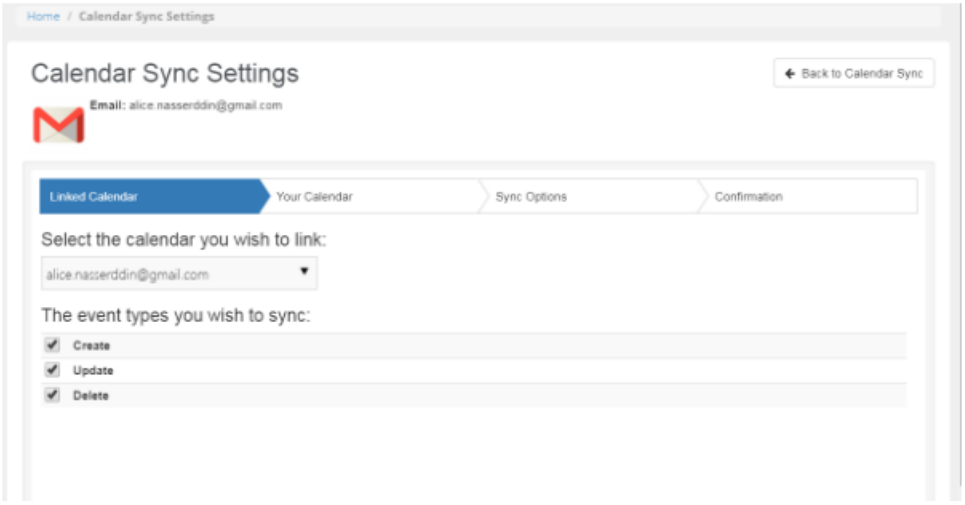
Cronofy Permission Page

8. Next, you will be directed to the Calendar Sync settings wizard.

The wizard consists of four tabs with various sync settings.

A. Linked calendar Tab:

a. The dropdown will retrieve all the available calendars from your email. Select the calendar that you wish to send/receive items from.
b. Next, select the event types you wish to sync (Create, Update, Delete). For example, if you check “Create” and leave “Update” and “Delete” unchecked, only created events are synced to “My Calendar” from the linked calendar.



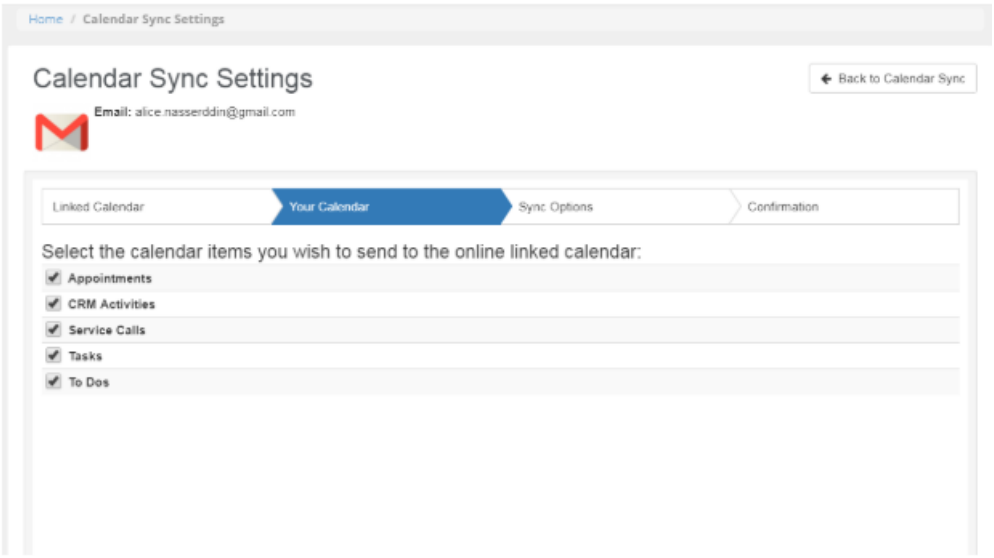
Linked Calendar Settings

B. Your Calendar Tab:

In this tab, you are specifying the calendar items that you wish to send to your linked calendar. These calendar items are: Appointments, CRM Activities, Service Calls, Tasks, and To dos.

Once an item is checked, the item activities will be reflected to your linked character.

a. For instance, assume “Service Call” is checked. If the user adds a service call to a ticket and assigns the service call resources to the linked email user, the service call will be created as an appointment on the linked calendar. Furthermore, updating or deleting this item will be reflected to the linked calendar.



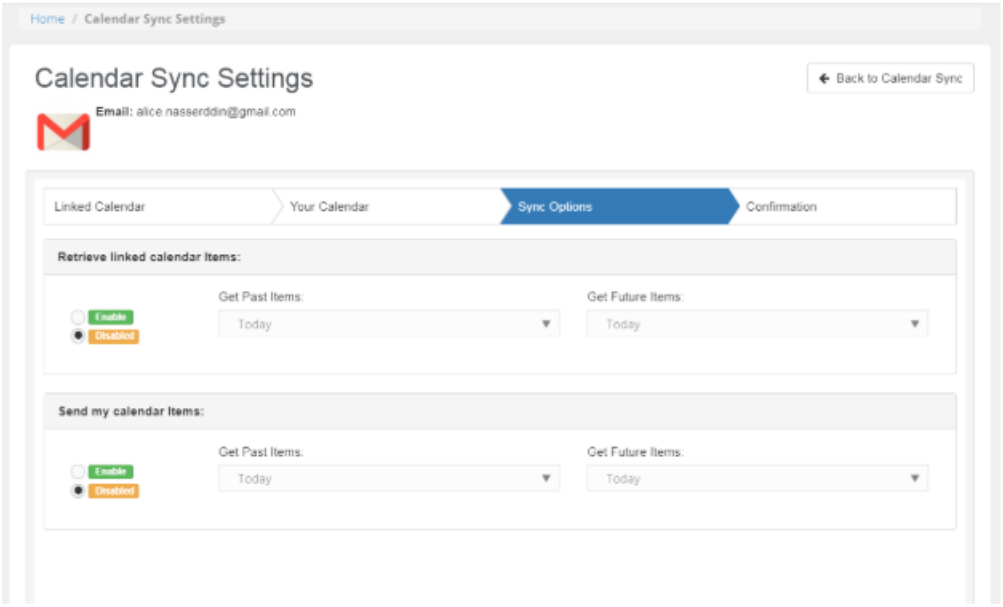
Your Calendar Settings

C. Sync Options:

By Default, the two-way sync options are disabled.

a. Retrieve linked calendar items: At some point, a user might want to retrieve specific events within a specific date range from the linked calendar and have them available on “BMS My calendar” as well. For that, the “Retrieve linked Calendar items” radio button should be enabled. By doing so, the “Get Past Items” and “Get Future Items” dropdowns will be enabled and the user can select the date range.

b. Send my calendar Items: Likewise, “My Calendar” items can be synced to the linked calendar by enabling the “Send my Calendar Items” radio button.



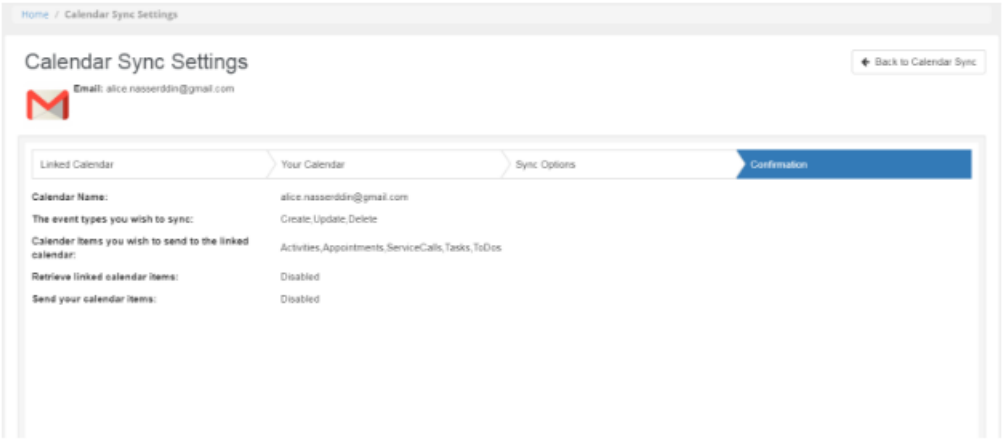
Sync Options

D. Confirmation:

The final tab contains a confirmation summary of the fields and options selected in the previous tabs.

Once “Finish” is clicked,at the bottom right, the options are saved and the sync runs in case one of the sync options is enabled.

You will be directed to the “Calendar Sync” listing page. You can view the newly created integration.



Confirmation Summary

Calendar Sync Options

1. Active : The user can activate/ deactivate the integration according to preference.If deactivated, real time sync from/or to BMS will not function. Also, manual sync from the settings will not start.
2. Settings: Settings is the integration edit page.The user can perform any changes to the options or perform a sync.
3. Delete: This will delete the integration permanently and therefore no more real-time syncing happens.
4. Logs: All syncing actions performed manually from/to BMS will be listed in the logs.
5. Last Sync Date: This date is updated in case any item is synced to BMS or to the linked calendar.
6. Status: This field is related to the connection status between Cronofy and BMS. If connected, the sync process occurs normally.

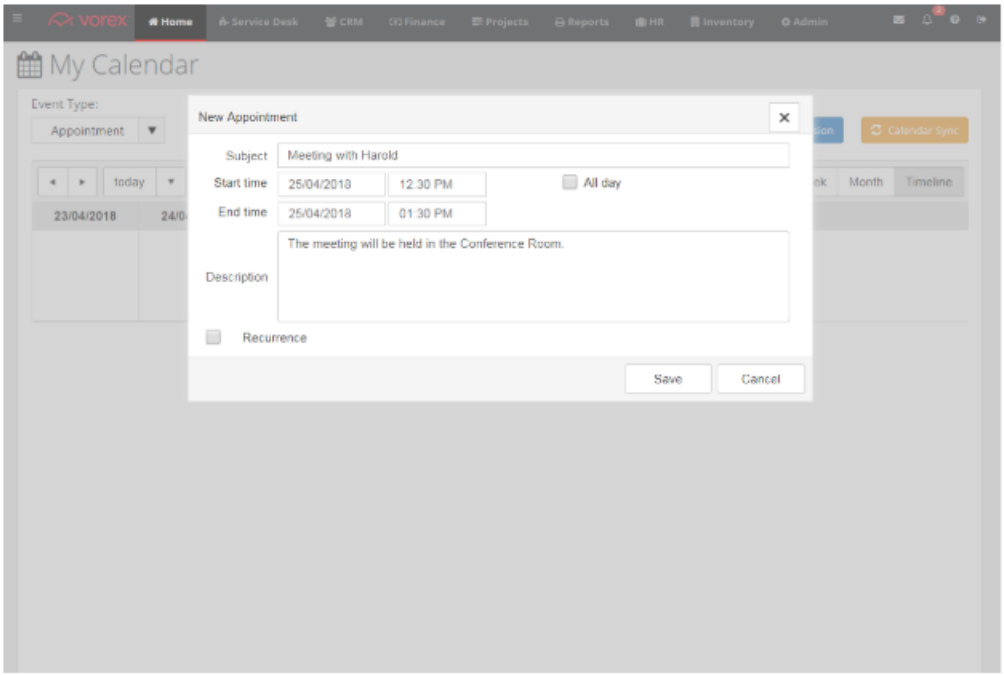
Note: If the status is “Not Connected”, verify that Cronofy has the permission to connect to BMS.

Calendar Sync

Calendar Sync Mode of Action

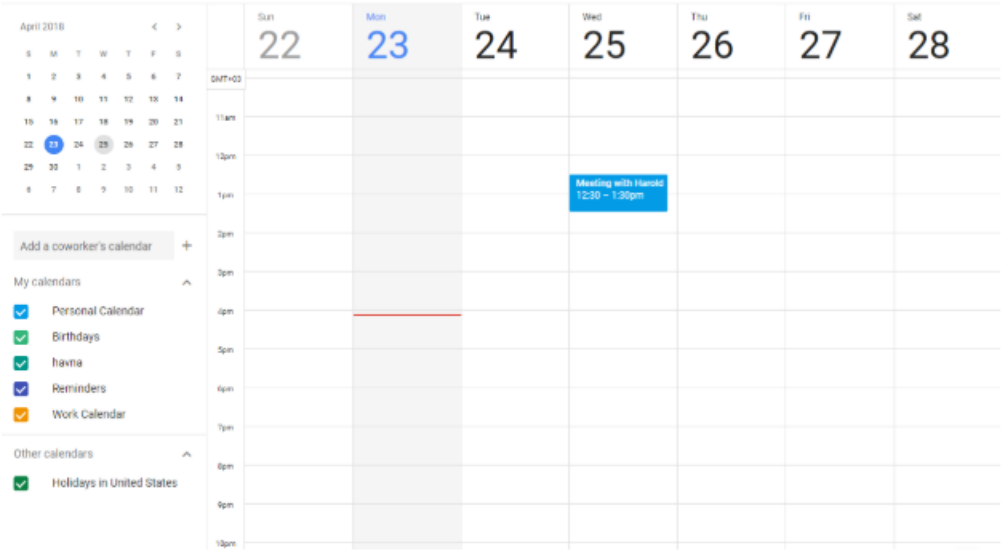
1. Make sure you have an active integration with the “Appointments” event checked.
2. Go to BMS>Home> My Calendar.
3. Select a specific day.

4. Right click and add an appointment with a specific subject, datetime, and description.

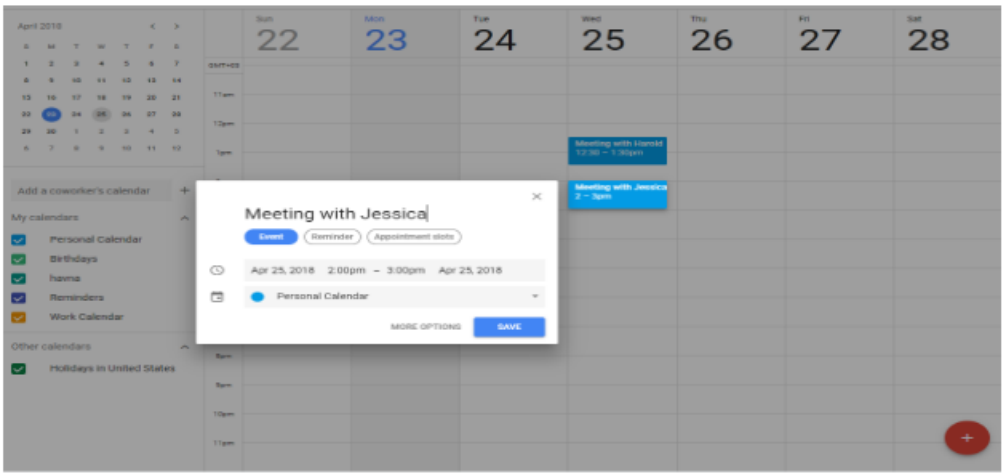


Add an appointment

5. Sign in to your linked email and check the appointment was added.

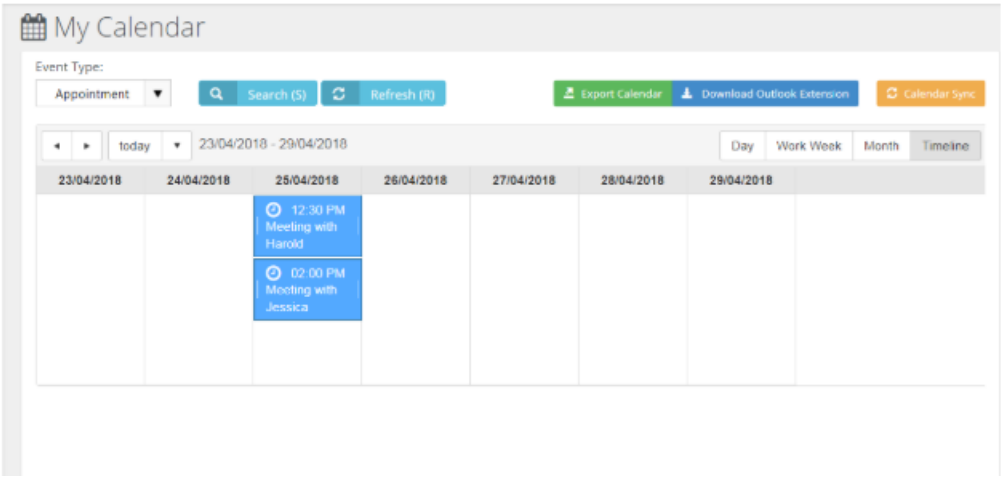


6. Now,Go to your integration setting and make sure “Create” is checked from the “Linked Calendar”. Add another appointment to your linked Calendar.



Linked Calendar

7. Go to “My Calendar” in BMS.Note that the appointment added in the linked calendar now appears in “My Calendar”.



My Calendar

Enabling the Calendar Sync with Exchange Hosted Servers

In order for the Calendar Sync to work with Hosted Exchange Servers, the Exchange Server Administrator must enable the Exchange Web Services (EWS). This can be done to all users or specific users. For more instructions on how to do this you can follow the Microsoft Online Documentation on the following links:

1. **https://msdn.microsoft.com/en-us/library/office/jj900168(v=exchg.150).aspx**
   (https://msdn.microsoft.com/en-us/library/ms735120.aspx)
2. **https://msdn.microsoft.com/en-us/library/office/dd877012(v=exchg.150).aspx**
   (https://msdn.microsoft.com/en-us/library/ms735120.aspx)