

## ManagePro and Synchronizing with Microsoft Outlook (2003 & XP)

Synchronization with Outlook version 2003 and is provided directly between a logged in user's records (to-dos, events and goals to which they are assigned) and their Outlook folder. There are a number of business rules that govern how the synchronization works, which are reviewed below. In a Microsoft Exchange 2003 environment, ManagePro will synchronize Goals, To-do's, Events and Contacts with Outlook's default delivery folders. In most cases the default delivery folders will either be your Exchange Mailbox or your Personal Folders. If you are unclear about your default delivery folders, please check with your Exchange Server administrator. We suggest that users work with ManagePro as the hub for synchronization to Outlook. If they wish to synchronize to their Palm device, we suggest synchronizing first from ManagePro to Outlook, and then from Outlook to their Palm Pilot or compatible device.

### **Synchronization Steps**

Synchronization with Microsoft Outlook is only supported for Outlook 2002 and above, and uses specific fields as outlined in a grid at the end of this section. The specific steps for synchronizing are very easy as outlined by the steps below:

1. First make sure that Outlook is installed on your computer.
2. Before you run the synchronization feature the first time, you will need to configure which options you intend to use. Go to ManagePro, click on File/ Utilities/Outlook Sync Config... and make your selections.
3. Check the boxes indicating the data you want to be included in your synchronization process, and when both programs are showing a change to a data type since the last synchronization, which version of the data type you want to keep (e.g. which programs wins).
4. Having finished the configuration, you can now synchronize with Outlook at any time while in the ManagePro database by first closing all windows in ManagePro, then clicking on File/Utilities/Outlook Sync option. Outlook need not be running to complete a synchronization.

### **ManagePro Synchronization Business Rules**

1. Synchronization between ManagePro and Outlook is only supported for one database per user. Attempts to synchronize multiple databases to a user's Outlook will result in erratic results and multiple "HRCheck" errors. We suggest you complete an integrity check on your ManagePro database prior to syncing to avoid incurring unforeseen data integrity problems, and if you have synced your ManagePro records to in other Outlook file, that you first run the Clear Outlook Sync ID#s in the Outlook configuration folder. To activate that button you must first enter "Fix Mode" by clicking Alt F in the Help/About menu. Be sure to turn Fix mode off, by clicking Alt F again in the Help/About menu after you have finished.
2. Syncing is based upon the date stamp of comparable records across tools. When syncing, ManagePro checks each record duplicated in Outlook and determines which program has been edited since the last sync. If both records have been edited (ex. in both ManagePro and Outlook), it uses the "Sync Config" setting to determine which program (ex. ManagePro) wins the tie and has its record duplicated across both programs. Users will need to be careful when reviewing and not editing records that they use the Cancel button, not the Ok button, to avoid date stamping the record when no change has really occurred and incurring a loss of data on their other platform at the time of the next sync!
3. Syncing of the people side of ManagePro is accessible only to database owners, or users of full access databases. Selective access users would not have access to the People details in ManagePro to use as a basis for syncing. Essentially ManagePro checks the database configuration and the relative access rights of the user logging in. If the user is logging in as a non-database owner of a selective access database, the option to sync the address book is grayed out.
4. ManagePro does not transfer the "name" field as part of a "contact" sync process as it usually is some form of an abbreviated form of the person's name that Outlook would not recognize. ManagePro does sync additional first and last name fields which Outlook does recognize.
5. The sync process involves preset field mapping. This means that certain fields the user may have previously used will no longer be available if the user takes advantage of the sync process. The field mapping is presented in grid form below for each record type. Syncing does offer each user the option of syncing any combination of to-dos, events and address book if applicable.
6. Synchronizing between ManagePro and Outlook is handled using record ID#s for both to-dos and events/appointments. The Common User Long Text 1 field in ManagePro is reserved for managing these ID#s.
7. The Long Description field in ManagePro may contain more data than the note field in Outlook can store, in which case it will be truncated or limited to the number of characters determined by Outlook.
8. ManagePro can store many more done or completed to-dos and events than Outlook can comfortably manage. Consequently on the first sync with either device ManagePro both does not send over any "Done" items. Thereafter, as existing events and to-dos are completed they are appropriately updated in the sync process.
9. ManagePro syncs those to-dos and events having the name of the person logged in at the time of the sync in the "Who" field. That means that if you were to log in as someone other than yourself, you could send over all of their to-dos to your to-do list in Outlook! E.g. you don't want to make this mistake.
10. Events with due dates older than today's date will not be synchronized.
11. **Recurring events** from Outlook are only transferred across to ManagePro as the single original event. If you wish to synchronize recurring events back and forth between ManagePro and Outlook, you must originate them as "Checkpoints" in ManagePro.
12. Deletions to events and to-dos in ManagePro are synced across directly to Outlook. Deletions in Outlook follow a two step process for safety concerns when being synced to ManagePro.
  1. It first checks to see if the record in ManagePro is only assigned to the user conducting the synchronization. If this is true, it proceeds to remove the sync id token from the record in ManagePro. At this point the user should also delete the record in ManagePro.  
(Note: If you do not manually delete the record in ManagePro that was previously deleted in Outlook, upon the next sync it will be recreated in Outlook. We chose to insert this manual process because of the number of users who deleted items in Outlook without realizing the impact upon ManagePro.)
  2. If other users are also assigned to the to-do or event, it simply removes the synchronizing user from the Who column in ManagePro and lets the record remain in ManagePro in its updated state.
13. At times new contact data will not update properly within ManagePro. This is due to how it sets up data fields, or rather doesn't set them up to keep the database compact. For this reason, information may not be updated in the contact fields in ManagePro with Outlook until you have first entered some type of information in that field. Thereafter updates occur appropriately.
14. ManagePro will not read and save categories choices for Events, Tasks, or Contacts from Outlook until they have first been added to the corresponding Category field in the File/Preferences/Terminology window. In ManagePro Events use the Category field, To Do's use the Type field, and People window uses the Relationship field. You also need to add any category choices from ManagePro into the Main category list in Outlook before they will sync into Outlook.
15. The following fields are not yet supported in 6.7: Privacy/Sensitivity, To-do Contact, Reminder date, Country, Company and Duration.
16. Goals, when included in the synchronization process, are transferred to Outlook (and to Palm) as a list of tasks or to-dos with a folder entitled Goals. You may need to create this folder first before the synchronization will complete successfully.
17. Contact/Address Book Considerations:

ManagePro does a selective sync process with the contact or address modules in Palm and Outlook. The basic premise is that the people section of ManagePro will be a sub-set (for many people a small sub-set) of their total address book as it reflects those in their extended workgroup and organization. Essentially ManagePro will sync it's people contents to the

Palm and Outlook, but it will not import data for new people records unless they already exist in ManagePro. If user's want to transfer over data on certain accounts in Outlook, they simply need to enter the first and last name of each person in ManagePro, and the rest of the data will come over on the next sync. Any data change to the existing people records in ManagePro will automatically be a part of every sync whether they originate in ManagePro or Palm or Outlook. With the Palm, the contact sync simply transfers ManagePro contacts to the Palm, thereafter any updates to those contacts will be synced back and forth. There is no recognition of pre-existing records.

An important consideration is to determine the necessity of transferring all address data between Outlook and the Palm. If both are synchronized to ManagePro, which only retains a sub-set of selected work contacts, users will lose the ability to update a complete address book review between their Outlook and their Palm. If the user wishes to synchronize all address book data between Outlook and their Palm, we suggest they retain a 3rd party conduit program between Outlook and the Palm and not use the ManagePro conduit, as it will overwrite and prevent the 3rd party conduit from working.

#### The Assigned Field Mapping for Synchronization

| Event - Calendar   | Synchronization       | Field Mapping                      |
|--------------------|-----------------------|------------------------------------|
| <b>Palm</b>        | <b>Outlook</b>        | <b>ManagePro</b>                   |
| Description        | Subject               | Title                              |
| Description        | Location              | Location                           |
| Start Time         | Start Time            | Date/Time-Due Date                 |
| End Time           | End Time              | End Date/Time                      |
| Alarm              | Reminder              | Reminder Date                      |
| Note               | Body                  | Long Description                   |
| Private            | Sensitivity - Private | Common User Number 2               |
| Not Private        | Sensitivity - Normal  | Common User Number 2               |
| Repeat             | Recurrence            | N/A                                |
| Category           | Category              | Category                           |
| ?                  | Who                   | Who                                |
| ?                  | Duration              | Duration                           |
| ID# - not viewable | ID# - not viewable    | Common User Long Text 1 - reserved |

| Address Book (Contact)   | Synchronization                | Field Mapping                              |
|--|--------------------------------|--|
| <b>Palm Pilot</b>  | <b>Outlook</b>                 | <b>ManagePro</b>                           |
| Width1 Width3 Width2820<br>Width3 Width2160<br>Width3 Width3510 Last<br>Name | Last Name                      | Last Name                                  |
| First Name   | First Name                     | First Name/Person User Defined Text #3     |
| Title  | Job Title                      | Title                                      |
| Company  | Company                        | Company/Job user defined text 3            |
| Work Phone   | Business Telephone             | Work Phone                                 |
| Home Phone   | Home Telephone                 | Home Phone                                 |
| Mobile Phone   | Mobile Telephone               | Mobile                                     |
| Fax  | Business Fax                   | Fax  |
| Email  | Email - 1 Address              | Email                                      |
| Address  | Mailing Address<br>Street      | Home Address                               |
| City   | Mailing Address City           | City                                       |
| State  | Mailing Address State          | State                                      |
| Zip Code   | Mailing Address<br>Postal Code | Zip/Postal Code                            |
| Country  | Mailing Address<br>Country     | Country/Info user defined text 3           |
| ID# - not viewable   | ID# - not viewable             | Person User Defined Long Text 2 - Reserved |
| Note   | Body                           | Other Information                          |
| Category   | Category                       | Relationship                               |
| Private  | Sensitivity - Private          | Private/Info User Defined Number 3         |
| Not Private  | Sensitivity - Normal           | Private/Info User Defined Number 3         |