Exchange Integration Guide

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Exchange Servers

Manage Exchange Servers **1**

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With Microsoft *Exchange* server integration, you can use constituent information from your database to create contact records and calendar items in Microsoft *Outlook*. The system administrator configures synchronization processes to create contact records from constituent information and calendar items from pending constituent interactions and prospect plan steps. The synchronization processes update contact records and calendar items in *Outlook* if the information changes in the database. The system administrator configures a download *Exchange* data process to download changes to contact records and calendar items into batches. The download process also downloads email messages to contacts created by the synchronization process.

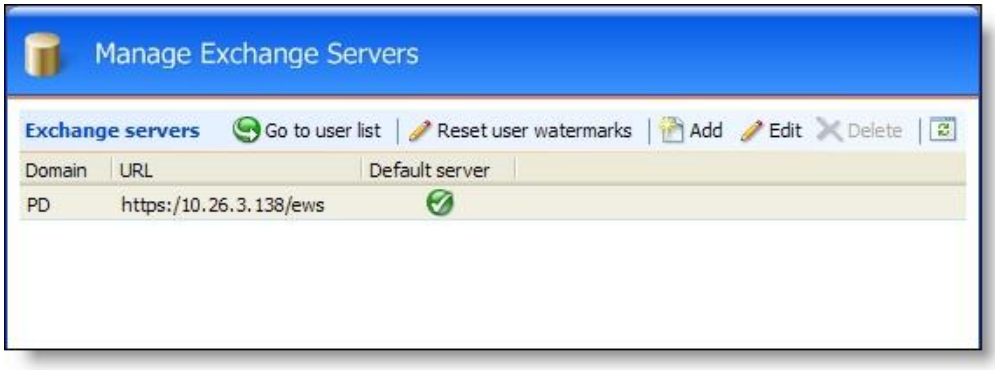
The system administrator sets up *Exchange* server integration, and no burden is placed on the *Outlook* user. However, integration is only available for application users with *Exchange* mailboxes on the server. The system administrator sets up the *Exchange* server and provides credentials for the program to access it. The administrator then maps the program to the server and designates application users. Next, the administrator configures the synchronization processes and the download process. To run the processes at scheduled intervals, the administrator creates job schedules.

Note: In addition to *Outlook*, *Exchange* server integration can work with other email client applications that use the *Exchange* server.

Manage Exchange Servers

Before you can integrate with an *Exchange* server, you must set up the server and provide credentials so the program can access it. After you do this, you can map the program to the *Exchange* server on the Manage Exchange Servers page. On this page, you can manage *Exchange* servers and access the user list for each server.

From *Administration*, click **Exchange integration**. The Exchange integration page appears. On this page, click **Manage Exchange servers**. The Manage Exchange Servers page appears.



This page displays the domain and URL for any *Exchange* servers added to the program. Under **Default Server**, a green check mark indicates the default *Exchange* server. After you add a server, you can add application users. To update the information on this page, click **Refresh List**.

Go to User List

After you map the program to an *Exchange* server, you can add application users to the server. You can include only users with *Exchange* mailboxes on the server in *Exchange* server integration. On the Manage Exchange Servers page, select a server and click **Go to user list**. The Exchange Server Application Users page appears. On this page, you can search for application users with *Exchange* mailboxes and manage the user list.

For more information about the Exchange Server Application Users page, see Exchange Server Application Users on page 3.

Reset User Watermarks

Microsoft *Exchange* uses digital watermarks as time stamps to provide points of reference during synchronization. For *Exchange* server integration, watermarks identify each application user you add to the *Exchange* server.

If the *Exchange* server cannot find a watermark for a user, the synchronization process cannot pull the user's data from Microsoft *Outlook* into the program. If this happens, you can click **Reset user watermarks** on the Manage Exchange Servers page. This removes the digital watermarks for all application users and creates new watermarks. The **Reset watermarks** button allows you to resume downloading the user's data. However, the next instance of the *Exchange* synchronization processes will not include any changes made since the previous instance of the synchronization process.

Add Exchange Servers

To set up *Exchange* server integration, the system administrator maps the program to an *Exchange* server. If necessary, the program can support multiple servers. After you add a server, the program can send information to an *Exchange* mailbox to create contact records and calendar items in Microsoft *Outlook*.

Note: Before you add a Microsoft *Exchange* server to the program, you must provide the credentials to access the *Exchange* mailbox.

Add an Exchange server

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Manage Exchange servers**. The Manage Exchange Servers page appears.
3. Click **Add**. The Add Exchange server screen appears.

4. Enter the *Exchange* user name and password for account authentication, and enter the domain and URL for the *Exchange* server. For a detailed explanation of the options on this screen, see Add Exchange Server Screen on page 3.
5. To test the connection to the server, click **Test login**.
6. Click **Save**. You return to the Manage Exchange Servers page. The server appears in the grid.

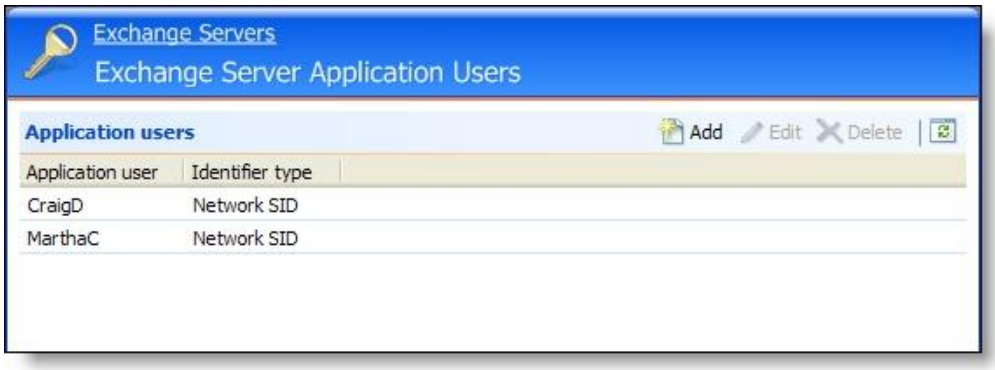
Add Exchange Server Screen

Screen Item	Description
User name	Enter a user name to authenticate the account with the *Exchange* server. To allow the program to access *Exchange* mailboxes, the user you enter in this field must have rights to impersonate other users.
Password	Enter a password to authenticate the account with the *Exchange* server.
Domain	Enter the name of the domain that contains the *Exchange* server.
URL	Enter the URL for the *Exchange* server. The program uses this IP address to map to the server.
Use Exchange impersonation	To allow the program to impersonate users and access their *Exchange* mailboxes, select this checkbox. We recommend you always select this checkbox. If you clear it, the program can access only the *Exchange* mailbox for the user in the **User name** field.
Default server	To designate the default server, select **Default server**. For the first server you add, his checkbox is selected. The default server is used unless an application user is specifically assigned to a different server.
Test login	To make sure the user name, password, domain, and URL are correct, click **Test login**. If the credentials are authenticated, a confirmation message appears. Otherwise, a failure message describes the fields to check for the error.

Exchange Server Application Users

Exchange server integration is available only for application users with *Exchange* mailboxes on the server. After you map the program to an *Exchange* server, you can add application users. On the Exchange Server Application

Users page, you can manage the user list. To access this page, click the domain name for a server in the grid. The Exchange Server Application Users page appears.



On this page, you can manage application users who are mapped to the *Exchange* server. The grid displays the users you add to the server and the method used to map them. To search for all application users with *Exchange* mailboxes on the server, click **Auto-find application users**. To update the information on this page, click **Refresh List**.

Add Application Users

In *Administration*, the system administrator creates application users. Before the system administrator can add users to an *Exchange* server, the administrator must create *Exchange* mailboxes for them.

For information about application users, see the of the *Administration Guide*.

Add an Exchange server application user

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Manage Exchange servers**. The Manage Exchange Servers page appears.
3. In the grid, click the domain name for a server. The Exchange Server Application Users page appears.
4. Click **Add**. The Add Exchange server application user screen appears. For a detailed explanation of the options on this screen, see Add Exchange Server Application User Screen on page 5.

5. In the **Application user** field, enter an application user. To search for a user, click the binoculars. A search screen appears.
6. In the **Identifier type** field, select the method to map the application user to the *Exchange* server.
   - If the *Exchange* server and the program are in the same domain, select “Network SID” to use a unique alphanumeric string to identify the user.

- If the *Exchange* server and the program are in different domains, select "SMTP address" to use Simple Mail Transfer Protocol to map the user to an *Exchange* mailbox on the server.

7. If you select "SMTP address" in the **Identifier type** field, the **SMTP address** field is enabled. Enter the SMTP address to map the application user to the *Exchange* server.
8. Click **Save**. You return to the Exchange Server Application Users page. The application user appears in the grid.

Add Exchange Server Application User Screen

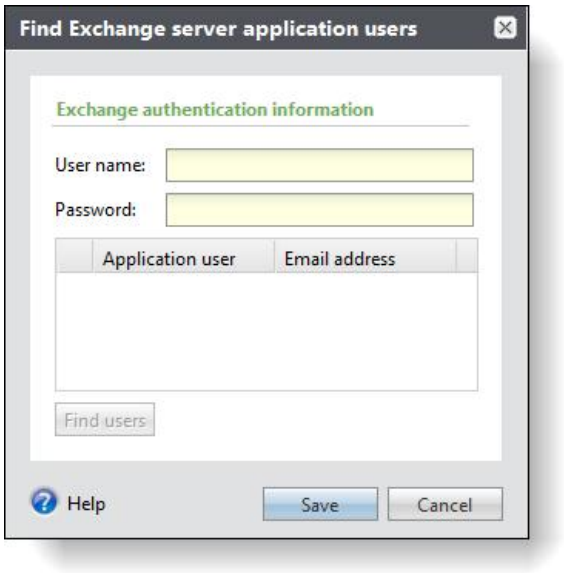
Screen Item	Description
Application user	Enter the application user to map to the *Exchange* server. To search for a user, click the binoculars. A search screen appears. You cannot add groups of application users because all users must be mapped to the server.
Identifier type	Select the method to map the user to the *Exchange* server. SID, or security identifier, is a unique alphanumeric string that identifies the user. If the server and program are in the same domain, the *Exchange* server grants or denies access based on the SID. SMTP, or Simple Mail Transfer Protocol, is a protocol used to send email messages between servers. If the server and program are in different domains, SMTP maps the user to an *Exchange* mailbox on the server.
SMTP address	If you use SMTP to map the application user to the *Exchange* server, enter the SMTP address for the application user's *Exchange* mailbox.

Find Exchange Server Application Users

To add all application users with *Exchange* mailboxes on the server, use the Find Exchange server application users screen. On this screen, you can search for all application users with *Exchange* mailboxes and add them simultaneously.

▶ **Find Exchange server application users**

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Manage Exchange servers**. The Manage Exchange Servers page appears.
3. In the grid, click the domain name for a server. The Exchange Server Application Users page appears.
4. Under **Tasks**, click **Auto-find application users**. The Find Exchange server application users screen appears.



5. Enter an *Exchange* user name and password for account authentication and click **Find users** to locate aplication users. For a detailed explanation of the options on this screen, see Find Exchange Server Application Users Screen on page 6.
6. Click **Save**. You return to the Exchange Server Application Users page. The application users appear in the grid.

Find Exchange Server Application Users Screen

Screen Item	Description
User name	Enter a user name to authenticate the account with the *Exchange* server. The user must have an *Exchange* mailbox. The program searches for application users and compares the users it finds to the address book in the *Exchange* mailbox. Any matches appear when you click **Find users**.
Password	Enter a password to authenticate the account with the *Exchange* server.
Find users	To search for application users with *Exchange* mailboxes, click **Find users**.
Application user	After you click **Find users**, this column displays users with *Exchange* mailboxes on the server. You cannot add groups of users because all users must be mapped to the server.
Email address	After you click **Find users**, this column displays email addresses for the *Exchange* mailboxes.

Exchange Contacts

Create Exchange Contacts **7**

Exchange Field Mappings **11**

Contact Synchronization Process Page **15**

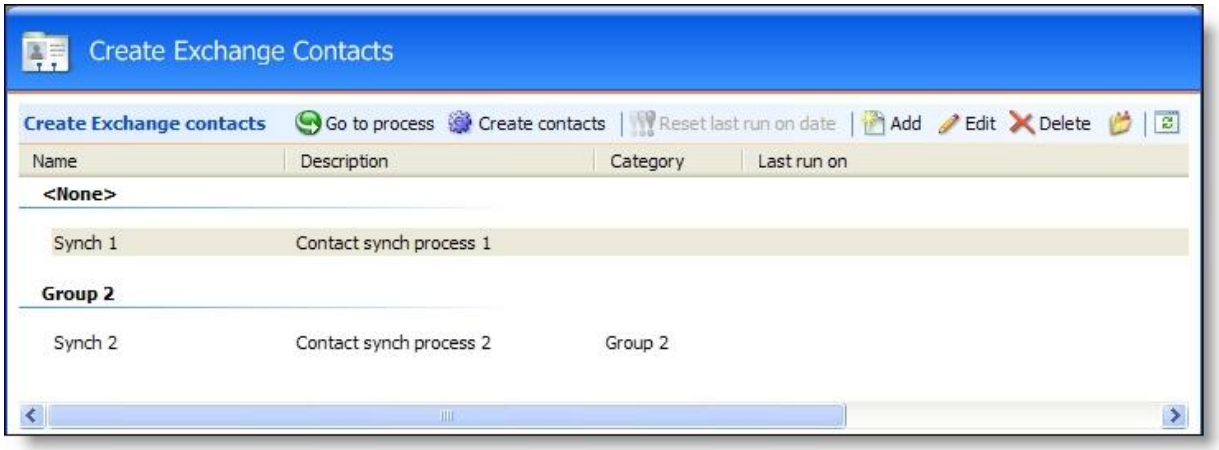
With Microsoft *Exchange* server integration, you can use constituent information from your database to create contact records in Microsoft *Outlook*. The system administrator configures the contact synchronization process to create and update contact records, and no burden is placed on the *Outlook* user. The administrator selects the constituents and application users to include, and the contact synchronization process creates contact records in *Outlook*. If necessary, the administrator can configure multiple contact synchronization processes. To run processes at regular intervals, the administrator adds job schedules. When a contact synchronization process runs, it creates or updates contact records in *Outlook* with data from constituent records.

Note: You can also download changes to contact records that the process creates. To download changes from *Outlook*, you configure the download *Exchange* data process. The process downloads changes to contact records into batches. The process also downloads email messages to the contacts that the contact synchronization process creates. A designated batch owner reviews the changes from *Outlook* and decides whether to commit them to the database. For more information about the download *Exchange* data process, see Exchange Downloads on page 31.

Create Exchange Contacts

With Microsoft *Exchange* server integration, Microsoft *Outlook* users can access constituent information from the program. To create contacts, the system administrator configures the contact synchronization process. On the Create Exchange Contacts page, you can manage contact synchronization processes.

From *Administration*, click **Exchange integration**. The Exchange integration page appears. On this page, click **Create Exchange contacts**. The Create Exchange Contacts page appears.



This page displays the name, description, and category of each contact synchronization process, as well as the last date each process ran. To update information on this page, click **Refresh List**.

Note: To include addresses, email addresses, and phone numbers in the contact synchronization process, the system administrator maps the information to corresponding fields in *Outlook*. For information about how to map the fields, see Exchange Field Mappings on page 11.

Go to Contact Synchronization Process Page

To view the process history and create job schedules for a contact synchronization process, select a process and click **Go to process**. The contact synchronization process page appears. On this page, you can start or edit the process, view the status of the most recent instance and details about past instances, and create job schedules.

For more information about the contact synchronization process page, see Contact Synchronization Process Page on page 15.

Create Contacts

You can manually start a contact synchronization process independent of a job schedule. On the Create Exchange Contacts page, select the process and click **Create contacts**. The contact synchronization process page appears. The process creates and updates contact records in Microsoft *Outlook*, and the Recent status tab displays information about its progress.

For information about the contact synchronization process page, see Contact Synchronization Process Page on page 15.

Reset Last Run on Date

When a contact synchronization process runs, it updates contact records only if the corresponding constituent records have been modified. To update contact records when the constituent information is unchanged, you can clear the date when the process was last run. On the Create Exchange Contacts page, select a process and click **Reset last run on date**. When you reset this date, the next instance of the process updates contact records even if the constituent records are unchanged. This is useful to restore deleted contact records or to overwrite changes in *Microsoft Outlook*. As a general rule, you do not want to reset the last run on date, as it unnecessarily resends information from the program to *Outlook*.

Add Contact Synchronization

The contact synchronization process allows Microsoft *Outlook* users to access constituent information from the program. The administrator selects constituents to include and the *Outlook* users to receive contact records. The contact records created in *Outlook* include names and some personal information from constituent records in the program, as well as any addresses, email addresses, or phone numbers you map to *Outlook* on the Exchange Field Mappings page. The process can also update contact records if constituent records change.

Note: You can also download changes to contact records. To download changes from *Outlook*, you configure the download *Exchange* data process. For information about the download *Exchange* data process, see Exchange Downloads on page 31.

Add a contact synchronization process

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.

2. Click **Create Exchange contacts**. The Create Exchange Contacts page appears.
3. Click **Add**. The Add contact synchronization screen appears. For a detailed explanation of the options on this screen, see Add Contact Synchronization Screen on page 10.

4. Under **General**, enter a name and description for the process, and select an *Exchange* contact category. Select a page in the program to link to from the contact record.
5. Under **Add these constituents as contacts**, select the constituents to include in the contact synchronization process.
6. Under **Create contacts for these users**, select the application users to receive constituent data in *Outlook*.
7. Click **Save**. You return to the Create Exchange Contacts page. The contact synchronization process appears in the grid.

Add Contact Synchronization Screen

Screen Item	Description
Name	Enter a name for the contact synchronization process.
Description	Enter additional information about the process.
Category	Select an *Exchange* contact category. The category is useful for sorting purposes and appears on the contact record. You add *Exchange* contact categories in the **Code Tables** section of *Administration Guide*.
Add link to	Select a page in the program to include as a link in the contact record. When a user clicks the link in Microsoft *Outlook*, the program opens to the selected page.
Selection	Select a query of constituents to add as contacts in *Outlook*. This should be a dynamic query of individual constituents. For information about how to create a query, see the *Analysis* section of the help file. For information about how to create a query, see the *Query and Export Guide*.
Apply to	Select the application users to include in the contact synchronization process. You can include all application users, a query of users, or a single user. The process creates contact records for these users in *Outlook*.
Selection	If you select "Selected users" in the **Apply to** field, the **Selection** field is enabled. Select a query of application users to include in the contact synchronization process. To search for a query, click the binoculars. A search screen appears.
User	If you select "Specific user" in the **Apply to** field, the **User** field appears. Enter the application user to include in the contact synchronization process. To search for a user, click the binoculars. A search screen appears.
Create contacts based on prospect planned step or plannedinteraction ownership	To create contacts for application users only when they are owners of planned steps or interactions for constituents, select this checkbox. This limits the number of contact records created. All constituents from the constituent query are available for contact synchronization, but contact records are created in *Outlook* only for application users who are owners of prospect planned steps or planned interactions for the constituents.

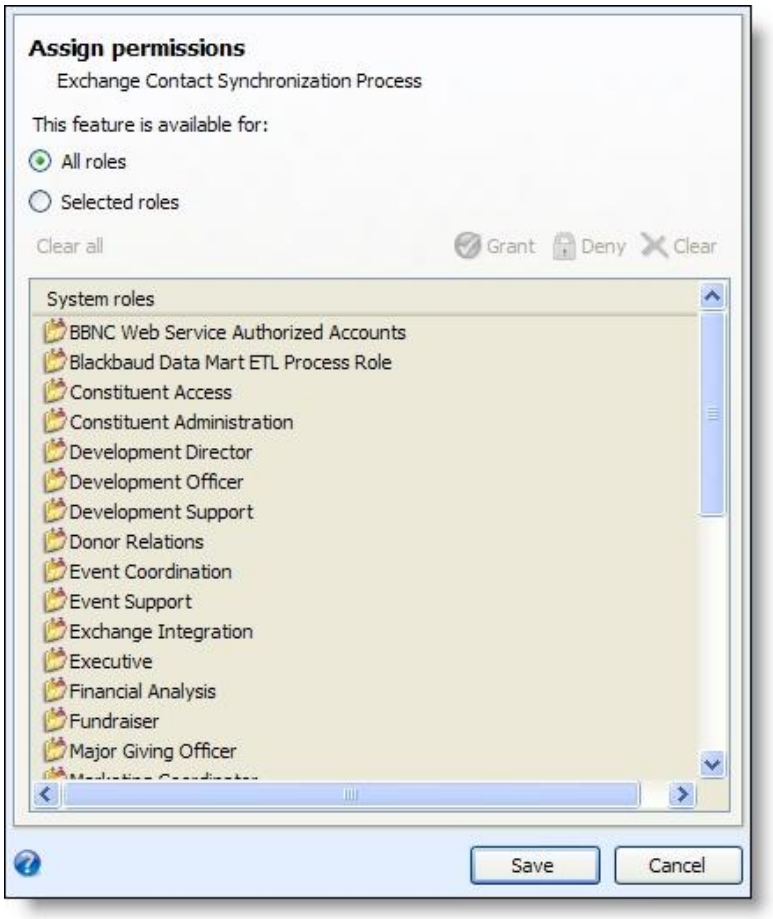
Assign Permissions

To restrict the users who can access a contact synchronization process, you can assign permission to system roles. When a user goes to the Create Exchange Contacts page, the process appears only if the user belongs to a system role that is granted access. Users with permission to access a contact synchronization process can start, edit, and delete the process.

Note: If a user has multiple roles and one role is granted access to a contact synchronization process but another is denied, the user cannot access the process. If one role is granted access and another is unspecified, the user can access the process. For information about system roles and security, see the *Security Guide*.

▸ Assign user permissions for a contact synchronization process

1. On the Create Exchange Contacts page, select a synchronization process and click **Assign permissions**. The Assign permissions screen appears.



2. To grant permission to all roles in the system, select **All roles**.
3. To grant or deny permission to system roles, select **Selected roles**.
    - To grant access, select a system role and click **Grant**.
    - To deny access, select a system role and click **Deny**. Users in that system role cannot access the process even if they belong to other system roles that have access.
    - To remove an assignment, select a system role and click **Clear**. To remove all assignments, click **Clear all**.
4. Click **Save**. You return to the Create Exchange Contacts page. The program applies the system role permissions to the contact synchronization process.

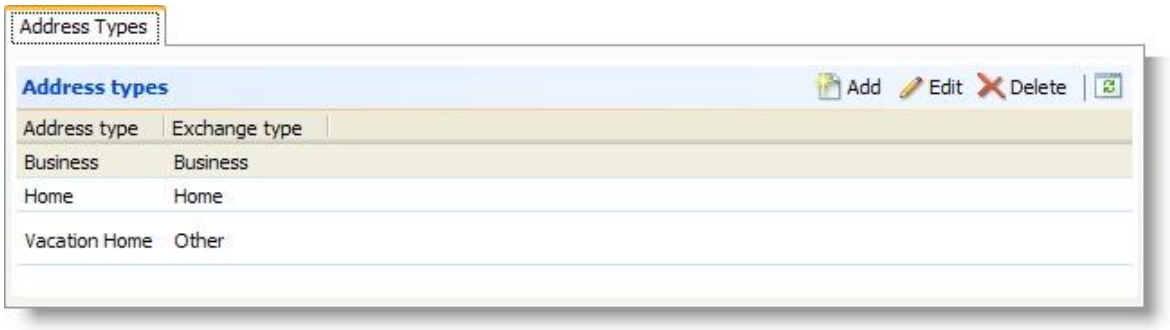
Exchange Field Mappings

When a contact synchronization process creates contact records, some constituent information is automatically mapped to the corresponding fields in Microsoft *Outlook*. However, the system administrator must map addresses, email addresses, and phone numbers from the program to corresponding fields in *Outlook*.

To select fields in *Outlook* to map to constituent addresses, email addresses, phone numbers in the program, click **Manage field mappings** on the Create Exchange Contacts page. The Exchange Field Mappings page appears. On this page, you can manage field mapping information.

Address Types Tab

On the Address Types tab, you manage address type mapping for contact records. This page displays mapped address types in the program and the corresponding address types in Microsoft *Outlook*.



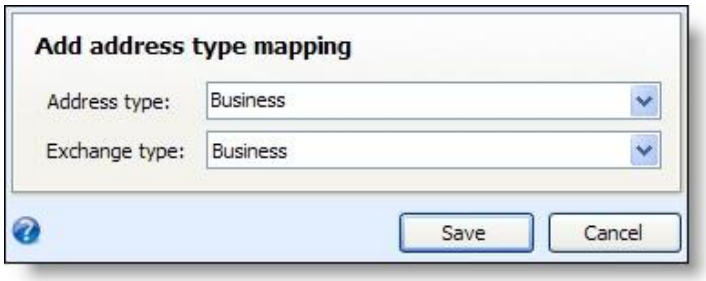
Under **Address type**, address types in the program that you include in the synchronization process appear. Under **Exchange type**, the corresponding fields in *Outlook* appear. To update information on this page, click **Refresh List**.

Add an Address Type Mapping

Microsoft *Outlook* contains only three address types for contacts: "Home," "Business," and "Other." On the Address Types tab, you can map three address types from the program to these three address types in *Outlook*. If the primary address type on the constituent record is not mapped to an address type in *Outlook*, it is mapped to the "Other" address type by default. If the primary address type in the program changes, the new primary address is added to the contact record.

Add an address type mapping

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Create Exchange contacts**. The Create Exchange Contacts page appears.
3. Under **Tasks**, click **Manage field mappings**. The Exchange Field Mappings page appears.
4. On the Address Types tab, click **Add**. The Add address type mapping screen appears.



5. In the **Address type** field, select an address type from the program to map to an address type in *Outlook*. The contact synchronization process adds constituent addresses with this type to contact records in *Outlook*.

Note: You cannot map an address type in the program to multiple address types in *Outlook*

6. In the **Exchange type** field, select the corresponding address type in *Outlook*. The process maps data from the program to this field in *Outlook*.
7. Click **Save**. You return to the Address Types tab. The address type mapping appears in the grid.

Email Address Types Tab

On the Email Address Types tab, you manage email address type mapping for contact records. This tab displays mapped email address types in the program and the corresponding email address types in Microsoft *Outlook*.

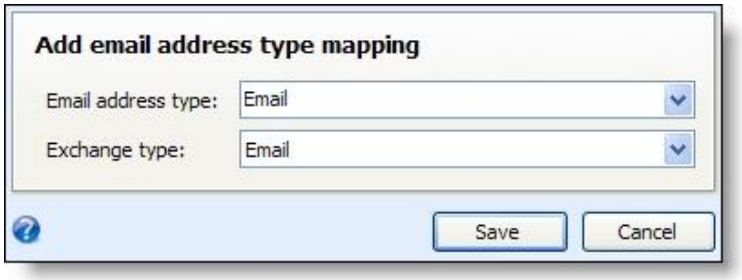
Under **Email address type**, email address types in the program that you include in the synchronization process appear. Under **Exchange type**, the corresponding fields in *Outlook* appear. To update information on this page, click **Refresh List**.

Add an Email Address Type Mapping

Currently, only one email address type exists in the program, so you can map only one email address type to Microsoft *Outlook*.

Add an email address type mapping

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Create Exchange contacts**. The Create Exchange Contacts page appears.
3. Under **Tasks**, click **Manage field mappings**. The Exchange Field Mappings page appears.
4. On the Email Address Types tab, click. The Add email address type mapping screen appears.



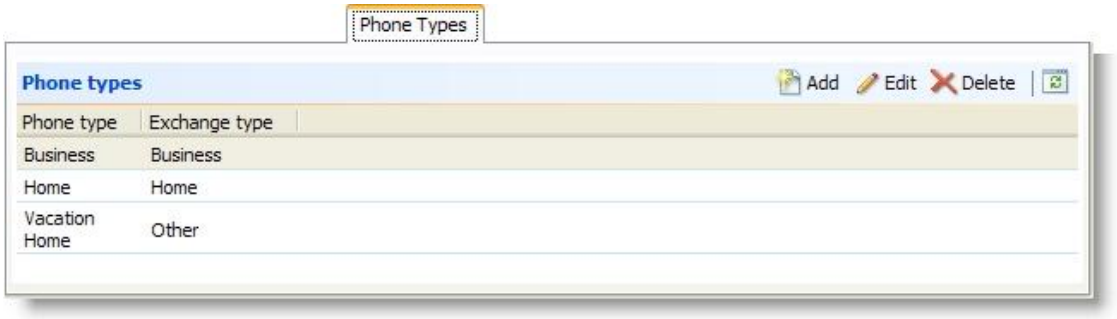
5. In the **Email address type** field, select an email address type from the program to map to an email address type in *Outlook*. The contact synchronization process adds email addresses with this type to contact records in *Outlook*.

Note: You cannot map an email address type in the program to multiple address types in *Outlook*

6. In the **Exchange type** field, select the corresponding email address type in *Outlook*. The process maps data from the program to this field in *Outlook*.
7. Click **Save**. You return to the Email Address Types tab. The email address type field mapping appears in the grid.

Phone Types Tab

On the Phone Types tab, you manage phone type mapping for contact records. This tab displays mapped phone types in the program and the corresponding phone types in Microsoft *Outlook*.



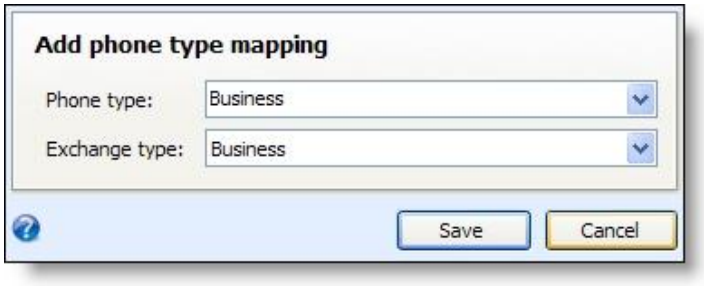
Under **Phone type**, phone types in the program that you include in the synchronization process appear. Under **Exchange type**, the corresponding fields in *Outlook* appear. To update information on this page, click **Refresh List**.

Add a Phone Type Mapping

If the primary phone type on the constituent record is not mapped to a phone type in *Microsoft Outlook*, it is mapped to the "Other" phone type in *Outlook* by default.

Add a phone type mapping

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Create Exchange contacts**. The Create Exchange Contacts page appears.
3. Under **Tasks**, click **Manage field mappings**. The Exchange Field Mappings page appears.
4. On the Phone Types tab click **Add**. The Add phone type mapping screen appears.



5. In the **Phone type** field, select a phone type from the program to map to a phone type in *Outlook*. The contact synchronization process adds constituent phone numbers with this type to contact records in *Outlook*.

Note: You cannot map a phone type in the program to multiple address types in *Outlook*

6. In the **Exchange type** field, select the corresponding phone type in *Outlook*. The process maps data from the program to this field in *Outlook*.
7. Click **Save**. You return to the Phone Types tab. The phone type mapping appears in the grid.

Default Field Mapping

The system administrator manually maps addresses, email addresses, and phone numbers to corresponding fields in Microsoft *Outlook*. The program maps other biographical information by default to corresponding fields in the contact records. The following table describes the fields in *Outlook* that are automatically populated with information from your database.

Default Field Mapping

Outlook Screen Item	Description
Full name	The first name and last name on the constituent record are combined in this field on the contact record.
Company	The primary business on the constituent record appears in this field on the contact record. You enter the primary business on the constituent's Relationships page. The contact synchronization process does not update the program when you edit this field on the contact record.
Web page address	The website on the Personal tab of the constituent record appears in this field on the contact record.
Nickname	The nickname on the Personal tab of the constituent record appears in this field on the contact record.
Title	The title on the Personal tab of the constituent record appears in this field on the contact record.
Suffix	The suffix on the Personal tab of the constituent record appears in this field on the contact record.
Spouse's name	The first name and last name of the spouse on the constituent record are combined in this field on the contact record. You enter the spouse's name on the constituent's Relationships page. The contact synchronization process does not update the program when you edit this field on the contact record.
Birthday	The birth date on the Personal tab of the constituent record appears in this field on the contact record.

Contact Synchronization Process Page

To view the process history and create job schedules for a contact synchronization process, select the process on the create Exchange Contacts page and click **Go to process**. The contact synchronization process page appears. On this page, you can start or edit the process, view the status of the most recent instance, view details about past instances, and create job schedules.

Start Contact Synchronization Process

On the contact synchronization process page, you can manually start the process independent of a job schedule. Under **Tasks**, click **Start process**. The process creates and updates contact records in Microsoft *Outlook*. The Recent status tab displays information about its progress.

For information about the contact synchronization process, see Create Exchange Contacts on page 7.

Edit Contact Synchronization Process

On the contact synchronization process page, you can edit the process. For example, to include additional application users, you can select a different constituent query. Under **Tasks**, click **Edit process**. The Edit contact synchronization screen appears.

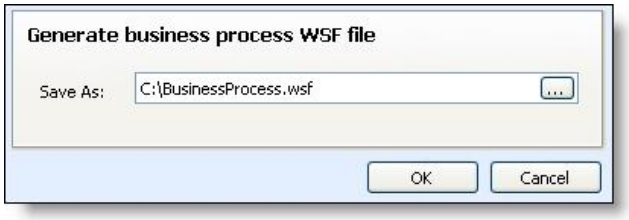
The items on this screen are the same as the items on the Add contact synchronization screen. For a detailed explanation of the options, see Add Contact Synchronization Screen on page 10.

Generate WSF

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the contact synchronization process page, you can select an export process and use either JScript or VBScript language to generate a .wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Create a Task

To specify security permissions for the contact synchronization process, click **Create task** under **Tasks**. You can assign rights to run a process without full access to the process functional area.

For information about how to create and edit tasks, see the *Page Designer Guide*.

Delete a Contact Synchronization Process

On the contact synchronization process page, you can delete a process. For example, if you no longer need to update contact records in Microsoft *Outlook* for a selection of constituents, you can delete the contact synchronization process. Under **Tasks**, click **Delete process**. On the confirmation message that appears, click **Yes**.

For information about the contact synchronization process, see Create Exchange Contacts on page 7.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid include the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for a instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Contact Synchronization Process History

On the History tab, you can delete instances of a contact synchronization process. For example, if an instance does not create or update any contact records, you can delete it from the process history.

On the contact synchronization process page, select an instance of the process on the History tab and click **Delete**. On the confirmation message that appears, click **Yes**. You return to the History tab, and the instance no longer appears in the grid.

Job Schedules Tab (Not Available on all Process Pages)

On the Job schedules tab, you view the job schedules of the process in the database. The details in this grid include the name of the job, whether a job schedule is enabled, the frequency of the job schedule, the start date

and time and end date and time of the scheduled jobs, and the dates the job schedule is added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List** on the action bar.

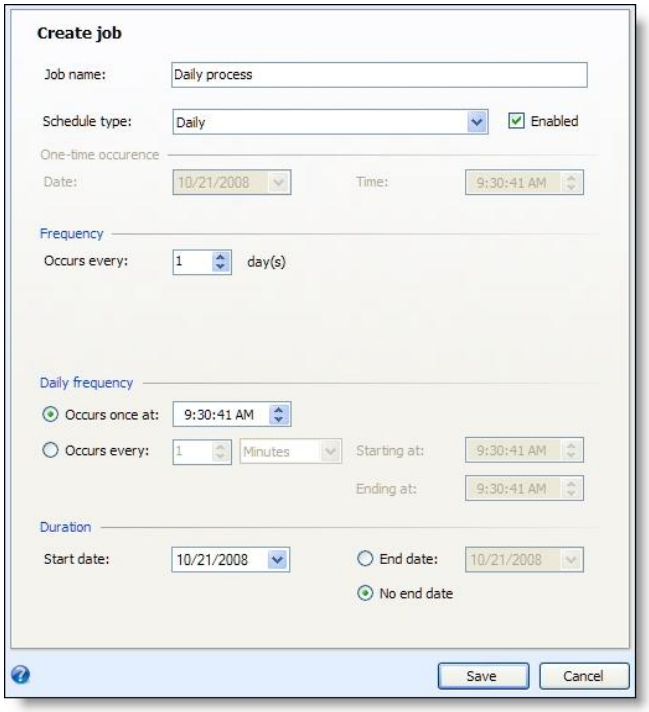
Schedule a Process Job

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule to run a process at a time convenient for your organization, such as overnight. You can create a job schedule from the Job schedules tab of the process status page. On the action bar, click **Add**. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Create Job Screen

The table below explains the items on the Create job screen. For information about how to access this screen, see Schedule a Process Job on page 1.

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Exchange Calendar Items

Create Exchange Calendar Items **21**

Calendar Item Synchronization Process Page **25**

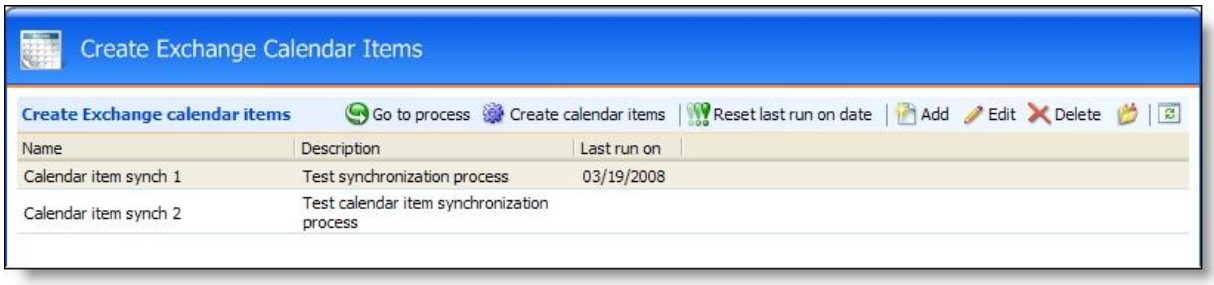
With Microsoft *Exchange* server integration, you can use pending constituent interactions, prospect plan steps, or pending stewardship steps from your data base to create calendar items in Microsoft *Outlook*. The system administrator configures the calendar item synchronization process to create and update calendar items, and no burden is placed on the *Outlook* user. The administrator selects the type of records and the application users to include, and the calendar item synchronization process creates calendar items in *Outlook*. If necessary, the administrator can configure multiple calendar item synchronization processes. To run processes at regular intervals, the administrator creates job schedules. When the calendar item synchronization process runs, it creates or updates calendar items in *Outlook* with data from pending constituent interactions, prospect plan steps, or pending stewardship steps.

Note: You can also download changes to calendar items that the process creates. To download changes from *Outlook*, you configure the download *Exchange* data process. The process downloads changes to calendar items into batches. A designated batch owner reviews the changes from *Outlook* and decides whether to commit them to the database. For more information about the download *Exchange* data process, see Exchange Downloads on page 31.

Create Exchange Calendar Items

With Microsoft *Exchange* server integration, Microsoft *Outlook* users can access constituent information from the program. To create calendar items, the system administrator configures the calendar item synchronization process. On the Create Exchange Calendar Items page, you can manage calendar item synchronization processes.

From *Administration*, click **Exchange integration**. The Exchange integration page appears. On this page, click **Create Exchange calendar items**. The Create Exchange Calendar Items page appears.



This page displays the name and description for each calendar item synchronization process, as well as the last date each process ran. To update the information on this page, click **Refresh List**.

Go to Calendar Item Synchronization Process Page

To view the process history and create job schedules for a calendar item synchronization process, select a process and click **Go to process**. The calendar item synchronization process page appears. On this page, you can start or edit the process, view the status of the most recent instance and details about past instances, and create job schedules.

For more information about the calendar item synchronization process page, see Calendar Item Synchronization Process Page on page 25.

Create Calendar Items

You can manually start a calendar item synchronization process independent of a job schedule. On the Create Exchange Calendar Items page, select a process and click **Create calendar items**. The calendar item synchronization process appears. The process creates and updates calendar items in Microsoft *Outlook*, and the Recent status tab displays information about its progress.

For information about the calendar item synchronization page, see Calendar Item Synchronization Process Page on page 25.

Reset Last Run on Date

When a calendar item synchronization process runs, it updates calendar items only if the corresponding pending constituent interactions, prospect plan steps, or pending stewardship steps have been modified. To update calendar items when this information is unchanged, you can clear the date when the process was last run. On the Create Exchange Calendar Items page, select a process and click **Reset last run on date**. When you reset this date, the next instance of the process updates calendar items even if the pending constituent interactions, prospect plan steps, or pending stewardship steps are unchanged. This is useful to restore deleted calendar items or to overwrite changes in Microsoft *Outlook*. As a general rule, you do not want to reset the last run on date, as it unnecessarily resends information from the program to *Outlook*.

Add Calendar Item Synchronization

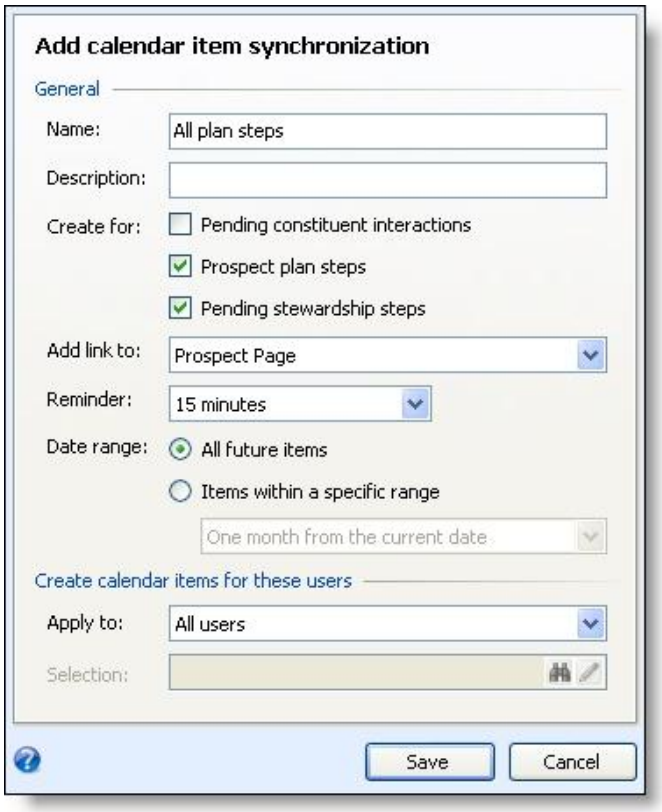
The calendar item synchronization process allows Microsoft *Outlook* users to access pending constituent interactions, prospect plan steps, or pending stewardship steps from the program. The system administrator selects the types of records to include and the *Outlook* users to receive the calendar items. The process can also update calendar items if the information in the program changes.

Note: To create calendar items in *Outlook for an application user*, the user must be linked to a constituent record. Calendar items are created only when the linked constituent is the owner of pending constituent interactions, prospect plan steps, or pending stewardship steps. For more information about application users, see the *Administration Guide*.

Add a calendar item synchronization process

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Create Exchange calendar items**. The Create Exchange Calendar Items page appears.

3. Click **Add**. The Add calendar item synchronization screen appears. For a detailed explanation of the options on this screen, see Add Calendar Item Synchronization Screen on page 24.



4. Under **General**, enter a name and description for the process, and select whether to create calendar items for pending constituent interactions, prospect plan steps, and pending stewardship steps. Select a page in the program to link to from the calendar item, and set the reminder for calendar items in *Outlook*. Select how far in advance to create calendar items.
5. Under **Create calendar items for these users**, select the application users to include in the calendar item synchronization process.
6. Click **Save**. You return to the Create Exchange Calendar Items page. The calendar item synchronization process appears in the grid.

Add Calendar Item Synchronization Screen

Screen Item	Description
Name	Enter a name for the calendar item synchronization process.
Description	Enter additional information about the process
Create for	Select whether to create calendar items in Microsoft *Outlook* for pending constituent interactions, prospect plan steps, or pending stewardship steps.
Add link to	Select a page in the program to include as a link in the calendar item. When the user clicks this link in *Outlook*, the program opens to the selected page.
Reminder	To set a reminder in *Outlook* for calendar items, select the time in the **Reminder** field.
Date range	The date range determines how far into the future to create calendar items. To create calendar items regardless of when they are scheduled, select **All future items**. To create calendar items only for items within a designated period of time, select **Items within a specific range** and select how far in advance to create calendar items. You can create calendar items from one to six months from the current date. Each time the synchronization process runs, the date range resets. For example, if you select "One month from current date," items are not created for a pending constituent interaction that is more than a month away. When you run the process again and the item is less than a month away, a calendar item is created.
Apply to	Select the application users to include in the calendar item synchronization process. You can include all application users, a query of users, or a single user. The process creates calendar items for these users in *Outlook*.
Selection	If you select "Selected users" in the **Apply to** field, the **Selection** field is enabled. Select a query of application users to include in the calendar item synchronization process. To search for a query, click the binoculars. A search screen appears.
User	If you select "Specific user" in the **Apply to** field, the **User** field appears. Enter the application user to include in the calendar item synchronization process. To search for a user, click the binoculars. A search screen appears.

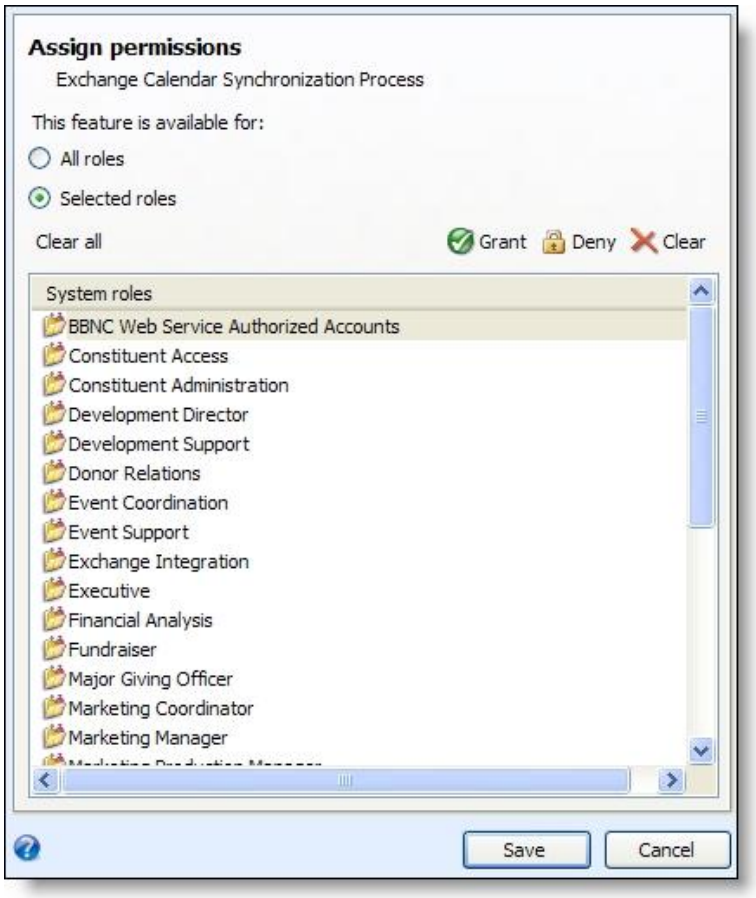
Assign Permissions

To restrict the users who can access a calendar item synchronization process, you can assign permission to system roles. When a user goes to the Create Exchange Calendar Items page, the process appears only if the user belongs to a system role that is granted access. Users with permission to access a calendar item synchronization process can start, edit, and delete the process.

Note: If a user has multiple roles and one role is granted access to a calendar item synchronization process but another is denied, the user cannot access the process. If one role is granted access and another is unspecified, the user can access the process. For information about system roles and security, see the *Security Guide*.

▸ Assign user permissions for a calendar item synchronization process

1. On the Create Exchange Calendar Items page, select a synchronization process and click **Assign permissions**. The Assign permissions screen appears.



2. To grant permission to all roles in the system, select **All roles**.
3. To grant or deny permission to system roles, select **Selected roles**.
   - To grant access, select a system role and click **Grant**.
   - To deny access, select a system role and click **Deny**. Users in that system role cannot access the process even if they belong to other system roles that have access.
   - To remove an assignment, select a system role and click **Clear**. To remove all assignments, click **Clear all**.
4. Click **Save**. You return to the Create Exchange Calendar Items page. The program applies the system role permissions to the calendar item synchronization process.

Calendar Item Synchronization Process Page

To view the process history and create job schedules for a calendar item synchronization process, select the process on the Create Exchange Calendar Items page and click **Go to process**. The calendar item synchronization process page appears. On this page, you can start or edit the process, view the status of the most recent instance, view details about past instances, and create job schedules.

Start Calendar Item Synchronization Process

On the calendar item synchronization process page, you can manually start the process independent of a job schedule. Under **Tasks**, click **Start process**. The process creates and updates calendar items in Microsoft *Outlook*. The Recent status tab displays information about its progress.

For information about the calendar item synchronization process, see Create Exchange Calendar Items on page 21.

Edit Calendar Item Synchronization Process

On the calendar item synchronization process page, you can edit the process. For example, if you need to include additional application users, you can you can select a different constituent query. Under **Tasks**, click **Edit process**. The Edit calendar item synchronization screen appears.

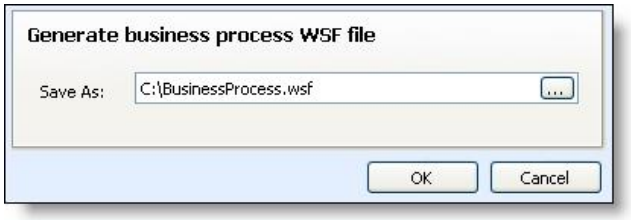
The items on this screen are the same as the items on the Add calendar item synchronization screen. For a detailed explanation of the options, see Add Calendar Item Synchronization Screen on page 24.

Generate WSF

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the calendar item synchronization process page, you can select an export process and use either JScript or VBScript language to generate a .wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Create a Task

To specify security permissions for the calendar item synchronization process, click **Create task** under **Tasks**. You can assign rights to run a process without full access to the process functional area.

For information about how to create and edit tasks, see the *Page Designer Guide*.

Delete a Calendar Item Synchronization Process

On the calendar item synchronization process page, you can delete a process. For example, if you no longer need to update calendar items in Microsoft *Outlook* for a selection of constituents, you can delete the calendar item synchronization process. Under **Tasks**, click **Delete process**. On the confirmation message that appears, click **Yes**.

For information about the calendar item synchronization process, see Create Exchange Calendar Items on page 21.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid include the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for a instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete Calendar Item Synchronization Process History

On the History tab, you can delete instances of a calendar item synchronization process. For example, if an instance does not create or update any calendar items, you can delete it from the process history.

On the calendar item synchronization process page, select an instance of the process on the History tab and click **Delete**. On the confirmation message that appears, click **Yes**. You return to the History tab, and instance no longer appears in the grid.

Job Schedules Tab (Not Available on all Process Pages)

On the Job schedules tab, you view the job schedules of the process in the database. The details in this grid include the name of the job, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time of the scheduled jobs, and the dates the job schedule is added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List** on the action bar.

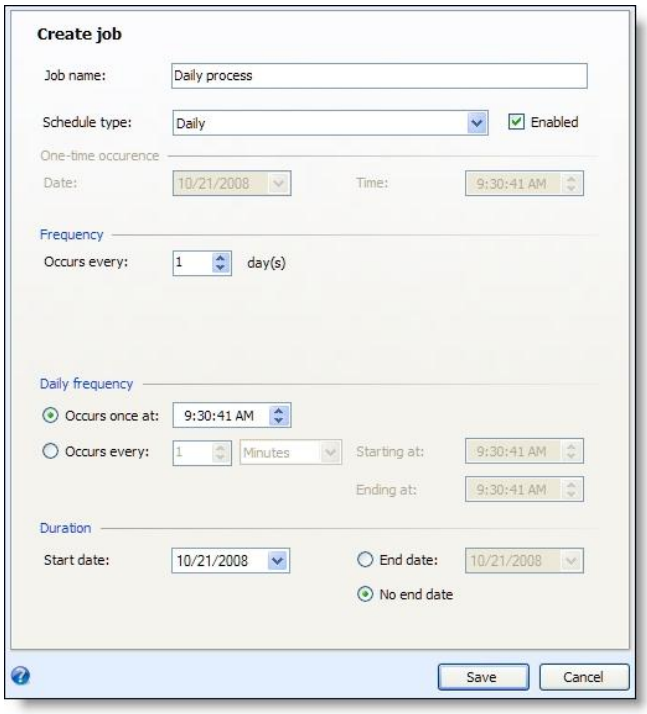
Schedule a Process Job

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule to run a process at a time convenient for your organization, such as overnight. You can create a job schedule from the Job schedules tab of the process status page. On the action bar, click **Add**. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.

4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Create Job Screen

The table below explains the items on the Create job screen. For information about how to access this screen, see Schedule a Process Job on page 1.

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Exchange Downloads

Download Exchange Data **31**

Download Exchange Data Process Page **38**

Exchange Server Integration Batch Entry Tasks **42**

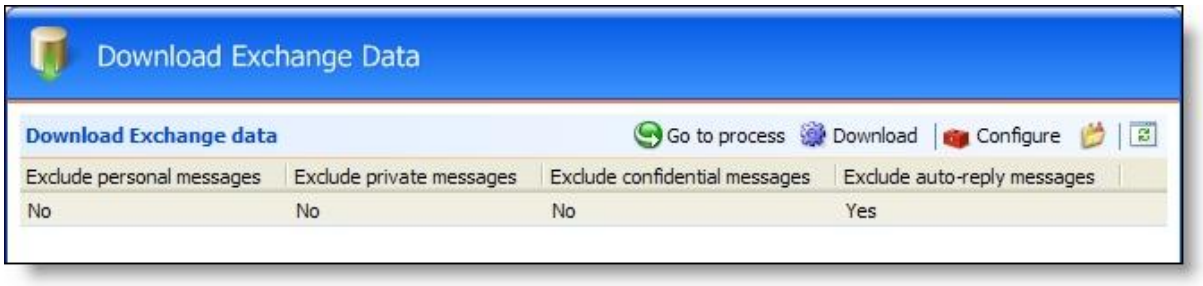
With Microsoft *Exchange* server integration, you can download email messages and changes to contact records and calendar items from Microsoft *Outlook*. To download this information, the system administrator configures the download *Exchange* data process; sets up batch options for emails, contacts, and calendar items; and designates an owner for each batch. When the process runs, it downloads data into batches. The batch owner reviews the information and decides whether to commit it to the database.

Note: You can download data and email messages only for contact records and calendar items in *Outlook* that you created with the contact synchronization and calendar item synchronization processes. For information about the contact synchronization process, see Exchange Contacts on page 7. For information about the calendar item synchronization process, see Exchange Calendar Items on page 21.

Download Exchange Data

With Microsoft *Exchange* server integration, you can download changes to contact records and calendar items created by the contact synchronization and calendar item synchronization processes. You can also download email messages for the contacts you create. After you download data from Microsoft *Outlook*, you can update the corresponding information in the program. To download changes, the system administrator configures the download *Exchange* data process. On the Download Exchange Data page, you can manage batch options and other settings to download contact record changes, calendar item changes, and email messages.

From *Administration*, click **Exchange integration**. The Exchange integration page appears. On this page, click **Download Exchange data**. The Download Exchange Data page appears.



This page displays whether the download process excludes auto-reply email messages and email messages marked as personal, private, and confidential. To update information on this page, click **Refresh List**.

Download Exchange Data

You can manually start the download *Exchange* data process independent of a job schedule. On the Download Exchange Data page, select the process and click **Download**. The download *Exchange* data process page appears. The process downloads changes and email messages from *Microsoft Outlook*, and the Recent status tab displays information about its progress.

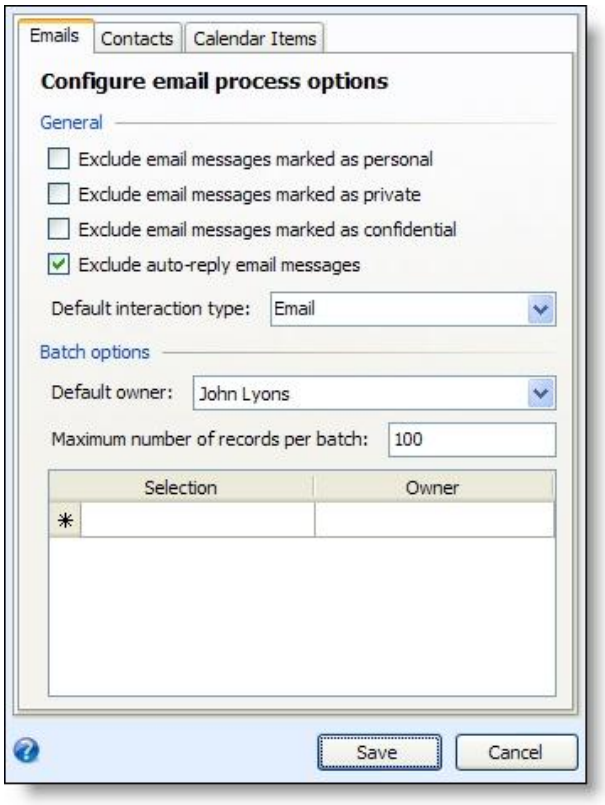
For more information about the download *Exchange* data process page, see Download Exchange Data Process Page on page 38.

Configure Download Exchange Data Process

The download *Exchange* data process allows you to update information in the database with changes in Microsoft *Outlook*. The process downloads changes into batches for contact records and calendar items created by the contact synchronization and calendar item synchronization processes. You can then update the corresponding records in the program. The process also downloads email messages for contacts that the contact synchronization process created. You can use the batches to save email messages as constituent interactions. The system administrator is responsible for the process, and no burden is placed on *Outlook* users. The administrator configures batch options for email messages, contact records, and calendar items, and designates owners for the batches. Batch owners review batches and decide whether to commit information to the database.

Configure the download Exchange data process

1. From *Administration*, click **Exchange integration**. The Exchange integration page appears.
2. Click **Download Exchange data**. The Download Exchange Data page appears.
3. Click **Configure**. The Configure options screen appears. For a detailed explanation of the options on this screen, see Configure Options Screen on page 36.
4. To configure the email updates batch, select the Emails tab.

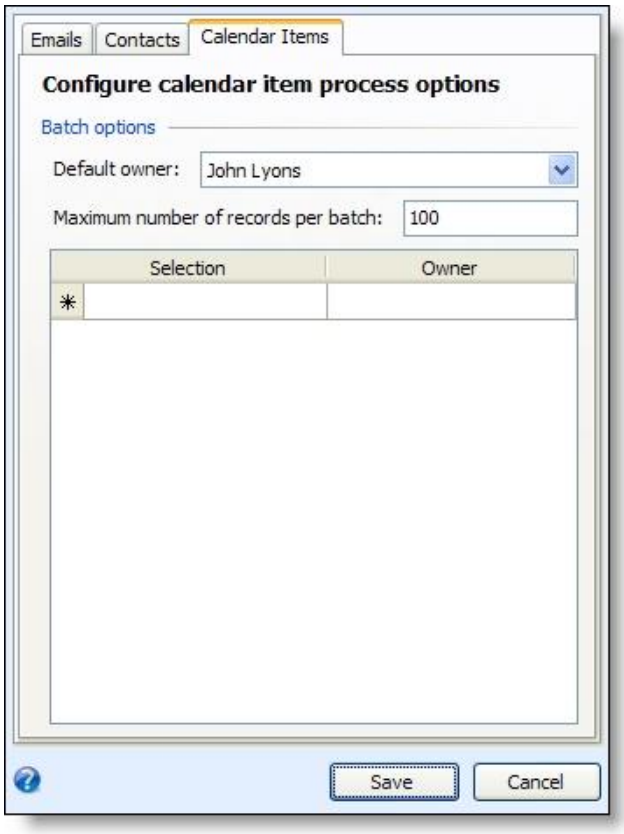


Select the types of email messages to exclude, select a default interaction type, and enter a default batch owner. To assign application users to batch owners, enter selections of application users and assign owners for the selections.

5. To configure the contact update batch, select the Contacts tab.

Select a default country and select a default information source. When contact information is added or updated in *Outlook*, you can specify the default information source to apply to the constituent address, email, or phone information. For example, you might use an information source of "Outlook" to apply to any changes to contact information that come from *Outlook*. The information source appears next to the new or updated contact information on the Contact tab of the constituent record. You can also enter a default batch owner. To assign application users to batch owners, enter selections of application users and assign owners for the selections.

6. To configure the calendar update batch, select the Calendar Items tab.



Select a default batch owner. To assign application users to batch owners, enter selections of application users and assign owners for the selections.

7. Click **Save**. You return to the Download Exchange Data page. Settings for email message types appear in the grid.

Configure Options Screen

Screen Item	Description
Exclude email messages marked as personal	To exclude email messages marked as personal, select this checkbox. This provides privacy for Microsoft *Outlook* users and prevents nonbusiness emails from being downloaded.
Exclude email messages marked as private	To exclude email messages marked as private, select this checkbox. This provides privacy for *Outlook* users and prevents nonbusiness emails from being downloaded.
Exclude email messages marked as confidential	To exclude email messages marked as confidential, select this checkbox. This provides privacy for *Outlook* users and prevents nonbusiness emails from being downloaded.
Exclude auto-reply email messages	To exclude auto-reply email messages, select this checkbox. Since auto-reply email messages are unlikely to be saved as interactions, this checkbox is marked by default.
Default interaction type	Enter an interaction type for downloaded email messages on a constituent's Interactions page. When you commit email messages from *Outlook* to the database, the program saves them as constituent interactions of this type.
Default owner	Select a default owner for batches generated by the download *Exchange* data process. The batch owner reviews the batch and decides whether to commit information to the database. You can enter a different default owner for each batch type. When you commit batches, the program saves email messages as constituent interactions; updates constituent records with changes to contact records; and updates pending constituent interactions, prospect plan steps, and pending stewardship steps with changes to calendar items. To search for a batch owner, click the binoculars. A search screen appears.
Maximum number of records per batch	Enter the maximum number of records in each batch.
Selection	When you download information from *Outlook*, you can create separate batches for selected user groups. When you create separate batches for selections of application users, you can assign different batch owners to each selection to restrict access to the downloaded information. Each batch owner manages the information downloaded from the assigned application users. The batch owner entered in the **Default owner** field manages information downloaded from users not included in a selection. To assign different batch owners to selected user groups, use the **Selection** and **Owner** columns. In the **Selection** column, enter the selections of application users to assign to batch owners. To search for a selection, click the binoculars. A search screen appears.
Owner	To assign a batch owner to a selection of application users, select the batch owner. This owner is responsible only for batches connected to the users in the **Selection** column.
Default country	On the Contacts tab, select a default country. This is necessary for *Outlook Web Access* (OWA) to access email messages, contact records, and calendar items when *Outlook* is unavailable.
Default source	For contact information, select a default information source. When contact information is added or updated through *Outlook*, you can specify the default information source to apply to the constituent address, email, or phone information. For example, you might use an information source of "Outlook" to apply to any changes to contact information that come from *Outlook*. The

Screen Item	Description
	information source appears next to the new or updated contact information on the Contact tab of the constituent record.

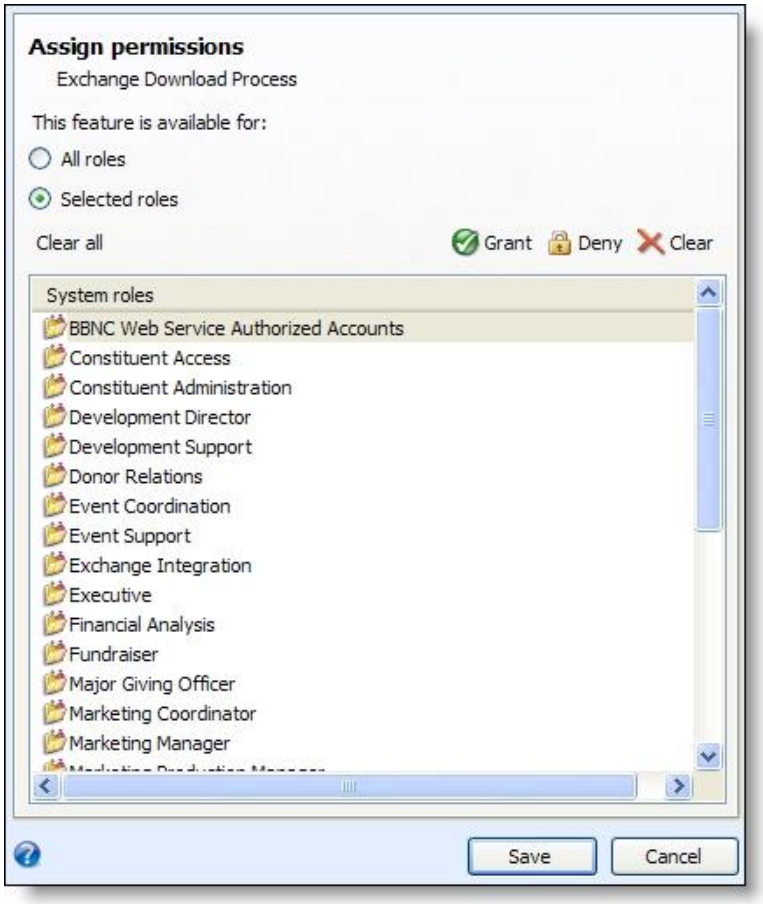
Assign Permissions

To restrict the users who can access the download *Exchange* data process, you can assign permission to system roles. When a user goes to the Download Exchange Data page, the process appears only if the user belongs to a system role that is granted access. Users with permission to access the download *Exchange* data process can start and edit the process.

Note: If a user has multiple roles and one role is granted access to a download *Exchange* data process but another is denied, the user cannot access the process. If one role is granted access and another is unspecified, the user can access the process. For information about system roles and security, see the *Security Guide*.

Assign user permissions for a download Exchange data process

1. On the Download Exchange Data page, select the synchronization process and click **Assign permissions**. The Assign permissions screen appears.



2. To grant permission to all roles in the system, select **All roles**.
3. To grant or deny permission to system roles, select **Selected roles**.
   - To grant access, select a system role and click **Grant**.

- To deny access, select a system role and click **Deny**. Users in that system role cannot access the process even if they belong to other system roles that have access.
- To remove an assignment, select a system role and click **Clear**. To remove all assignments, click **Clear all**.

4. Click **Save**. You return to the Download Exchange Data page. The program applies the system role permissions to the download *Exchange* data process.

Download Exchange Data Process Page

To view the process history and create job schedules for the download *Exchange* data process, select the process on the Download Exchange Data page and click **Go to process**. The download *Exchange* data process page appears. On this page, you can start or edit the process, view the status of the most recent instance and details about past instances, and create job schedules.

Start Download Exchange Data Process

On the download *Exchange* data process page, you can manually start the process independent of a job schedule. Under **Tasks**, click **Start process**. The process downloads any changes or email messages from Microsoft *Outlook*. The Recent status tab displays information about its progresses.

For information about the download *Exchange* data process, see Download Exchange Data on page 31.

Edit Download Exchange Data Process

On the download *Exchange* data process page, you can edit the download process. For example, if you no longer want to include email messages marked as personal, you can exclude these messages. Under **Tasks**, click **Edit process**. The Configure options screen appears. On this screen, you can configure batch options for email messages, contact records, and calendar items, and designate owners for each batch.

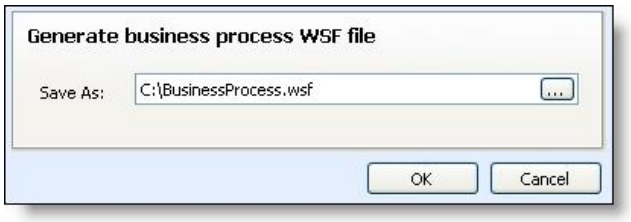
For information about the Configure options screen, see Configure Options Screen on page 36.

Generate WSF

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the download *Exchange* data process page, you can select an export process and use either JScript or VBScript language to generate a .wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Create a Task

To specify security permissions for the download *Exchange* data process, click **Create task** under **Tasks**. You can assign rights to run a process without full access to the process functional area.

For information about how to create and edit tasks, see the *Page Designer Guide*.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid include the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for a instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter

the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Download Exchange Data Process History

On the History tab, you can delete instances of the download *Exchange* data process. For example, if an instance does not download any data, you can delete it from the process history.

On the download *Exchange* data process page, select an instance of the process on the History tab and click **Delete**. On the confirmation message that appears, click **Yes**. You return to the History tab, and the instance no longer appears in the grid.

Job Schedules Tab (Not Available on all Process Pages)

On the Job schedules tab, you view the job schedules of the process in the database. The details in this grid include the name of the job, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time of the scheduled jobs, and the dates the job schedule is added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List** on the action bar.

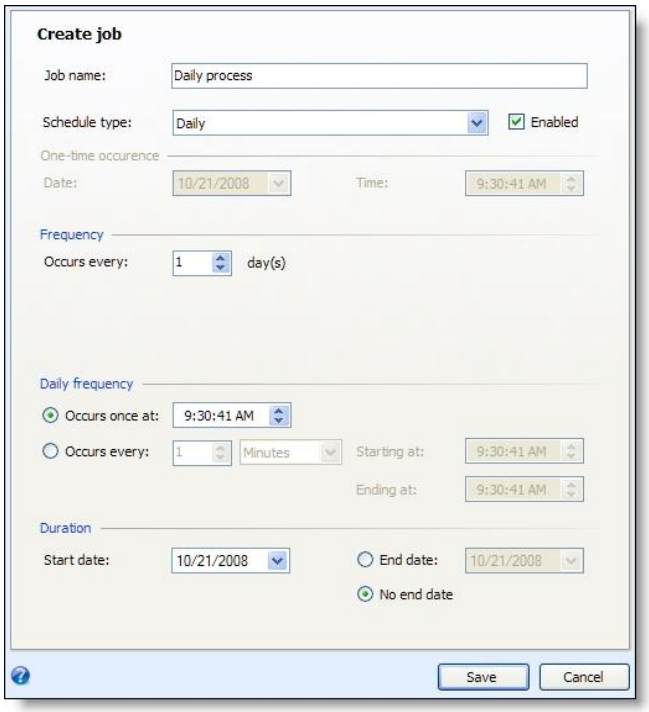
Schedule a Process Job

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule to run a process at a time convenient for your organization, such as overnight. You can create a job schedule from the Job schedules tab of the process status page. On the action bar, click **Add**. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Create Job Screen

The table below explains the items on the Create job screen. For information about how to access this screen, see Schedule a Process Job on page 1.

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single

Screen Item	Description
	time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Exchange Server Integration Batch Entry Tasks

The download *Exchange* data process downloads email messages and changes to contact records and calendar items from Microsoft *Outlook* into uncommitted batches. The batches that are created use three existing batch designs: Exchange Calendar Item Batch, Exchange Contact Update Batch, and Exchange Email Batch. Multiple batches can appear for each type when selections of application users are assigned to multiple batch owners or when the number of batch items exceeds the maximum allowed.

Batch owners review the batches and decide whether to commit the information to the database. If the download process runs before a batch is committed, new entries can be added to an existing batch. On the Batch Entry page, you can view batches of information downloaded from *Outlook*. From *Administration*, click **Batch**. The Batch page appears. On this page, click **Batch entry**. The Batch Entry page appears.

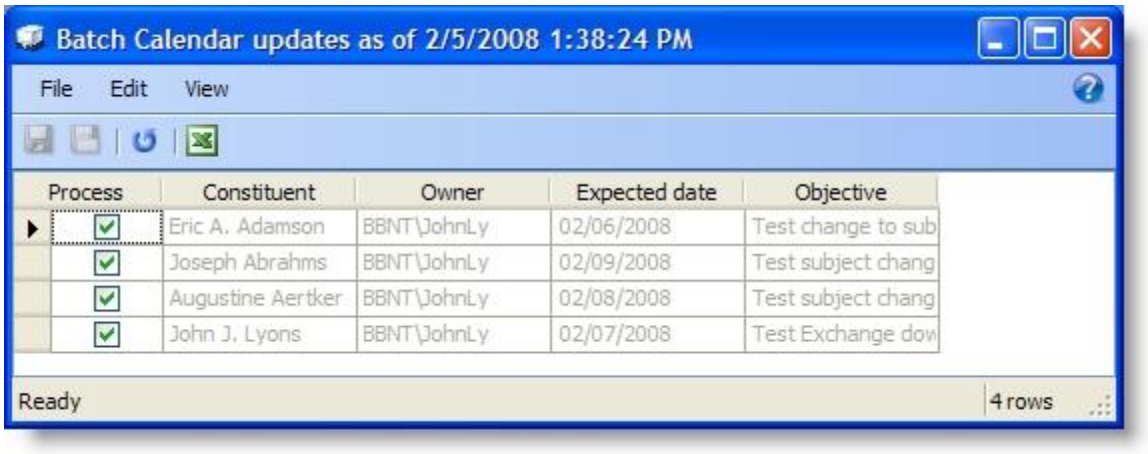
On the Uncommitted Batches tab, you can manage uncommitted batches. To edit a batch, select it and click **Edit**, **Edit batch**. The batch data entry screen appears. On the batch data entry screen, you can perform basic batch data entry tasks. You can delete a row of data, export data to Microsoft *Excel*, find and replace values in a batch, set a message for a row in the batch, and validate the batch.

For information about these tasks, see the *Batch and Import Guide*.

Exchange Calendar Item Batch

When you download calendar item changes from Microsoft *Outlook*, the program creates an uncommitted calendar update batch on the Batch Entry page. To edit a calendar update batch, select it and click **Edit**, **Edit batch**. The batch data entry screen appears.

Note: Before you can edit a calendar update batch, you must update its status to “Ready for review.” On the action bar, click **Update status**. The Update status screen appears. Select “Ready for review” in the **State** field, select an owner, and enter comments as necessary. Click **Save**. You return to the Uncommitted Batches tab. You can now edit the batch.



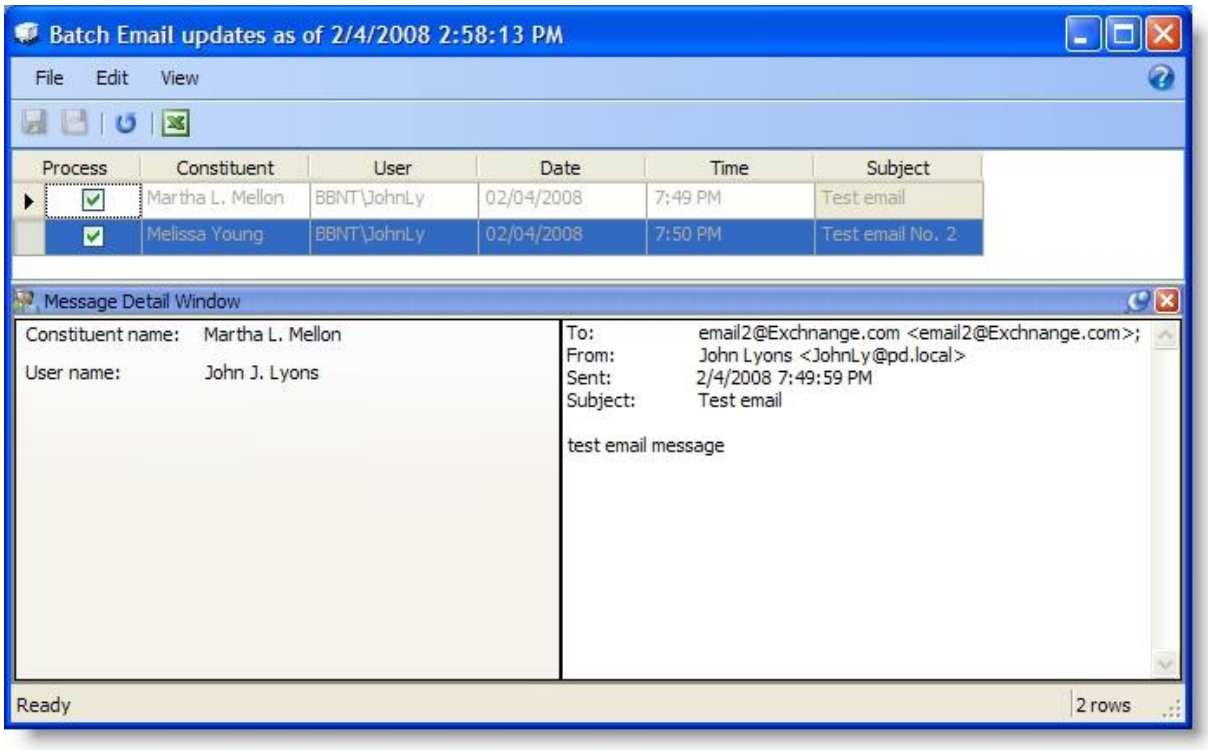
The batch data entry screen displays the calendar items downloaded from *Outlook*. The grid displays the constituent linked to the calendar item, the *Outlook* user who changed it, the expected date, and the objective. Under **Process**, select the entries to include. When you commit the batch, the program updates the corresponding pending constituent interactions or prospect planned steps.

Note: The batch data entry screen for calendar update batches does not compare changes from *Outlook* to pending constituent interactions or prospect planned steps. To compare the information in the **Expected date** and **Objective** columns with information in the program, go to the constituent's Interactions page or the prospect's Plan page.

Exchange Email Batch

When you download email messages from Microsoft *Outlook*, the program creates an uncommitted email update batch on the Batch Entry page. To edit an email update batch, select it and click **Edit**, **Edit batch**. The batch data entry screen appears.

Note: Before you edit an email update batch, you must update the status to "Ready for review." On the action bar, click **Update status**. The Update status screen appears. Select "Ready for review" in the **State** field, select an owner, and enter comments as necessary. Click **Save**. You return to the Uncommitted Batches tab. You can now edit the batch.



The batch data entry screen displays email messages downloaded from *Outlook*. The grid displays the constituent and application user who exchanged the email message, the date and time it was sent, and the subject. Under **Process**, select the entries to include. When you commit the batch, these email messages are added to the program as constituent interactions.

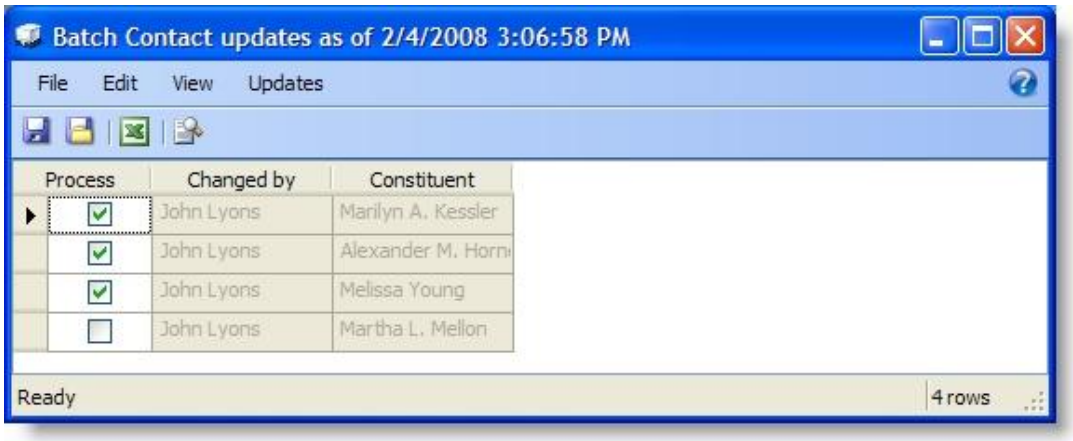
To view the details of an email message, select the row on the batch data entry screen. In the **Message Detail Window**, the email message appears. The frame also displays the constituent and application user who exchanged the email message, when it was sent, and the subject. To hide or view the frame, select **View**, **Show Message Detail Window** in the menu.

For more information about the **Message Detail Window**, see the *Batch and Import Guide*.

Exchange Contact Update Batch

When you download contact record changes from Microsoft *Outlook*, the program creates an uncommitted contact update batch on the Batch Entry page. To edit a contact update batch, select it and click **Edit**, **Edit batch**. The batch data entry screen appears.

Note: Before you can edit a contact update batch, you must update the status to "Ready for review." On the action bar, click **Update status**. The Update status screen appears. Select "Ready for review" in the **State** field, select an owner, and enter comments as necessary. Click **Save**. You return to the Uncommitted Batches tab. You can now edit the batch.



The batch data entry screen displays the contact records downloaded from *Outlook*. The grid displays the *Outlook* user who changed the contact record and the constituent in the program. If multiple application users modify contact records for a constituent, multiple entries for that constituent appear. Under **Process**, select the entries to include. When you commit the batch, the program updates the corresponding constituent records.

Review Contact Update Batch Details

The download *Exchange* data process downloads changes to contact records from Microsoft *Outlook* into uncommitted batches. From the batch data entry screen, you can view the details of the contact update batch and compare changes to the contact record in *Outlook* to the constituent record.

View the details of an Exchange contact update batch

1. On the batch data entry screen, select the row of the contact update batch to view.
2. In the menu, select **Updates**, **Review record updates**. The Review record updates screen appears.

   On the Review record updates screen, you can compare changes in *Outlook* to the constituent record and select the changes to commit to the database. Changes to contact records appear on several tabs. The fields changed in *Outlook* determine the tabs that appear. For more information about these tabs, see Tabs of the Review Record Updates Screen on page 45.

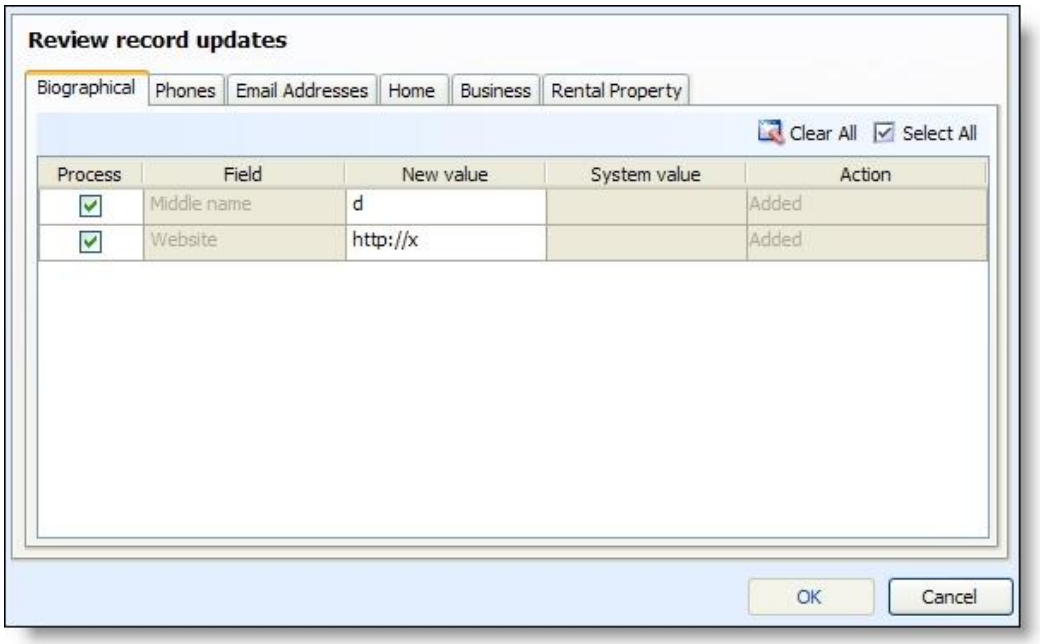
Note: To view details of a contact update batch, you can also click **Review record updates** on the action bar or press **CTRL + U** on the keyboard.

Tabs of the Review Record Updates Screen

On the Review record updates screen, you can compare changes to the contact record in *Microsoft Outlook* to the constituent record. The fields changed in *Outlook* determine the tabs that appear on the screen.

Biographical Tab

When you download changes to personal information from a contact record, the Biographical tab appears. On this tab, you can view changes to biographical information such as name and website that is mapped to Microsoft *Outlook*.

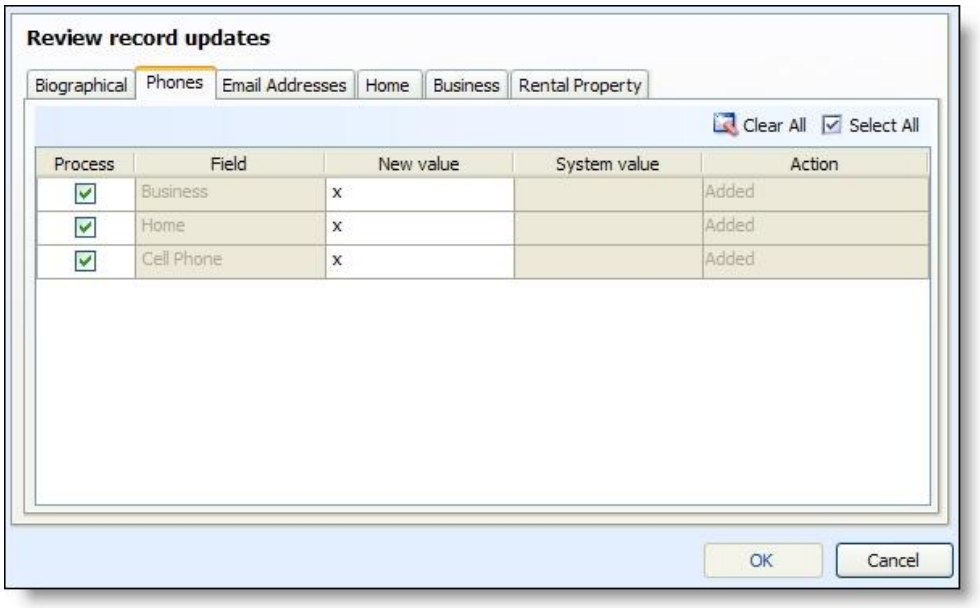


Under **Process**, select the entries to include when you commit the batch. To select all **Process** checkboxes, click **Select All**. To clear all **Process** checkboxes, click **Clear All**. When you commit a batch, the program updates the constituent records.

The **Field** column displays the fields that were changed on the contact record. The **New Value** column displays the changes. You can edit entries in this column as necessary, such as to correct misspelled words. Changes to this column are reflected on the contact record after you commit the batch and run the contact synchronization again. The **System value** column displays the data in the constituent record before the change. The **Action** column indicates whether the *Outlook* user added or edited data on the contact record. “Added” indicates the user added data to a blank field. “Changed” indicates the user edited existing data.

Phones Tab

When you download changes to phone numbers on a contact record, the Phones tab appears. On this tab, you can view changes to phone numbers mapped to Microsoft *Outlook*.

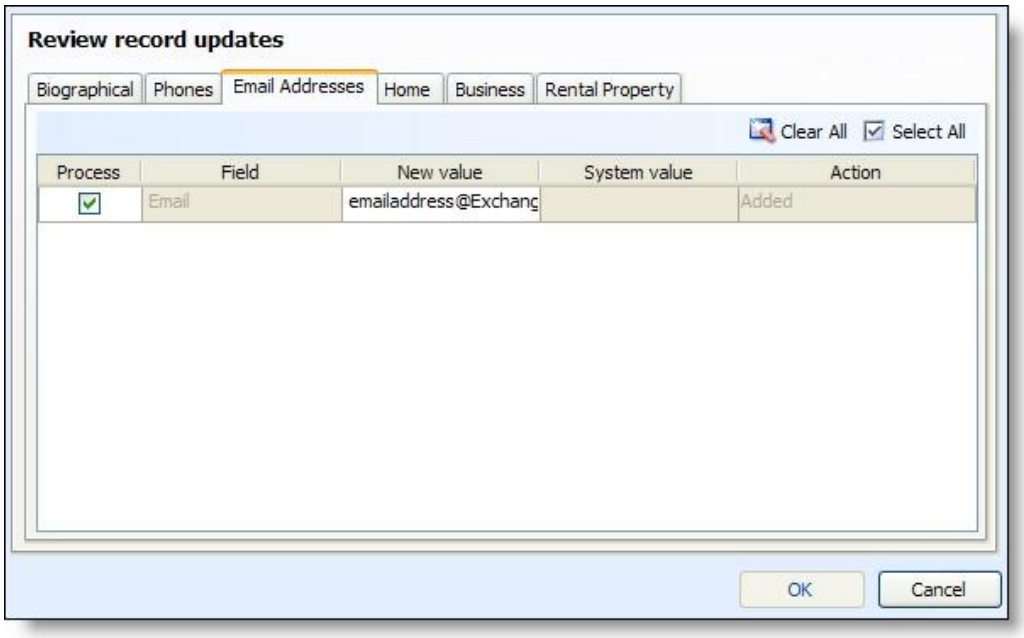


Under **Process**, select the entries to include when you commit the batch. To select all **Process** checkboxes, click **Select All**. To clear all **Process** checkboxes, click **Clear All**. When you commit a batch, the program updates the constituent records.

The **Field** column displays the fields that were changed on the contact record. The **New Value** column displays the changes. You can edit entries in this column as necessary, such as to correct misspelled words. Changes to this column are reflected on the contact record after you commit the batch and run the contact synchronization again. The **System value** column displays the data in the constituent record before the change. The **Action** column indicates whether the *Outlook* user added or edited data on the contact record. “Added” indicates the user added data in a blank field. “Changed” indicates the user edited existing data.

Email Addresses Tab

When you download changes to the email address on a contact record, the Email Addresses tab appears. On this tab, you can view changes to email addresses mapped to Microsoft *Outlook*.

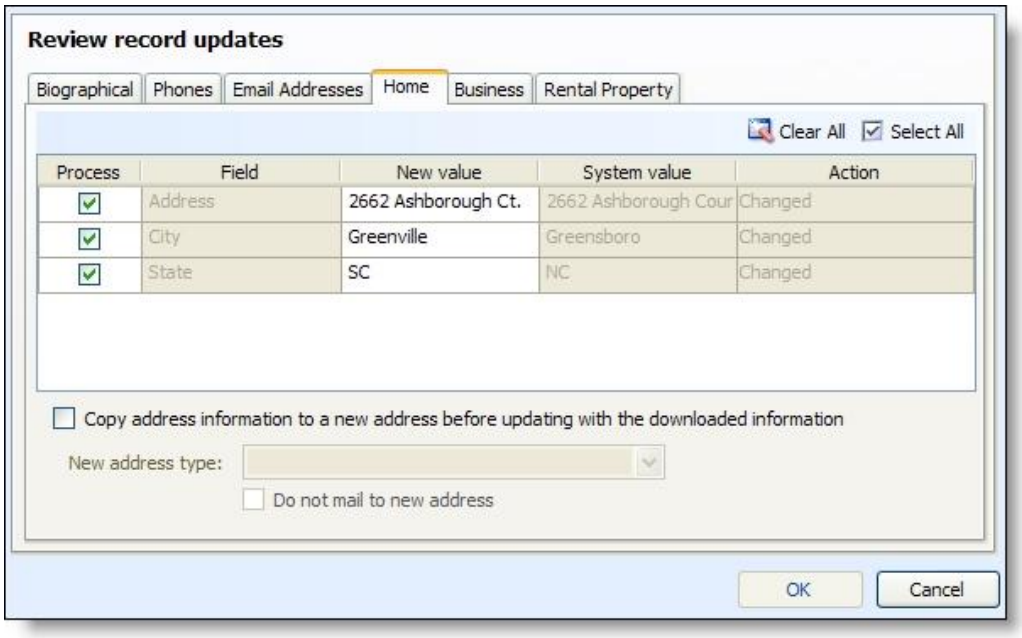


Under **Process**, select the entries to include when you commit the batch. To select all **Process** checkboxes, click **Select All**. To clear all **Process** checkboxes, click **Clear All**. When you commit a batch, the program updates the constituent records.

The **Field** column displays the fields that were changed on the contact record. The **New Value** column displays the changes. You can edit entries in this column as necessary, such as to correct misspelled words. Changes to this column are reflected on the contact record after you commit the batch and run the contact synchronization again. The **System value** column displays the data in the constituent record before the change. The **Action** column indicates whether the *Outlook* user added or edited data on the contact record. “Added” indicates the user added data in a blank field. “Changed” indicates the user edited existing data.

Miscellaneous Address Types Tab

When you download changes to an address on a contact record, a tab appears for that address type. The name of the tab depends on the address type in the database that you map to Microsoft *Outlook*. For example, if you map the “Home” address type to *Outlook* and change the information on the contact record, the Home tab appears. On this tab, you can view changes to addresses mapped to *Outlook*.



Under **Process**, select the entries to include when you commit the batch. To select all **Process** checkboxes, click **Select All**. To clear all **Process** checkboxes, click **Clear All**. When you commit a batch, the program updates the constituent records.

The **Field** column displays the fields that were changed on the contact record. The **New Value** column displays the changes. You can edit entries in this column as necessary, such as to correct misspelled words. Changes to this column are reflected on the contact record after you commit the batch and run the contact synchronization again. The **System value** column displays the data in the constituent record before the change. The **Action** column indicates whether the *Outlook* user added or edited data on the contact record. “Added” indicates the user added data in a blank field. “Changed” indicates the user edited existing data.

To save new address information but not replace an existing address, select **Copy address information to a new address before updating with the downloaded information**. In the **New address type** field, select an address type for the new address information. To have “Do not mail” appear beside the address on the constituent record, select **Do not mail to new address**.

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