

Gold-Vision – Enabling Calendar Synchronisation

Pre-upgrade Checklist

Before continuing please review and check the following:

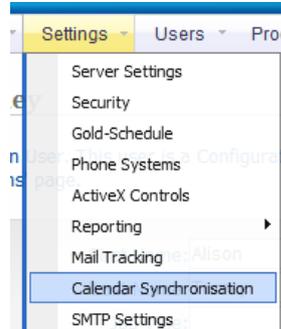
- **Calendars** – please ensure that your third party calendar system is compatible with this feature. Calendar Synchronisation supports the following third party calendar providers:
 - **Microsoft Exchange 2007 or later**
 - **Google calendar**
 - **Office 365**

NB. Please note if you are on Exchange 2003 or 2000, DO NOT enable external Calendar Synchronisation. You will be **unable** to use the new built-in Appointment synchronisation functionality but you will have the new Calendar functionality.

- **Calendar Settings** – if **all users** use the same 3rd Party Calendar you will need to know the following information:
 - **Default calendar address for Exchange**
e.g. <https://server/ews/exchange.asmx> - this can be found in an existing user record under 'mail tracking details', or via your IT support.
 - **Office 365** – Service account username and password
 - **Default calendar username –Exchange** - this will usually be the service account that is used by Gold-Vision to access your calendar provider (in domain name format or email address format – e.g. domain\username or user@domain.co.uk).
 - **Default calendar username –office 365 or Google** – use the service account username and password
- **Time Zone** – if all users are in the same time zone please ensure the correct **default time zone** is selected from the time zone dropdown list.
- If you have users working in different time zones you will also need to configure time zones **BY USER** from the Admin Console under **Users > View Users**. See Option 2 below.
- When upgrading please ensure **Gold-Vision is not currently in use – all users should exit the system.**
- Please note the upgrade process is not reversible.
- If you have any queries or would like assistance before proceeding, please contact support via email on support@gold-vision.com or by phone on 01788 511110.

How to enable Calendar Synchronisation

1. Ensure you are on the latest version of Gold-Vision.
2. Once the Live Update is complete, please review the checklist above and ensure you have all the information required.
3. To begin enabling the Calendar Synchronisation in the Admin Console select **Settings > Calendar Synchronisation**.



Gold-Vision Administration Console

Home - User Interface - Settings - Users - Products - Alerting - Data - Documents - LiveUpdate - Help

Calendar Settings

Gold-Vision is currently running in 'classic' calendar mode, meaning Appointments are created directly in Outlook. A new calendar synchronisation process is supported that allows you to create Appointments directly in Gold-Vision, which remain synchronised with your calendar. The 'new' mode can be enabled using this screen, however, please check the following before doing so:

- Please ensure that your third party calendar is compatible with this feature. External calendar tracking supports the following third party calendar providers:
 - Google Calendar
 - Exchange 2007 or later
 - Office 365
- Please ensure that Gold-Vision is not currently in general use. Performing this upgrade will temporarily degrade system performance whilst it is running and it is strongly recommended that this upgrade not be carried out during a time where users are currently working with Gold-Vision.
- Please ensure that a time zone has been configured for each user. To configure time zones for users, please view the [users list](#).
- If a time zone is not selected for user, the update process will use the default timezone selected below.

Important Note: Enabling the 'new' calendar mode is a one-way process that cannot be reversed. Depending on the number of Appointments currently present in your system, this process may take several minutes to complete.

If you are unsure about any of the points above, please contact Gold-Vision technical support or your account manager for assistance.

Enable New Calendar Tracking Mode: (I confirm that I have understood the above information.)

Default Settings

Default Time Zone: (UTC) Dublin, Edinburgh, Lisbon, London
The time zone applied to all appointments when the user does not have a specific timezone set

Default Calendar Type: Exchange 2007 (Recommend upgrading to 2007 SP1)
The third party calendar that users will be used by default

Default Calendar Address: https://server/ews/exchange.asmx
Example: https://server/ews/exchange.asmx

Default Calendar Username: domainusername
Example: domain\username

Default Calendar Password:

Lock User Calendar Settings:
Stops users from changing their connection details for appointment scanning

Auto Add Member Attendees:
Automatically add linked members of the parent to the appointment as attendees

Save

Gold-Vision Logged on as Mark Vernon [Check for Gold-Vision Updates](#)

OPTION 1 – ALL USERS USE EXCHANGE AND ARE IN THE SAME TIME ZONE

Select the Default Time Zone

Select the **Default Calendar Type and Address**. This is the default address for accessing the calendars. For Exchange this will generally be in the format <https://exchangeserver.domain.local/EWS/exchange.asmx>.

Default Calendar Username – if you have a Service Account user that has permissions to access multiple users, the service account's NT account details should be entered here. **NB.** Service Accounts on Exchange can be configured by your system administrator.

Lock User Calendar Settings – If you do not want to allow users to change their connection details for appointment scanning (from the Homepage Preferences), set this option on. **Please note that this is off by default.**

Auto Add Member Attendees – Automatically adds linked members of the parent to the Appointment as attendees, e.g. If you create an appointment from an Account, it will automatically add the Primary Contact. **Please note that this is off by default.**

Click **Save**. This will initiate the migration process.

You will now need to test the connection for all users and select the Calendar which will synch with Gold-Vision.

Open the User record and click the Calendar Setting icon (or users can open from the My Menu → Preferences → Home Page → Calendar Settings)

- Import from 3rd Party – tick if the 'non Gold-Vision' appointments are to be synchronised with Gold-Vision
- Click Test Connection. Once connection test successful, select the Calendar which is to synch (usually this will be the default Calendar)

OPTION 2 - ALL USERS USE EXCHANGE BUT NOT ALL IN THE SAME TIME ZONE

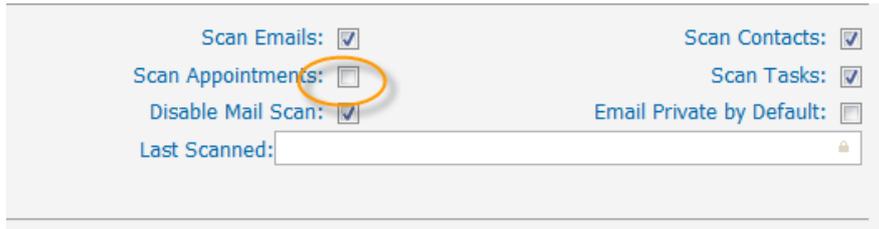
As above but set up **Time Zone by User for those not in the Default Time**. Open the User record and click Time Zone field (or users can open from the My Menu → Preferences → Home Page)

OPTION 3 – ALL USERS USE OFFICE 365 - If a service account exists, you will need to set the service account’s username and password as defaults. If a service account does not exist please set this up on a per user basis via the individual user record. (As above)

OPTION 4 – ALL USERS USE GOOGLE – This will need to be set up on a per user basis. In order to configure Google for Gold-Vision access the Google API needs to be configured. See Appendix A

OPTION 5 – A MIXTURE OF CALENDARS – Please do not set any Calendar defaults, set up per User.

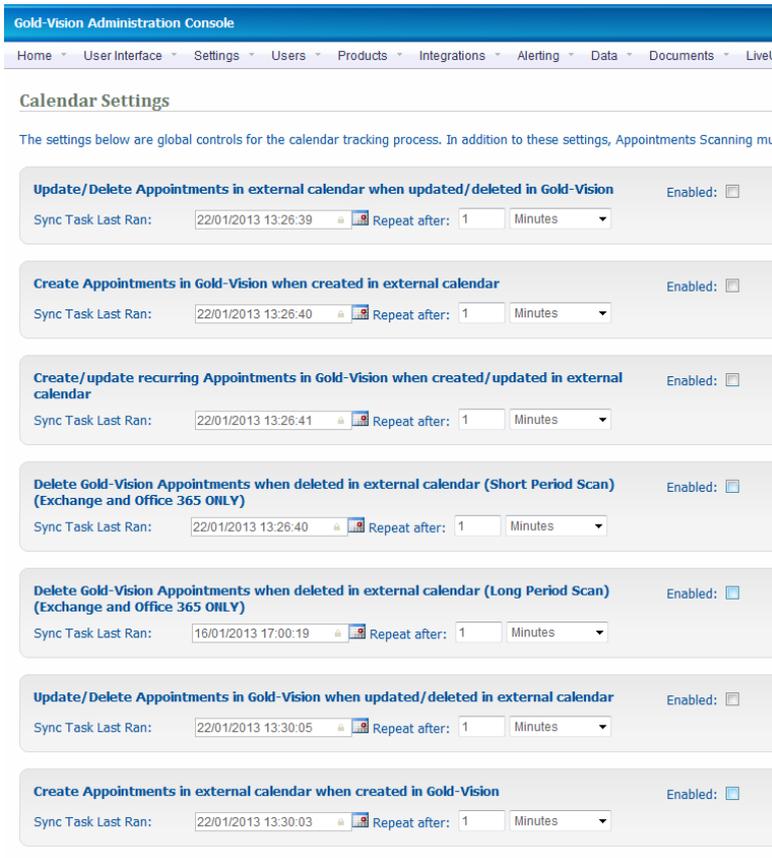
Please note: If users’ calendars do not need to be tracked, un tick the Scan Appointments checkbox in the User record.



Once all users have been set up you can then enable the Calendar Sychronisation.

Settings → Calendar Sychronisation. This will bring you to the **Calendar Settings** page.

Calendar Settings



This shows a list of all the synchronised tasks which take place when Calendar Synchronisation is enabled.

Please enable the services you wish to run.

The default scan date can be changed as required.

Activation of Calendar Synchronisation

Please note – Any existing appointments that were created from Gold-Vision will be updated, but not affected.

If you have ticked (per user) **Import From Third Party**, then all Non Gold-Vision Appointments in their selected Calendar will be brought into Gold-Vision. By default, the appointments are marked as Public, however if the appointment is marked as Private in Outlook, it will appear as a Private Appointment in Gold-Vision.

For Private appointments, only the Owner (or a user who has been given permission, see below) can change the setting to make it Public.

Before enabling calendar synchronisation, it is recommended that users mark any personal appointments as Private if required, or move their Personal appointments to a separate Outlook calendar.

Please note- Private Appointments do not follow Gold-Vision Security – the details can **only** be viewed by the Owner and any user who has been given permission to Create and Edit Appointments. **Other users will not be able to open the Appointment.**

Setting Calendar Permissions

A new permission set has been added specifically for Calendars.

Calendar permissions must be set by the **user** and can be configured from under the User Settings screen, which can be found under the Home menu or by clicking on the user's name in the bottom left corner of the screen.

Preferences		Edit	Undo	Close
First Name:	Nikki	Phone System:	Not Set	
Last Name:	Bugla	Phone Country:	UNITED KINGDOM	
Position:		Outside Line Prefix:		
Department:		National Prefix:	0	
Team Name:	Management Team	International Code:	44	
Email:		International Prefix:	00	
Direct Phone:		Default Currency:	[Base Currency] (£ GBP)	
Mobile Phone:		Date Format:	[default]	
Middle Name:		Numeric Format:		
Use Word MailMerge:	<input type="checkbox"/>	Time Zone:	(GMT) Greenwich Mean Time :	
Simple View Menu:	<input type="checkbox"/>			

Calendar Permissions				
User	Read My Private Appointments	Create or Edit My Appointments		
Alison Turney	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Save	Delete
Jiggy Keith	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Save	Delete
Andrew Fiendley	<input type="checkbox"/>	<input type="checkbox"/>	Save	

From the Calendar Permissions screen users can grant access to others to allow them to create/edit appointments on their behalf.

Create/Edit Permissions

Create/edit permissions can be granted by selecting a user from the drop down, checking the Create or edit Appointments box and clicking the Save button to the right. By granting a user Create/Edit

permission you are allowing them to create appointments on your behalf and also be able to edit the attendee list (see below).

Read My Private Appointments

By checking the Read My Private Appointments box and clicking the Save you are granting a user to be able to see the details (namely Subject and Location) of any Private Appointments in your calendar.

FAQ

My Outlook Appointments are not all showing in Gold-Vision

This may be due to the scan date of appointments, for example your appointment might have been created prior to the scan date. Ask your GV Admin to re-set the scan date.

I don't want my personal appointments to appear in Gold-Vision – what do I do?

You have various options for stopping Outlook appointments appearing in Gold-Vision.

- If you don't want any non-Gold-Vision Appointments from your calendar to appear in Gold-Vision ensure the Import Appointment checkbox is NOT ticked.

From the My Menu → Preferences → Homepage → Calendar Settings



Calendar Settings ▾	
Calendar Type:	Exchange2010
Primary Email Address:	<input type="text"/>
Web Service Uri:	https://valiant.esteiro.local/ews/exchange.asmx
Username (Optional):	<input type="text"/>
Password (Optional):	<input type="text"/>
Ignore Certificate Errors:	Yes
Import Appointment:	<input type="checkbox"/>

- Alternatively, if you set your appointments in your main synchronised calendar to be **Private**, when they are imported into Gold-Vision, they will be visible in the Appointments list, but will be marked as 'private' and only readable by you. They can be made Public if required.
- Thirdly, if you do not want the appointments to be brought into Gold-Vision at all, you can create a new 'Personal' calendar in Outlook/Exchange and then transfer your personal appointment into that calendar. Gold-Vision will only pick up appointment from one calendar at a time (usually your 'main' calendar).

APPENDIX A

Required Data

The Gold-Vision to Google API integration requires three pieces of information and some configuration setting up. *You will gain these pieces of information by following the steps below.*

1. An O-Auth 2.0 Client Email Address
2. A matching O-Auth 2.0 Private Key
3. A matching O-Auth 2.0 Password

Gmail Account

You will need an active Gmail/Google Calendar account in order to perform these steps. Please note that the O-Auth account and your end-user GMail account can be the same, but do not have to be. For the purposes of testing you may as well use the same account to log in to the Google API Console (below) and Gmail.

Google API Console

The first port of call is the API Console.

<https://console.developers.google.com/>

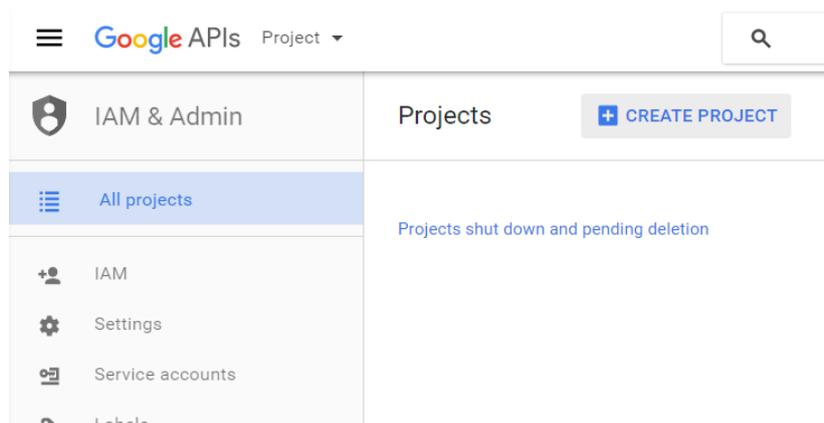
Example Test Account

You can use the follow account for testing if you do not have one already.

- Username: esteirotest@gmail.com
- Password: testword

Create a New API Project

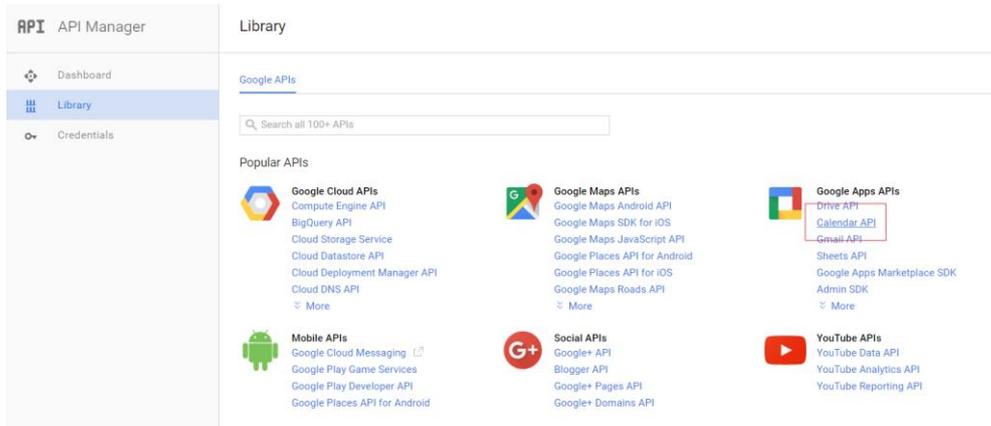
When you first log into the Google API page at <https://console.developers.google.com/> you will automatically be redirected to the **IAM & Admin** section where you can set up your project. Select **Create Project** from the top menu.



It will ask you to select a project name – type this in and click **Create**. It will take a few minutes to create the project.

Configure Calendar API

After the project is created; you will automatically be redirected to the **Library** of APIs. Select **Calendar API** from the **Google Apps APIs** section.



After you select the Calendar API, select **Enable API** at the top of the next page. After the API is enabled you'll get a message telling you about **Credentials**, click **Go to Credentials** if you haven't already set these up.



There are a few different options for credentials, what you're looking for though is the 'Create Oauth Client ID' selection. When you first visit this page it will warn you that you need to set the **Product Name** on the **Consent Screen**. Simply click **Configure consent screen** to do this.



Fill out the details for **Email Address**, **Product Name** and **Homepage URL** then click **Save** to commit these changes. You will then be asked to create your client ID, select **Web Application** as the type, enter a friendly name for it and any restrictions you would like to use (you can find out more about the types of restrictions available [here](#)) and click **Create**.

You will then be issued with a **Client ID** and **Secret**, please make a note of both of these and click **Ok**.

Configure Mail API

To configure the Mail API simply follow the steps to configure the **Calendar API** but instead of selecting that select the **Gmail API** instead. If you've already configured the Calendar API this will only require you to turn it on.

Google Calendar Permission Changes

The next thing you will need to do is change your Google Calendar permissions to give your API developer client account read/write access.

1. Log into Google Calendar
2. Click the Settings menu (the gear symbol)
3. Select "Settings"
4. Click the "Calendars" tab
5. Click the "Edit" link under the "Sharing" column for your desired calendar
6. Under the "Share with specific people" section copy-paste your developer Client Email Address (looks like 316726158585@developer.gserviceaccount.com)
7. Under the permission settings choose "Make Changes AND Manage sharing"
8. Click the "Add Person" button to set the permission.

Now your Google developer Client ID will be able to modify your Google calendar through O-Auth.

Gold-Vision Settings

In Gold-Vision you can apply the settings acquired through this process to allow it to access and modify your calendar.

1. In Gold-Vision select "Home" and then "User Settings"
2. Click the Navigation menu and select "Calendar Settings"
3. Click the "Edit" button
4. Change the "Calendar Type" be "Google"
5. Paste your developer Client Email into the "Client Email" field (looks like 316726158585@developer.gserviceaccount.com)
6. Enter your O-Auth password in to the "Password" field (do NOT enter your Gmail/Calendar password)
7. Click "Upload File" and upload your O-Auth private key file.
8. Click the "Test Connection" button.
 1. If you get a "Bad Request" response then either your client ID, certificate or API settings are incorrect
 2. If your password is incorrect you will get a specific password incorrect button
9. If the test succeeds select your Google Calendar from the "Calendar/Folder" drop down
 1. Note: Do not select your developer client id from the drop down, it will not work.
10. Click "Save"