Using

MiSync Personal for iMIS

V4.2.0.17 BETA

by Metisc

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Getting Started

Overview

MiSync Personal for iMIS is a tool that allows you to synchronize contacts between Outlook and *iMIS*.

You can synchronize contacts based on the following methods:

- iMIS ID
- Member Type
- Adhoc search
- Committee members
- Meeting registrants

Once you synchronize data, *MiSync* stores a link between *iMIS* and Outlook so that changes made to contacts in one system are reflected in the other.

What's New

Change the separator in IMISAllGroups file to make it unique.

Former releases:

Add Licensing

Adding Ignore Activity Date checkbox for ignoring from and thru date in Activity/Committee filtering when retrieving from iMIS.

Fix Address not updated when sync from Outlook to iMIS.

Fix new Contact from Outlook cannot be search by name in iMIS.

New User Interface implemented consistent with Outlook

Choice of MAPI or the Outlook Object Model to communicate with Outlook has been simplified and automated

MiSync installed as a separate program group

New security additions for Outlook security

Corrected occasional configurations where e-mail was not synced from *iMIS*

Additional Contact fields added to Outlook

Support for multiple e-mail addresses and preferred e-mail address added

Redundant Verify option removed from Contacts

User information screen allows ID's to be linked to *iMIS* user names, enabling synchronizing for Appointments, Tasks, E-mails and Opportunity Management

Added alternate CDO processing method where appropriate

Corrected faults in some Outlook/Exchange configurations

Ability to stop Business Fax numbers coming into Outlook

Manual has been improved

Ability to schedule Contact sync using Windows Scheduler

Ability to create Distribution Lists during Contact sync from *iMIS*

MiSync now checks for and ignores any instances where an email address matches more than one *iMIS* customer record

Cell phone mapping is now customizable. Users can choose which 'name' table they wish to retrieve a customer's cell phone number from when doing a sync from iMIS to Outlook

MiSync can now handle the third address line, present in iMIS v10.6 onwards

Users can choose to display company name in the title of an Outlook contact

Re-enable Bulk Sync synchronization process.

System Requirements

Microsoft SQL Server or MSDE

iMIS 10.6 and greater for MSDE, or MS SQL

Pentium processor

256 Mb of memory

15 inch color VGA display (17 inch SVGA recommended)

Microsoft Outlook 2000/XP/2003/2007/2010

Microsoft Exchange 2007

Technical Support

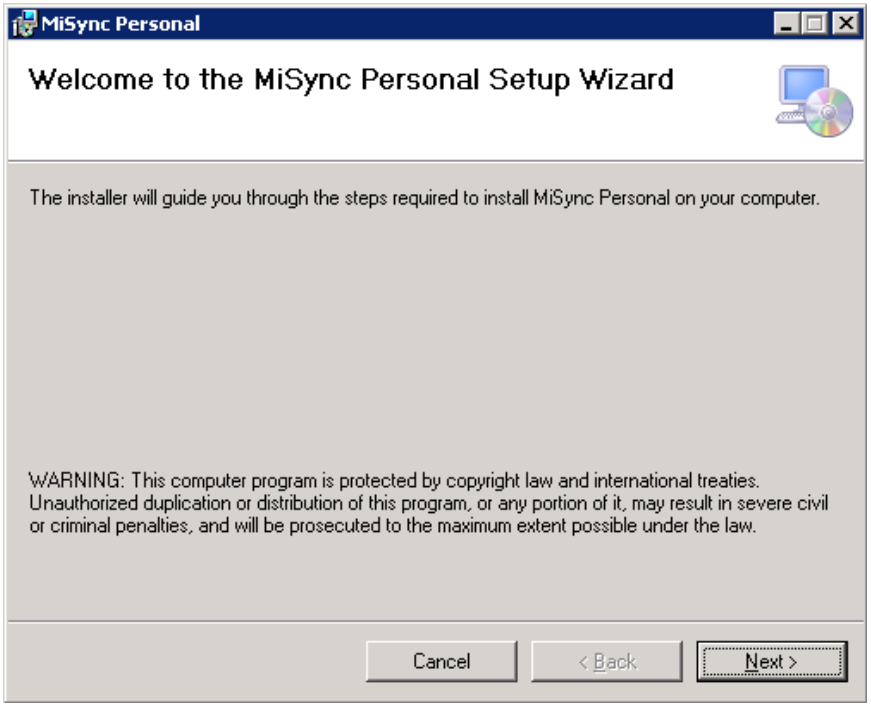
For technical support, contact:

Metisc Computer Services
www.metisc.com.au
support@metisc.com.au

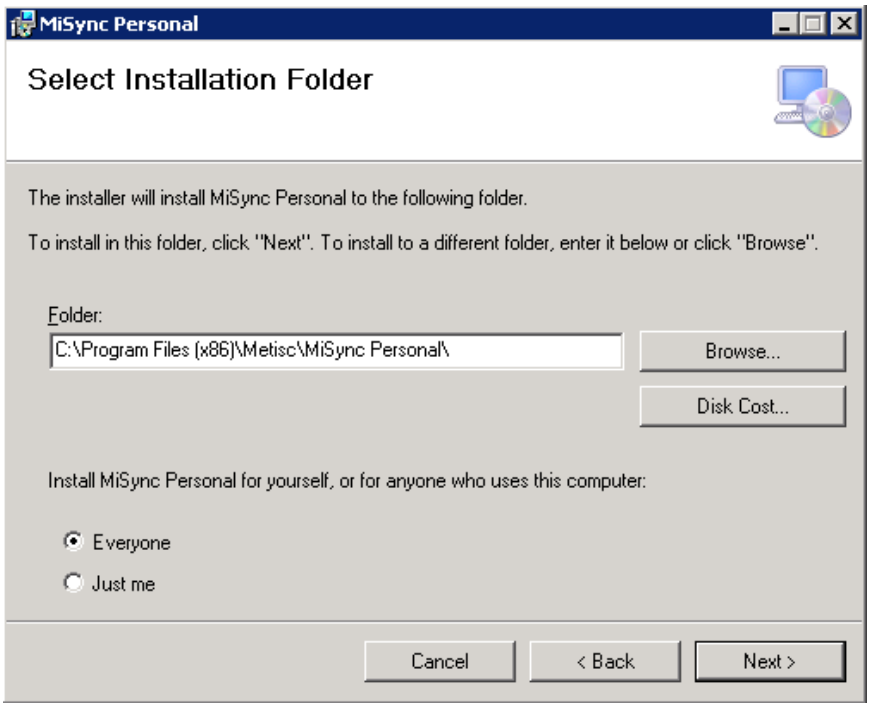
Installing *MiSync Personal for iMIS*

Before running the installer, please make sure you uninstall any MiSync Personal installation in your computer.

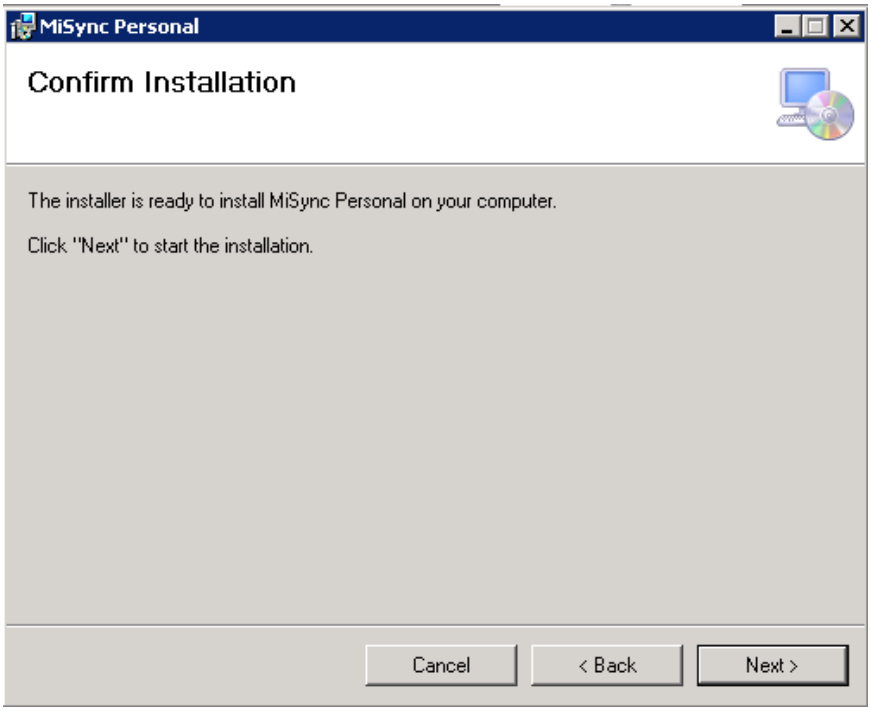
Run the installation program on the computer on which you wish to use *MiSync*. Click **Next >** to begin the installation.



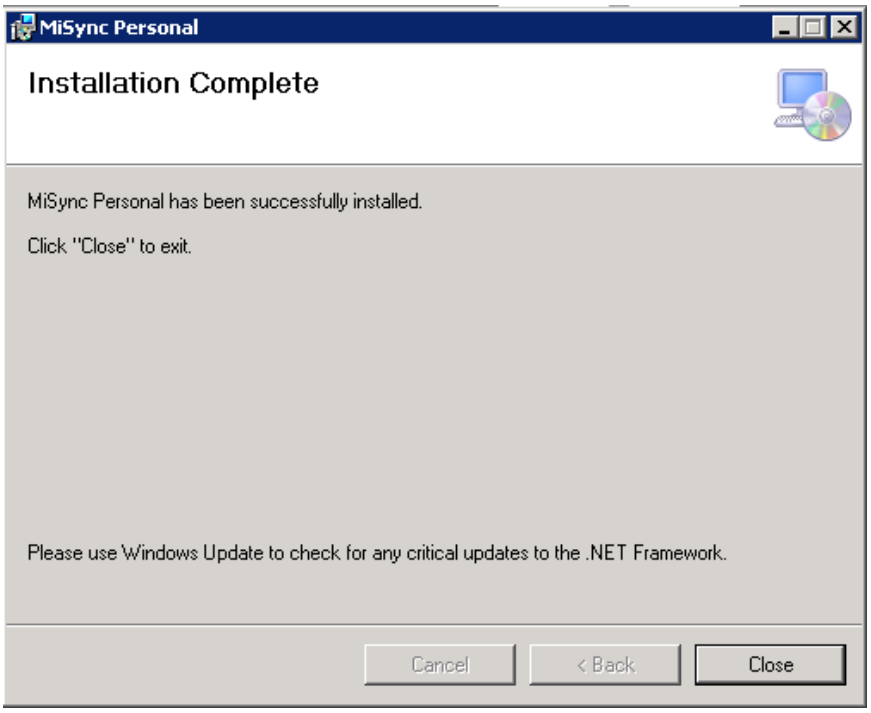
Choose the location you wish to install to and specify who will have access to the program. Then click **Next >** to continue the installation.



MiSync is now ready to be installed. If you are happy with your installation settings, click **Next >** to commence the installation.



Once installation is complete, click **Close** to end the installation process.

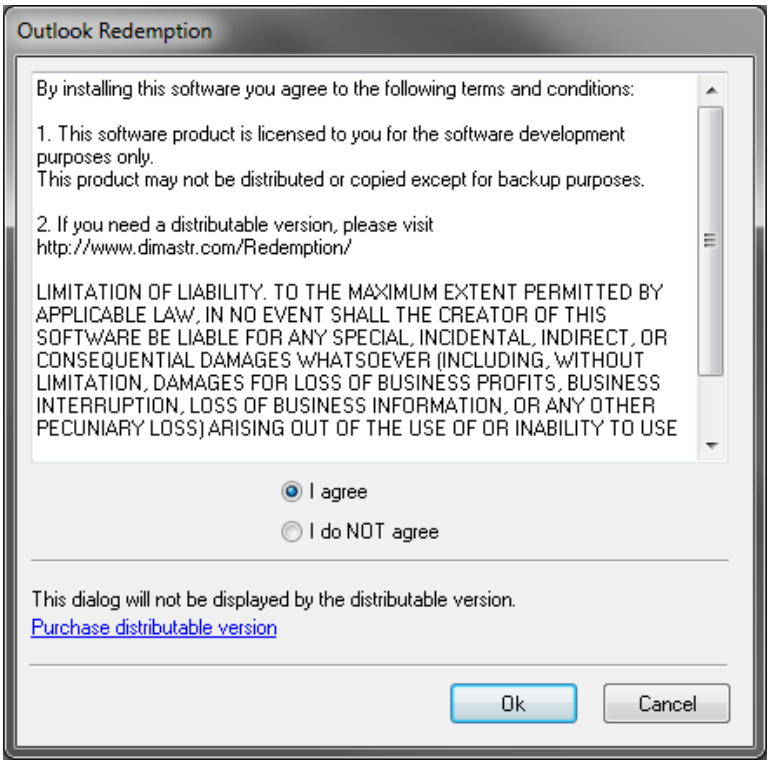


There should now be two shortcuts to *MiSync Personal* placed on your desktop, one for *MiSync Personal for CRM* and one for *MiSync Personal for iMIS*.

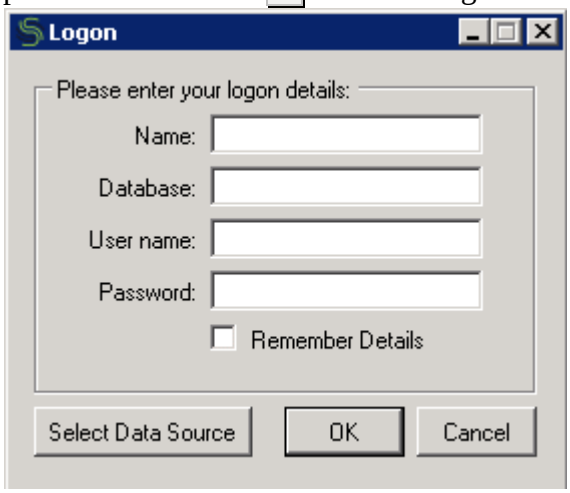
► To un-install, see "Installation Notes" section in the appendices.

Running *MiSync Personal for iMIS* for the First Time

1. Please make sure that your Outlook is connected into any mailbox.
2. The first time you run *MiSync*, you may be prompted with agreement of using Outlook Redemption, check I Agree and click Ok button.



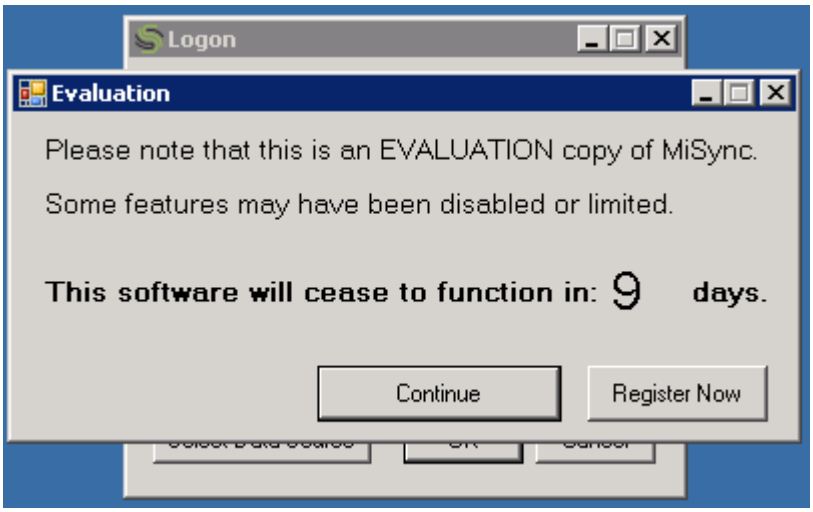
3. After that, you are prompted with a database login window. You will see this window every time you run *MiSync*. Enter a valid server address, database name, user name and password. Click the **OK** button to login.



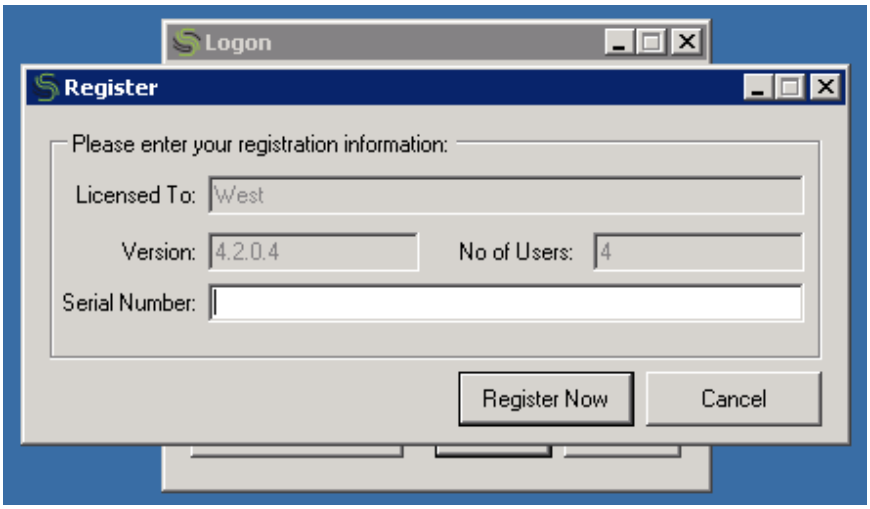
4. To change the Data Source, click **Select Data Source**.

Trial and Registration

First tme user will be prompted by a trial form. We can still use the application within 30 days after first installation.



Registration can be done by clicking the "Register Now" button and will prompt for serial number. After doing a valid registration, these forms will not show up again.



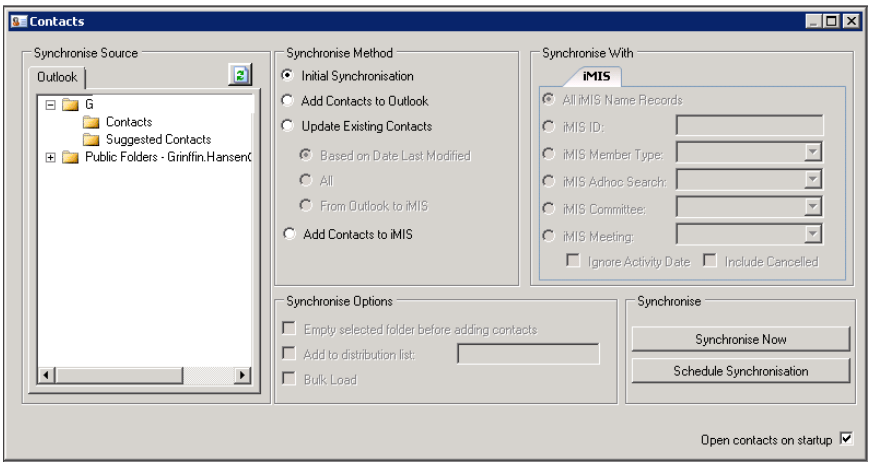
Using *MiSync Personal for iMIS*

Starting *MiSync Personal for iMIS*

To open *MiSync*, select:

Start>All Programs>Metisc>MiSync>MiSync For Imis

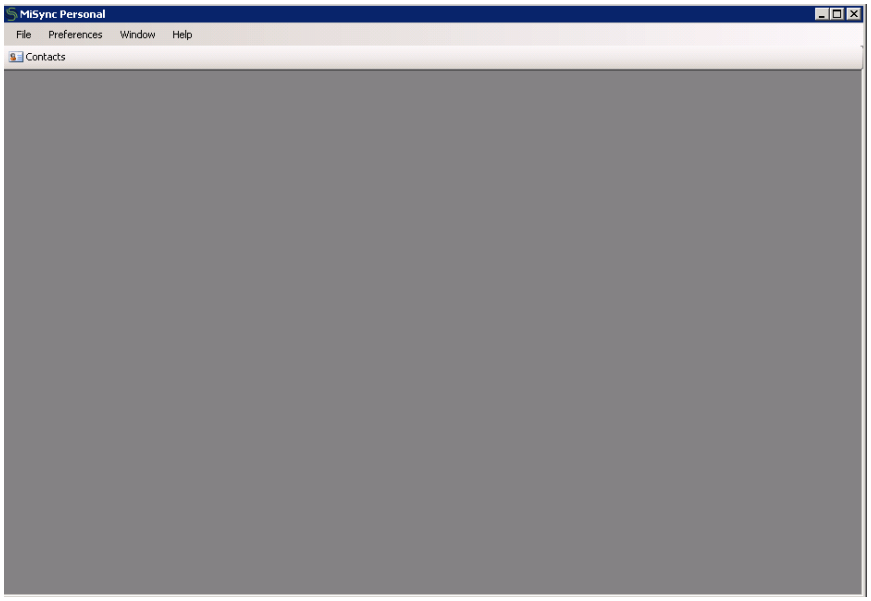
Alternatively, click on the MiSync For iMIS icon on your desktop. Once you log in, the following screen will appear:



MiSync will automatically log on to your Outlook or Outlook/Exchange system using either the default profile of the currently logged-on Windows user, or your selected profile if you have multiple profiles.

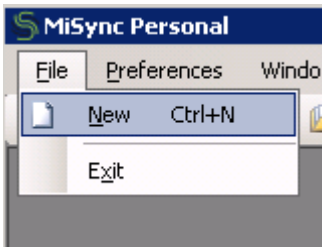
Once you have logged on, you can begin synchronizing information between Outlook and *iMIS*. The sections that follow provide details about using *MiSync*.

This is the main *MiSync* screen:



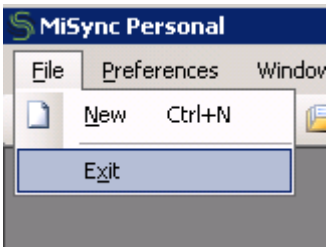
These are the available menus of the main screen:

File>New



A new ‘Contacts’ window will open.

File>Exit

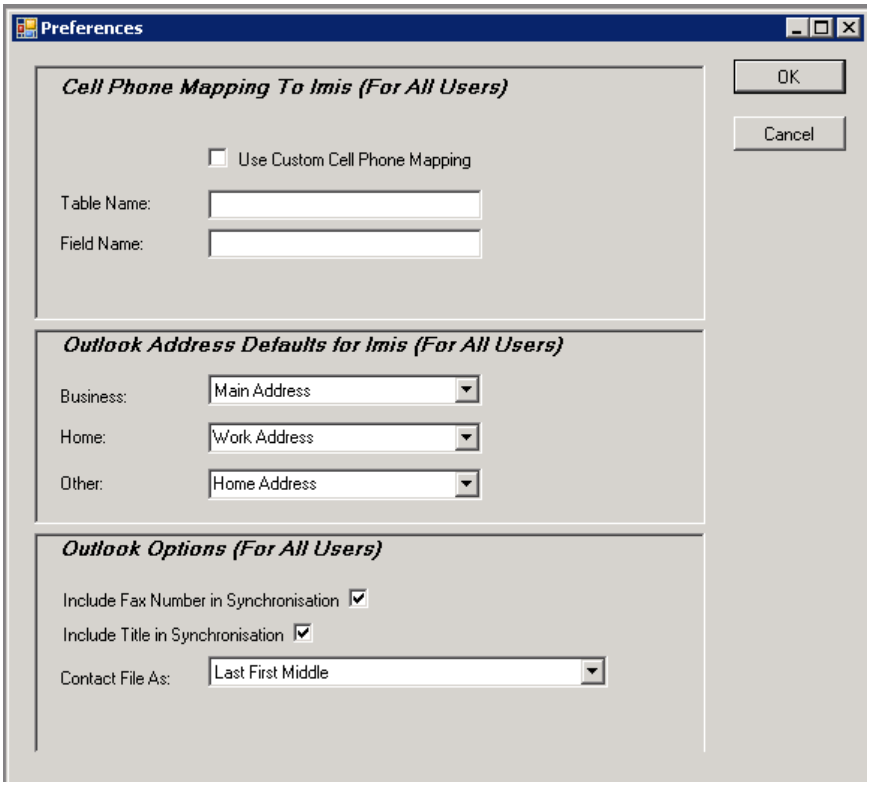


MiSync will be closed.

Preferences

This will open a 'Preferences' screen.

The following options are available in the 'Preferences' screen:



Cell Phone Mapping to Imis (For All Users)
Tick the Use Custom Cell Phone Mapping check box to allow synchronization of mobile phone numbers. A valid database table and field name must also be entered defining where *MiSync* should retrieve a contact's cell phone number from.

Un-tick the Use Custom Cell Phone Mapping check box to disallow synchronization of mobile phone numbers.

Outlook Address Defaults
Change address mapping between iMIS and Outlook.

Outlook Options (For All Users)
Tick the Include Fax Number in Synchronization checkbox to include contact's fax numbers in Outlook.

Un-tick the Include Fax Number in Synchronization checkbox to exclude contact's fax numbers in Outlook.

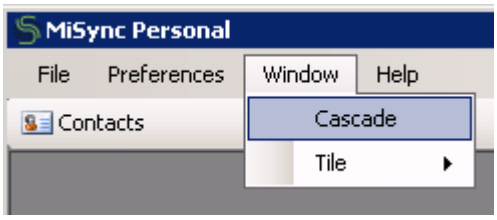
Tick the Include Title in Synchronization checkbox to include titles of contacts (i.e. Mr. Mrs.) in Outlook.

Un-tick the Include Title in Synchronization checkbox to exclude titles of contacts in Outlook.

Contact File As will display the following options:

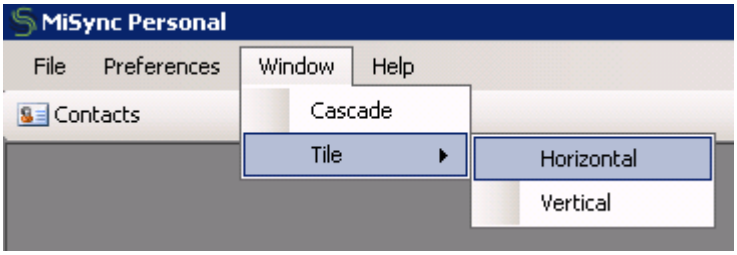
Pick an option which will determine how contacts are sorted in Outlook.

Window>Cascade



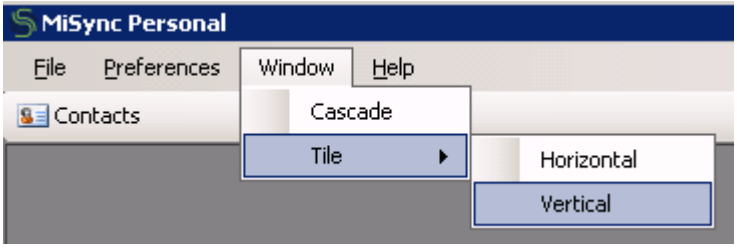
Arranges multiple ‘Contacts’ windows.

Window>Tile>Horizontal



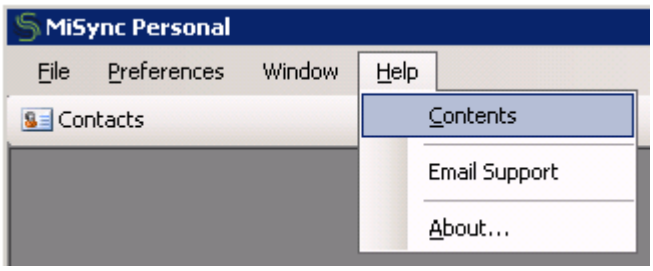
Arranges multiple ‘Contacts’ windows horizontally.

Window>Tile>Vertical



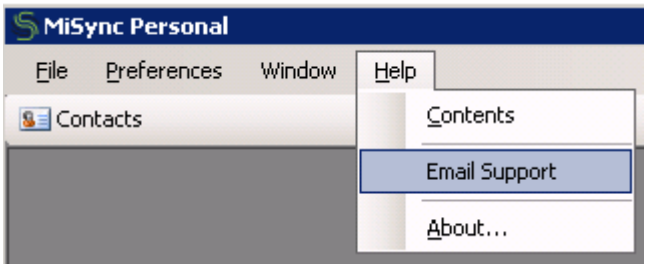
Arranges multiple ‘Contacts’ windows vertically.

Help>Contents



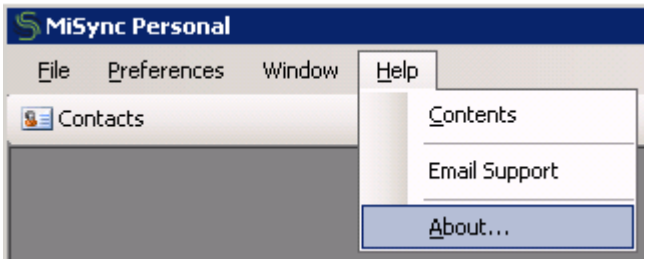
An application help window will open.

Help>Email Support



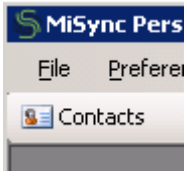
Send an email to Metisc support.

Help>About…



Display information regarding *MiSync* and contact information.

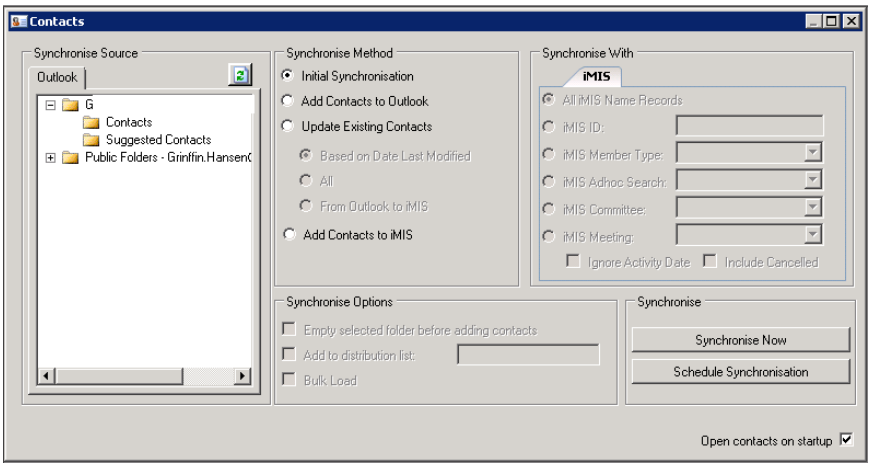
Contacts button



A new 'Contacts' window will open.

Synchronizing Contacts

This is the main Contacts screen of *MiSync*:

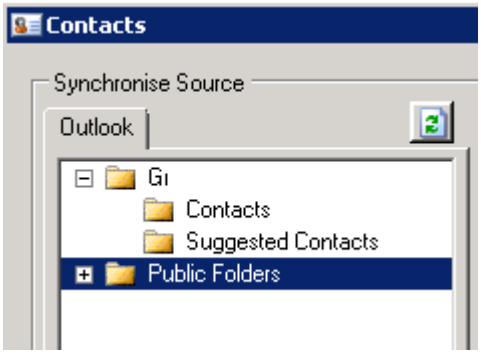


The **Contacts** icon allows you to synchronize Outlook contacts with *iMIS* Name records. You must select one or more options from each of the three selection areas before you can synchronize records. The three selection areas include **Synchronize Source**, **Synchronize Method**, and **Synchronize With.**

► Note: Please make sure that the First Name and Last Name in Outlook is filled before sync to iMIS, because it's mandatory in iMIS.

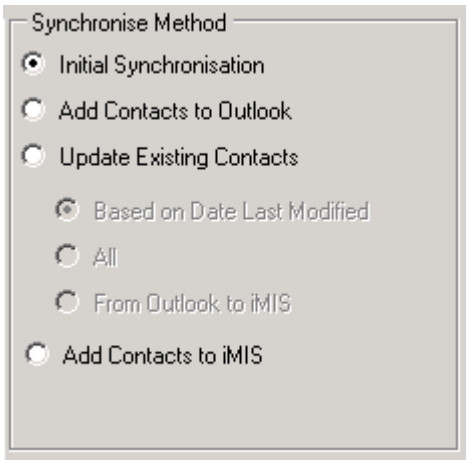
Synchronize Source

This area displays the available Outlook folders. Select the folder to which you want to add contacts and from which you want to copy contacts. Refresh button will refresh/update the display of all your Outlook files.



Synchronize Method

Use the options in this area to specify how you want *MiSync* to synchronize your contacts.



Initial Synchronization – Select this option to establish links between matching record in both Outlook and *iMIS*. *MiSync* matches contacts based on first name and last name.

Once contacts in Outlook and *iMIS* are linked, updates made in either system can be sent to the other system, or date based updates can be performed.

► Note: Due to the way dates are stored in Outlook, your PC's regional settings should be correct. If the settings are not correct, the dates that iSync compares against in SQL Server and Exchange may result in incorrect updates and incorrect data being considered the most recent update.

Add Contacts to Outlook – Select this option to add new (not already linked) contacts in *iMIS* to Outlook.

Update Existing Contacts – Select this option to apply changes from one system to the other, where the contact records are already linked. The option "Based on Date last Modified" allows updates to occur in both systems based on the most recent update from either system. The option "All" will update all existing contacts.

The "Based on Date last Modified" and "All" option will sync from iMIS to Outlook, the "From Outlook to iMIS" option will sync all from Outlook to iMIS.

► Note: Due to the way dates are stored in Outlook, your PC's regional settings must be correct. If the settings are not correct, the dates that iSync compares against in SQL Server and Exchange may result in incorrect updates and incorrect data being considered the most recent update.

Add Contacts to iMIS – Select this option to add new (not already linked) contacts in Outlook to *iMIS*.

Synchronize Options

These options are available only if 'Add Contacts to Outlook' is selected.

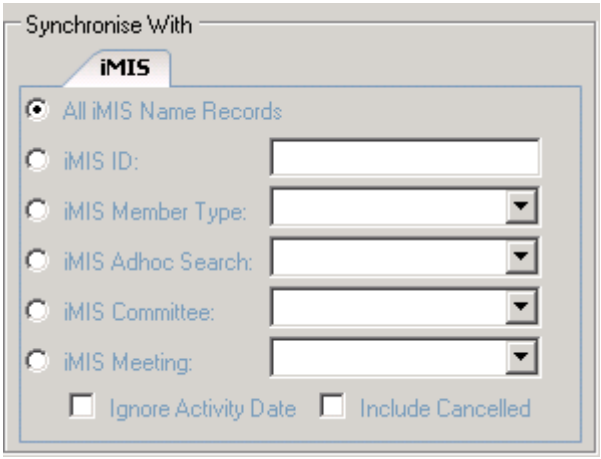
Empty selected folder before adding contacts – Select this option if you want to add *iMIS* contacts to Outlook. The system will empty the Outlook folder and then add all the selected *iMIS* contacts. This option is useful if you are using Folders to store meeting registrants or Committee Members and the registrants cancel, or committee members leave. If they are not deleted, you may have committee members that are not current.

Add to distribution list: When this option is selected, it is possible to create Distribution Lists which include contact records from *iMIS.*

Bulk load : When this option is selected, distribution list are created for all the different groups and contacts are added to the distribution list. This option also removes contacts from the distribution list when it is no longer in its associated IMIS group

Synchronize With

Use the options in this area to specify which contacts to synchronize with Outlook.



All iMIS Name records – Select this option to synchronize all *iMIS* contacts.

iMIS ID – Select this option to synchronize one *iMIS* contact.

iMIS Member Type – The option value is from all customer type in *iMIS.* Select this option to synchronize all *iMIS* contacts of the selected member type.

iMIS Adhoc Search – Select this option to synchronize all *iMIS* contacts returned in the selected adhoc search. Note searches that include *iMIS* calculations are not supported.

iMIS Committee – The option value is from Committee codes that's being used in the activity in *iMIS*. Select this option to synchronize all *iMIS* contacts in the selected committee. The "Ignore Activity Date" checkbox is used if want to synchronized all selected Committee without filtering by From and Thru Date.

iMIS Meeting – The option value is from all event in *iMIS*. Select this option to synchronize all *iMIS* contacts registered for the selected meeting. The "Include Cancelled" checkbox is used if cancelled registrants need to also be synchronized.

Synchronize

Synchronize Now Click this button to synchronize the data between Outlook and *iMIS*. A progress bar displays the progress of the operation. When the process is complete, a message displays informing you of how many records were synchronized. The synchronize process can be interrupted/stopped by clicking on the **Cancel** button which will appear during synchronization next to the progress bar.

Schedule Synchronization Schedule the current chosen settings to run at defined times. This option allows you run synchronization at set times, for example every Monday and Friday, every 6 hours, or on the first day of each month. This option is only available in the E-mail and Contacts window. For more information see the sections **Scheduling Synchronization**.

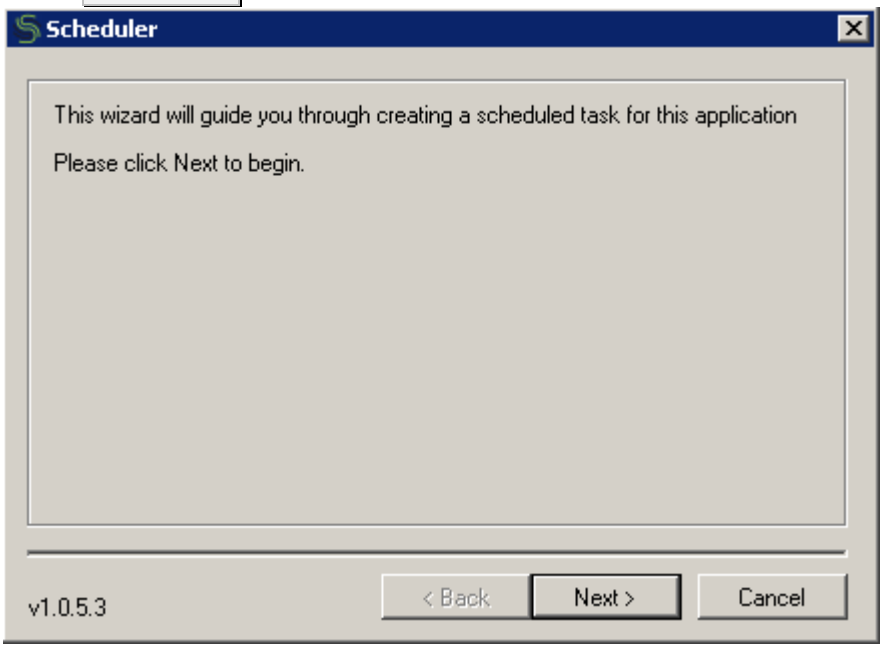
Open contacts on startup – Tick this check box for MiSync to start with a 'Contacts' window. Un-tick this check box and MiSync will start without the 'Contacts' window.

Schedule Synchronization

MiSync gives you the ability to schedule Contact and Account synchronizations using the Windows scheduler. First select the type of Synchronization as you would normally and then press the **Schedule Synchronization** button.

You will be presented with a 'Scheduler' screen which allows you to choose the recurrence type of the schedule.

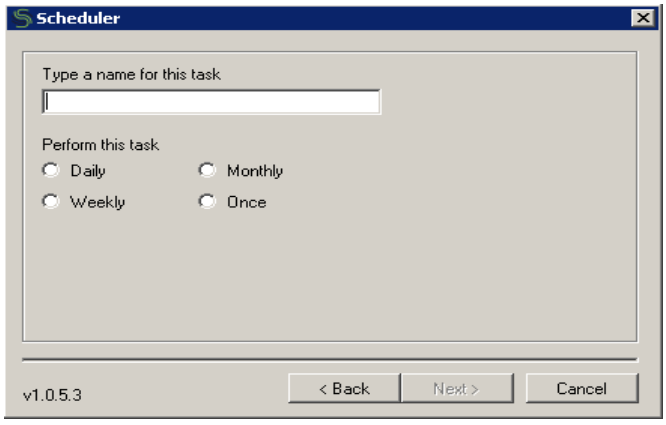
Click **Next >** to continue.



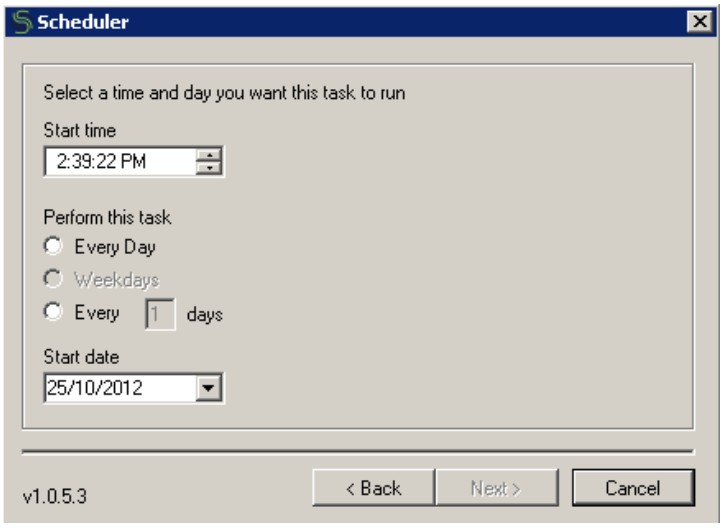
When scheduling tasks you have three different types of recursion:

- Daily
- Weekly
- Monthly
- Once

Each has its own set of parameters that must be set for the schedule to be constructed. Pick an option and enter a name for the task. Click **Next >** to continue.

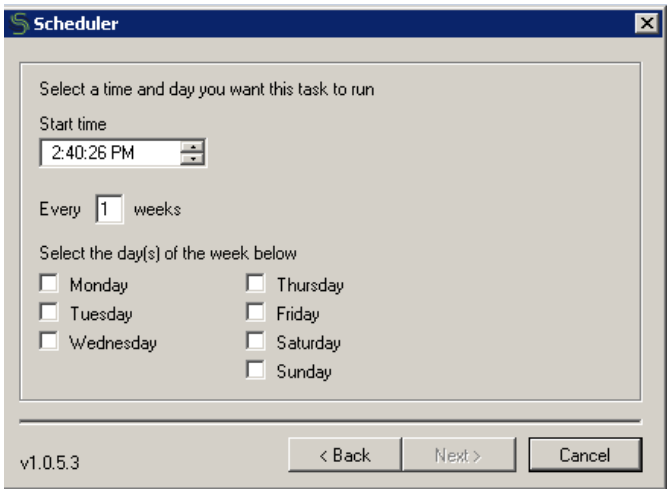


Daily



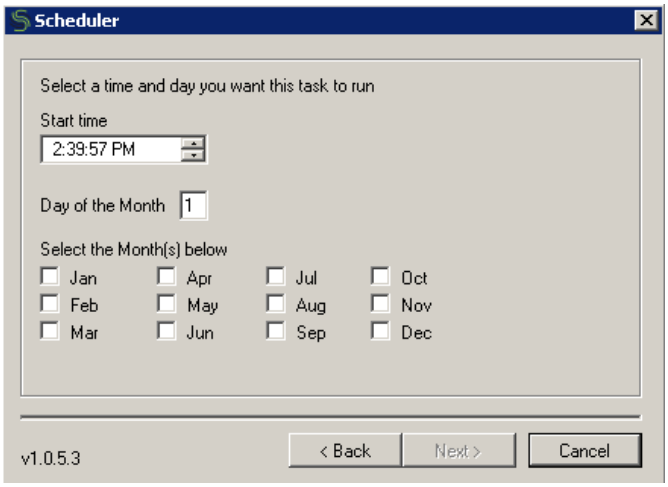
The first option is ‘Daily’. This allows you to schedule synchronizations for every ‘x’ number of minutes or hours on a specific day or days. To schedule this type simply enter the start time and start date you wish the schedule to kick off, and tick the option you wish it to recur on.

Weekly



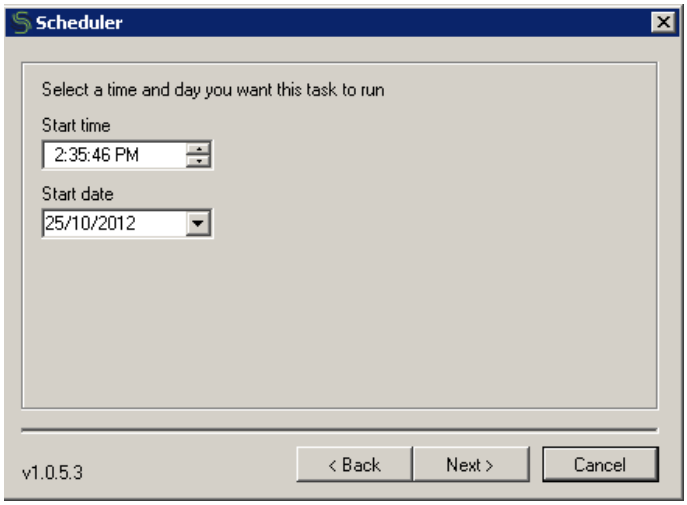
The second option is ‘Weekly’. This allows you to schedule synchronizations for every ‘x’ number of weeks on a specific day or days and at a specified time. To schedule this type simply enter the start time you wish the schedule to kick off, enter the weeks you wish it to recur on and tick the day or days you wish the synchronization to run on.

Monthly



The third option is 'Monthly'. This allows you to schedule synchronizations on the 'x'th day of specific month or months and at a specified time. To schedule this type simply enter the start time and day of the month you wish the schedule to kick off, and tick the month or months you wish the synchronization to run on.

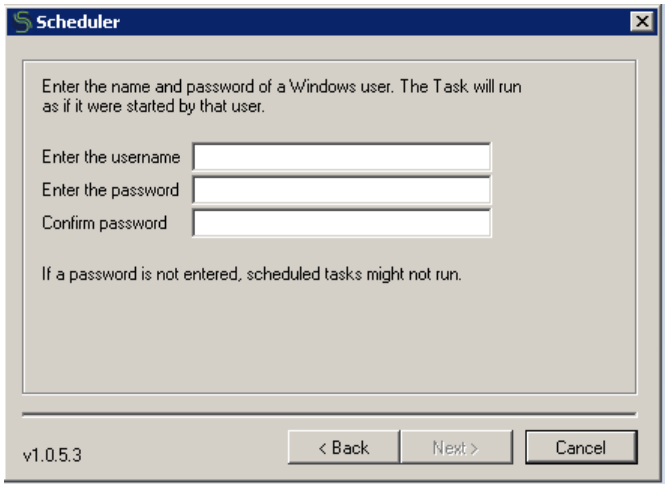
Once



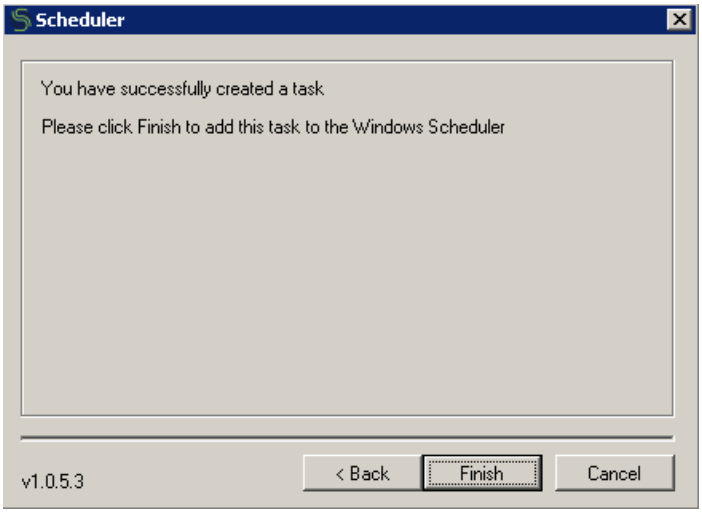
The final option is 'Once'. This allows you to schedule synchronizations just once for a specific time and day. To schedule this type simply enter the time and day on which you wish the schedule to kick off.

Once you adjust your schedule, click **Next >**.

This final screen requires your Windows name and password. You can enter another user's name and password so that the schedule will run as if it were started by that user. When you are satisfied with your options, click the **Next >** button to complete your schedule.



You schedule is now set, click the **Finish** button to close the window.



You can view and makes changes to your scheduled tasks in the Windows Scheduler by going to **Start > All Programs > Accessories > System Tools > Schedule Tasks**

Bulk Load

When creating the Schedule Synchronization with Bulk Load, the application will create a new file named (username)IMISAllGroups in the "C:\Users\(username)\AppData\Roaming\Metisc\MiSync Personal", this file contains of all groups name (separated by unique character "!@#") from Member Type, Adhoc, Committee, and Meeting that want to be synchronize when scheduler is running with the Group type at the prefix.

You can modified this file to only leave the group that want to be synchronize, for example if you only want to sync the ADHOC group, just delete all groups that don't has ADHOC prefix, and run the scheduler. Need to remember that everytime you create a new Bulk Load scheduler, this file is refreshed and will contains all groups again.

Communicating with Outlook

MiSync communicates with Outlook using:

- MAPI
- Outlook Object Model

Appendices

Using Command-Line Parameters

Using command-line parameters allows you to automate some operations in *MiSync*. The automation is normally performed using the Windows Scheduler, or Automation products like *iFlow* for *iMIS*.

At the command line, type the path of the M*iSync* executable, followed by your *iMIS* user name and password, the command line options.

Example Contacts Command-line Sync:

```
MiSync.exe iusr:<user> ipwd:<password> /close
/OLPROFILE:<profile name>
/SYNCITEM:<item>
/SYNCFOLDER:<folder name>
/SYNCDIR:<method>,<direction>[,EMPTY]
/SYNCMETHOD:<type>[=<name>]
```

Where:

```
<profile name> = Name of Outlook Profile
<item> = CONTACTS
<folder name> = Name of Outlook folder
<method> = EXISTING or NEW
<direction> = TOMAPI, FROMMAPI, BOTH
<type> = ALL, or
IFS=<IFS filename>, or
TYPE=<member type>, or
ADHOC=<adhoc searchname>, or
COMMITTEE=<committee name>, or
MEETING=<meeting code>
```

Example E-mail Command-line Sync:

```
MiSync.exe iusr:<user> ipwd:<password> /close
/OLPROFILE:<profile name>
/SYNCITEM:<item>
/SYNCFOLDER:<folder name>
```

```
Where:
```

```
<profile name> = Name of Outlook Profile
<item> = EMAIL
<folder name> = Name of Outlook folder
```

Connection and command line options can be preceded by "-" or "/." These options are listed below. To execute more than one synch in the same run, precede each task with the SYNCITEM: command.

Connection

DSN:<datasource name>	*iMIS* datasource name
USR:<username>	Database admin username
PWD:<password>	Database admin password
IUSR:<username>	*iMIS* username
IPWD:<password>	*iMIS* password

Commands

CLOSE	Closes the *MiSync* window when done
SYNCFOLDER:<folder name>	Name of Outlook folder
SYNCDIR:<method>,<direction>	EXISTING or NEW
SYNCITEM:<item>	Currently Only supports 'Contacts' and 'Email'
[,EMPTY]	Clear the folder first
SYNCMETHOD:<type>[=<name>]	ALL or IFS=<IFS filename> or TYPE=<member type> or ADHOC=<adhoc search name> COMMITTEE=<committee name> or MEETING=<meeting code>
DISTNAME:<name>	Name of Distribution group to add Contacts to. GAL only.
DISTEMPTY	Empty the Distribution group before Adding the contacts. GAL only
ORGNAME:<name>	Name of Organizational unit to add Contacts to. GAL only.
DEBUG	Debugging Mode.

Frequently Asked Questions

Q. *MiSync* gives me a message saying the evaluation period has expired.

A. If this message appears, contact your reseller to obtain a new serial number.

Q. A new version of *iMIS* has been installed. Do I need to do anything to *MiSync*?

A. No, as the database has not changed, *MiSync* is not affected at all.

Q. Where can I find the log files?

A. You can find it in "C:\Users\<username>\AppData\Roaming\Metisc\MiSync Personal\LogFiles"

Installation Notes

This section is provided for users who have installed *MiSync* version 3.0.0.0 and above.

To un-install *MiSync*

1. Make sure that Microsoft Outlook is not running prior to un-installing.
5. Open the **Contol Panel** (under **Start -> Settings**).
6. Select the **Add Remove Programs** icon.
7. Find the entry for **MiSync** & select.
8. Click on the **Remove** button.

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