



## Outlook CalDav Synchronizer

Outlook CalDav Synchronizer is a two-way solution to sync your Outlook 2013 calendar system to your CSM calendar. This tool is compatible with 64 and 32 bit Outlook.

*Please Note:* Outlook CalDav Synchronizer is the *preferred option* to support an Outlook calendar sync with CSM because the tool continues to be improved and supported by its vendor, CalDav. Symplicity's testing has shown this to be a more stable solution than other 3<sup>rd</sup> party synchronization options, and has successfully used CalDav with our Insight and Accommodate clients using appointment scheduling in 2015-2016. This feature has NOT been tested to work on Exchange servers, or with Outlook 2016.

*Clients using getOut or Google Sync may continue to use these options, however Funambol is no longer being updated and will no longer be supported by the Symplicity Help Desk. If you plan on switching from getOut to CalDav, please be sure to uninstall getOut on your computer.*

## Setting Up Outlook CalDav Sync

### System Settings

To activate syncing abilities for managers, the setting "Activate Calendar/Address Book Synchronization for Managers" must be enabled. Once this setting has been turned on, calendar sync system settings unique to each user will be available via the left navigation bar, under My Account > My Custom System Settings. From there, you will see a series of "Enable Synchronize" settings, including:

- Enable Synchronize for Calendar Events
- Enable Synchronize Student
- Enable Synchronize for Advising Appt.
- Enable Synchronize for Workshop
- Enable Deletion of Archived Items in Calendar
- Enable Deletion of Archived Items in Address Book

*Please Note:* If Enable Deletion of Archived Items in Calendar is set to "on", items that have been archived in CSM will also be deleted from the synced Outlook calendar. This setting only deletes one way, from CSM to the synced Outlook calendar. Items deleted on the synced Outlook calendar WILL NOT be deleted in CSM.

## Installing Outlook CalDav Sync

To begin, managers MUST download **Version 1.20.3** of the Outlook CalDav Synchronizer plugin using the link below.

### Downloading CalDav Sync Software

<https://sourceforge.net/projects/outlookcaldavsynchronizer/files/1.20.3/OutlookCalDavSynchronizer-1.20.3.zip/download>.

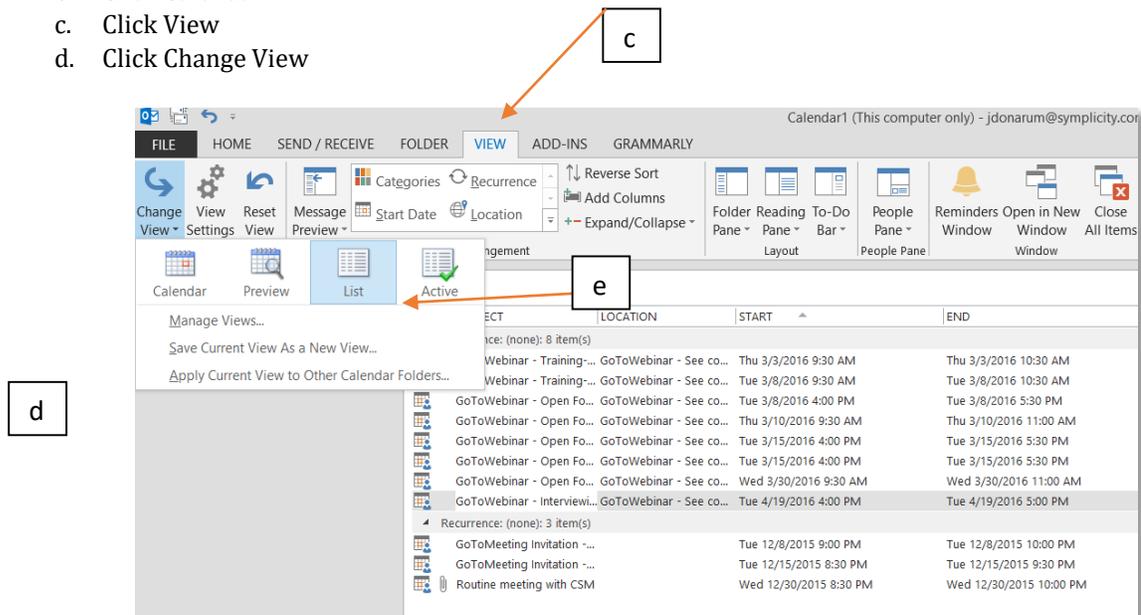
- The download will automatically prompt. Once the download completes, unzip the downloaded file
- Double click the "CalDavSynchronizer.Setup" file to install the plugin.
- Follow through the installation wizard to install the plugin.



**VERY IMPORTANT: Only for clients switching from getOut to CalDav**

**If you plan on switching from getOut to CalDav, please be sure to follow the steps below prior to setting up your CalDav synchronization profile.**

1. Completely uninstall getOut from your computer.
2. Manually purge all events found on your Outlook Calendar (don't be alarmed, they will all get synced back to your Outlook calendar when you sync with CalDav because they are already on your CSM calendar)
  - a. Open Outlook
  - b. Click Calendar
  - c. Click View
  - d. Click Change View



- e. Select List View
- f. Select and delete all events

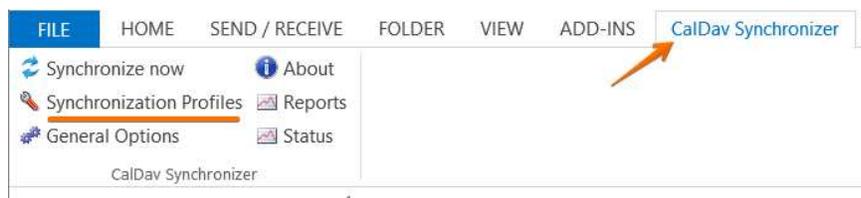
**Please note: Installing and syncing with CalDav without completing the removal of the getOut tool and ALL events on your Outlook calendar will result in duplicate events on your Outlook calendar.**

*An alternative to manually removing all of your items processed through a getOut sync will be to create a second calendar in Outlook and sync all items from CalDav to this new calendar. If you do this, you will still want to remove getOut from your computer.*



### Outlook Set Up for CalDav

Once the installation is completed, open Outlook. If you already had Outlook open, you must close it down and re-open. There should be new tab (for Outlook 2013) called “**CalDav Synchronizer**”. Click this tab, then “**Synchronization Profiles**” to set up CalDav integration.



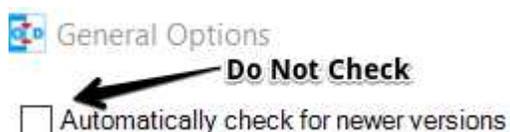
Now click the “**Add**” button > Make sure the radio button is selected for “**Generic CalDav/CardDav**” and click **Ok**

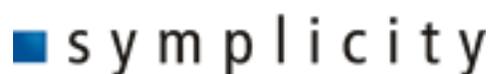
- **Name:** You may give the synchronization profile any name (we suggest using “CSM CalDav Sync”).
- **Outlook Folder:** Click three dots to select your existing Outlook calendar. If you want to create a new calendar in Outlook, click Calendar (this computer only) > New > Name your calendar > Folder Contains = Calendar Items > OK
- **Dav URL:** This url depends on your system, [https://\[instance\]-csm.simplicity.com/manager/cal/calendars/\[email\]/default/](https://[instance]-csm.simplicity.com/manager/cal/calendars/[email]/default/) Where:
  - [Instance] is your CSM url. For example, demo-csm.simplicity.com.
  - [Email] is your CSM manager email address
- **Username:** Your CSM email address
- **Password:** You CSM manager password (tied to above email address).
- **Email Address:** Your email address.
- **Synchronization Interval (minutes):** Select an interval of no less than 5 minutes.
- Click OK

A proper example of a Dav URL is:

<https://demo-csm.simplicity.com/manager/cal/calendars/test@simplicity.com/default/>

In Outlook Calendar under CalDav Synchronizer tab, click “General Options”, make sure that “**Automatically check for newer versions**” is NOT checked. This should remain unchecked as illustrated here:





**If your sync is unsuccessful** please check and confirm your settings under “Synchronization Profiles”. Within this section, you may also want to test your settings before syncing:

**Server settings**

DAV Uri:

Username:

Password:

Use IMAP/POP3 account password

Email address:

## Support



For questions or assistance with the CalDav Outlook Sync please contact the Symplicity CSM help desk at 703-373-7040 between the hours: Mon-Fri 9am-8pm ET (except holidays) or submit your questions via our client Neighborhood, which can be accessed via your CSM system.