Client-Based Groupware Integration

Applies to:

SAP CRM 2007. For more information, visit the Customer Relationship Management homepage.

Summary

This article explains client-based groupware integration that is used to synchronize tasks, appointments, and contacts between Microsoft Outlook and SAP CRM, and vice versa so that we can access from groupware client all the data that have been created in an SAP CRM application. This also explains how to trouble shoot incase of errors during synchronization.

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Client-Based Groupware Integration

This function is used to synchronize tasks, appointments, and contacts between Microsoft Outlook or IBM Lotus Notes, and SAP CRM, and vice versa so that we can access from groupware client all the data that have been created in an SAP CRM application.

In client-based groupware integration, the synchronization process has to be triggered by the user.

Configuration Steps

Step 1: Do necessary settings in Customizing for SAP Customer Relationship Management, by choosing: SPRO-> CRM Middleware and Related Components →Settings for Client-based Synchronization.

- In this Customizing activity we can define, for example, which transaction type can be used for the synchronization of appointments and tasks. We can assign and use only one transaction type for appointments and one transaction type for tasks. In the default Customizing, transaction type 0000 (appointment) is allocated for appointments and transaction type 1003 (task) for tasks.
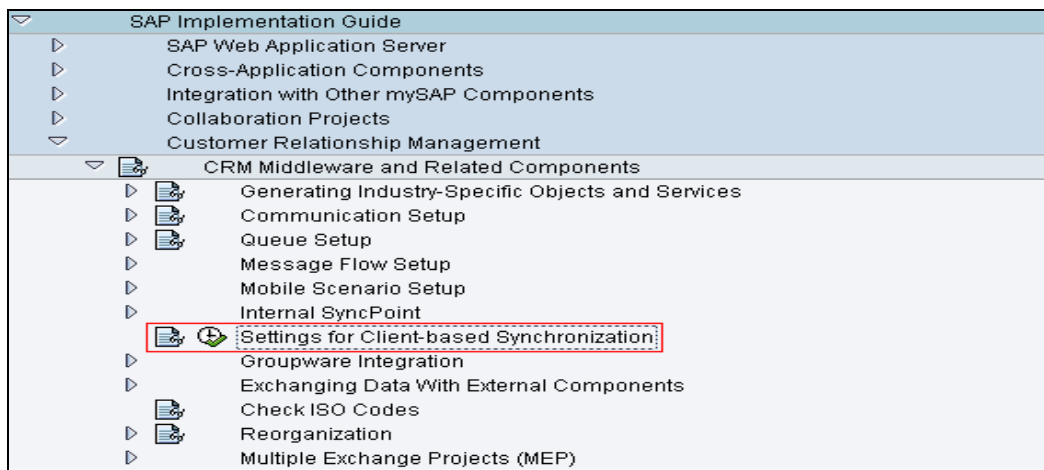
Step 2: Installation of Synchronization Software:
- Click on the "**PERSONALIZE**" option on the UI.
- Select the "**Install Synchronization software**" under Groupware Integration.

Step 3: Settings for Client based Groupware Integration (for Microsoft Outlook):
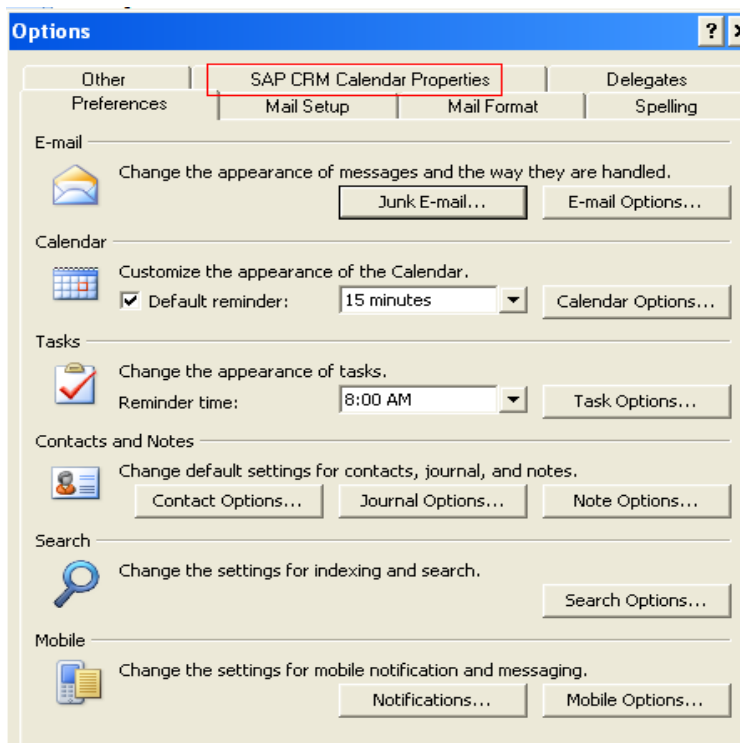
There are two ways by which these settings could be done- settings from Microsoft Outlook or through SAP CRM Web client.
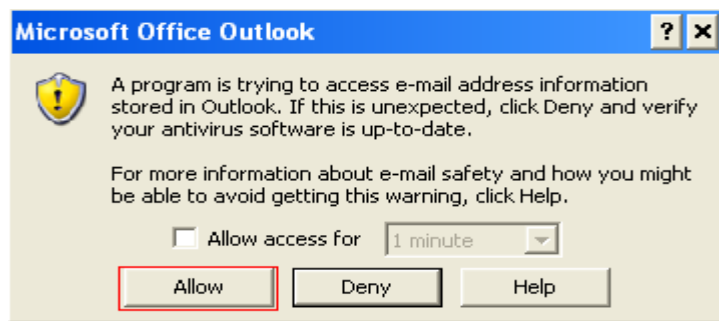
Settings from Microsoft Outlook:

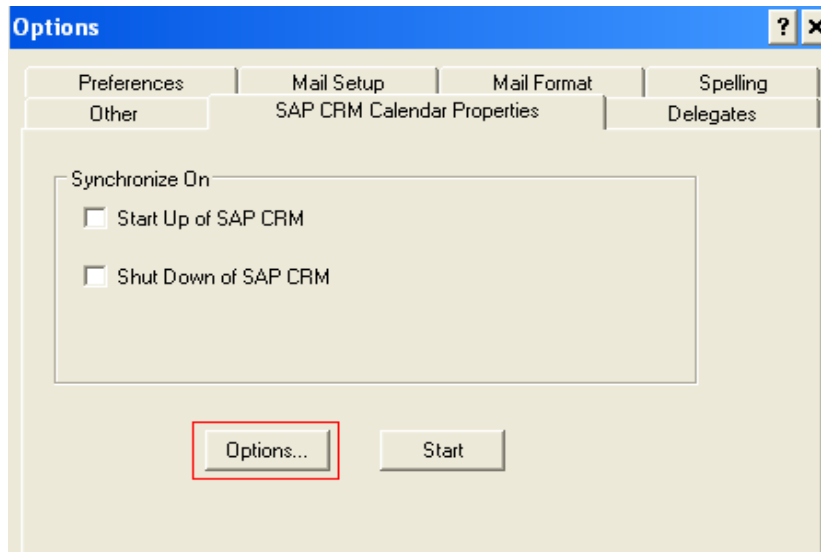- Path- *Tools* →*Options* →*SAP CRM Calendar Properties* ->choose the *Options* pushbutton.
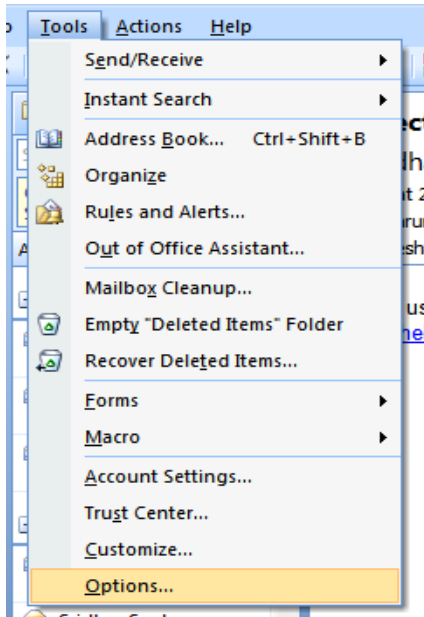
- Select "**SAP CRM calendar Properties**" in the Options window.

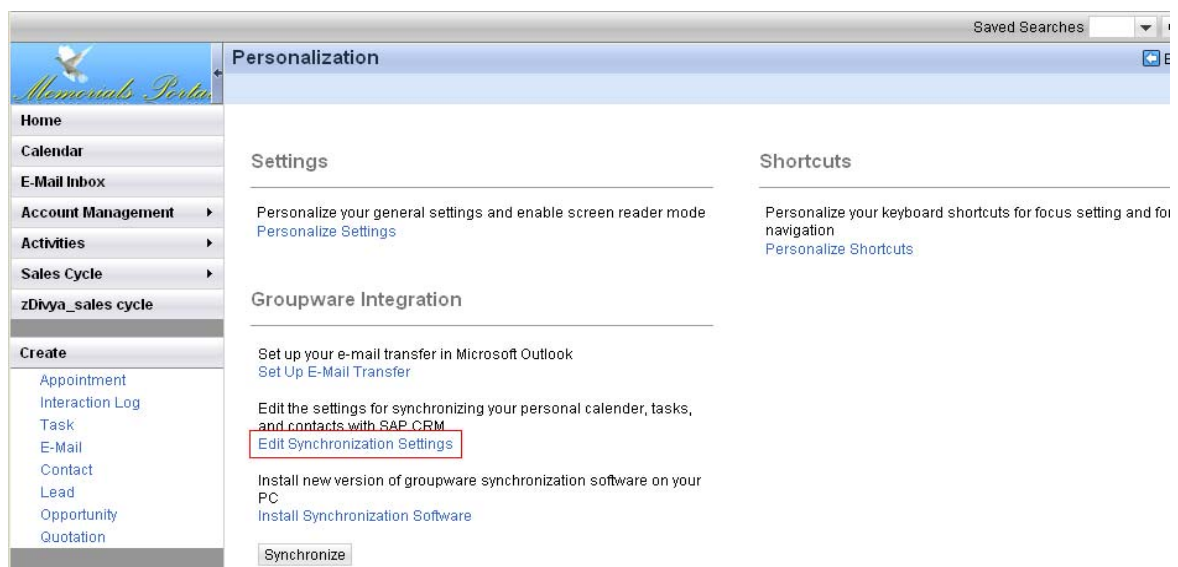- Choose **options.**

Settings from CRM Web Client:

Click on **Personalize** in the top right corner of the CRM WebClient UI home page and then click on the link **Edit Synchronization Settings** in the Groupware Integration content block.

The following client side settings need to be done under various tab pages:

a. <u>General</u>

SAP CRM Calendar Synchronization Settings

| General | Sync Properties | Conflict Resolution | Miscellane |

CRM Client

○ SAP CRM Server

○ SAP CRM Mobile Client

SAP CRM Logon Info

Server   XYZ.com:443

Client   001   Save Password   ☑

User ID   m1008877

Password   **********************************

Synchronization Version   3.045

System Credentials are defined in the general tab page. To get information about the system use the tcode SMICM.

List   Edit   Goto   Administration   Settings   System   Help

ICM Mon

Trace File	►
Trace Level	►
Parameters	►	Display
Statistics	►	Change
Memory Pipes	►
Host Name Buffer	►
Services	Shift+F1
Display Connections	
Release Notes	F9
HTTP Server Cache	►
HTTP Log	►
HTTP Server	►
Back	F3

ICM Status
Restart Aft
Trace Level
Created Wor   / 50   (Current / Peak / Maximum)
Connections   / 500   (Current / Peak / Maximum)
Queue Entri   / 500   (Current / Peak / Maximum)

○○●

No. Thr		Processed Request
1 281		
2 606		
3 1128	84 Available	
4 37916	81 Available	
5 7064	71 Available	
6 49684	80 Running	Administration
7 27816	77 Available	
8 33288	71 Available	
9 67484	80 Available	
10 41444	74 Available	

```
ICM Parameter

Services
_____

icm/server_port_0      = PROT=HTTP,PORT=8000
icm/server_port_1      = PROT=HTTPS,PORT=443

Hard limits
_____

icm/max_services              = 30
icm/listen_queue_len          = 512
icm/req_queue_len             = 500
icm/max_conn                  = 500
icm/max_sockets               = 2048


Memory Pipe settings
_____

mpi/total_size_MB             = 80
mpi/buffer_size               = 65536

J2EE settings
_____

rdisp/j2ee_start              = 1
is/HTTP/default_root_hdl      = J2EE

Content Filter settings
_____

csi/enable                    = TRUE
csi/SAP/csa_lib               = E:\usr\sap\C7I\DVEBMGS00\exe\sapcsa.dll

Misc
___

icm/host_name_full            = a2sr10000.xxxxxxxx.com
icm/cancel_strategy           = cancel requests without session (stateless)
rdisp/plugin_auto_logout      = 1800
is/HTTP/virt_host_0           = *:*;
is/SMTP/virt_host_0           = *:*;
```

Enter the values for icm/host_full_name and HTTPS port together and separate the two values with a colon. Using the examples above, the value for the server would be a2sr10000.XYZ.com:443.

b. Sync Properties:

Synchronize Appointments: Specify the time period in which appointments or tasks should be synchronized.

Synchronize:

- Select the objects (appointments, tasks, contacts) that we want to synchronize.
- Specify the required groupware folder.
- Specify the direction of synchronization: Both directions - groupware client (For e.g., Microsoft Outlook) to CRM server, and CRM server to groupware client. If you have specified the default folder for customer-specific forms on the General tab page, set the Use Form indicator. Select Include Attachment if attachments should be taken into account during synchronization.

c. <u>Conflict Resolution</u>: Here we can determine how activities or contacts are to be processed in the event of a conflict. A conflict is an activity or contact that has not yet been synchronized

d. <u>Miscellaneous:</u>

Select the options as per your requirements
- Send updates to attendees
- Color codes
- Path for error log

e. <u>Handling of new private appointments/tasks:</u> You can select the option of either ignoring or synchronizing new private appointments/tasks created in groupware client or SAP CRM.

Trigger synchronization

From SAP CRM:

- Click on *Personalize* in the top right corner of the CRM WebClient UI home page and then the *Synchronize* pushbutton in the *Groupware Integration* content block.

Click on the Synchronize Activities and Contacts with Groupware icon in the Calendar page.

From the groupware client:

- Click on the *Start Synchronization with SAP CRM* icon

- Click on *Start* from ▶ *Tools* →*Options* →*SAP CRM Calendar Properties*
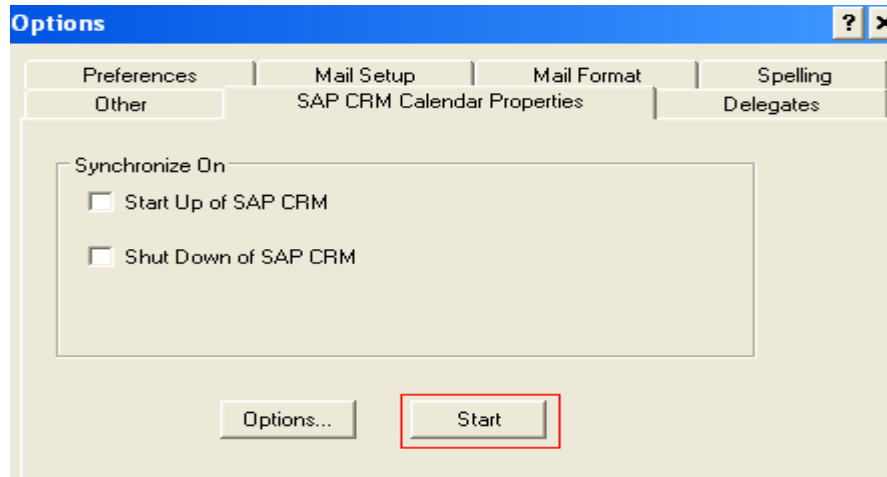
During the synchronization process, a popup displays the progress.
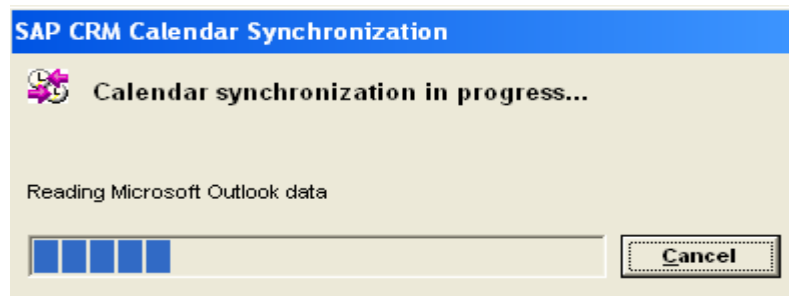
Every time we try to synchronize, a pop appears that says that "A program is trying to access e-mail address information stored in Outlook." It gives options for **Allow, Deny** and **Help**.

After clicking on the allow button, the process is completed.

Best Practices for SAP CRM 2007 and MS Outlook Integration

- If you create an activity (appointments and tasks) or a contact from the Groupware that you want to synchronize with SAP CRM, you have to manually enter SAP CRM in the Categories field in the activity or contact page; otherwise, synchronization does not take place. Only tasks, appointments, and contacts of category SAP CRM are taken into account for synchronization.
- You can install the synchronization software only through the CRM WebClient UI.
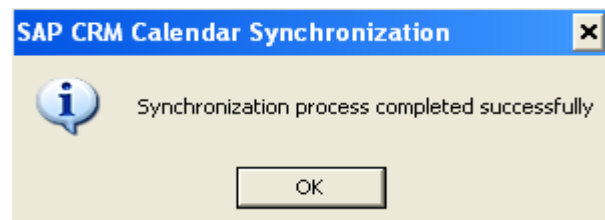- Synchronization of recurrences: You *cannot* synchronize appointment series with SAP CRM.
- Make sure that the Time zones in both the systems are the same. Otherwise different timings will be displayed in both the systems for the same task or appointment. For outlook we define the Time zone in the General tab page under Detail settings in Options-> CRM Calendar properties->options.
- The SMTP port setting should be correctly done for the CRM system. This is done by a Basis consultant. The Tcode for this is SCOT. The Mail host IP address and the port number and appropriate filter settings need to be maintained here.
- Certain restrictions apply for client-based groupware synchronization. For example, meeting requests can only be partially synchronized: only the organizer of the meeting has information about who the participants are. Organizers can find this information in the appointment details in the CRM WebClient UI in the *Notes* group. All attendees invited to the groupware appointment are listed here.

Notes

1. Transfer Contacts from CRM to Outlook (Groupware Client): The contact in CRM needs to have a relation to the employee responsible you are logged on with. The relation is BUR011 by default.
   Make sure that the Account for which you are creating a contact, must have the relationship "has employee responsible" with BP who has the same User with which you have logged in to the system.

2. When synchronizing from Outlook the system throws the error message
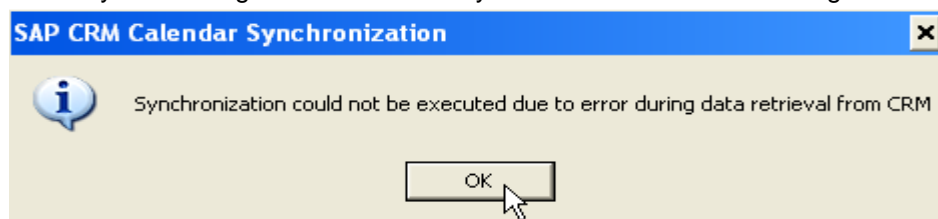
   Requesting Client information (Outlook) from the CRM server doesn't require secure authentication. But requesting CRM Server information from the client needs a secure protocol.
   To rectify this error please check the following:
   For this purpose it's normal that if you haven't activated **HTTPS** protocol you cannot synchronize from Outlook. In this case you should be able to synchronize from the CRM system.

   You need to activate HTTPS protocol , open a port for this, and add a profile parameter for this. finally you should be able to see it in SMICM > Go To > Parameters > Display.

   icm/server_port_1 = PROT=HTTPS,PORT=ABC , TIMEOUT=900

   ABC is the port number that you have opened for this purpose. (e.g. 443)

Finally you can customize your outlook CRM calendar options, there you have to fill the host name like this:

a2sr10000.XYZ.com:443

Integration of Outlook with SAP Email Inbox: Error message "SAP CRM solution cannot access Microsoft outlook application was stopped" To rectify the problem follow these steps:

o First check if you have CDO components for Outlook installed.
o For e-mailing, the most important setting is "Initial and script ActiveX controls not marked as safe" needs to be set to "enable".
o Also check if all necessary services are active(tcode sicf, press F8):
   /sap/bc/bsp/sap/crm_gw_integ
   /sap/bc/bsp/sap/crm_send_screen
   /sap/bc/bsp/sap/crm_email_bo
   /sap/crm/crm_addr_inp
   /sap/crm/crm_src_provide
   /sap/crm/crm_att_provide

3. While making changes to existing contacts, make sure that you don't change the business address. If Business address is changed then the system creates a new account for the contact deleting the "has contact person" relationship between the existing contact and existing account.

The "has contact person" relationship is established with the newly created account.

Related Contents

http://help.sap.com/saphelp_crm70/helpdata/EN/44/559f3699d908fae10000000a422035/frameset.htm

https://sapmats-de.sap-ag.de/download/download.cgi?id=USDAO5Q2BQM51XYGWWG55XFXG3DLIWKA5QDSJQ6EBIELFGW13O

For more information, visit the Customer Relationship Management homepage.

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