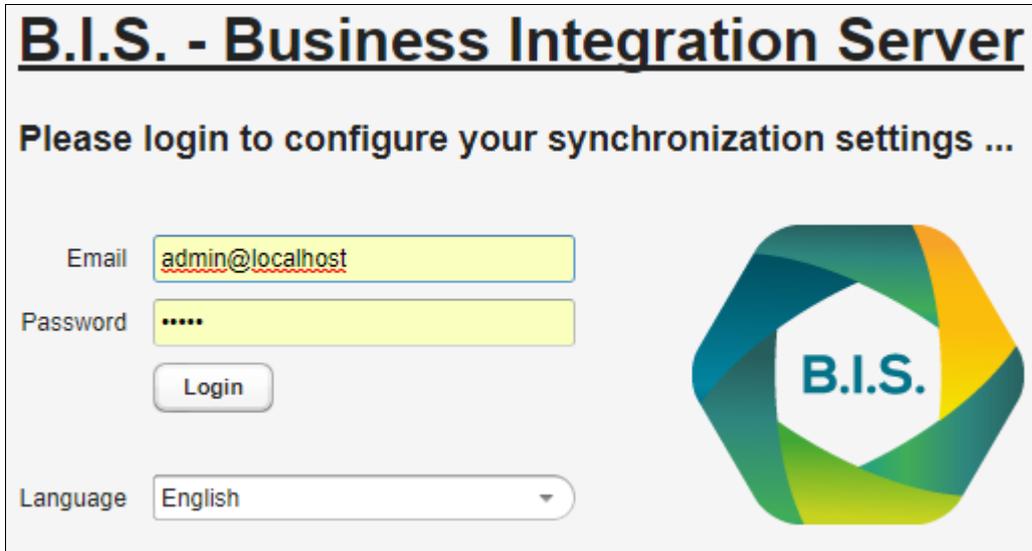


B.I.S. QUICK CONFIGURATION GUIDE

1. Login as administrator to setup systemwide configurations

Default login: <http://<server>:8080/gui> or <https://<server>:8443/gui>

Default credentials: Email: `admin@localhost`, Password: `admin`



B.I.S. - Business Integration Server

Please login to configure your synchronization settings ...

Email

Password

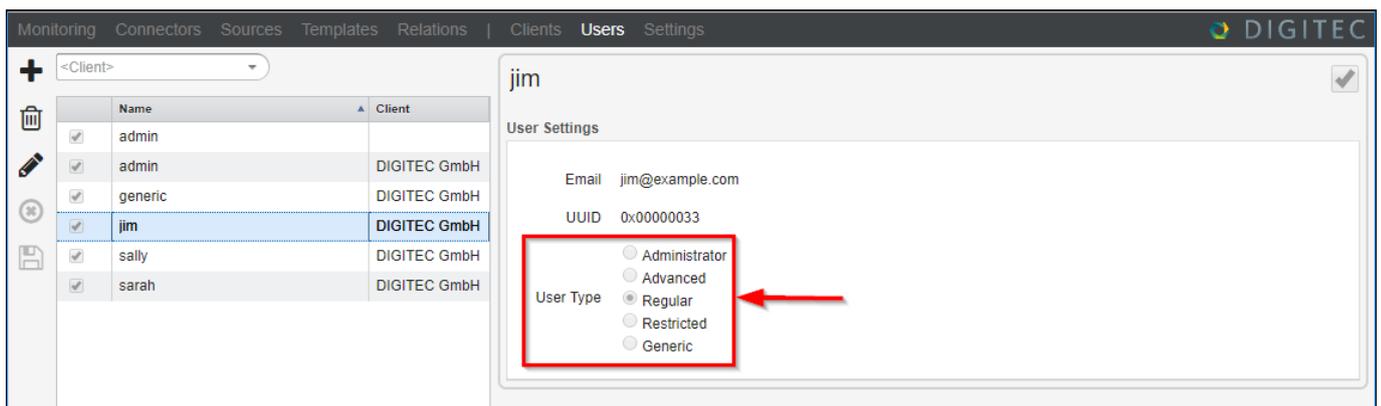
Language



After login change password immediately via drop down menu of the B.I.S. icon. 

2. Add synchronization users (These users later will be able to synchronize data)

- Click on the Users tab
If a client is selected new user can be added.
- Use 'Regular' as User Type.
The description of other User Types can be viewed here: [User Types](#)
- The password can be changed by the user itself after first login.



Monitoring Connectors Sources Templates Relations | Clients **Users** Settings 

<Client>

Name	Client
<input checked="" type="checkbox"/> admin	
<input checked="" type="checkbox"/> admin	DIGITEC GmbH
<input checked="" type="checkbox"/> generic	DIGITEC GmbH
<input checked="" type="checkbox"/> jim	DIGITEC GmbH
<input checked="" type="checkbox"/> sally	DIGITEC GmbH
<input checked="" type="checkbox"/> sarah	DIGITEC GmbH

jim

User Settings

Email jim@example.com

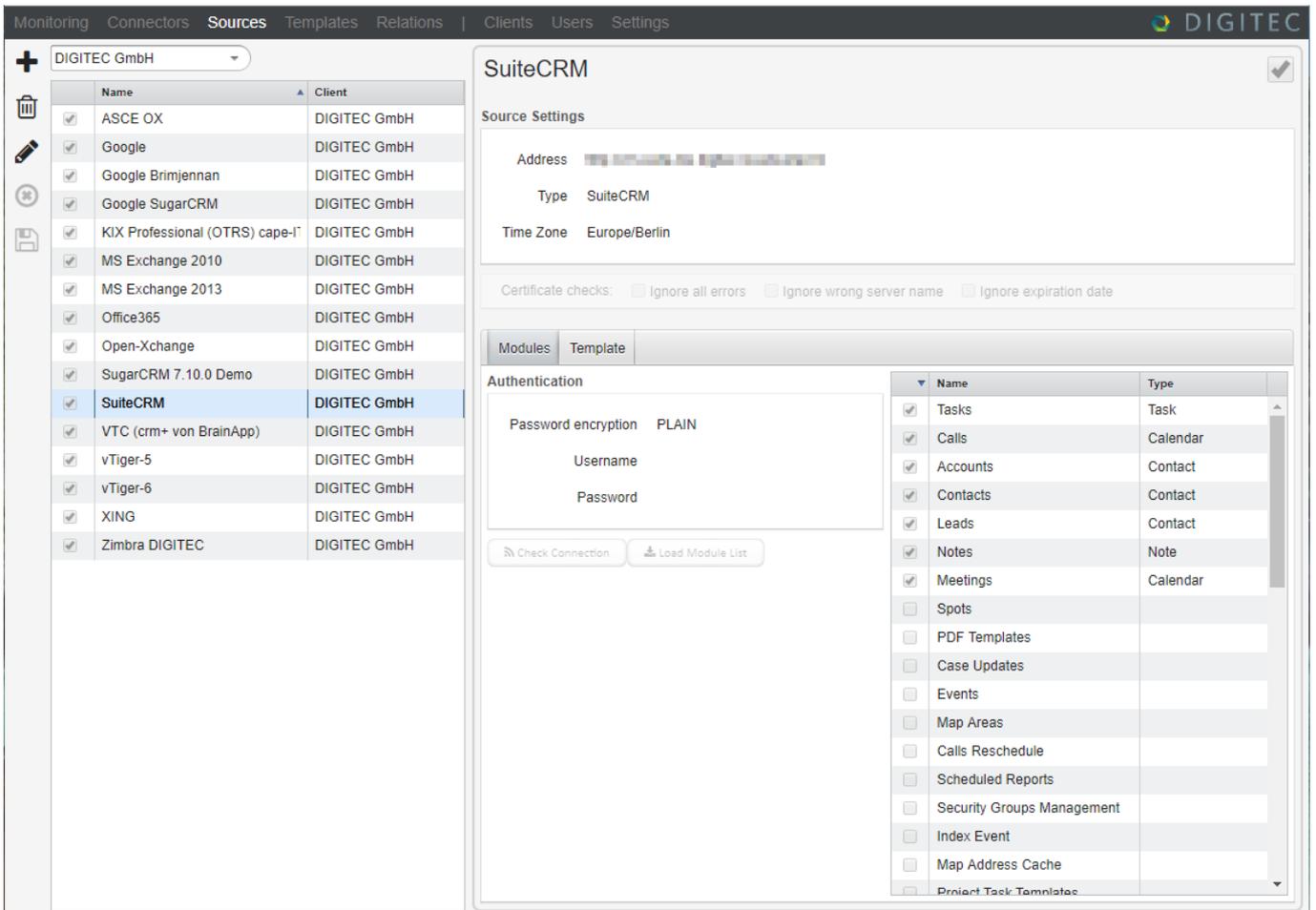
UUID 0x00000033

User Type

- Administrator
- Advanced
- Regular
- Restricted
- Generic

3. Add a Source

- Click on the Sources tab
- Choose your client from the drop down menu
- Press the '+' icon
- Enter a name for the new source (e.g. SuiteCRM)
- Enter the URL of the source (e.g. https://suitecrm.example.com)
- Select the type of the connector from the dropdown-menu (e.g. SuiteCRM)
- Select the time zone of the server from the drop down box (if you know it)
- Select the password encryption from the dropdown box (use PLAIN with SuiteCRM)
- Enter username and password, this may be an administrative account
- Press 'Check Connection' button. This is necessary to check if the URL and the connection settings are correct.
- If there occur errors due to certificate problems it is possible to disable certificate checks
- Press 'Load Module List' button (In Groupware systems there might be no module list)
- select modules for synchronization (e.g. Modulename Contacts with Modultype Contacts from the dropdown menu) then activate the enabled check-box
- Activate the 'enabled' check box in the upper right corner to access the source
- Save the configuration by pressing the disk icon  in the left side actionbar

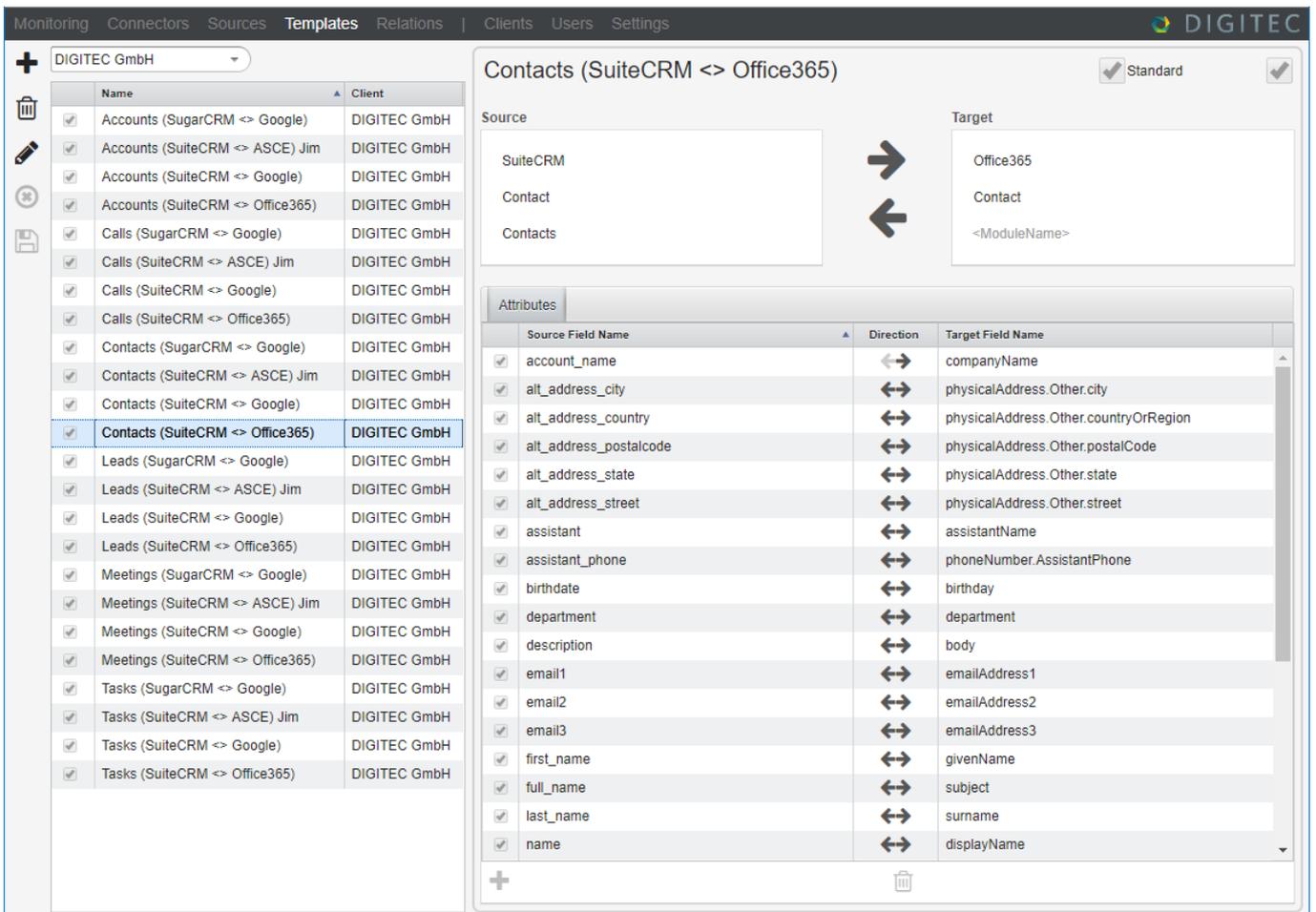


The screenshot shows the DIGITEC Sources configuration page for SuiteCRM. The interface includes a navigation bar with tabs for Monitoring, Connectors, Sources, Templates, Relations, Clients, Users, and Settings. The main content area is divided into several sections:

- Sources List:** A table listing various sources for the client DIGITEC GmbH. The 'SuiteCRM' source is selected and highlighted.
- SuiteCRM Source Settings:** A form for configuring the SuiteCRM source. It includes fields for Address, Type (SuiteCRM), and Time Zone (Europe/Berlin). There are also checkboxes for certificate checks: Ignore all errors, Ignore wrong server name, and Ignore expiration date.
- Authentication:** A section for setting up authentication, including fields for Password encryption (PLAIN), Username, and Password. There are buttons for 'Check Connection' and 'Load Module List'.
- Module Selection:** A table with columns for Name and Type, listing various modules available for synchronization. The 'Tasks' module is selected, and its type is 'Task'. Other modules include Calls, Accounts, Contacts, Leads, Notes, Meetings, Spots, PDF Templates, Case Updates, Events, Map Areas, Calls Reschedule, Scheduled Reports, Security Groups Management, Index Event, Map Address Cache, and Project Task Template.

4. Add a template

- Click on the Templates tab
- Select a client from the client dropdown-menu
- Press the '+' icon
- Add a Template Name (e.g. Contacts between SuiteCRM and Office365)
- Select a source from the dropdown menu on the left (SuiteCRM)
- **REMARK:** The CRM system shall be the leading system!
- Select a moduleType from the dropdown menu on the left (e.g. CONTACT)
- Select a ModuleName from the dropdown menu on the left (e.g. Contacts)
- Select the direction for synchronization (left to right, right to left or both directions)
- Select a source from the dropdown menu on the right (Office365)
- Select a moduleType from the dropdown menu on the right (CONTACT)
- Optional: Enter a ModuleName on the right (Contacts [SuiteCRM])
- This will be the folder name shown in the groupware with the synchronized SuiteCRM contacts
- Activate the 'enabled' check box in the upper right corner to access the source
- Save the configuration by pressing the disk icon  in the left side actionbar



The screenshot displays the DIGITEC Templates configuration screen. The left sidebar shows a list of templates for 'DIGITEC GmbH'. The main area is titled 'Contacts (SuiteCRM <=> Office365)'. It features a 'Source' section with 'SuiteCRM' selected, and a 'Target' section with 'Office365' and 'Contact' selected. A table of attributes is shown below, mapping source fields to target fields with synchronization directions.

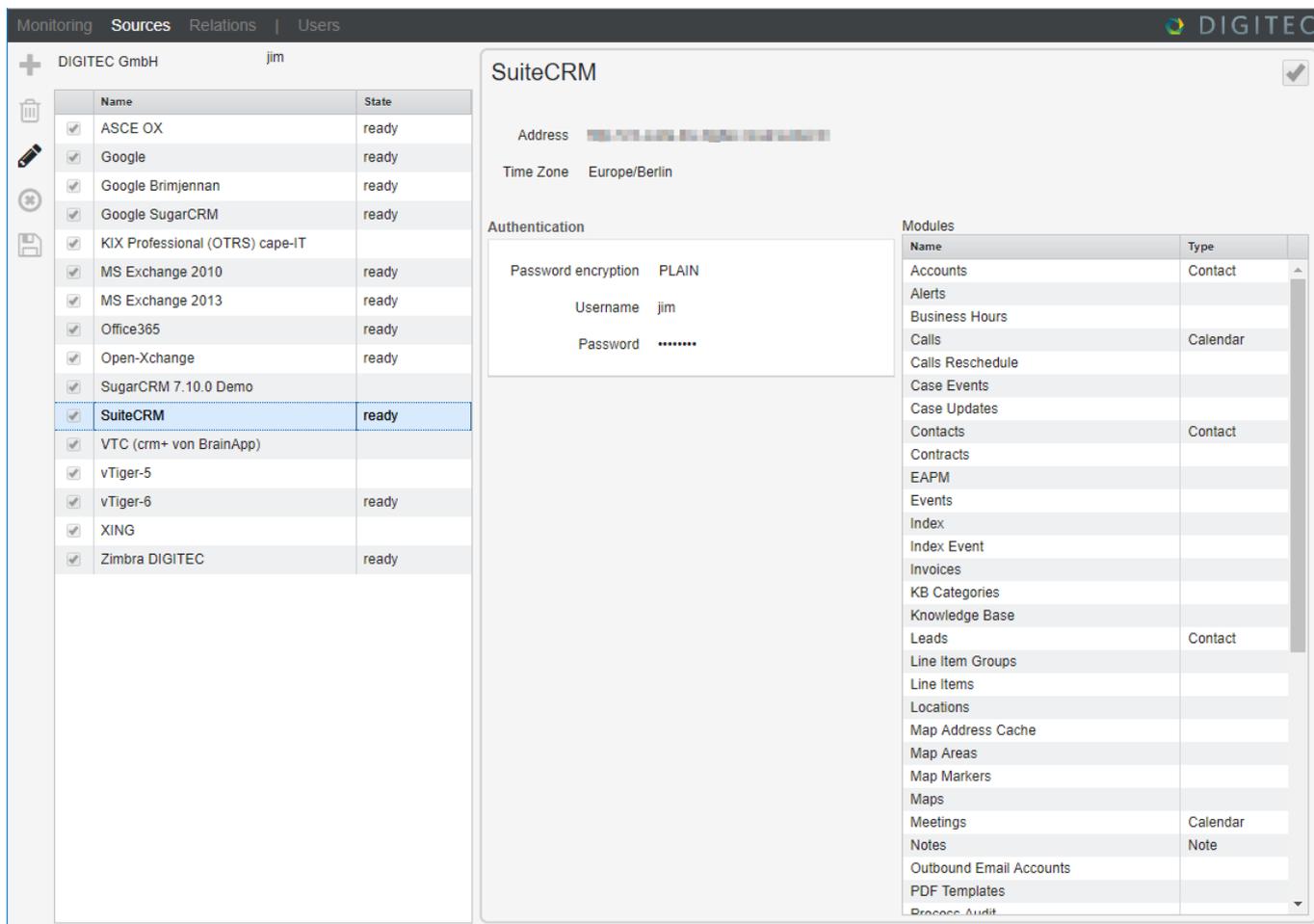
Source Field Name	Direction	Target Field Name
<input checked="" type="checkbox"/> account_name	↔	companyName
<input checked="" type="checkbox"/> alt_address_city	↔	physicalAddress.Other.city
<input checked="" type="checkbox"/> alt_address_country	↔	physicalAddress.Other.countryOrRegion
<input checked="" type="checkbox"/> alt_address_postalcode	↔	physicalAddress.Other.postalCode
<input checked="" type="checkbox"/> alt_address_state	↔	physicalAddress.Other.state
<input checked="" type="checkbox"/> alt_address_street	↔	physicalAddress.Other.street
<input checked="" type="checkbox"/> assistant	↔	assistantName
<input checked="" type="checkbox"/> assistant_phone	↔	phoneNumber.AssistantPhone
<input checked="" type="checkbox"/> birthdate	↔	birthday
<input checked="" type="checkbox"/> department	↔	department
<input checked="" type="checkbox"/> description	↔	body
<input checked="" type="checkbox"/> email1	↔	emailAddress1
<input checked="" type="checkbox"/> email2	↔	emailAddress2
<input checked="" type="checkbox"/> email3	↔	emailAddress3
<input checked="" type="checkbox"/> first_name	↔	givenName
<input checked="" type="checkbox"/> full_name	↔	subject
<input checked="" type="checkbox"/> last_name	↔	surname
<input checked="" type="checkbox"/> name	↔	displayName

5. Logout from admin account via drop down menu of the B.I.S. icon and re-login as a regular user

6. Enter user credentials for systems to be synchronized

The sources tab shows all available sources. The user has to enter his personal login data for every used source.

- Click on the Sources tab
- Select a source from the left side table
- Select the time zone where the user is located
- Enter user name and password
- Press 'Check Connection' button. This is necessary to check if the URL and the connection settings are correct.
- Activate the 'enabled' check box in the upper right corner to access the source
- Save the configuration by pressing the disk icon  in the left side actionbar



The screenshot displays the DIGITEC monitoring interface. The top navigation bar includes 'Monitoring', 'Sources', 'Relations', and 'Users'. The main content area is divided into three sections:

- Left Panel:** A table listing various sources under the heading 'DIGITEC GmbH jim'. The 'SuiteCRM' source is selected and highlighted in blue. The table columns are 'Name' and 'State'.
- Center Panel:** Configuration details for 'SuiteCRM'. It includes fields for 'Address', 'Time Zone' (set to 'Europe/Berlin'), and 'Authentication' (set to 'PLAIN'). The 'Username' is 'jim' and the 'Password' is masked with dots.
- Right Panel:** A table titled 'Modules' showing a list of modules and their types. The 'Type' column indicates categories like 'Contact', 'Calendar', and 'Note'.

Name	State
ASCE OX	ready
Google	ready
Google Brimjennan	ready
Google SugarCRM	ready
KIX Professional (OTRS) cape-IT	
MS Exchange 2010	ready
MS Exchange 2013	ready
Office365	ready
Open-Xchange	ready
SugarCRM 7.10.0 Demo	
SuiteCRM	ready
VTC (crm+ von BrainApp)	
vTiger-5	
vTiger-6	ready
XING	
Zimbra DIGITEC	ready

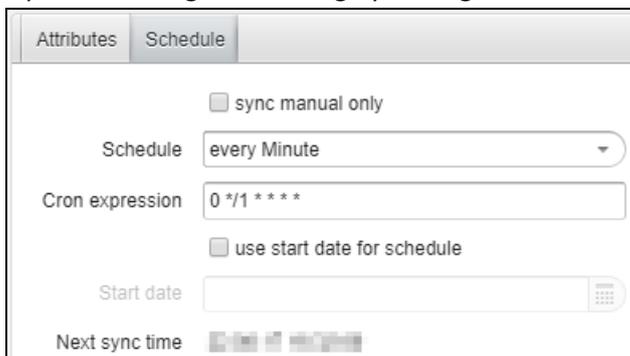
Name	Type
Accounts	Contact
Alerts	
Business Hours	
Calls	Calendar
Calls Reschedule	
Case Events	
Case Updates	
Contacts	Contact
Contracts	
EAPM	
Events	
Index	
Index Event	
Invoices	
KB Categories	
Knowledge Base	
Leads	Contact
Line Item Groups	
Line Items	
Locations	
Map Address Cache	
Map Areas	
Map Markers	
Maps	
Meetings	Calendar
Notes	Note
Outbound Email Accounts	
PDF Templates	
Process Audit	

7. Add a relation (a relation describes the user based synchronization between two systems)

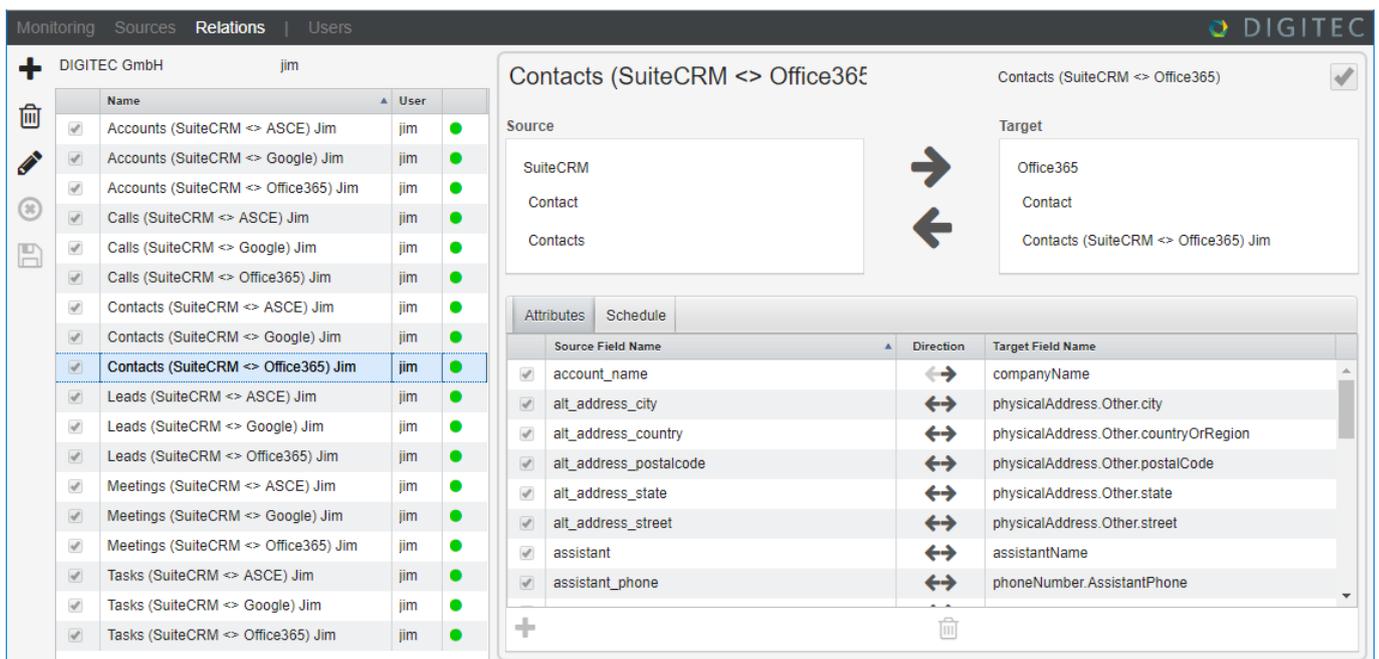
The Relations Tab allows to assign a predefined template to a user. Usually this is done on personal by each user.

REMARK: Adding a relation is only possible if the user has entered his login data (via the sources tab) for each of the systems to be synchronized. In this case, the administrator can also add relations for this user.

- Click on The Relations tab
- Press the '+' button
- Add a name for the new relation
- Select a template from the Dropdown menu (e.g. Contacts (SuiteCRM <> Office365))
- Choose an existing target folder from the target module name dropdown menu or enter a new folder name
- Check if the enabled Checkbox is activated
- Check if all attributes for synchronization are enabled
- Optional: deselect not needed attributes
- Optional: add user specified attributes
- Optional: Change scheduling by editing the default of 5 minutes



- Save the configuration by pressing the disk icon  in the left side actionbar



Source Field Name	Direction	Target Field Name
<input checked="" type="checkbox"/> account_name	↔	companyName
<input checked="" type="checkbox"/> alt_address_city	↔	physicalAddress.Other.city
<input checked="" type="checkbox"/> alt_address_country	↔	physicalAddress.Other.countryOrRegion
<input checked="" type="checkbox"/> alt_address_postalcode	↔	physicalAddress.Other.postalCode
<input checked="" type="checkbox"/> alt_address_state	↔	physicalAddress.Other.state
<input checked="" type="checkbox"/> alt_address_street	↔	physicalAddress.Other.street
<input checked="" type="checkbox"/> assistant	↔	assistantName
<input checked="" type="checkbox"/> assistant_phone	↔	phoneNumber.AssistantPhone

8. Wait for the end of the first synchronization (depending of the amount of data, this can take a while)

The status of each synchronization can be checked via the relations tab or the monitoring tab for more details.

A DETAILED DESCRIPTION OF THE B.I.S. CAN BE FOUND HERE:

<https://digitec.de/en/bi/business-integration-server>

A DETAILED CONFIGURATION GUIDE / MANUAL WITH ALL AVAILABLE FUNCTIONS CAN BE FOUND HERE:

For administrators:

[Administrator Manual](#)

For users:

[User Manual](#)