



# Installation and configuration

User Manual

The instructions in this manual are for informational purposes only and are subject to change. Protonic Software GmbH assumes no liability. The software described in this manual requires a license.

The individual functions are described using screenshots. Depending on your easyjob license, operating system or Office version, the functions and screenshots you have in your environment may differ from this manual or may only be available in later versions.

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Copyright © 2022  
protonic® software GmbH  
Frankfurter Landstr. 52  
63452 Hanau  
Germany

[www.protonic-software.com](http://www.protonic-software.com)

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# INTRODUCTION

Information about the structure and content of this document can be found here



## Important notice

This manual provides an overview of the Installation and Configuration of the easyjob 6 rental software.

The development of the easyjob rental software as well as the documentation has been done with great care. The individual program functions are constantly checked through our Quality Assurance Process. However, errors can still occur.

## Main Office

protonic software GmbH  
Frankfurter Landstr. 52  
63452 Hanau  
Germany

<http://www.protonic-software.com>

## Support

You can find more information about the support options on-line at <http://www.protonic-software.com/en/easyjob/corporate/support/>.

In addition, there is a support forum where you can exchange information with other users. The support forum can be found at <http://forum.protonic-software.com>

## Training

We offer customized training programs for the following extensive topics.

To learn more, please visit our website at

<http://www.protonic-software.com/en/service/training/> or contact our sales office at [sales@protonic-software.com](mailto:sales@protonic-software.com).

## About this manual

The individual functions are described using screenshots of easyjob license 6. Depending on your easyjob license, the forms you have in your environment may differ from the screenshots shown in the manual.

## How to use this manual

This document uses the following standards




### Functions that require a license

Individual program functions are made available in your easyjob environment based on your license. This may concern individual program functions or entire modules.

Functions that are only available in individual modules are marked with minimum-edition symbols **S**, **M**, **L** or **XL**. Some functions are limited in easyjob S. There is no indication of this. You can find the limitations in the version comparison matrix on our website.

Functions that are only available by subscription are marked with the symbol .

For example:


<b>L</b>	The function is only available in easyjob L and easyjob XL
<b>L</b> 	The function is only available in easyjob L and XL with a current subscription.

### easyjob-specific terms

In order to make a description better understood, in some cases easyjob-specific terms are **highlighted** with a color.

For example: with the **Project** and **Job** Groups, you also have the possibility to select a **Template**.


### Work steps, buttons, actions and menu paths


Individual work steps, actions, menu paths or clicks are separated from each other or initiated by the symbol ".

Buttons, menus, tabs, etc. used in context are highlighted in color.

Example 1: Check the box in the **Activating the List Editor** field.

Example 2: easyjob Menu  **View**  **Monthly Overview**

Example 3:  **Help**

Example 4:  **Ok**

### Reference to other chapters

References to other chapters and sections are marked with a manual icon and displayed in color.

Example: See section  **Important information**.

## Important information

Important information is highlighted in orange and presented with a light bulb.











Example:



This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important.

## Special keys

Special keys are represented with the following symbols:

Special key	Explanation
	Windows key
	Tabulator key
	Arrow keys
	Return key
	Context Menu key
	Escape key
	Function key 1
 + A	Control key. Keep the control key pressed down and press the A button.
 + H	Alt key. Keep the Alt key pressed down and also press the H button
	Delete key

## Phrasing

In this manual and in the easyjob examples, terms such as employee, assistant, technician or carpenter are used both for men and for women.

## Screenshot explanations

The screenshots will be explained using numbers ① ② ③ and arrows → marked.

Screenshot highlights will be marked with orange frames.

The screenshot shows the 'Invoices' window. The search filter section at the top includes fields for 'From' (9/28/2021), 'To' (10/28/2021), 'Keyword' (marked with ①), 'Type' (<All>, marked with ②), 'Status' (<All>), 'Company' (Default, ThisIsMyCompany), and 'Site' (Default, Tomorrowland, USA). Below the search filter is a table of invoices with the following columns: Number, Name, Invoice Date, Total, Total incl. Tax, Name1, Status, Paid, Site, Manager, Open, and Payments. The table contains 12 rows of invoice data. At the bottom, there is a Totals row with a blue border. The Totals row shows: Quantity 12, Total €370,421.32, Total incl. Tax €378,759.72. Buttons for Print, Add, Edit, and Close are visible at the bottom right.

Number	Name	Invoice Date	Total	Total incl. Tax	Name1	Status	Paid	Site	Manager	Open	Payments
DFT21-0010	ABC Product Lounge	10/5/2021	€23,537.70	€23,537.70	XY Event Productions	Finalized	<input checked="" type="checkbox"/>	Default	Gabriel Gibbs	€0.00	€23,537.70
DFT21-0006	ABC Product Lounge	8/11/2021	€29,537.10	€29,537.10	XY Event Productions	Open	<input checked="" type="checkbox"/>	Default	Protonic Support	€0.00	€53,682.90
DFT21-0005	ABC Product Lounge	8/11/2021	€12,072.90	€12,072.90	XY Event Productions	Open	<input checked="" type="checkbox"/>	Default	Protonic Support	€0.00	€12,072.90
DFT21-0002	Future Planet	8/11/2021	€58,108.40	€58,108.40	XY Event Productions	Open	<input checked="" type="checkbox"/>	Default	Protonic Support	€0.00	€58,108.40
DFT21-0001	ABC Product Lounge	7/1/2021	€75,586.82	€75,586.82	XY Event Productions	Exported	<input checked="" type="checkbox"/>	Default	Protonic Support	€0.00	€77,854.42
DFT21-0013	Party	10/26/2021	€250.00	€250.00	Pro Sound	Open	<input type="checkbox"/>	Tomorrowland	Gabriel Gibbs	€0.00	€242.20
DFT21-0007	Rechnung urf.wi.17533	10/5/2021	€4,500.00	€4,500.00	Pro Sound	Finalized	<input checked="" type="checkbox"/>	Default	Gabriel Gibbs	€0.00	€4,500.00
20-0002	Big Festival	10/19/2020	€62,048.40	€62,048.40	Pro Sound	Finalized	<input type="checkbox"/>	Default	Mateo Mullen	€62,048.40	€0.00
20-0001	Technology Center	10/19/2020	€104,230.00	€112,568.40	Meeting Today	Finalized	<input type="checkbox"/>	Default	Tom Tyson	€112,568.40	€0.00
DFT21-0012	Cinema Event	10/12/2021	€550.00	€550.00		Finalized	<input checked="" type="checkbox"/>	Tomorrowland	Protonic Support	€0.00	€532.84
DFT21-0011	Cinema Event	10/20/2021	€0.00	€0.00		Open	<input type="checkbox"/>	Tomorrowland	Brad Casagni	(€532.84)	€532.84
DFT21-0009	ABC Product Lounge	10/5/2021	€0.00	€0.00		Open	<input type="checkbox"/>	Tomorrowland	Gabriel Gibbs	€0.00	€0.00
<b>Totals</b>	Quantity	12	Total	€370,421.32	Total incl. Tax	€378,759.72					

## Additional documentation

In order to make it easier to become acquainted with and consult the easyjob documentation, we have divided it into multiple sections.

You can find an overview of all documentation on the following website.

<https://help.protonic-software.com/en/documentation>

# INSTALLATION

Here you can find information and assistance for the operation and provision of easyjob

## Installation und Konfiguration - Additional documentation

This chapter will be published soon.

# GETTING STARTED

## Installation und Konfiguration - Additional documentation

This chapter will be published soon.

# **INSTALLATION AND UPDATES**

## Installation und Konfiguration - Additional documentation

This chapter will be published soon.

## System requirements

For perfect easyjob performance, the minimum system requirements described below must be fulfilled.

### Windows Client (Full use)

Operating system in the physical or virtual computer: Windows 7, 8, 8.1, 10 or 11
Operating system for remote desktop environments: Windows 2012, 2012 R2, 2016, 2019, 2022, 7, 8, 8.1, 10 or 11
Min 2 GB free RAM
Minimum screen resolution 1280x1024

### Web Client (Limited Features)

Current web browser
---------------------

### Mobile Client

Android or iOS
----------------

## Application server

You may require further upgrades to your existing infrastructure in order to achieve optimal performance.

The easyjob server applications can be installed in desktop PCs in parallel in small environments and in addition to other applications on a server in medium-sized environments. We recommend an application server for large environments.

For operation, a Microsoft SQL Server database is also necessary.

Depending on the size of the environment, the SQL Server Express variant provided with the installation is sufficient.

A large amount of data is read and written in the SQL database. For this reason, the entire performance depends mainly on the SQL Server environment. We recommend using very fast disks and processors, and to have sufficient free RAM available.

Windows Server 2016, 2019 and 2022 server operating systems are supported.

Microsoft SQL Server 2016, 2017 and 2019 can be used in all editions for the SQL database.

# INTERFACES

## Installation und Konfiguration

The easyjob WebApi offers real-time access to easyjob. Depending on user rights, Items, availability, addresses and projects can be called up via a JSON interface and partially edited. The WebApi has the same functional scope as the easyjob WebApp and the app for mobile end devices, as the same interface is used.

## Webshop

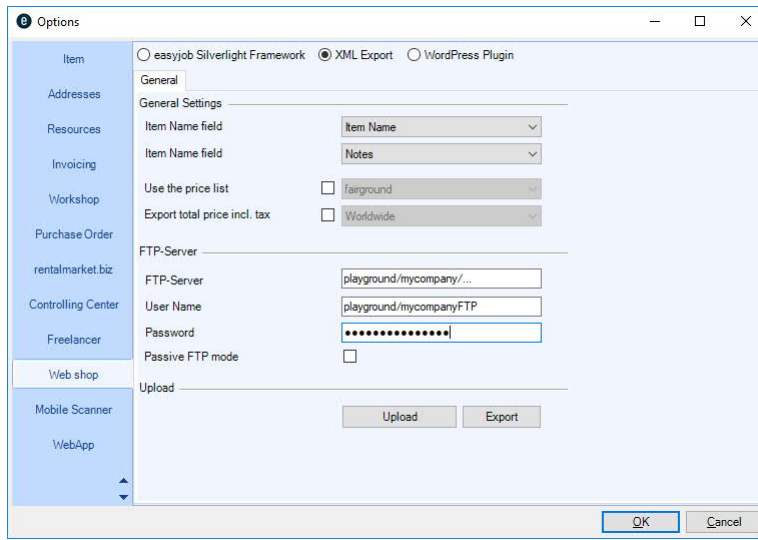
With the easyjob Webshop you can automatically load Item information for your own Webshop in XML format to a server via FTP.

Requests that are generated by the Webshop can be imported into easyjob as a project in a special file format (ewsm).

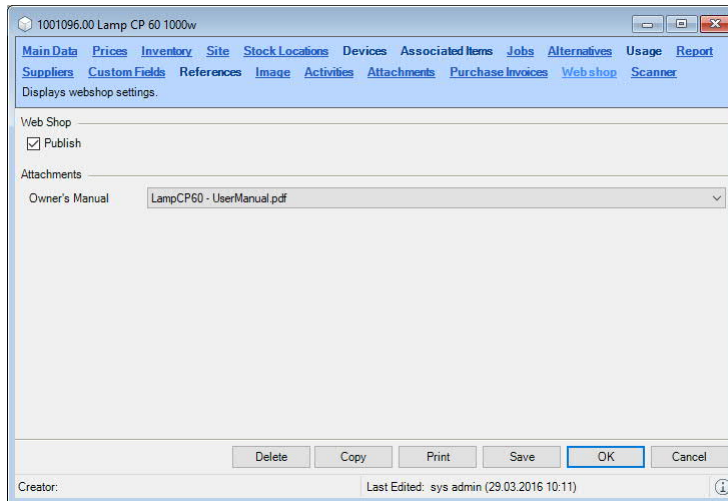
An easyjob WebShop license is necessary to use the interface.

## Configuration

The export information for the Item master data is configured in the easyjob program settings.



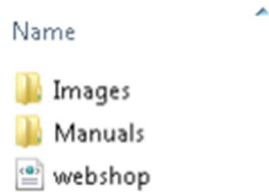
It is defined in the Item master data which Items should be available in the Webshop.



## Directory structure on the server and setup of webshop.xml

The Item image data is stored in a large and small format in the Images directory. The manual associated with the item is stored in the Manuals folder.

All items inclusive of the sub-category hierarchy are exported to Webshop.xml.



Structure of the webshop.xml

```
<?xml version="1.0" encoding="utf-8"?>
<webshop>
  <categories>
    <category id="61">
      <name><![CDATA[Lighting]]></name>
      <subcategories>
        <subcategory id="225">
          <name><![CDATA[Control]]></name>
          <items>
            <item id="7755">
              <name><![CDATA[2 CH Rack]]></name>
              <description><![CDATA[]]></description>
              <price>0.00</price>
              <SmallImageUrl>Images/small7755.png</SmallImageUrl>
              <LargeImageUrl>Images/large7755.png</LargeImageUrl>
              <ManualUrl>Manuals/manual7755.pdf</ManualUrl>
            </item>
          </items>
        </subcategory>
      </subcategories>
    </category>
  </categories>
</webshop>
```

## Processing incoming requests in easyjob

easyjob can import Webshop requests. To do so, the Webshop must create a file with the extension .ewsm.

easyjob records the file extension during installation. After the file is called (e.g. via an email attachment), easyjob automatically starts the import process.

## Sample structure of an ewsm file

```
<?xml version="1.0" encoding="utf-8"?>
<root>
  <ShopOrder xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema" Version="1.0.0">
    <Header>
      <OrderId>695ab491-e931-47c6-bf25-f54ce7ba51d6</OrderId>
      <CryptCode></CryptCode>
      <Address>
        <Name1></Name1>
        <Addressnumber></Addressnumber>
        <Firstname></Firstname>
        <Lastname></Lastname>
        <Street></Street>
        <Line2></Line2>
        <Zip></Zip>
        <City></City>
        <Email>info@protonic-software.com</Email>
        <Phone></Phone>
        <IdCountry>6</IdCountry>
        <State></State>

      <CountryCaption>Belgium</CountryCaption>
    </Address>
    <ProjectName>sdfsdf</ProjectName>
    <StartDate>2019-03-21T09:00:00</StartDate>
    <EndDate>2019-03-21T17:00:00</EndDate>
    <Comment>sdfds</Comment>
    <Service.Delivery>True</Service.Delivery>
    <Service.Setup>True</Service.Setup>
    <IdStock>1</IdStock>
    <Service_FullService>True</Service_FullService>
    <IdUserManager>0</IdUserManager>
  </Header>
  <Body>
    <Items>
      <Item>
        <IdStockType>7742</IdStockType>
        <Factor>10</Factor>
        <Price>0</Price>
      </Item>
    </Items>
  </Body>
</ShopOrder>
</root>
```

## WebApi

With the easyjob WebApi interface, data is retrieved and updated in easyjob in real-time.

The data is transferred in JSON format by means of GET and POST instructions.

Based on the login, only data for which the user has rights is transferred.

This WebApi documentation shows only the most important functions and calls to help you get started. For a complete overview, use an "HTTP Sniffer" program (such as Fiddler <https://www.telerik.com/fiddler>). With the Postman program and service, you can send your example queries to your easyjob WebApi. There you can also find detailed information about the structure of queries for programs such as cURL and sample code for various program languages. Link to the Postman documentation: <https://documenter.getpostman.com/view/17814395/UVR8onMz>

In the following example, the list of the individual WebApi calls is shown to the left. The data for the selected call that is sent and received is shown to the right.

The screenshot displays the Fiddler Web Debugger interface. On the left, a list of HTTP requests is shown with columns for #, Result, Protocol, Host, and URL. The selected request is #1703, a GET request to `localhost:8008/api.json/common/getwebsettings?_=15766777750`. On the right, the details of this request are shown, including the request headers and the received JSON response. The JSON response contains various settings for the application, such as `AccessKey`, `AllowActivityEdit`, `AllowAvailabilityView`, etc.

#	Result	Protocol	Host	URL
1680	200	HTTP	localhost:8008	/js/SiteMVC/LoadDMVC.js
1681	200	HTTP	localhost:8008	/js/SiteMVC/ActivityMVC.js
1682	200	HTTP	localhost:8008	/js/SiteMVC/ErrorMVC.js
1683	200	HTTP	localhost:8008	/js/appFunctionScripts/Customizing.js
1684	200	HTTP	localhost:8008	/js/appFunctionScripts/JSONController.js
1685	200	HTTP	localhost:8008	/js/appFunctionScripts/HandlerHelpers.js
1686	200	HTTP	localhost:8008	/js/appFunctionScripts/AccessController.js
1687	200	HTTP	localhost:8008	/js/appFunctionScripts/TranslationController.js
1688	200	HTTP	localhost:8008	/js/appFunctionScripts/timeline.js
1689	200	HTTP	localhost:8008	/img/dose.png
1690	200	HTTP	localhost:8008	/img/loading.gif
1691	200	HTTP	localhost:8008	/img/prev.png
1692	200	HTTP	localhost:8008	/img/hext.png
1693	200	HTTP	localhost:8008	/api.json/Common/GetGlobalWebSettings?_=15766777750
1694	200	HTTP	localhost:8008	/favicon.ico
1695	200	HTTP	localhost:8008	/img/logo.png
1696	200	HTTP	localhost:8008	/img/delete.png
1702	200	HTTP	localhost:8008	/token
1703	200	HTTP	localhost:8008	/api.json/common/getwebsettings?_=15766777750
1704	200	HTTP	localhost:8008	/js/frameworks/ddd/json/supplemental/likeSubtag
1705	200	HTTP	localhost:8008	/js/frameworks/ddd/json/supplemental/timeData.js
1706	200	HTTP	localhost:8008	/js/frameworks/ddd/json/supplemental/weekData.js
1707	200	HTTP	localhost:8008	/js/frameworks/ddd/json/main/de-ca-gregorian.json
1708	200	HTTP	localhost:8008	/api.json/dashboard/list?type=1&_=15766777750
1709	200	HTTP	localhost:8008	/api.json/dashboard/list?type=2&_=15766777750
1710	200	HTTP	localhost:8008	/api.json/dashboard/list?type=3&_=15766777750
1711	200	HTTP	localhost:8008	/api.json/dashboard/calendar?days=7&_=15766777750
1712	200	HTTP	localhost:8008	/api.json/dashboard/calendar?days=42&startdate
1713	200	HTTP	localhost:8008	/img/menubutton.png
1714	200	HTTP	localhost:8008	/img/e.png
1715	200	HTTP	localhost:8008	/img/darkArrowLeft.png
1716	200	HTTP	localhost:8008	/img/darkArrowRight.png
1717	200	HTTP	localhost:8008	/img/ALetter.png
1723	200	HTTP	localhost:8008	/api.json/dashboard/calendar?days=42&startdate
1724	200	HTTP	localhost:8008	/img/add.png
1725	200	HTTP	localhost:8008	/img/leftsmall.png
1726	200	HTTP	localhost:8008	/img/rightsmall.png
1727	200	HTTP	localhost:8008	/api.json/projects/list?startdate=2019-12-18T00:00:00
1728	200	HTTP	localhost:8008	/img/search.png
1729	200	HTTP	localhost:8008	/img/jquery-ui-bg_highlight-soft_100_eeeeee_1b
1734	200	HTTP	localhost:8008	/api.json/Activities/List?style=List&_=15766777750
1736	200	HTTP	localhost:8008	/api.json/Items/List?type=view&style=Tree&_=15766777750
1737	200	HTTP	localhost:8008	/img/arrowRight.png
1738	200	HTTP	localhost:8008	/api.json/addresses/list?searchtext=&style=List&_=15766777750
1739	200	HTTP	localhost:8008	/img/address.png
1740	200	HTTP	localhost:8008	/img/contact.png

```
GET http://localhost:8008/api.json/common/getwebsettings?_=15766777750 HTTP/1.1
Host: localhost:8008
Connection: keep-alive
Accept: */*
X-Requested-With: XMLHttpRequest
EJ-webapi-client: Browser
Authorization: Bearer AQAANCMnd88FDERjHOawe_c1-s8AAAAdLbxxSOMUCjFAGRZ67ghAAAAACA
User-Agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.4012.101 Safari/537.36
Content-Type: application/json; charset=utf-8
Sec-Fetch-Site: same-origin
Sec-Fetch-Mode: cors
Referer: http://localhost:8008/
Accept-Encoding: gzip, deflate, br
Accept-Language: de,en-AU;q=0.9,en;q=0.8,ru;q=0.7,es;q=0.6,en-GB;q=0.5,en-US;q=0.4,
```

```
{
  "AccessKey": "1031664488",
  "AllowActivityEdit": false,
  "AllowActivityView": true,
  "AllowAvailabilityView": true,
  "AllowBarcodeScan": true,
  "AllowEditOwnResourceStates": true,
  "AllowItemValuesView": false,
  "AllowItemValuesView": true,
  "AllowMDAddressView": true,
  "AllowMDDocumentView": true,
  "AllowMDItemView": true,
  "AllowMDOwnerView": true,
  "AllowProjectAdd": true,
  "AllowProjectView": true,
  "AllowServiceAdd": true,
  "GlobalizeCulture": "de",
  "HasWebAppLicense": true,
  "IdAddress": 1,
  "IdShortCutUserImage": 0,
  "IdUser": 1,
  "IsEJUser": true,
  "IsTimeCardUser": true,
  "LengthUnit": "m",
  "LNG": 0,
  "SendGeolocationOnTCAStart": false,
  "UserDisplayName": "Admin",
  "UserName": "Administrator"
}
```

## Functions

### Authorization

Authorization takes place via the OAuth 2.0 Bearer Token. It must first be requested at the end point `/token` in the WebApi.

The request to this endpoint must be performed as an HTTP-POST request

The `"Content-Type"` header must be set as follows: *"Content-Type: application/x-www-form-urlencoded; charset=UTF-8"*.

The user name and password are transferred in the Request-Body with the following structure:  
`grant_type=password&username=Administrator&password=123"`

Authorization takes place both via the user's easyjob login or via the login data in the address/contact (WebApi license required).

Token request example:

```
POST http://server:8008/token HTTP/1.1
```

```
Content-Length: 55
```

```
Content-Type: application/x-www-form-urlencoded; charset=UTF-8
```

```
grant_type=password&username=Administrator&password=123
```

The WebApi answers the request as follows:

```
{
  "access_token": "ACCESS_TOKEN",
  "token_type": "bearer",
  "expires_in": 172799,
  "userName": "Administrator",
  ".issued": "Wed, 22 Jan 2020 15:05:12 GMT",
  ".expires": "Fri, 24 Jan 2020 15:05:12 GMT"
}
```

The answer contains a validity date next to the Access Token that indicates until when the token is valid ("`expires_in`" is indicated in seconds).

## Installation und Konfiguration - WebApi

The received token must be set in all further requests in the Authorization Header: "Authorization: Bearer **ACCESS\_TOKEN**".

The content type must be set to "*application/json; charset=utf-8*".

Project details request example:

```
GET http://server:8008/api.json/projects/details/62 HTTP/1.1
```

```
Authorization: Bearer ACCESS_TOKEN
```

```
Content-Type: application/json; charset=utf-8
```

The WebApi answers the request as follows:

```
HTTP/1.1 200 OK
```

```
Content-Length: 1002
```

```
Content-Type: application/json; charset=utf-8
```

```
{
  "AllowHeadEdit": true,
  "AllowDocumentView": true,
  "AllowTimeCardView": true,
  "AllowPriceView": true,
  "AllowActivityView": true,
  "AllowJobAdd": true,
  "AllowCostplanView": true,
  "HtmlColor": "#C9F3C9",
  "CurrencySymbol": "EUR",
  "IdProject": 65,
  "Number": "20-0003",
  "CustomNumber": "",
  "Caption": "Sample project",
  "ProjectState": {
    "IdProjectState": 1,
    "Caption": "Confirmed",
    "Color": -3542071
  },
  "StartDate": "2020-01-22T00:00:00",
  "EndDate": "2020-03-01T00:00:00",
  "Address_Customer": {
    "IdAddress": 8,
    "Number": "1000008.00",
    "Company": "Sample company LLC",
```

```
    "FirstName": "Max",
    "Surname": "Smith",
    "Street": "Main street 1",
    "Zip": "0000",
    "City": "Any town",
    "Phone": "",
    "PhoneCompany": "",
    "Fax": "",
    "EMail": "",
    "WWWAddress": ""
  },
  "Contact_Customer": {
    "IdContact": 8,
    "Surname": "Smith",
    "FirstName": "Max",
    "Phone": "",
    "Fax": "",
    "Mobile": "",
    "Email": ""
  },
  "Jobs": [
    {
      "IdJob": 120,
      "Number": "20-0003.01",
      "Caption": "Sample job",
      "Stock": {
        "IdStock": 1,
        "Caption": "Default"
      }
    }
  ],
  "Stock": { "Stock": {
    "IdStock": 1,
    "Caption": "Default"
  }
}
```



## General

With the Postman program and service, you can send your example queries to your easyjob WebApi. There you can also find detailed information about the structure of queries for programs such as cURL and sample code for various program languages. Link to the Postman documentation: <https://documenter.getpostman.com/view/17814395/UVR8onMz>

Possible calls

- GET /api.json/Common/GetGlobalWebSettings (Anonymous)
- GET /api.json/Common/GetWebSettings
- GET /api.json/Common/AutoComplete/?searchtext=abc&table=project

## Dashboard

Provides a view of the current processes related to the login

Possible calls

- GET /api.json/Dashboard/List/(type=Important|Today|FromTodayOn)
- GET /api.json/Dashboard/Calendar/?days=7&(startdate=2019-01-01T00:00:00.000Z)&(tables=7)

## Views

Access to all Navigator/easyjob Today views

Possible calls:

- GET /api.json/Views/List
- GET /api.json/Views/Execute/viewname

## Addresses

Access to the easyjob address master data

Possible calls

- GET /api.json/Addresses/List/(searchtext=abc)&(style=List|Compact)
- GET /api.json/Addresses/Details/123?(Idcontact=123|-1)
- GET /api.json/Addresses/ActivityList/123?(style=List|Compact)&(tables=7)
- GET /api.json/Contacts/Details/123

## Projects and Jobs

Access to easyjob Projects and Jobs

Possible calls

- GET /api.json/Projects/List/(searchtext=abc)&(style=List|Compact)&(startdate=2019-01-01T00:00:00.000Z)&(enddate=2019-01-01T00:00:00.000Z)
- GET /api.json/Projects/Details/123
- POST /api.json/Projects/Save/[model]
- GET /api.json/Projects/GetFormData/(type=add|edit)
- GET /api.json/ShortCuts/List2Object/123?table=project&(style=List|Compact)
- GET /ShortCuts/download|image|thumb|thumb2/123?access\_token=abc&access\_key=123
- GET /api.json/Job/Details/123
- POST /api.json/Job/Save/[model]
- GET /api.json/Job/GetFormData/(123)?(type=add|edit)

## Items

Access to easyjob Items

Possible calls

- GET /api.json/Items/List/(searchtext=abc)&(type=View|Book)&(style=List|Compact)&(IdCategoryParent=123)&(IdCategory=123)
- GET /api.json/Items/CategoryList/(type=View|Book)
- GET /api.json/Items/Details/123
- GET /api.json/Items/BillOfItems/123
- GET /api.json/Items/LinItemDetails/(123)?(idst=123)&(idjob=123)&(idst2jg=123)
- GET /api.json/Items/GetLinItemFormData/(123)?(idjob=123)&(idst2jg=123)
- POST /api.json/Items/Book/[model]
- GET /api.json/Items/Avail/123?startdate=2019-01-01T00:00:00.000Z&enddate=2019-01-01T00:00:00.000Z&(stock=123)

## Resources

Access to resource planning

Possible calls

- //GET /api.json/Resources/List/?(searchtext=abc)&(resourcetype=Staff|Vehicle|GenericRessource)&(style=List|Compact)
- GET /api.json/Resources/List2Object/123?(table=job)
- GET /api.json/Resources/AllocationList/123
- GET /api.json/Resources/Details/123
- GET /api.json/Resources/GetFormData/(123)?(idjob=123)&(resourcetype=Staff|Vehicle|GenericRessource)&(idresourcefunction=123)
- POST /api.json/Resources/Save/[model]
- POST /api.json/Resources/Delete/123

## Print

Starting printing processes (PDF generation)

Possible calls

- GET /api.json/Reports/List/?table=project
- GET /Print/123/project/123?access\_token=abc&access\_key=123

## Time Card

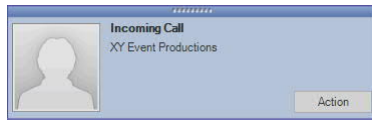
Access to time recording

Possible calls

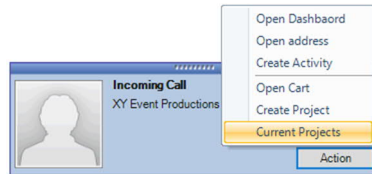
- GET /api.json/TimeCard/List2Object/123?(table=project)
- GET /api.json/TimeCard/Details/?(d=2019-01-01T00:00:00.000Z)
- POST /api.json/TimeCard/StartWorkTime
- POST /api.json/TimeCard/CloseWorkTime/?(d=2019-01-01T00:00:00.000Z)&(force=0|1)
- GET /api.json/TimeCard/GetFormData/?(worktype=123)
- POST /api.json/TimeCard/SaveWorkTrace/[model]
- POST /api.json/TimeCard/SaveWorkQualification/[model]
- GET /api.json/TimeCard/GetWorkQualificationTemplates
- GET /api.json/TimeCard/GetWorkTraceTemplates
- GET /api.json/TimeCard/UserList (Anonymous)
- POST /api.json/TimeCard/DeleteWorkTrace/123
- POST /api.json/TimeCard/DeleteWorkQualification/123

## TAPI interface

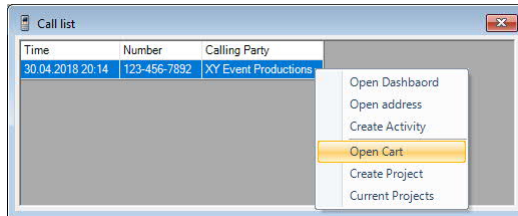
When integrating a phone, incoming calls will be resolved based on the stored phone number data and signaled with a popup window.



You can perform additional activities using the context menu.



From the call list context menu you can perform additional actions using a known address.



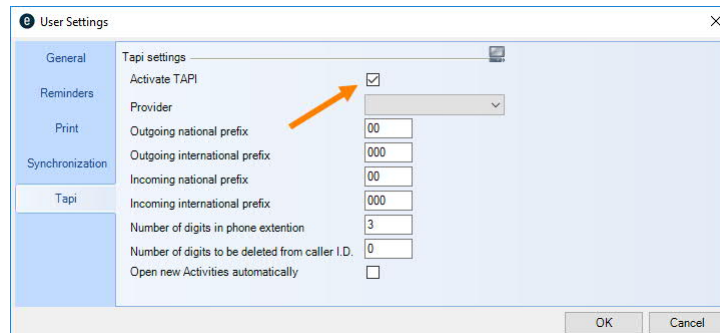
## Installation and activation

### User options

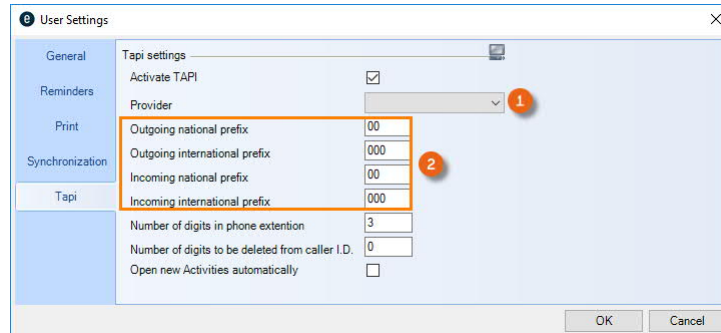
TAPI integration is activated in the user options.

### Activating TAPI

1. easyjob Menu ↵ • Tools ↵ • User Settings
2. ↵ • TAPI
3. Check the [Activate TAPI](#) box



In the user options, also select the provider ① made available by the installed TAPI driver of the telephone system. The prefix settings ② are inclusive of any numbers for accessing an outside line as well as local and international codes. If you have to select 0 for an outside line, for a national call it is = 00 (one 0 for the outside line and 0 for the area code). Internationally, you need one more 0: 0 = outside line 00 = int. code.



For incoming prefixes, it depends if the telephone sends the 0 for the outside line as a code for external calls. If yes, it is the same as for outgoing prefixes, otherwise with one less 0. (0 = national, 00= int.).

### Company address

Your own company address is selected in the program options from the master data. In order for the TAPI interface to function, the company address must contain the country.

### Storing the company address

1. easyjob Menu ↗ • [Tools](#) ↗ • [Settings](#)
2. ↗ • [General](#)
3. Select your company address
4. ↗ • [Ok](#)

easyjob must be restarted to activate the settings.

### Countries

The country phone prefix must be entered in the country master data.

### Managing countries

1. easyjob Menu ↗ • [Master Data](#) ↗ • [Countries](#)
2. Select a country you want to [Edit](#) or create a new country with [Add](#).
3. Enter a name, country code and phone prefix.

4. ↗ • [Ok](#)

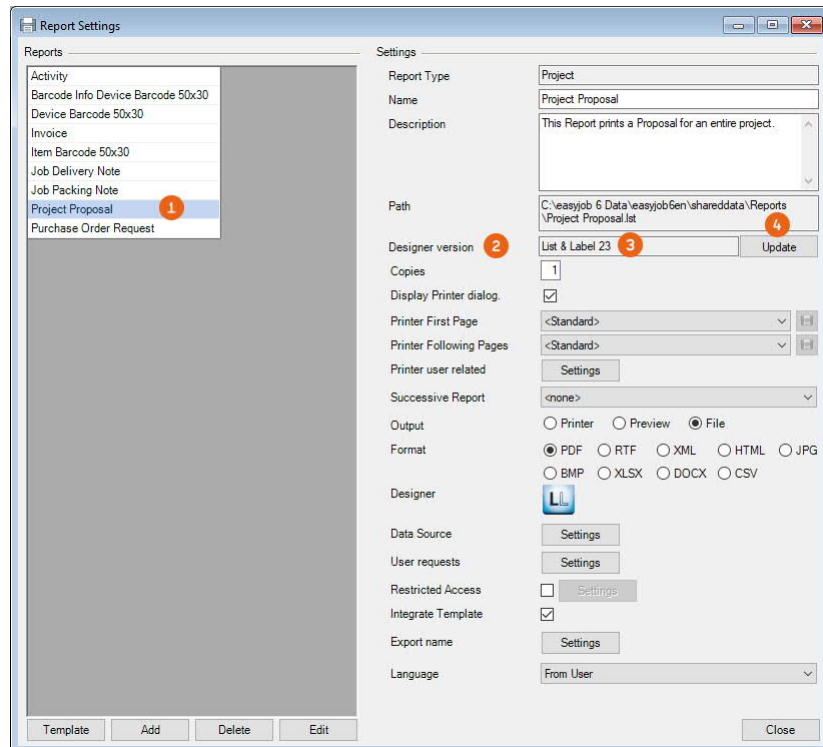
# REPORT DESIGNER

## Installation und Konfiguration - TAPI interface

This chapter will be published soon.

## Important information for the migration from List & Label 23 to 27

From easyjob 6.17 you have the option to migrate your reports individually to a higher List & Label Version. After you have selected the desired Report ①, the Designer Version ② (e.g. List & Label 23 ③) of the selected report will be displayed. With **Update** ④ you can convert the reports to the current List & Label Version.



When converting the report, a backup will be automatically stored in Version 23 in the Shared Report directory in the Backup subfolder (`SERVER\easyjob 6\Data\easyjob\shareddata\Reports\`).



Please note that this update cannot be reversed. After converting, please fully test your report to make sure that it functions like before the conversion.

## Changed behavior of Group Header Lines

Behavior up to Version 23:

The group header was output up until now to the field type of the first printed data line.

New behavior from Version 24:

The group header is output up to the first data line, regardless if it is printed, presented visually or not.

This change influences the behavior of the totals variables when Parts data source is used as a counter. If Parts in the data source are transferred at the beginning as a counter, they will not be executed and will be output up to the first data line, which should not be optically printed in the report. Here the group header must be intercepted and be excluded from the Parts counter of the data source by means of a display condition, so that they are executed and can also be counted.

You can find this in our Standard Report Templates [Job Delivery Note](#), [Job Pack Lists](#), [Job Pack Lists according to Stock Location](#), [Project Item Lists](#). The total quantity of the items/packages that could be counted via the totals variable is output at the top in the header.

If you do not have a group header or if the totals variable can no longer be used in a Version 27 report, the following approaches are possible:

- PreCalc() function (see the L&L manual in the Designer)
- Multi-pass procedure ([Multi-pass-processing: Finally – a Glance in the Crystal Ball \(combit.blog\)](#))

Which procedure is right depends on the individual report. Newly revised report templates are available from Version 6.17. You can find information about further changes and new features in the List & Label Designer at <https://www.combit.net/>.

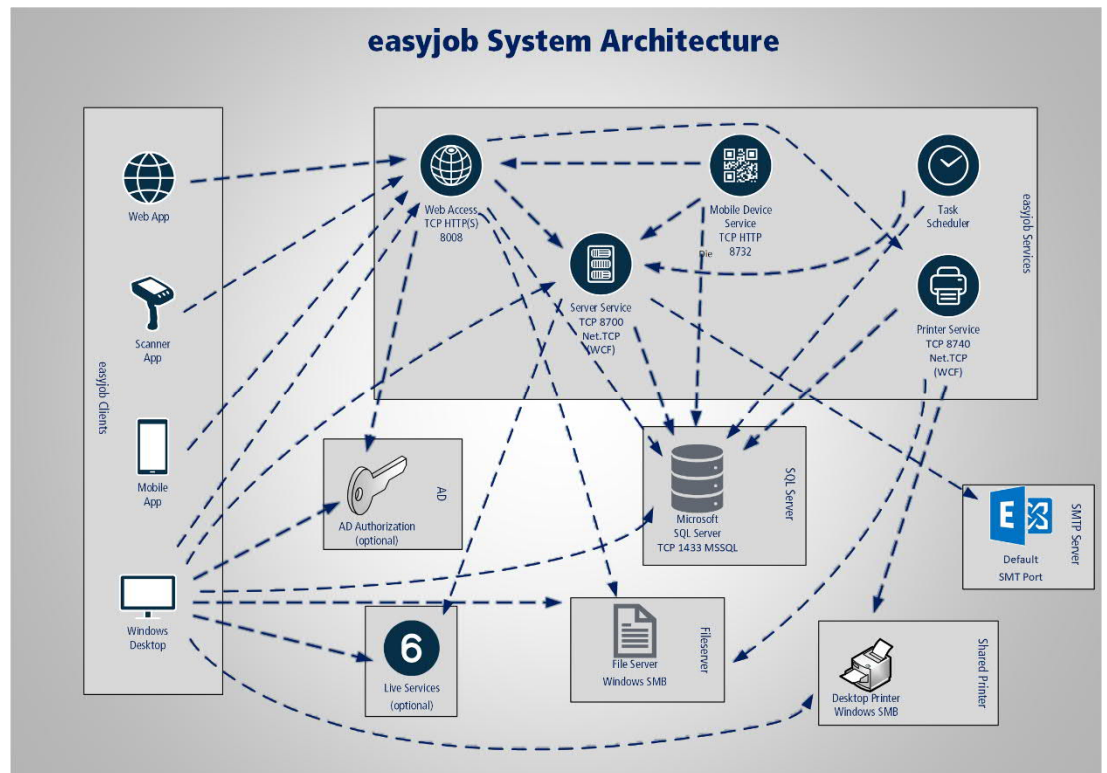
If you require support for the migration of the List & Label Designer Version, please contact our [Support](#).

# **OPERATION AND PROVISION**

Information and assistance for the  
operation and provision of easyjob

## easyjob system architecture

The easyjob system architecture is comprised of the easyjob Clients, easyjob Services as well as third-party services such as the Microsoft SQL Server.



## easyjob Clients



### easyjob Windows Desktop

The Windows Client with full functional scope can be virtualized on a local client or used as a remote desktop.

Necessary user context rights	<ul style="list-style-type: none"> <li>- Read access to the easyjob program directory</li> <li>- Read access to the global data directory</li> <li>- Write permission for the global data directory (e.g. to add document attachments)</li> <li>- Temp write permission</li> <li>- Access to the printer</li> </ul>
Provided network services (server)	<ul style="list-style-type: none"> <li>- None</li> </ul>
Utilized network services (client)	<ul style="list-style-type: none"> <li>- SQL database</li> <li>- LDAP Authorization (if configured)</li> <li>- easyjob Server Service</li> <li>- easyjob Web Access</li> <li>- servicepoint.easyjob6.com (if errors should be sent or if a check for updates should be performed. Can be deactivated)</li> </ul>



### easyjob Mobile App

Provides mobile access to the most important easyjob functions. The app is available for IOS and Android.

Utilized network services (client)	- easyjob Web Access
------------------------------------	----------------------



### easyjob Web App

It provides mobile access to the most important easyjob functions via the web browser. All commonly used browsers are supported.

Utilized network services (client)	- easyjob Web Access
------------------------------------	----------------------



### easyjob Scanner App

It optimizes easyjob functionality for use with barcode scanners. The app is available for IOS and Android.

Utilized network services (client)	- easyjob Web Access
------------------------------------	----------------------

## easyjob Services



### easyjob Server Service

It is the central communication interface between the individual easyjob components and takes over central tasks, such as the performance of workflows.

Necessary user context rights	<ul style="list-style-type: none"> <li>- Read access to the easyjob program directory</li> <li>- Read access to the global data directory</li> <li>- Temp write permission</li> <li>- Run as service rights</li> <li>- TCP lists on configured port</li> </ul>
Provided network services (server)	<ul style="list-style-type: none"> <li>- Microsoft .net TCP (WCF). Standard port 8700, can be configured</li> </ul>
Utilized network services (client)	<ul style="list-style-type: none"> <li>- SQL database</li> <li>- servicepoint.easyjob6.com (if errors should be sent or if a check for updates should be performed. Can be deactivated)</li> <li>- SMTP (Optional)</li> <li>- EWS (Optional)</li> </ul>



### easyjob Web Access Service

Provision of HTTP(S) requests for access to easyjob data via JSON as well as provision of HTML applications.

Necessary user context rights	<ul style="list-style-type: none"> <li>- Read access to the easyjob program directory</li> <li>- Read access to the global data directory</li> <li>- Write permission for the global data directory when document attachments should be added</li> <li>- Temp write permission</li> <li>- Run as service rights</li> <li>- TCP lists on configured port</li> </ul>
Provided network services (server)	<ul style="list-style-type: none"> <li>- TCP HTTP(S) Standard port 8008, can be configured</li> </ul>
Utilized network services (client)	<ul style="list-style-type: none"> <li>- SQL database</li> <li>- LDAP Authorization (if configured)</li> <li>- easyjob Server Service</li> <li>- easyjob Printer Service</li> </ul>



### easyjob Mobile Device Service

The service is still used on old barcode scanners due to compatibility reasons and should end in the future.

Necessary user context rights	<ul style="list-style-type: none"> <li>- Read access to the easyjob program directory</li> <li>- Read access to the global data directory</li> <li>Temp write permission</li> <li>- Run as service rights</li> <li>- TCP lists on configured port</li> </ul>
Provided network services (server)	<ul style="list-style-type: none"> <li>- TCP HTTP(S) Standard port 8732, can be configured</li> </ul>
Utilized network services (client)	<ul style="list-style-type: none"> <li>- SQL database</li> <li>- easyjob Server Service</li> <li>- easyjob Web Access</li> </ul>



### easyjob Task Scheduler

This triggers the performance of recurring server tasks, such as synchronization with third-party services, maintenance tasks. etc.

Necessary user context rights	<ul style="list-style-type: none"> <li>- Read access to the easyjob program directory</li> <li>- Read access to the global data directory</li> <li>- Write permission for the global data directory when document attachments should be added</li> <li>- Temp write permission</li> <li>- Run as service rights</li> </ul>
Provided network services (server)	None
Utilized network services (client)	<ul style="list-style-type: none"> <li>- SQL database</li> <li>- easyjob Server Service</li> </ul>



### easyjob Printer Service

Performance of printing processes if there is no user context. For example, for the generation of delivery notes via the barcode scanner or automatic reporting via the workflow engine.

Necessary user context rights	<ul style="list-style-type: none"><li>- Read access to the easyjob program directory</li><li>- Read access to the global data directory</li><li>- Temp write permission</li><li>- Run as service rights</li><li>- Access to the utilized printer</li><li>- TCP lists on configured port</li></ul>
Provided network services (server)	<ul style="list-style-type: none"><li>- Microsoft .net TCP (WCF). Standard port 8740, can be configured</li></ul>
Utilized network services (client)	<ul style="list-style-type: none"><li>- SQL database</li></ul>

## Third-Party Services



### Microsoft-SQL-Server

Access takes place via the standard Microsoft protocol. The TCP port can be configured on the SQL Server. Data communication can be encrypted.

### Live Services ([servicepoint.easyjob6.com](http://servicepoint.easyjob6.com))

The service point provides various (optional) live services via http(s):

- Sending program errors
- Checking for easyjob updates
- Activation of the license
- Geolocalization of addresses



### Windows File and Printer Services

A standard Windows interface is used for document storage, report definitions, printing procedures, etc.



### LDAP Authorization (Optional)

The authorization provided by easyjob can be used for authorization. Alternatively, authorization can take place via LDAP.



### SMTP Service and EWS

Emails can be sent from the system via SMTP. Additionally, it is possible to synchronize appointments, tasks, etc. with EWS.

## **easyjob Servermanager**

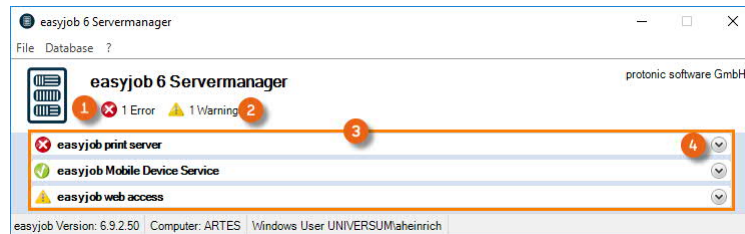
This chapter will be published soon.

## easyjob Services

This chapter will be published soon.

### Configuring easyjob services

To be able to use the numerous easyjob applications, the [easyjob Mobile device](#), [easyjob web access](#) and [easyjob print server](#) services must first be activated and configured in the server manager.

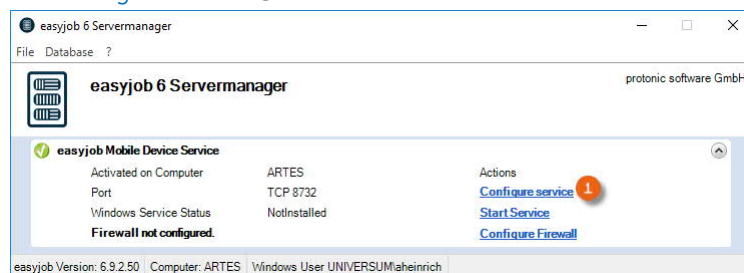


These services can be found in the easyjob server manager. Errors ① or warnings ② are displayed in the overview. To start the described services, ③, open them one after the other ④ and make the configurations.

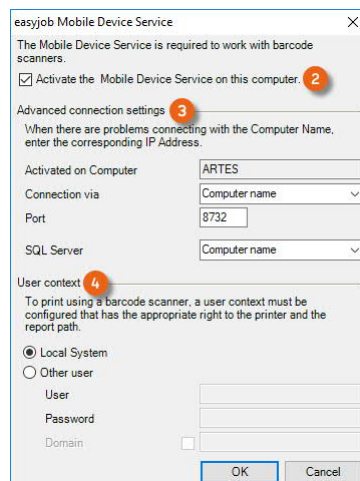
### easyjob Mobile Device service

#### Activating the easyjob Mobile Device Service

1. Open easyjob 6 server manager
2. ↪ [easyjob Mobile Device Service](#)
3. ↪ [Configure service](#) ①



4. Check the box Activate the Mobile Device Service on this computer ②



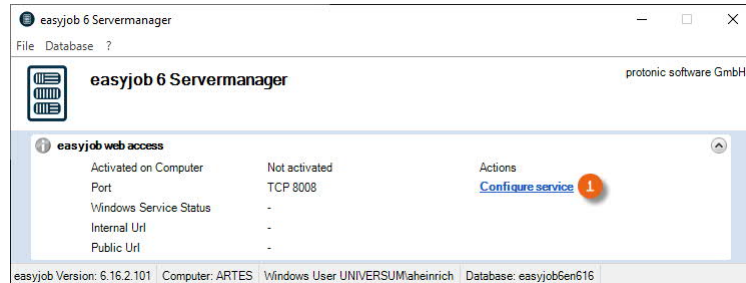
5. If needed, perform the Advanced connection settings ③ or configure the user context ④
6. ↪ [Ok](#)

The service will be executed by default with the [Local System](#) user context.

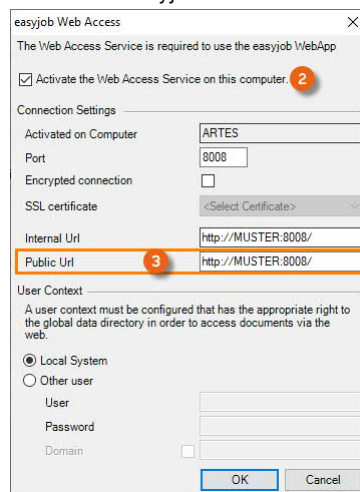
## easyjob web access service

### Activating the easyjob Web Access Service

1. Open easyjob 6 server manager
2. ↪ easyjob Web Access
3. ↪ **Configure service** ①



4. Check the easyjob web access box on this computer ②



5. If necessary, select an SSL certificate for an encrypted connection
6. Define the public URL ③
7. ↪ **Ok**

The service will be executed by default with the **Local System** user context.



A functional public URL must be set up in order to be able to use the Room Planner, for example, via the WebApp.

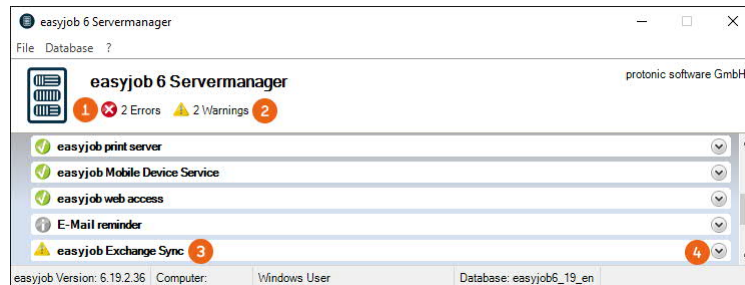
### easyjob print server

Perform the configuration in the same way as for  **easyjob Mobile Device service**.

## Configuring Exchange Sync

To be able to synchronize the **Exchange Server** or **Microsoft 365**, **Exchange Sync** must be activated and configured on the easyjob Servermanager.

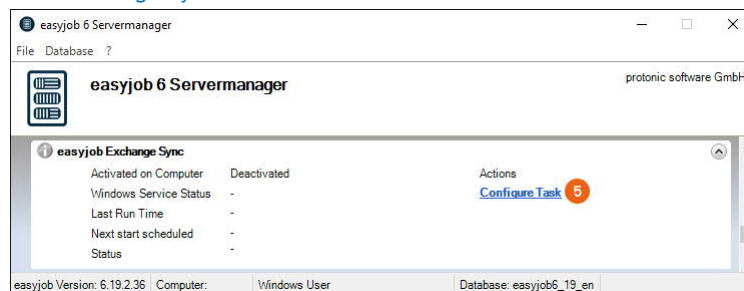
The service is required for **Synchronization settings** (e.g. for projects, jobs, addresses, activities, tasks) to be able to synchronize them with Outlook and/or Microsoft 365. The synchronization frequency is specified as well in **Exchange Sync**.



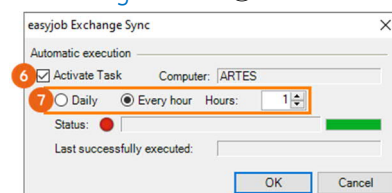
This service can be found in the easyjob Servermanager. Errors ① or warnings ② are displayed in the overview. To start the described service and configure the Synch Task ③ expand it ④ and make the configurations.

## Activating Exchange Sync

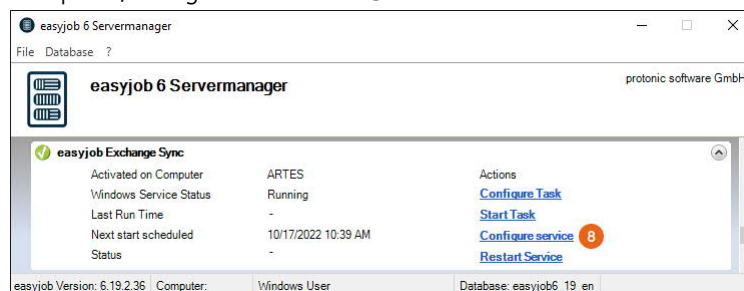
1. Open easyjob 6 server manager
2. ↩️ • **Exchange Sync**



3. ↩️ • **Configure Task** ⑤



4. Check the **Activate Task** ⑥ box
5. Determine the frequency of the synchronization task ⑦
6. ↩️ • **Ok**
7. If required, configure the service ⑧ or restart it



The service will be executed by default with the **Local System** user context.

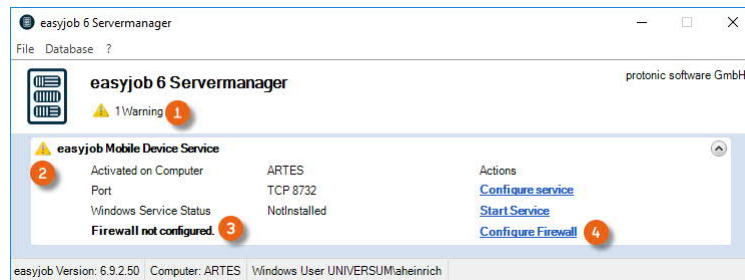
## Configure the Windows Firewall

### Release of the necessary TCP Ports

If the server is firewall protected, TCP authorizations are required. The easyjob Server Manager automatically configures the Windows integrated Firewall.

### Windows Firewall Configuration

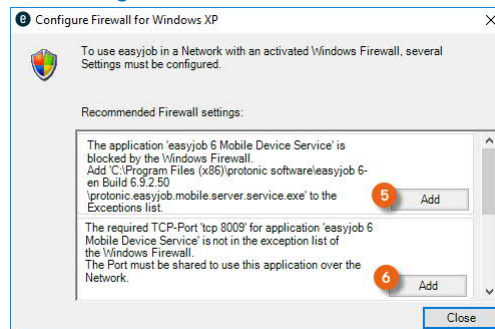
If the necessary settings are missing, you will receive a corresponding warning message ③ in the server manager ① and in the respective service ② for which the firewall was not yet configured.



The firewall for the concerned service can be directly configured from the server manager ④.

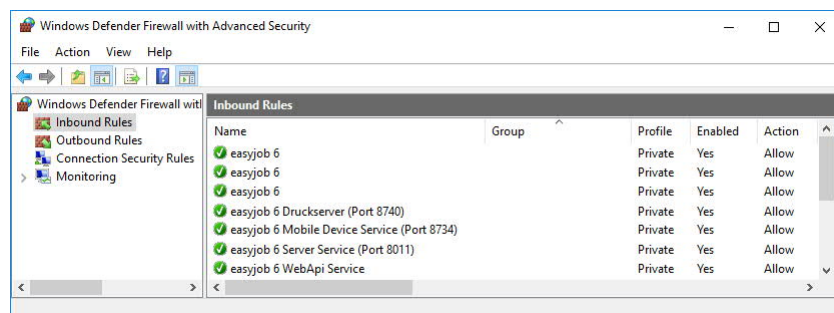
### Configuring the firewall

1. Open easyjob 6 server manager
2. ↶• open easyjob Service
3. ↶• Configure the firewall



4. ↶• Add ⑤ ⑥ to enter the exception in the firewall
5. ↶• Close

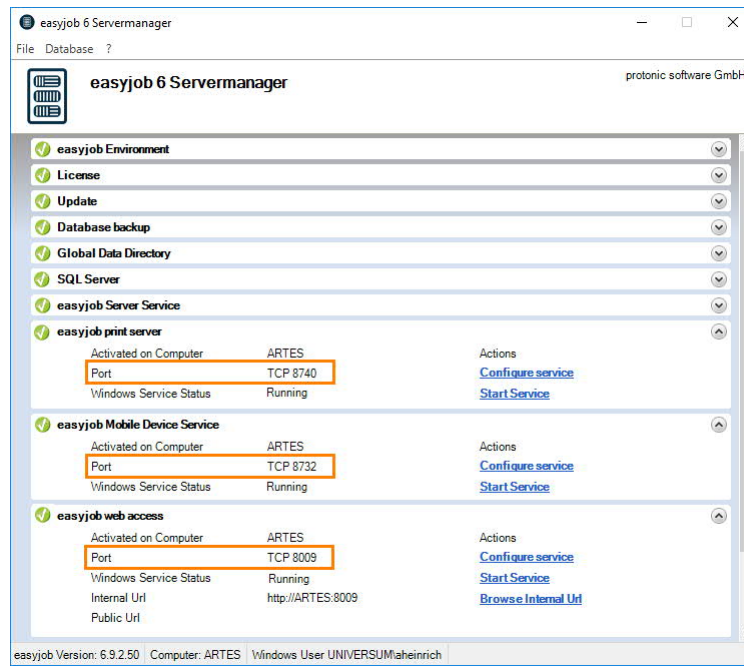
After successful firewall configuration, the following exceptions are entered:



## Configuring a non-Windows firewall

If you use another firewall, please note that the easyjob Server manager only detects a Windows Firewall and therefore can only create warning messages for a Windows Firewall.

For the release of a non-Windows firewall, please use the port information from the respective service of your server manager. The TCP number can deviate from the following image depending on the type of easyjob installation.



Please note that a release is necessary separately for each service and two releases are required for every service. First, the corresponding .exe file for the rights to access the network and second the port to permit communication between the network and the computer.

Service	.exe
<b>easyjob print server</b>	protonic.easyjob.printserver.service.exe
<b>easyjob Mobile Device service</b>	protonic.easyjob.mobile.server.service.exe
<b>easyjob web access</b>	protonic.easyjob.WebApi.service.exe

## Synchronization with Outlook/Exchange Server/Microsoft 365

**Outlook Synchronization** only takes place locally on the **client computer** with Outlook installed in it and therefore is PC-dependent. **Exchange Server Synchronization** requires additional settings and the synchronization service on the **Server**. This can be configured with the easyjob Servermanager and is independent of the PC.

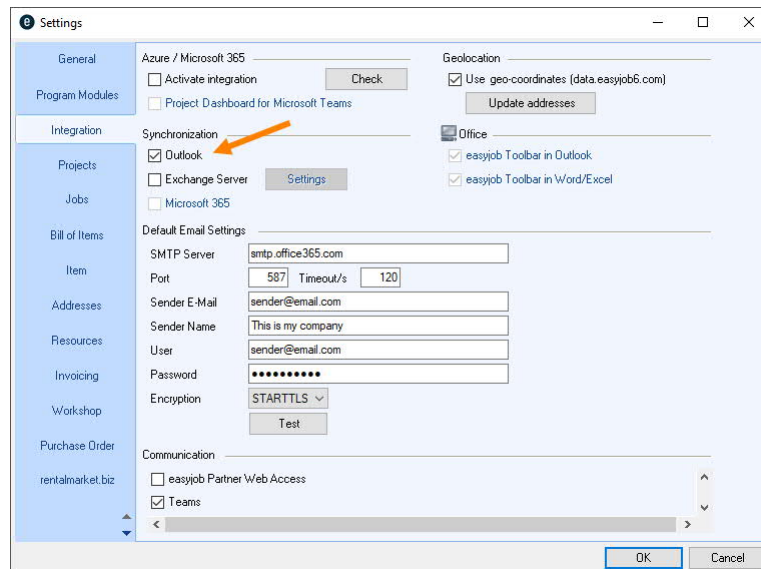
In both variants, the user has the opportunity to create their own individual **Synchronization settings** in the user settings (e.g. for projects, jobs, addresses, activities, tasks).

Some of the following settings are only possible with Admin rights. Open easyjob by right clicking with the mouse and run it **As Administrator**.



### Microsoft-Outlook

Go to the easyjob program settings to activate Outlook synchronization. Under **Synchronization**, check the **Outlook** box.



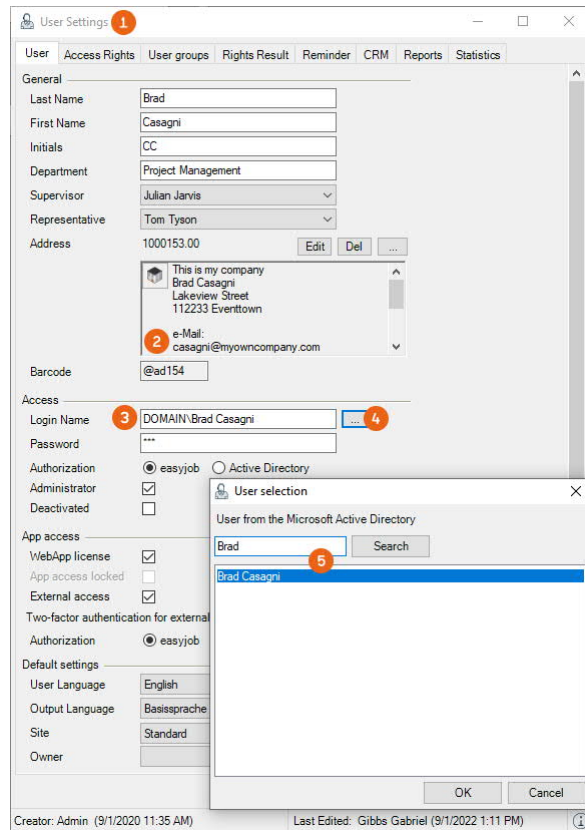
### Activating Outlook Synchronization

1. easyjob Menu  $\hookrightarrow$  **Tools**  $\hookrightarrow$  **Settings**
2.  $\hookrightarrow$  **Integration** tab
3. Check the box for **Synchronization Outlook**
4.  $\hookrightarrow$  **Ok**

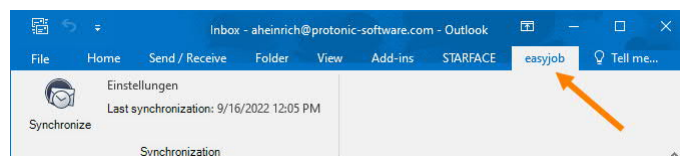
easyjob must be restarted to activate the settings.

## User settings for Synchronization

Every user who would like to use Synchronization must have a master data address assigned in the easyjob **User settings** ① that contains a corresponding email address ②. Furthermore the **Login Name** ③ must be stored with the format Domain\user name. You can use the search function ④ to select the user from the Microsoft Active Directory.



After set up was successful, you will see the easyjob - AddIn tab.



You can select the synchronization tasks in the easyjob user settings.

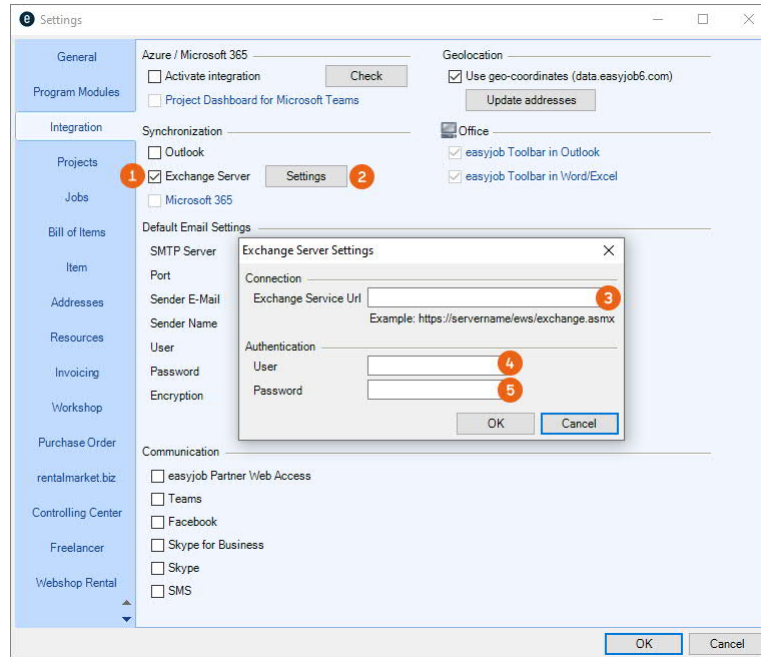
See also Synchronization settings.

## User settings for synchronization

1. easyjob Menu Tools Manage Users
2. Select a User
3. Edit
4. Under **General Address** click on
5. Select an address Ok
6. Under **Access Login Name** click on Search
7. Select the user
8. Ok

## Exchange Server

For the synchronization with the **Exchange Server**, check the corresponding box ① and click on **Settings** ②. Enter the Exchange Service Url ③ under which the Exchange service can be reached (e.g. <https://servername/ews/Exchange.asmx>), as well as the User ④ and Password ⑤ for authentication.



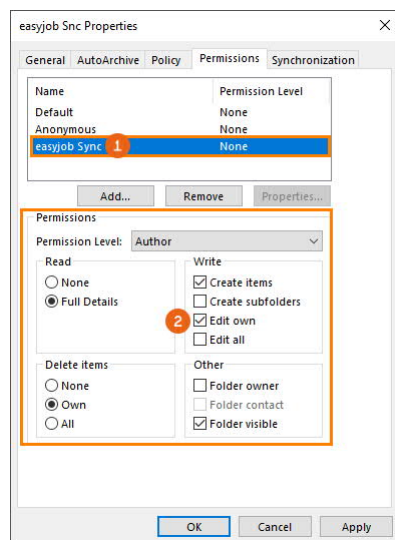
### Activating Exchange Server Synchronization

1. easyjob Menu ↔ • Tools ↔ • Settings
2. ↔ • Integration tab
3. Check the **Exchange Server** box
4. ↔ • Settings
5. Enter the **Exchange Service Url**, **User** and **Password**
6. ↔ • Ok

easyjob must be restarted to activate the settings.

## Assigning Folder permissions

Under the Exchange Webservice URL, a user ① is required who has the corresponding permissions ② for the concerned folder. It must be stored for the individual objects (calendar, address book, etc.) for which synchronization is to take place.



### Assigning permissions for the folder

1. ↪• Microsoft Outlook
2. Select a folder
3. ↪• Properties
4. ↪• Permissions tab
5. Add the user for Authentication ④ from the Exchange Server settings as the authorized author
6. ↪• **Ok**

When all settings are made, the Exchange Task can be activated with the Servermanager. An address must be assigned to the easyjob users. The e-mail address is used to identify the email account. See also [User settings for Synchronization](#) and [Synchronization settings](#).

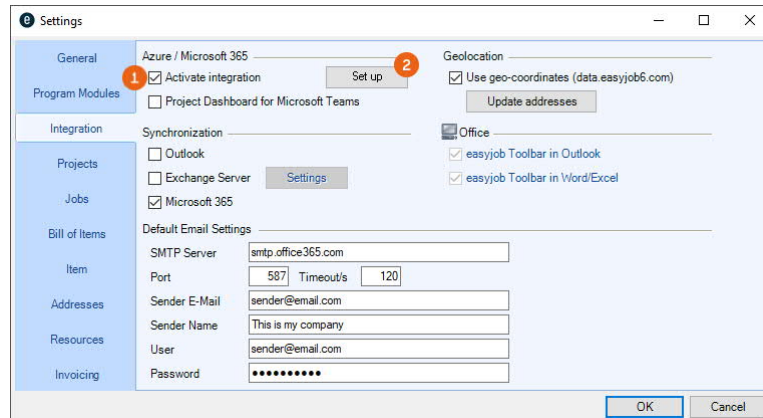


## Microsoft 365

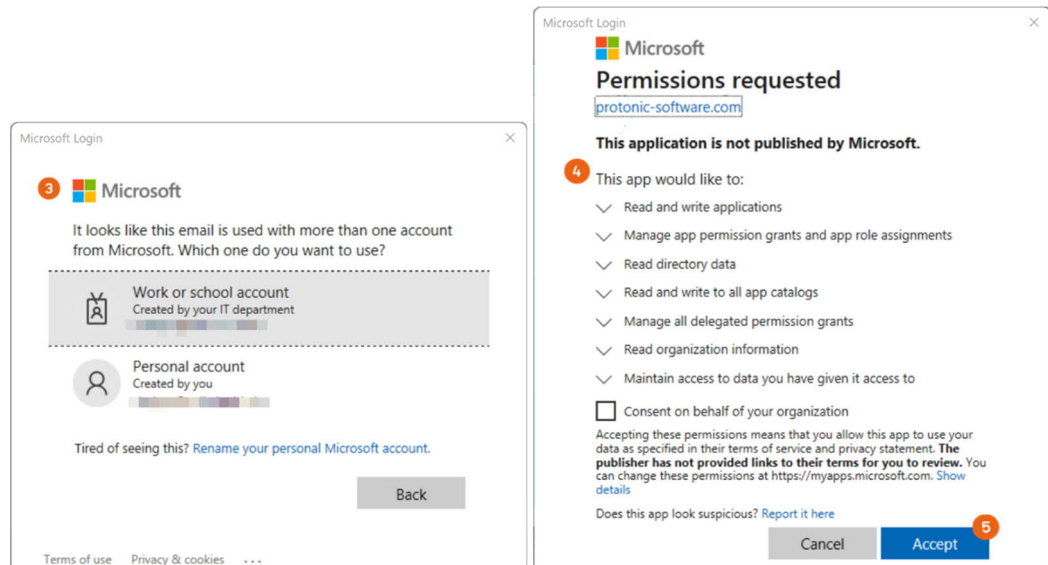
For integration /synchronization with Microsoft 365, please use easyjob from Version 6.19 upward. Azure / Microsoft 365 Integration requires a functional public URL with SSL encryption of the [easyjob web access service](#).

### Microsoft 365 Integration

For setup, check the box under **Azure / Microsoft 365** for **Activate integration** ① and click on **Set up** ②.



Then you must confirm your Microsoft account or select the correct account ③ and accept the request from protonic software ④ for one-time access permission ⑤.



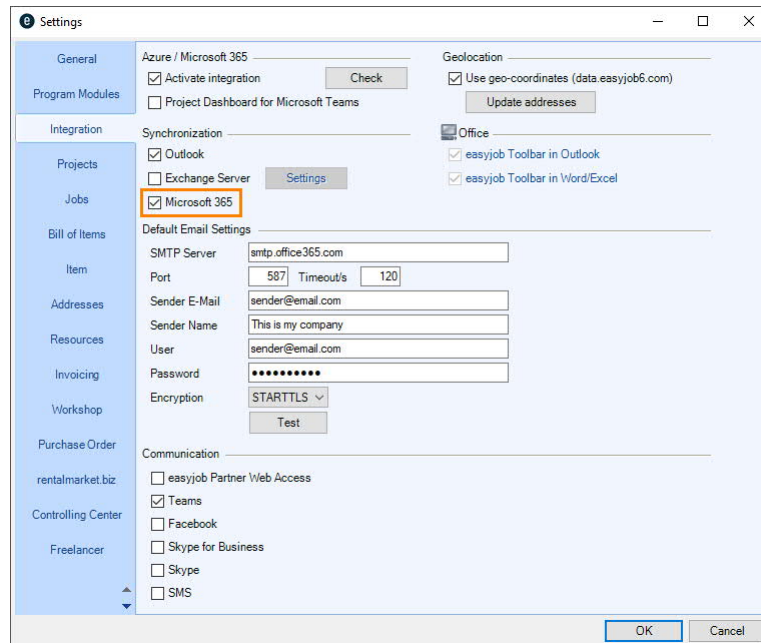
### Activating Microsoft 365 Integration

1. easyjob Menu ↔ • Tools ↔ • Settings
2. ↔ • Integration tab
3. Check the box for **Azure / Microsoft 365 Activate integration**
4. ↔ • Set up
5. Confirm/select the Microsoft account
6. Check the box for Synchronization **Microsoft 365**
7. ↔ • Ok

easyjob must be restarted to activate the settings.

## Microsoft 365 Synchronization

To set up the **synchronization tasks**, under Synchronization select **Microsoft 365** in the easyjob program settings.



For the use of synchronization, the **Synchronization service** must be set up and active on the **server**. See [Configuring Exchange Sync](#).

Details about the possible synchronization tasks can be found in [Microsoft 365 synchronization settings](#).

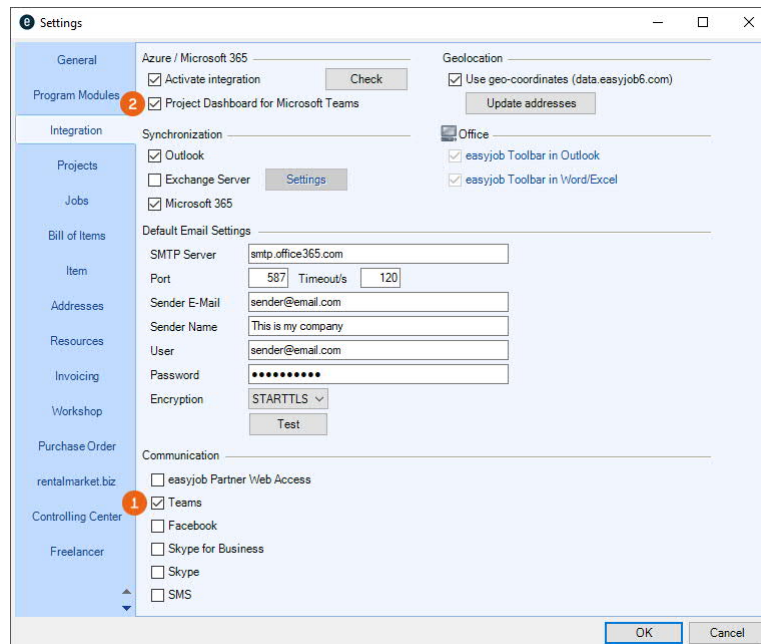
### Activating Microsoft 365 Synchronization

1. easyjob Menu  $\hookrightarrow$  Tools  $\hookrightarrow$  Settings
2.  $\hookrightarrow$  Integration tab
3. Check the box for Synchronization **Microsoft 365**
4.  $\hookrightarrow$  Ok





easyjob must be restarted to activate the settings.

## Microsoft Teams

With Microsoft 365 you can also integrate Teams in easyjob. To do so, select **Teams** ① in the program settings. You can also display a **Project Dashboard** ② in Teams. Please check in advance if  **Microsoft 365 Integration** was activated.







### Activating easyjob Teams communication

1. easyjob Menu  Tools  Settings
2.  Integration tab
3. Check the box for Communication **Teams**
4.  Ok

easyjob must be restarted to activate the settings.

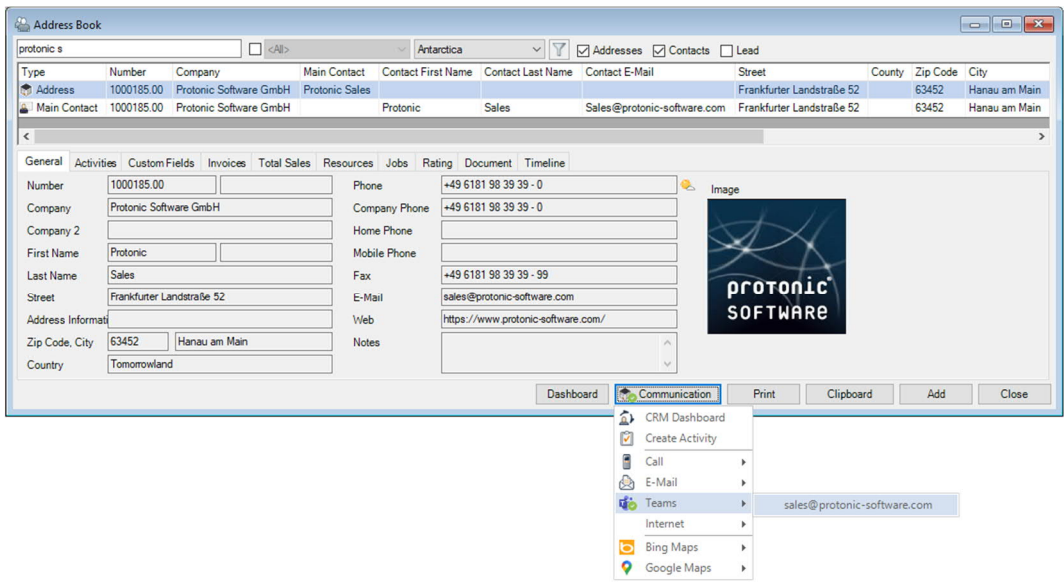
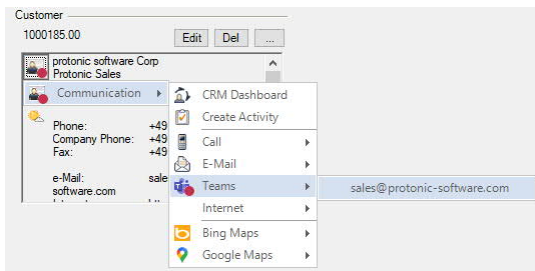
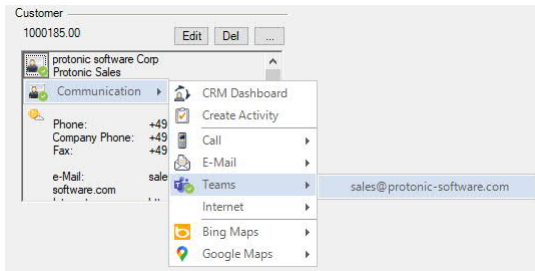
### Activating the easyjob Project Dashboard for Microsoft Teams

1. easyjob Menu  Tools  Settings
2.  Integration tab
3. Check the box for Azure /Microsoft 365 **Project Dashboard for Microsoft Teams**
4.  Ok

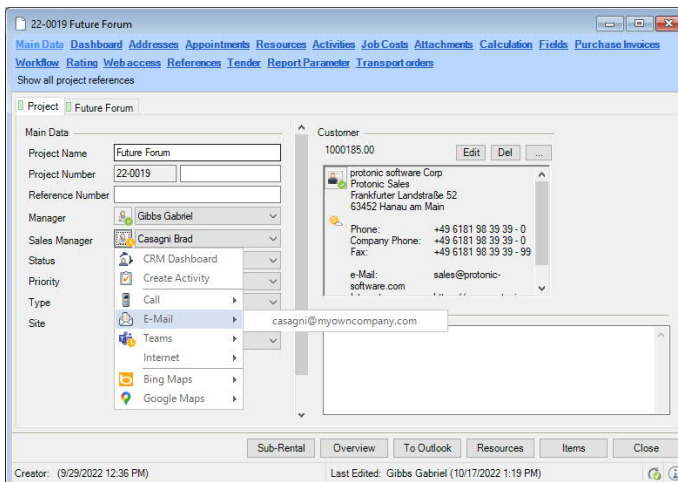
easyjob must be restarted to activate the settings.

**Teams presence status in the easyjob Communication menu**


After you have completed easyjob Teams Integration, the current team presence status appears in all areas in easyjob with the related address in the communication menu and the possibility to directly communicate via Teams.

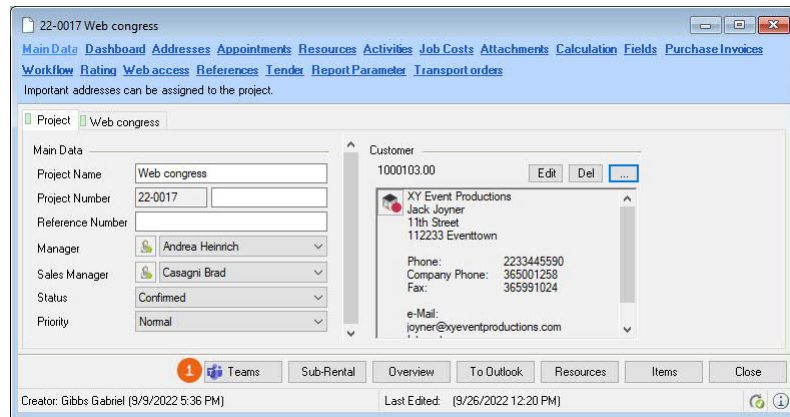



The Teams communication menu is also available to **Managers**.

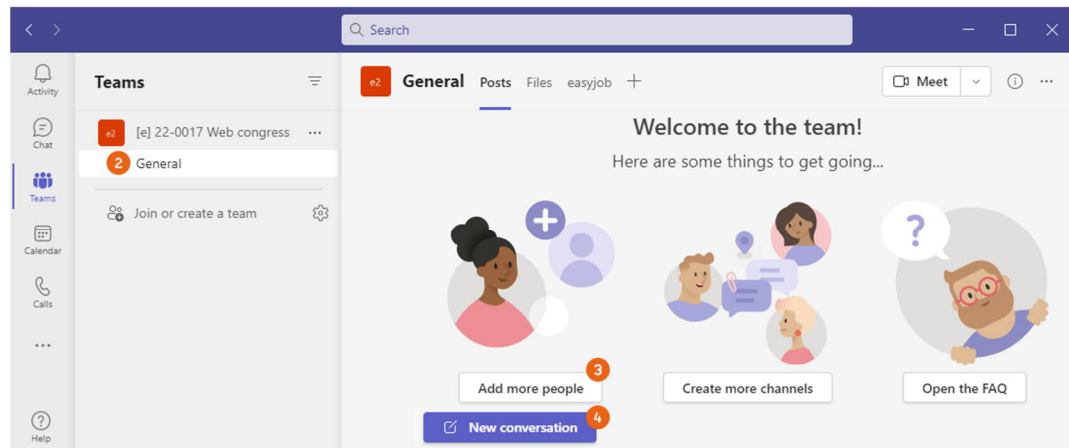





### Project Dashboard for Microsoft Teams

For an easyjob Project, you can create a new team or open a new channel in an existing team in order to work on this project with other Teams users. First go to the easyjob program settings to activate the function. See  [Microsoft Teams \](#).



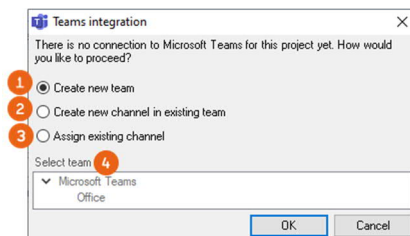
You must perform **Teams Integration** once per project. You can identify an existing Teams Integration by the colored Teams Logo  on the Project tab.







If you want to create a new Team, first the General  channel is created in Teams. The Team owner is always the Microsoft 365 user who is currently logged in, regardless of the Project/Job manager. You can add people  or start a conversation .


### Creating easyjob Teams Integration

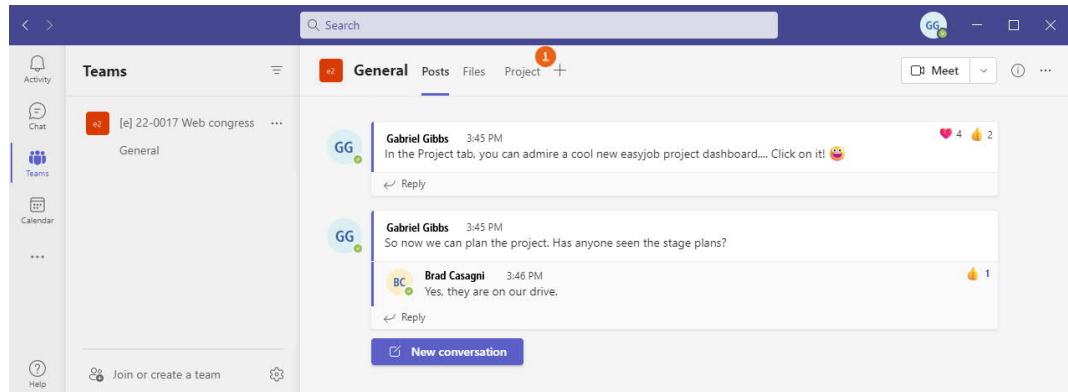
1. easyjob Menu  **Projects**  **Edit project** or **Create project**
2.  **Teams**




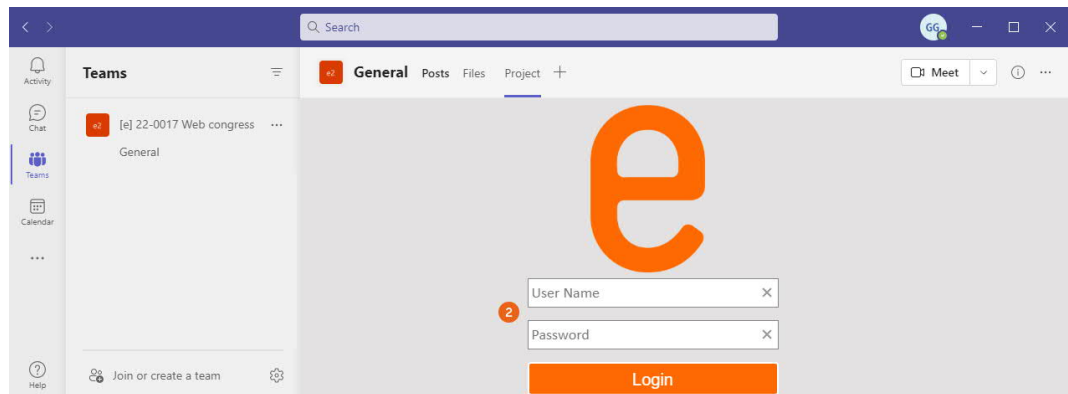
3. Select whether to create a new team , create a new channel in an existing team  or assign an existing channel 
4.  **Ok**





### easyjob Project tab in Teams

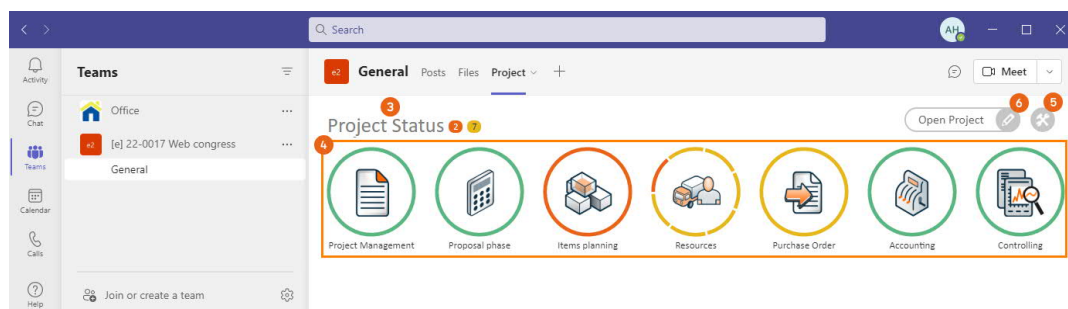
As soon as you have performed Teams Integration for an easyjob project, a new **Project** tab  appears in Teams that provides direct access to easyjob data.



When you click on this tab, you must log into the easyjob **WebApp**  with your access data. This step is omitted if you are already logged into the WebApp.




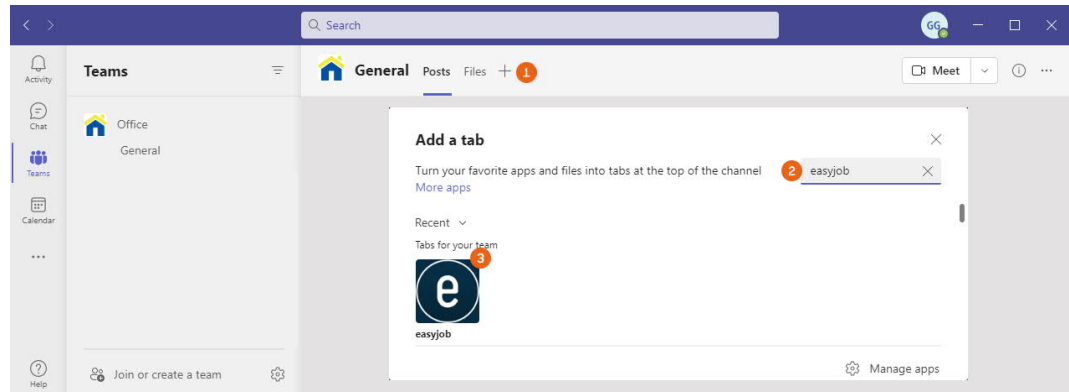
The home page shows the **easyjob Project Dashboard** with the **Project Status** , which shows the various areas of the project  and their status. You can configure the dashboard as you wish  or open the easyjob project directly from Teams .



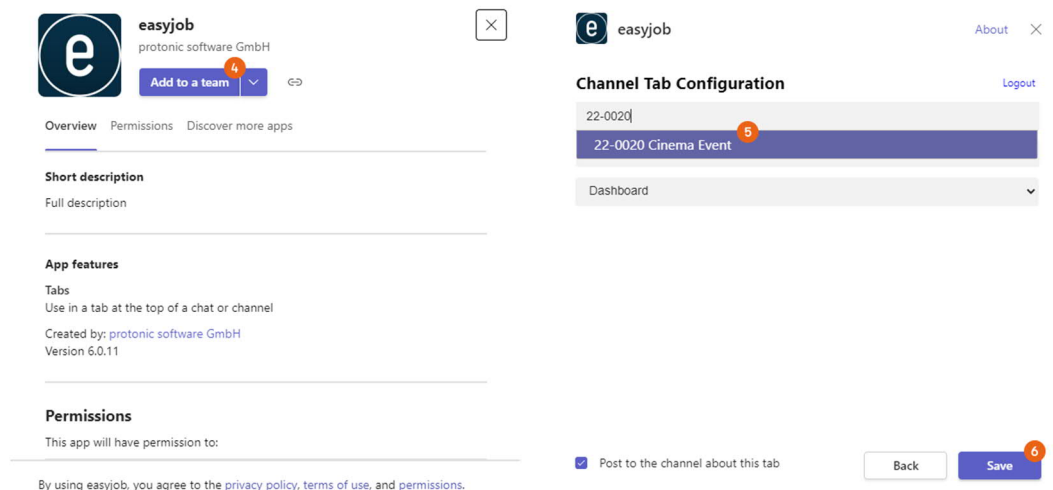
You can find more information about the **easyjob Project Dashboard** under  [Dashboard](#).

### Adding the easyjob App in Teams

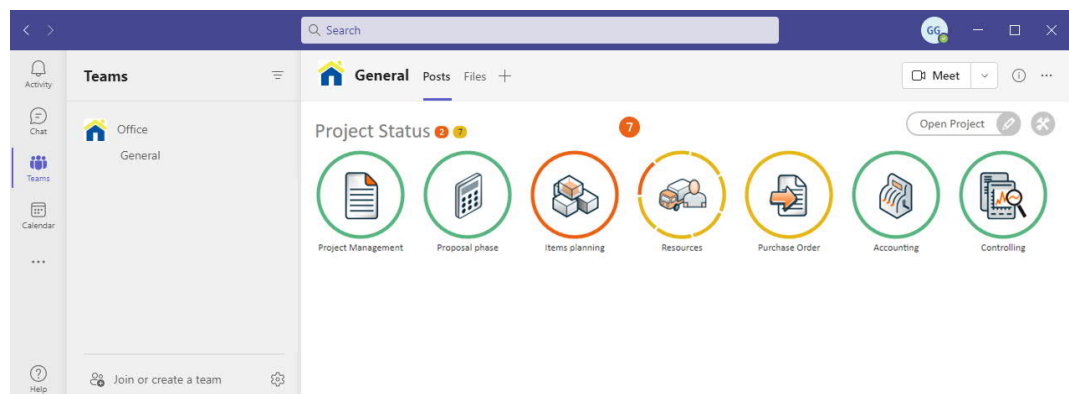
You can add the easyjob App as a tab in any chat or channel in Teams regardless if you created a separate team/channel for it from easyjob or if Teams is activated or not in the program settings—the requirement is a  [Microsoft 365 Integration](#)). Click on + <sup>1</sup> in the desired chat or channel. Under [Add tab](#) enter [easyjob](#) <sup>2</sup> as the search text or click on the [easyjob App](#) <sup>3</sup>.



Confirm installation of the easyjob App with [Add](#) <sup>4</sup>, then select the project <sup>5</sup> whose project dashboard should be displayed and click on [Save](#) <sup>6</sup>. If necessary, log into the easyjob [WebApp](#) with your access data.



The selected easyjob Project Dashboard is displayed <sup>7</sup>.

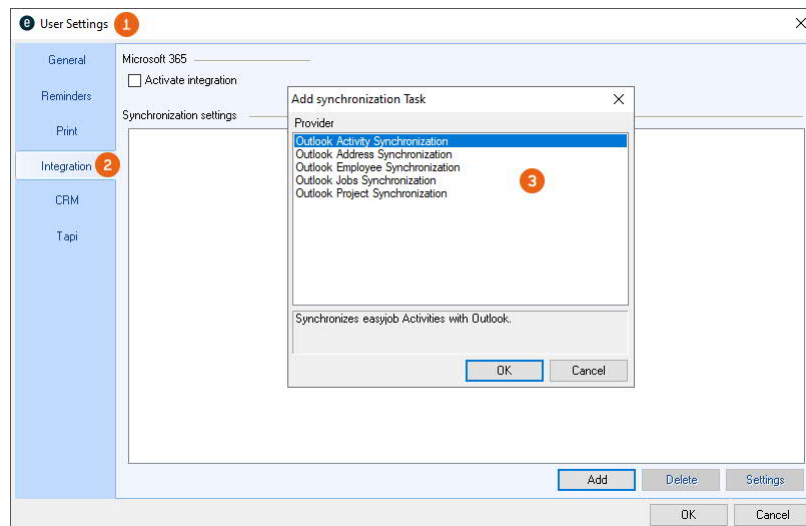


You can find more information about the [easyjob Project Dashboard](#) under  [Dashboard](#).

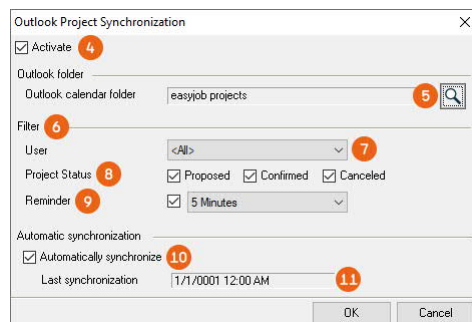
## Synchronization settings

The synchronization tasks are defined once per user in the easyjob User Settings ① under Integration ②. Select Outlook Synchronization for **Addresses**, **Activities** (with the CRM module) or **Tasks**, **Jobs**, **Personnel** and **Projects**.

See also [Microsoft 365 synchronization settings](#).



If, for example, you want to synchronize easyjob projects in your Outlook Calendar, select **Outlook Project Synchronization** ④, define the Calendar ⑤ to be synchronized and use – depending on the easyjob process – different **Filters** ⑥ to customize the synchronization. In the project, you can view for example all projects ⑦ or only the ones for a certain user. **Project Status** ⑧ and **Reminder** ⑨ can also be selected. You can **Automatically synchronize** ⑩ and see when the last synchronization ⑪ took place.



### Synchronization in easyjob processes

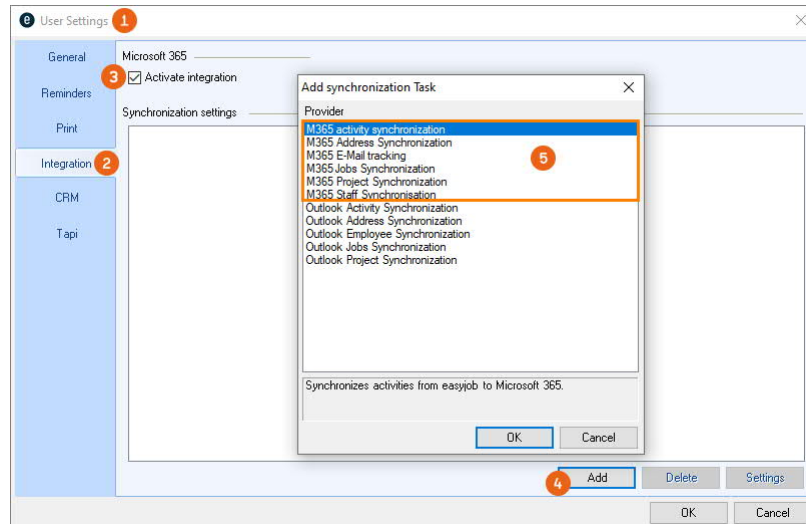
1. easyjob Menu ⇄ • [Tools](#) ⇄ • [User Settings](#)
2. ⇄ • [Integration](#) tab
3. ⇄ • [Add](#)
4. Select the desired Outlook Synchronization
5. ⇄ • [Ok](#)
6. Modify the settings as necessary
7. ⇄ • [Ok](#)

easyjob must be restarted to activate the settings.

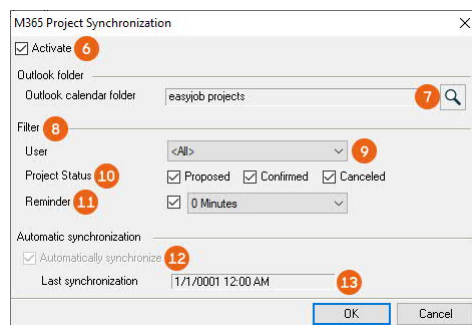
## Microsoft 365 synchronization settings

The synchronization tasks are defined once per user in the easyjob User Settings ① under Integration ②. Under **Microsoft 365** check the **Activate integration** ③ box. With **Add** ④ you can see the possible selection of synchronization tasks ⑤.

Select M365 synchronization for **Addresses**, **Activities** (with CRM module) or **Tasks**, **E-Mail Tracking**, **Jobs**, **Employees** and **Projects**.



If you want to synchronize easyjob projects in your M365 calendar, select **365 Project Synchronization** ⑥, define the Calendar ⑦ for synchronization and use – depending on the easyjob process – different **Filters** ⑧ to customize the synchronization. In the project, you can view for example all projects ⑨ or only the ones for a certain user. **Project Status** ⑩ and **Reminder** ⑪ can also be selected. You can **Automatically synchronize** ⑫ and see when the last synchronization ⑬ took place.



### Synchronization in easyjob processes

1. easyjob Menu ↩• **Tools** ↩• **User Settings**
2. ↩• **Integration** tab
3. ↩• Check Microsoft 365 **Activate integration**
4. ↩• **Add**
5. Select the desired M365-Synchronization ↩• **Ok**
6. Modify the settings as necessary
7. ↩• **Ok**

easyjob must be restarted to activate the settings.

## Office Integration

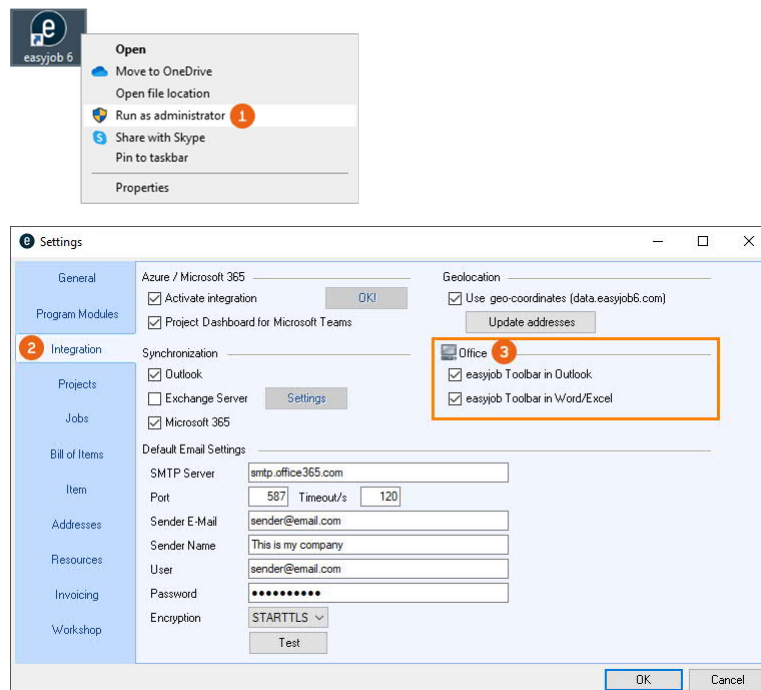
To be able to use easyjob data in the various Microsoft Office programs, you can integrate easyjob Toolbars in Outlook and/or Word/Excel. Various requirements must be fulfilled to be able to use the Toolbar.

Details about Microsoft 365 Office Integration can be found in [Microsoft 365 Office Integration](#).

### Prerequisites for the Office Integration

easyjob and MS Office installation on the same client
MS Office in the 32Bit installation
MS Office version 2010 or later
Active Directory Login for easyjob
Local administrator rights are required for set up

For set up, run easyjob as an Administrator ① (right-click the easyjob symbol). Afterwards to go the program settings under Integration ② and under Office Integration activate the desired Toolbar ③.



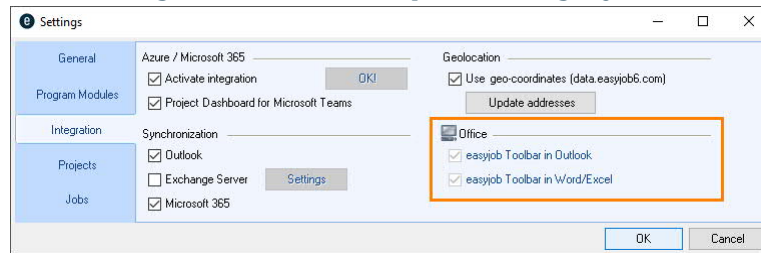
### Activating Office Integration

1. Run easyjob as administrator
2. easyjob Menu ↔ • Tools ↔ • Settings
3. ↔ • Integration tab
4. Check the desired Office Integration
5. ↔ • Ok

easyjob must be restarted to activate the settings.

## Information on setting up Office Integration

### Office Integration selection options are grayed out



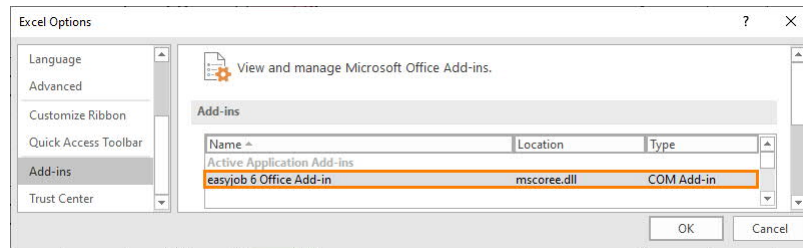
To be able to perform Office Integration, you must start easyjob as a local administrator. (Please right click on easyjob.exe from the program directory and select [Run as administrator](#)).

### Active Directory Login must be set up

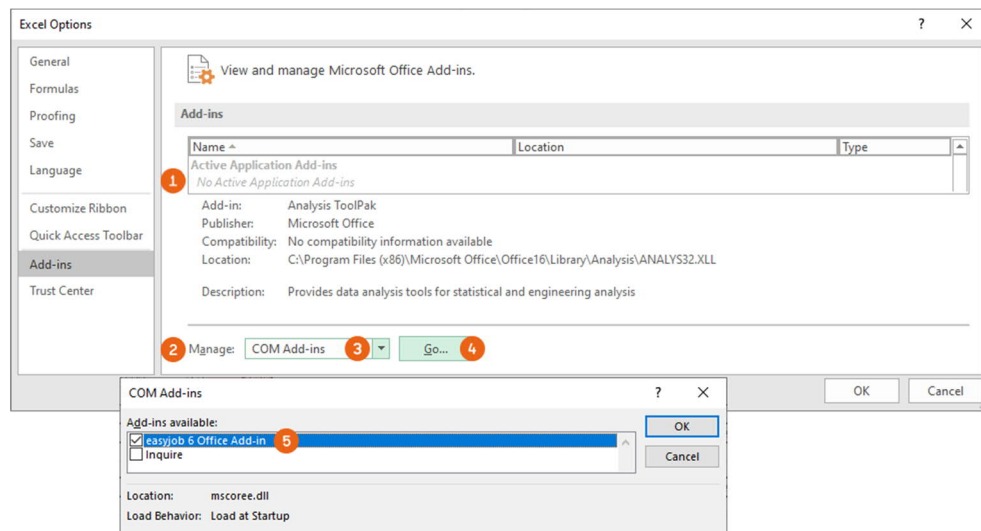
Set up information under [User settings for Synchronization](#).

### easyjob Toolbar is not visible in MS Office

Check in Outlook/Word/Excel in the corresponding Microsoft program under File Options Add-Ins, if the easyjob Add-in is activated.



If the Add-In is not displayed ①, go to Manage ② and select COM Add-Ins ③ and Go... ④. There you can activate the easyjob 6 Office Add-In ⑤.



### MS Office 32 BIT installed

Check in Outlook/Word/Excel in the corresponding Microsoft program under File Account Info about Outlook/Word/Excel if MS Office 32 BIT is installed.

## **Microsoft 365 Office Integration**

This chapter will be published soon.