

TeamAgenda Synchronization under Windows

This document describes the process of synchronizing TeamAgenda's Address Book, Calendar and To Do List with handheld devices such as Personal Digital Assistants (PDA), cellular phones or any device that may be synchronized with Microsoft Outlook®.

Microsoft Outlook as a Synchronization Gateway

In versions of Microsoft Windows® available up to now, Microsoft does not provide any generic synchronization solution. As such, Teamsoft made some research for a low-cost reliable solution and concluded the following:

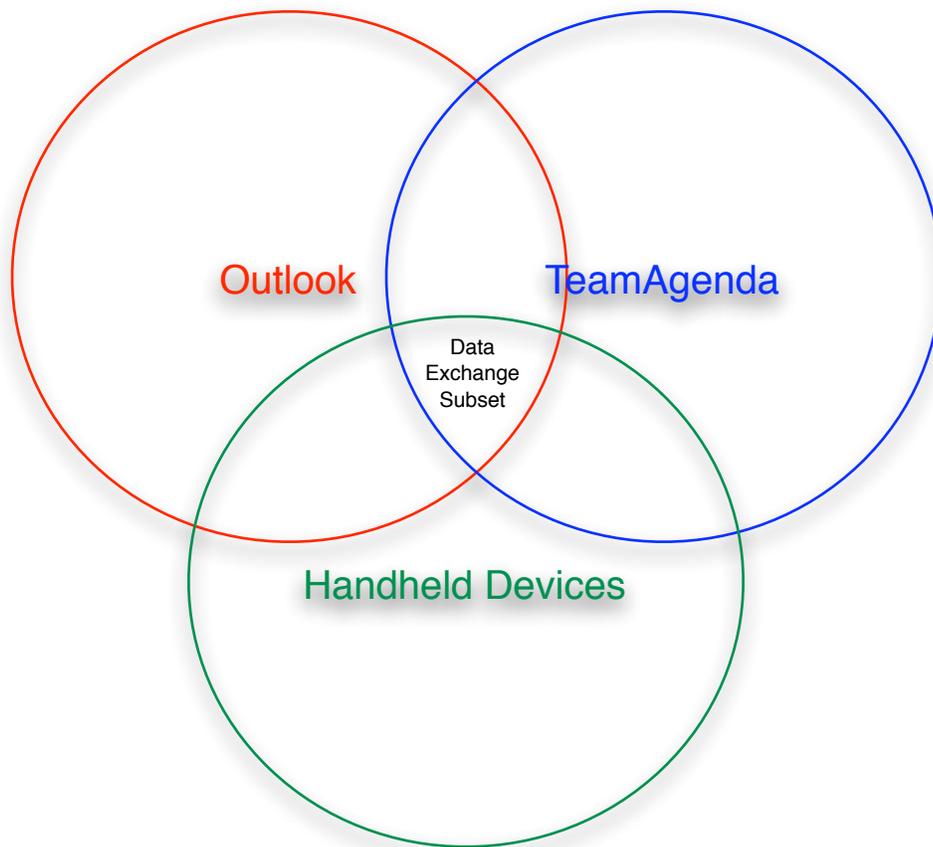
- Microsoft Office® is a reference platform under Microsoft Windows® and Microsoft provides tools to integrate Office with third-party applications.
- An overwhelming number of business users have Microsoft Office® installed on their computers already.
- Almost all handheld device manufacturers make sure that their device is compatible with Microsoft Office®.

As such, Teamsoft has implemented a synchronization module within TeamAgenda that allows TeamAgenda to exchange information with handheld devices through Microsoft Outlook.

Data Exchange

As mentioned above, the synchronization module exchanges Address Book, Calendar and To Do List information. In fact, during synchronization, not all the data stored in TeamAgenda gets transferred to the handheld device.

For synchronization to work, Teamsoft needed to define a subset for each type of data that corresponds to what both TeamAgenda, Outlook and the handheld devices supported.



The next three tables describe what data gets transferred to the device for each type of data.

Address Book		
Last Name	Business Street	Business Phone
First Name	Business City	Business Fax
Company	Business State/Province	Business Mobile Phone
Job Title	Business Postal Code/Zip	Business Email
Notes	Business Country	Home Phone

Table 1 - Address Book fields that are exchanged during the synchronization.

Calendar		
Date	Begin Time	End Time
Subject	Comments	Alarm Offset

Table 2 - Calendar fields that are exchanged during the synchronization.

To Do List		
Date	Begin Time	End Time
Subject	Comments	Alarm Offset
Due Date	Completed	Completion Date

Table 3 - To Do List fields that are exchanged during the synchronization.

Synchronization Process

The synchronization process may be launched from TeamAgenda's File menu item labeled "Synchronize using Outlook..." as seen on figure 1.

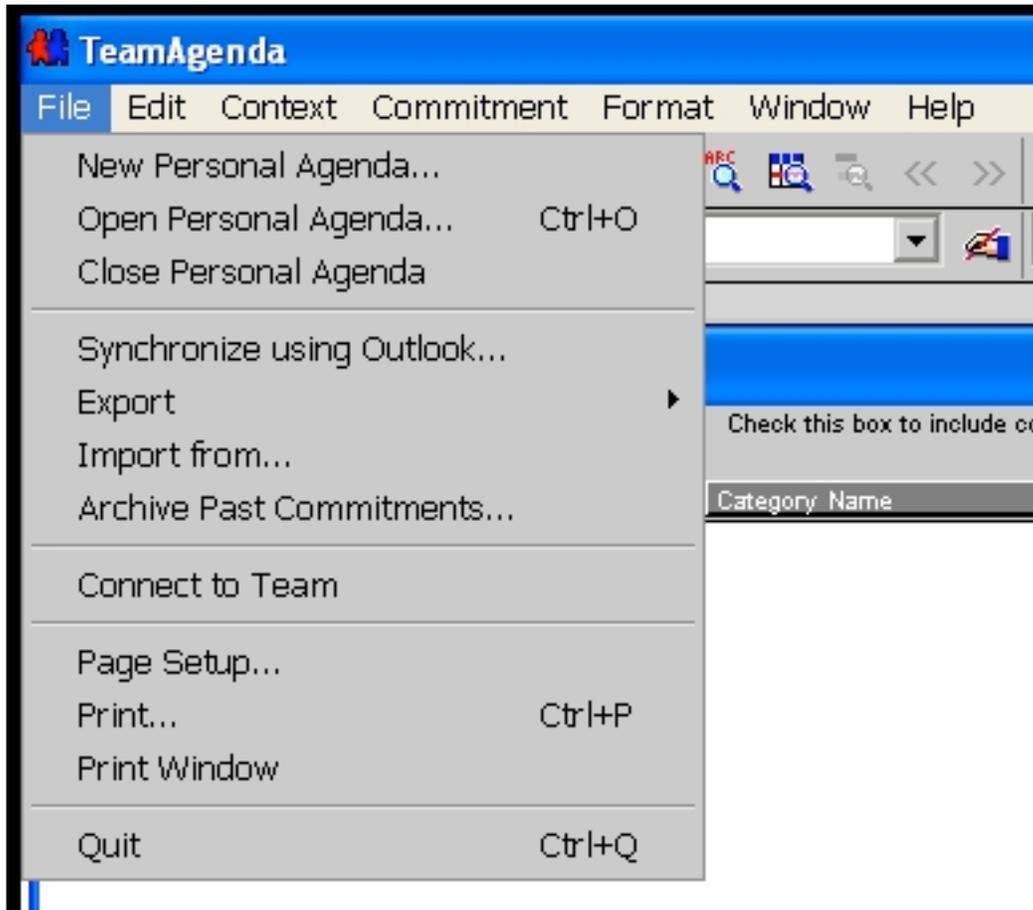


Figure 1 - Synchronize using Outlook... File menu item.

By selecting the “ Synchronize using Outlook...” File menu item you will initiate a three step process that begins with the display of the dialog illustrated by figure 2:

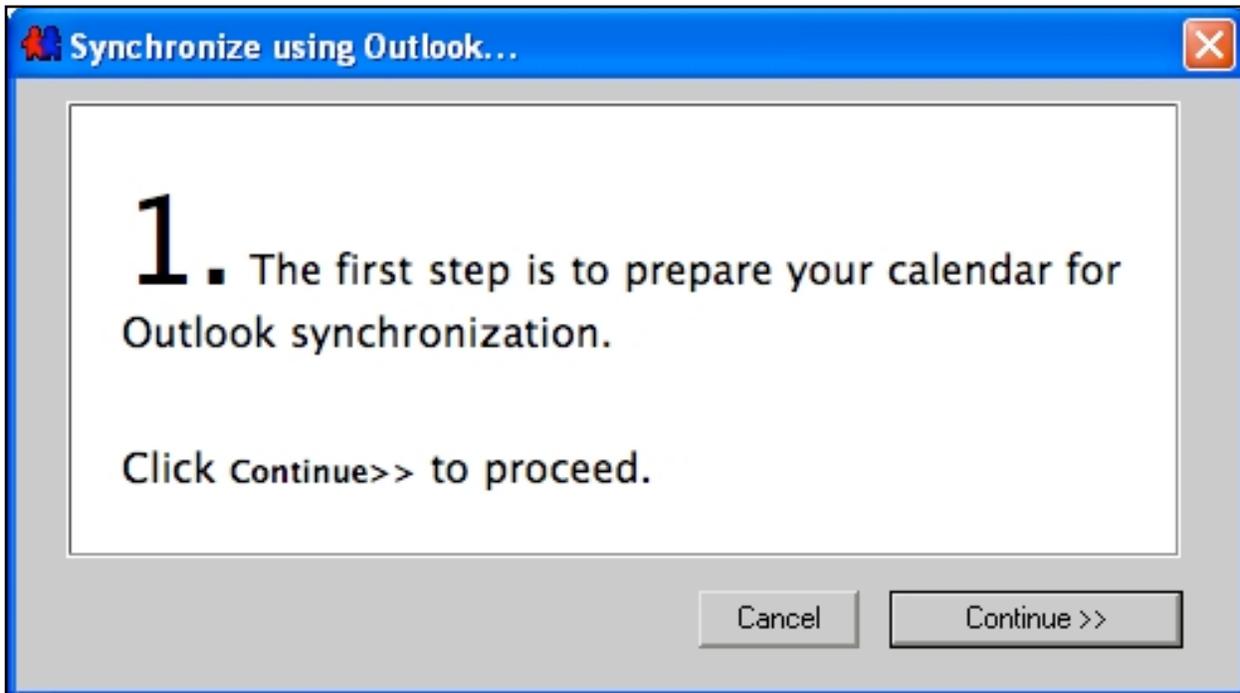


Figure 2 - First step of synchronization process.

During the first step of the process, TeamAgenda prepares the data for synchronization. As mentioned on the dialog, click the “Continue >>” pushbutton to move on to the second step or the “Cancel” pushbutton to abort the process.

The second step consists in launching an external application named “TASync”. TASync will let you define some options that will customize the synchronization process and then, at your command, TASync will deal with Microsoft Outlook to exchange information.

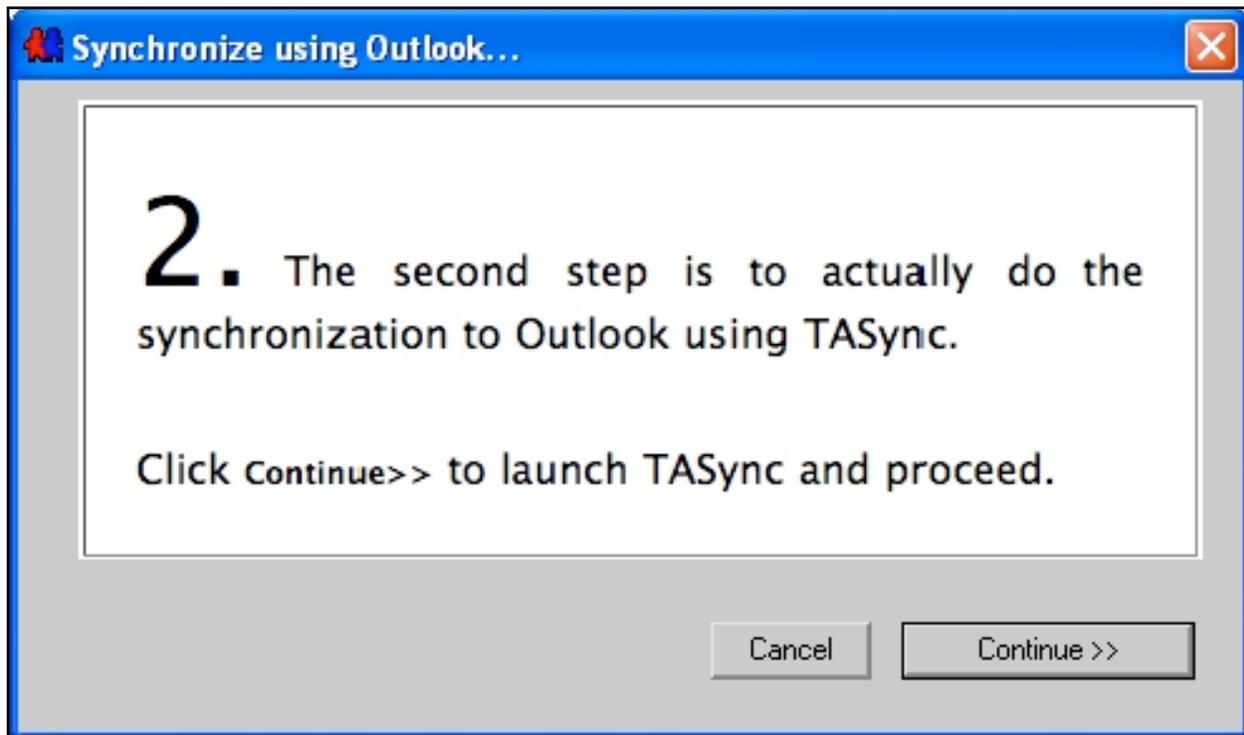


Figure 3 - Launching TASync.

The TASync dialog is divided in three sections.

The upper left section titled “Outlook File” lets you select which Outlook Personal Folders File (.pst) you want to use for the synchronization. The upper right section labeled “Data Exchange Settings” allows you to fine tune the synchronization process by specifying for each type of data whether:

- The data in TeamAgenda and the data in Outlook should be merged.
- The content of the TeamAgenda should overwrite the data in Outlook.
- The content of Outlook should overwrite the data in TeamAgenda.
- This type of data should not be synchronized at all.

Later, in a section named “Data Exchange Settings”, we will further discuss, in details, each option.

Finally, the third section tagged “Progress Log” provides a play-by-play description of what the synchronization process is doing as it unfolds. Also, the progress log may be used to report errors.

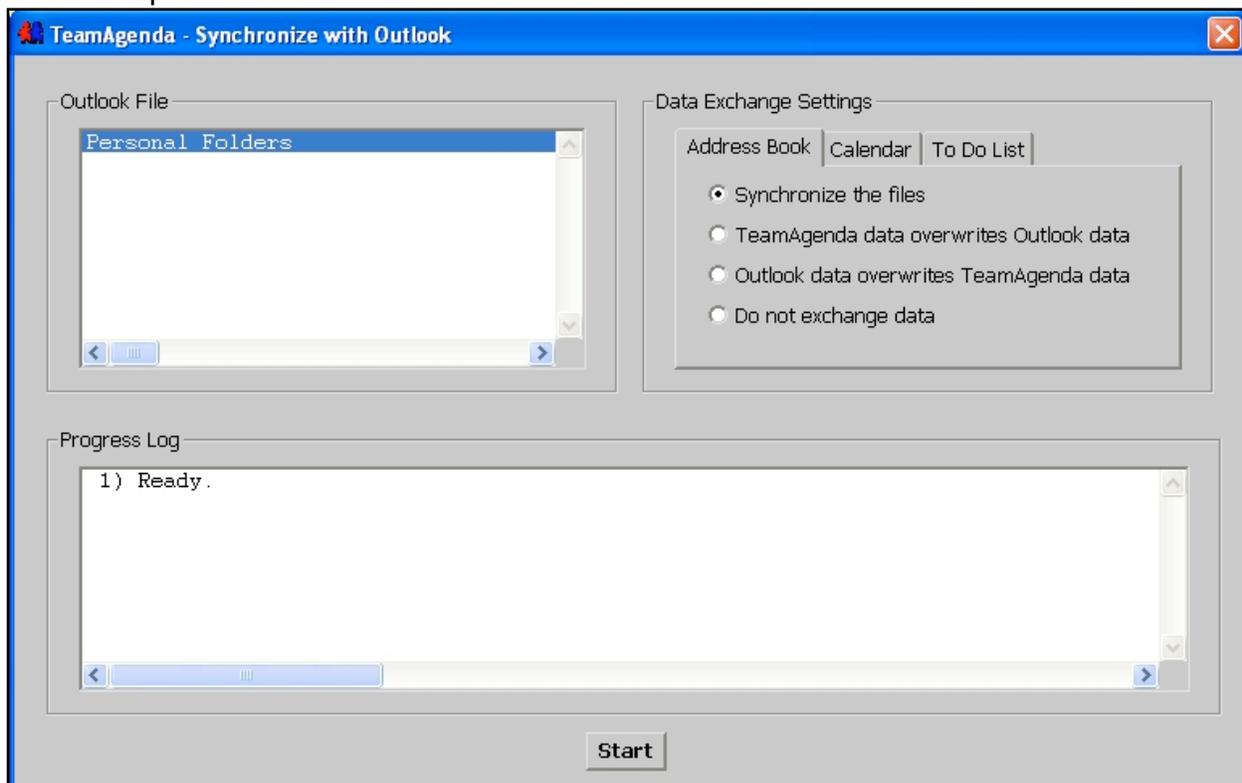


Figure 4 - TASync synchronization application.

The third and last step consists at applying the results of the synchronization against TeamAgenda's database. Figure 5 shows a dialog that allows you to apply or cancel the final step of the synchronization.

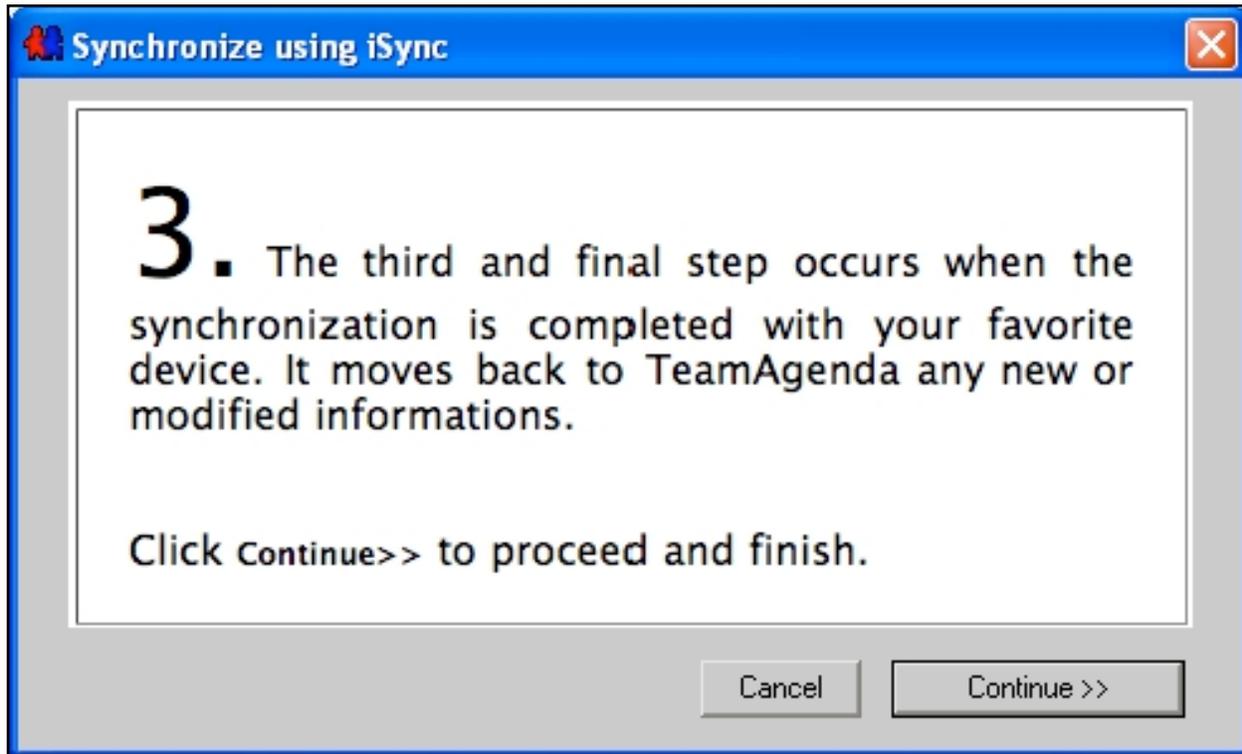


Figure 5 - Applying or canceling the results of the synchronization.

Outlook File Section

The Outlook file section lets you select one of Outlook's personal folder. By default, after a fresh install of Microsoft Outlook, the installation creates a file named Outlook.pst and stores it under the directory c:\Documents and Settings\

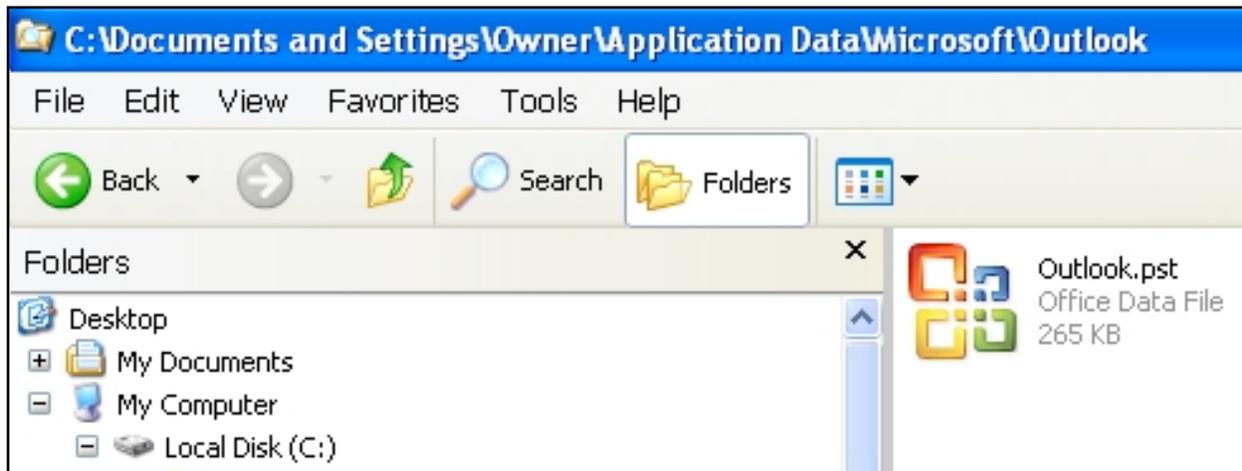


Figure 5 - Path to the default Outlook Personal Folders.

A typical Outlook user will be just fine using the default personal folder file. However, if you are familiar with Outlook and want to have your TeamAgenda synchronization data in a separate file, you will be able to do so. Let us say, you have created a personal folder named “TeamAgenda”, the Outlook File section would look like Figure 6.

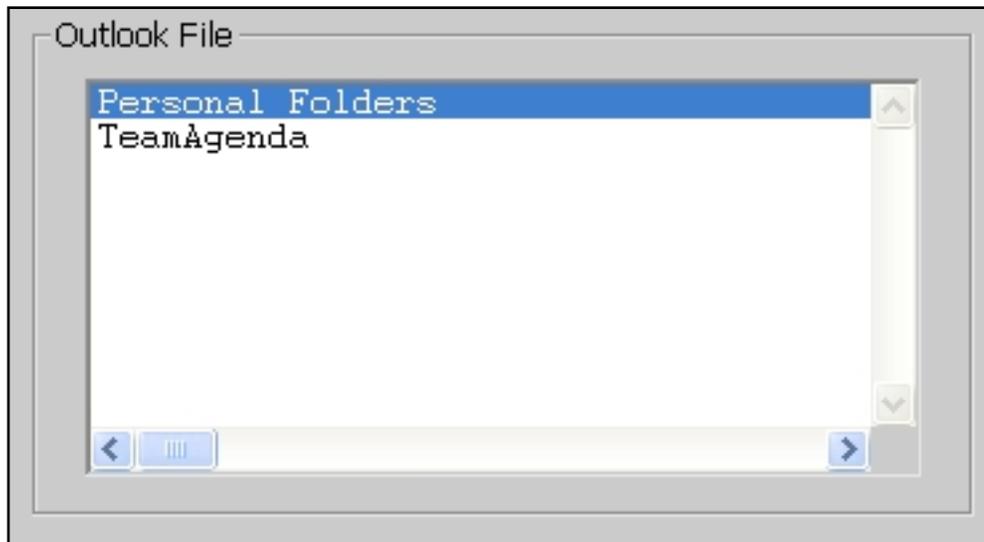


Figure 6 - Outlook File section with a custom personal folder named “TeamAgenda”.

In such a setup, you could select the TeamAgenda Outlook personal folder file. However, be aware that when you will perform the synchronization with the handheld device, you will have to select the TeamAgenda Outlook personal folder file also, so that the information flows correctly from TeamAgenda to the handheld and back.

Data Exchange Settings

For Address Book, Calendar and To Do data, you have the control over how the synchronization process exchanges information with Outlook. For each type of data, you can specify one of the following option as shown on Figure 7.

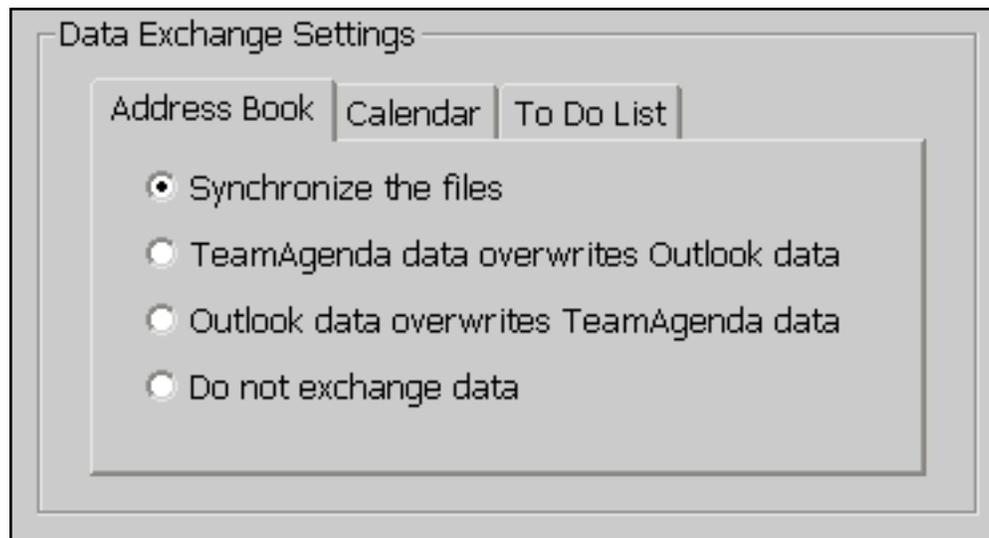


Figure 7 - Data exchange settings options.

Synchronize the files

This option merges data from TeamAgenda and Outlook together. The synchronization process compares records in both databases. Based on the logic as illustrated in Table 4, the synchronization process will keep the latest version of every record.

Synchronize The Files		
TeamAgenda	Outlook	Action
Record A is newer.	Record A is older.	Copy Record A from TeamAgenda to Outlook.
Record A is older.	Record A is newer.	Copy Record A from Outlook to TeamAgenda.

Synchronize The Files		
Record A is here.	Record A is not here.	Copy Record A from TeamAgenda to Outlook.
Record A is not here.	Record A is here.	Copy Record A from Outlook to TeamAgenda.
Record A is not here.	Record A is here and was here at the previous synchronization.	Delete Record A from Outlook. This represents the case when a record is deleted in TeamAgenda. Outlook is informed of the deletion only during the synchronization process.

Table 4 - “Synchronize the files” option behavior.

TeamAgenda data overwrites Outlook data

This option should be used when you know that TeamAgenda is up-to date and you want to refresh the content of your handheld device. For this option, the synchronization process will make an exact copy of the TeamAgenda database over the Outlook database.

Outlook data overwrites TeamAgenda data

This option should be used when you know that your handheld device is up-to date and you want to refresh the content of TeamAgenda. For this option, the synchronization process will make an exact copy of the Outlook database over the TeamAgenda database.

Do not exchange data

Occasionally, you might be in a hurry. You might want to skip some steps during the synchronization process. This option allows you to skip the exchange of data for any type of data that you choose.

Progress Log Section

The synchronization process is a sequential process that maybe lengthy depending on the volume of information you are managing using TeamAgenda. Also, during the process many situations may occur that may prevent the process from being completed. The progress log section is a simple list of text that informs you about the progress of the synchronization process. Also, if an error occurs, relevant information will be displayed in the log that could allow you to troubleshoot the problem yourself or that could assist Teamsoft's Tech Support Team in the resolution of problems. Figure 8 shows how the progress log looks when the synchronization process is performed successfully.

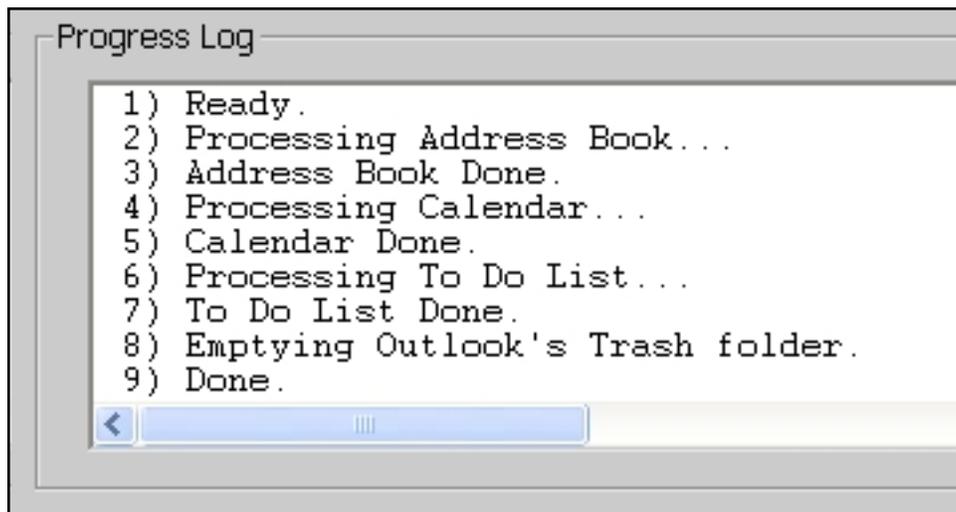


Figure 8 - Successful synchronization run.

Minimal Requirements

Any PC computer matching the following specifications:

CPU	AMD or Intel 500 MHz or faster
Operating System	Windows 2000, XP
Memory (RAM)	256 MB
Hard Drive	100 MB or more
Microsoft Outlook Version	Outlook 2003 with Office Service Pack 2