TeamAgenda STS

VERSION 4.5

Teamsoft

QUICKSTART

WINDOWS
MAC OS

END USER SOFTWARE AGREEMENT

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Welcome to TeamAgenda

This QuickStart Guide will help you get started with TeamAgenda. It is divided into three sections:

Provides a short overview of the TeamAgenda group scheduling system and how it works.

Explains the steps required to install a demo or full version of TeamAgenda, and how to upgrade an existing TeamAgenda installation.

Gives precise instructions on how to install each TeamAgenda component.

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To Get More Information

TeamAgenda also provides online documentation:

TeamAgenda Guide

Is found on the TeamAgenda CD-ROM and is also installed to your hard drive with TeamAgenda.

It provides detailed information about the different versions of TeamAgenda (Pro, Lite and Web), as well as installation and setup information. It is meant to help TeamAgenda administrators install and configure a TeamAgenda system.
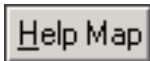
Help Map

Use the Help Map or search in the Index to find specific sections in the Online User Guide.

TeamAgenda Online User Guide

Provides the user with online help from inside TeamAgenda. It is available by clicking the **?** icon on the main tool bar.

The online help gives concrete explanations and procedures for using all of TeamAgenda's various functions and capabilities.

1. What Is TeamAgenda?

TeamAgenda is a personal appointment diary and a multi-user scheduling planner. Use TeamAgenda's customizable views, categories, and alarms to manage your own personal agenda. Then, over the network, bring your team together using TeamAgenda's powerful STS (Scalable TeamAgenda Server) software.

STS lets you share your agenda with other team members and, in turn, gain access to their agendas. Use TeamAgenda's powerful tools to coordinate everyone's schedules, delegate tasks, organize meetings, and track use of equipment and facilities, while keeping team members abreast of all changes, as they happen. See quickly if anyone has added a commitment to your schedule, and accept or decline meeting invitations.

TeamAgenda Lite and TeamAgenda Pro

TeamAgenda comes in two desktop versions:

TeamAgenda Lite provides all the tools you need to manage your schedule, and the schedules of your whole team. TeamAgenda's calendar windows, To-Do list, Address Book and Custom List window make it easy to coordinate your group.

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Support for Palm synchronization means you can take your TeamAgenda schedule with you on your Palm organizer.

TeamAgenda Pro provides added features:

- The Task Manager and the Workload window help you organize tasks and projects.
- Worksets let you create and save sets of TeamAgenda windows for easy recall.
- Templates let you store commitments, print settings, and import and export settings for future use.
- TeamAgenda Pro comes with TeamAgenda Web access included, so that all Pro users can also manage their schedules from a web browser.
- Finally, TeamAgenda Pro lets you use TeamAgenda's optional modules: PhoneAgenda and FileMaker Integration.

TeamAgenda Web

TeamAgenda also comes in a web access version:

TeamAgenda Web provides access to TeamAgenda data from a web browser. It supports two kinds of users:

- Web-only users can access TeamAgenda data only from a web browser.
- TeamAgenda Pro users can access TeamAgenda data either from their personal agenda file or from a web browser.

A TeamAgenda team can include both Pro and Web-only users, depending on the TeamAgenda licenses purchased.

TeamAgenda Web also lets you use the optional PhoneAgenda module.

For more information, see:

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TeamAgenda Components

The TeamAgenda groupware system uses a client-server architecture made up of three basic components: the TeamAgenda program itself, which is the client, the STS (Scalable TeamAgenda Server), which is the server software, and the Team-Notify startup module. Several other components are also available, including TeamAgenda Web, PhoneAgenda and FileMaker Pro Integration.

- The **TeamAgenda** application creates and works with a Personal Agenda document, which it uses to store all your personal data. (Team-Agenda Web-only users do not use or need the TeamAgenda program.)

- The **STS** lets individual users share and interact with each other's agendas. It stores a copy of each user's schedule, as well as resource and public agendas, public categories, groups, and holidays on a MySQL, PostSQL, MS SQL or Oracle database. The data can be displayed and modified externally using ODBC and JDBC protocols. User and contact information is stored on a Directory Sever and can be imported/exported externally using LDAP. It is STS that lets you set up meetings with other team members.

For more information see: the *STS ReadMe* file found in the installation package.

- The **Web Administration** interface runs on any Internet Browser. It allows team administrators to easily perform TeamAdministration tasks.

- The **TeamNotify** startup module triggers the alarms you set in TeamAgenda. It will sound your alarms regardless of whether the TeamAgenda application is running. It will also provide notification of any changes made to your schedule by others.

The following add-ons and options are available with TeamAgenda Pro:

- If your organization has a World Wide Web site or Intranet, **TeamAgenda Web** allows team members to access their schedules from a web browser. You can also let external guests view any schedules you wish to make public over the Internet.

    TeamAgenda Web is available both as a standalone, web-only version of TeamAgenda, and as an included add-on module for TeamAgenda Pro.

- **PhoneAgenda** is an optional version of the TeamAgenda Web that lets you connect to TeamAgenda using your web-enabled phone.

Working with TeamAgenda

TeamAgenda lets you manage your own schedule and, by logging into a team, coordinate your schedule with other TeamAgenda users.

When you log into a team, all team functions then become available, including viewing other agendas, setting up meetings, using public agendas, categories, templates, groups and contacts, and keeping track of common holidays. While you are connected to your team, an up-to-date copy of your personal agenda is kept in TA-Server's team database. When you reconnect to your team after an absence, your personal agenda and the team copy are reconciled automatically.

Every TeamAgenda system is made up of several TeamAgenda users. It may also include a number of Resource calendars and Public Agendas, as well as outside contacts.

TeamAgenda Users

All TeamAgenda users have access to various tools that enable them to schedule their own work as well as coordinate activities with others. These tools include the TeamAgenda **calendar**, the **To-Do List**, and the **Address Book**.

Your Calendar

TeamAgenda can display your calendar in a monthly, weekly or daily format. The weekly schedule is the basic display. It can be expanded to six weeks to give you a month of detail, or shrunk to a monthly calendar to save desktop space.

The various calendar windows are used to enter the bulk of your commitments.

Untimed items, which have a date but no set time, appear in the Untimed area at the bottom of your daily or weekly calendar.

Your To-Do List

TeamAgenda's To-Do List displays all your to-do items, that is, all commitments without a set date or time. Like all TeamAgenda commitments, To-Do items can be given a priority from 1 to 5.

By default, the To-Do List displays only uncompleted to-do items. However, you can use the check boxes at the top of the To-Do list to display all to-do items, all uncompleted to-do items or all completed to-do items.
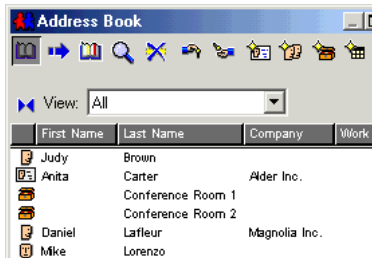
Your Address Book

All team members are listed in the TeamAgenda Address Book automatically. You can see at a glance who belongs to your team, and easily set up meetings or other synchronized commitments with them. You can drag users from the Address book into a schedule in order to create a meeting, or to add them to an existing meeting.

Along with TeamAgenda users, the Address Book lists company Resources, such as conference rooms and equipment, and Public Agendas, which may be used to track vacations or seminars, for example.

The Address Book's General Directory lists all TeamAgenda users, groups, resources and public agendas, as well as all public contacts.

The Personal Directory lists any contacts you have created, as well as any Team-Agenda users, groups, resources, public agendas and public contacts that you have decided to include in your personal list.

Public and Private Groups ▣

You can create groups of TeamAgenda users that can then be identified by name. When you choose a group, all members are selected; this provides a short cut for selecting multiple users and/or resources.

Individual users can create private groups in their personal directory. The Team-Agenda administrator, or other person with authorization, can also create public groups.

Resources and Public Agendas

A TeamAgenda team can also include calendars to manage company resources, as well as public agendas to track particular activities.

Resources 📦

Resource agendas may be created to schedule meeting rooms, company vehicles, demonstration computers, large screens or any other equipment that may be borrowed, or whose usage must be tracked. By using the appropriate access levels

you can require users to make reservations for meeting rooms or equipment that must then be approved by an authorized person.

Public Agendas ⊞

Public agendas may be created to schedule group members' vacations, lunch breaks, car pools, courses, etc. Public agendas are similar to resources, except that the creator's name appears in front of a synchronized commitment's title.

Outside Contacts 📇

You can also use the Address Book to manage contacts who are not TeamAgenda users, whether they are colleagues in other departments or contacts from other organizations. Address, telephone, e-mail and other information may be entered for each contact. Contacts may be public (accessible to your entire team) or private (accessible to you only).

TeamAgenda will automatically send a meeting invitation to anyone that can be reached by e-mail, directly from your personal agenda. When that person responds, their answer will show up right in your TeamAgenda schedule.

What Can You Organize with TeamAgenda?

Various items can be entered in TeamAgenda calendars and to-do lists.

Commitments are entered in your agenda by yourself or delegated to you by someone else. They may be linked together, and commitments in different people's schedules may be synchronized, to create a meeting, for example.

TeamAgenda also allows you to enter external **events** in your agenda, indicate when you will be **unavailable**, and show working and non-working **holidays**.

Each commitment may be given a **category**. Categories let you categorize commitments by goal, project, client, job, department, or any other criteria you prefer.

Commitments

For more information, see:
TeamAgenda Online Help:
Using the Personal Agenda:
**Commitments and
Categories**

A commitment is an item you enter in a TeamAgenda calendar or to-do list. Most commitments appear in TeamAgenda's calendar windows. These include scheduled items, which have a fixed date and time, and untimed items, which have a date but no fixed time. You can also create to-do items, with neither date nor time. To-do items appear in TeamAgenda's To-Do List but not in any calendar.

Every commitment involves at least one user, either yourself or another Team-Agenda team member. In the case of a meeting, many users may be involved. TeamAgenda also lets you include external contacts in a meeting or event.

There are three kinds of commitments:

- **Scheduled Commitments**

  Appointments or meetings are examples of scheduled commitments. TeamAgenda provides time grid areas in your Daily or Weekly calendars to enter scheduled commitments.

- **Untimed Items**

  Commitments such as tasks or phone calls may have a date but no set time. Use the Untimed area in your Daily or Weekly schedule to keep track of these items. Uncompleted untimed items in the past can automatically be carried forward to today when you open TeamAgenda.
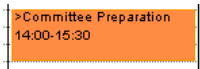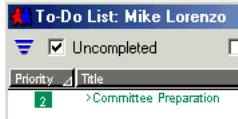
• **To-Do Items**

Commitments with neither a date nor a time may be entered in Team-Agenda's To-Do List. If you need to schedule a to-do item, simply drag it from the To-Do List into your schedule at the appropriate date and time. You can also unschedule any item by dragging it from a calendar into the To-Do list.

Setting Priorities

Any TeamAgenda commitment can be assigned a priority from 1 to 5. Priorities are displayed in all list views, including the To-Do list, the Task Manager, the Custom List and the Untimed area of the Daily, Weekly or Monthly calendars.

Using Categories

In TeamAgenda, each commitment may be given a category. Reports, on-screen displays and data export can all be filtered by category, so you can quickly check the work done, time spent, and progress made in each category.

If you classify your commitments by category, you can then manage them using the Task Manager and Workload windows (TeamAgenda Pro only).

Events, Unavailable Markers, Holidays

External Events
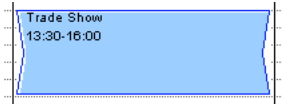
External events such as conferences or trade shows may be shown in your agenda, even if you are not committed to attend. Events have no deadline and need not be completed. They can overlap other commitments without notification and take up no time in your day. If an event spans many consecutive days, it may be placed in the untimed area as a banner.
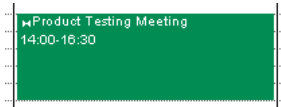
Unavailable Markers

If you are traveling, or are otherwise unavailable, an Unavailable marker will inform colleagues of your absence if they try to add an appointment or a meeting to your schedule. However, you may still use time marked as unavailable for specific purposes. You can mark either a portion of a day or many days in a row.

Holidays and Team Events

Holidays and team events appear in the background of everyone's schedules and may be overlapped by an individual's commitments without causing an overlap

warning. To create or modify holidays or public events, you require authorization from your team administrator.

Setting Up Meetings

Product Testing Meeting
14:00-16:30

TeamAgenda provides various ways to create synchronized, joint commitments between two or more people and resources. This lets you schedule meetings, appointments, joint business trips, telephone conference calls, and so on. Once a joint commitment has been created, any changes to it will be sent to all participants immediately and automatically. At any moment, TeamAgenda lets you see the current status of a meeting and of each of its participants.

Calling a Meeting

For more information, see:
TeamAgenda Online Help:
Coordinating the Office:
Setting Up Meetings

TeamAgenda provides varies ways to call a meeting.

- You can display and synchronize the agendas of the people and resources concerned. This lets you see when all the participants are free to meet. When you add the meeting to one of the synchronized agendas, it will be added to all the others automatically.

- If you know the meeting time in advance, you can enter the meeting in your own agenda, then use the Input window's Participants... button to add the other meeting participants.

- You can have TeamAgenda search for an available time slot for your meeting.

Notifications

Meeting participants are notified immediately when a team member includes them in a meeting.

If TeamAgenda is not open and a change is made to your agenda, TeamNotify will inform you. You can either Accept, Decline, or Acknowledge the change. You may choose how often TeamNotify should inform you of changes.

If TeamAgenda is open, the Notifications window can appear on your screen whenever changes are made to your agenda by co-workers, depending on your Notification Preferences.
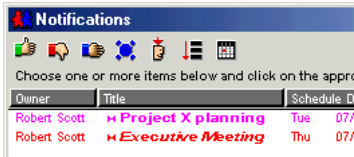
# Managing Tasks and Commitments
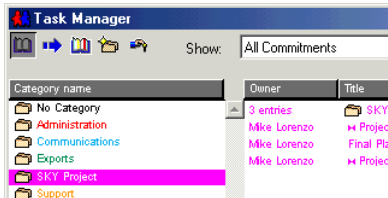
TeamAgenda Pro provides specific windows to manage tasks and commitments once they have been entered.

The **Task Manager** lets you display and organize commitments by category, both for yourself and for other team members. If all commitments belonging to a particular project, for example, have been given the same category, you can see at a glance who is doing what, and when, towards project completion. You can drag commitments from one category to another, or from one team member to another.

The **Workload window** lets you see how your time, or that of other team members, is being used, as well as the total time you have allocated to various categories or projects. You can see immediately which projects are taking up most of your time, and you can move commitments from one team member to another in order to balance tasks.

For more information, see:

TeamAgenda Online Help:
Using the Personal Agenda:
**Managing Tasks and
Commitments**
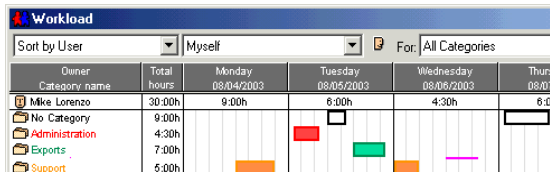
2. What Do You Want to Install?

To Install the Scalable TeamAgenda Server (STS) please refer to the *STS Readme File* included with the installation package.

The **WebAgenda** server module is included in the STS installation and therefore is not described in this document. Please refer to the STS Readme File for more information.

You can install a demo version of TeamAgenda Lite or Pro:

You can install a full version of TeamAgenda Lite or Pro:

For more information, see:

TeamAgenda Guide
Installing your
TeamAgenda System

You can upgrade an older version of TeamAgenda:

Install a Demo Version of TeamAgenda Pro or Lite

TeamAgenda Administrator:

One user should act as TeamAgenda Administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda server. The administrator can install TeamAgenda on each user's computer or alternately, can ask each user to install their own copy

TeamAgenda Installation:

1. **Install TeamAgenda** on the computer of each user who will be trying out TeamAgenda: see Install TeamAgenda, page 30

Optional steps:

Install any other TeamAgenda components that you want to try out.

1. **TeamAgenda Palm conduits**: see Procedure 2, page 32

Install a Full Version of TeamAgenda Lite

TeamAgenda Lite Administrator:

One user should act as TeamAgenda Administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda server. The administrator can install TeamAgenda on each user's computer or alternately, can ask each user to install their own copy.

TeamAgenda Lite installation:

1. **Install TeamAgenda** on the computer of each TeamAgenda user: see Install TeamAgenda, page 30.

Optional steps:

Install any other needed TeamAgenda components.

1. **TeamAgenda Palm conduits**: see Procedure 2, page 32

Install a Full Version of TeamAgenda Pro

TeamAgenda Pro Administrator:

One user should act as TeamAgenda Administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda server. The administrator can install TeamAgenda on each user's computer or alternately, can ask each user to install their own copy.

TeamAgenda Pro Installation:

1. **Install TeamAgenda** on the computer of each user: see Install Team-Agenda, page 30

Optional steps:

Install any other TeamAgenda components you need.

1. **TeamAgenda Palm conduits**: see Procedure 2, page 32

Upgrade from TeamAgenda 3.1 or Earlier

TeamAgenda Web

If you wish to provide your users with web access to TeamAgenda, or if you previously used the TeamAgenda Internet Extension, you no longer need to install the TeamAgenda Web component separately, as it is included in the Scalable TeamAgenda Server (STS) installation.

Team Administrator

Note: To **install the STS** (Scalable TeamAgenda Server please see the STS Readme File in the Installation Package.

One user should act as TeamAgenda Administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda environment.

TeamAgenda Client Installation

1. **Back up your existing data files**: see Procedure 5, page 35

2. **Upgrade TeamAgenda**: see Install TeamAgenda, page 30

Note: Choose Typical or Easy install if you need to install the Palm synchronization.

3. **TeamAgenda Palm conduits**: see Procedure 2, page 32

Upgrade from TeamAgenda 4.0 or Later

When you upgrade from TeamAgenda version 4 to a later version, the earlier TeamAgenda components in the Teamsoft folder will be replaced by the new components.

TeamAgenda Web

If you wish to provide your users with web access to TeamAgenda, or if you previously used the TeamAgenda Internet Extension, you no longer need to install the TeamAgenda Web component separately, as it is included in the Scalable TeamAgenda Server (STS) installation.

Team Administrator

Note: To **install the STS** (Scalable TeamAgenda Server please see the STS Readme File in the Installation Package.

One user should act as TeamAgenda Administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda environment.

TeamAgenda Client Installation

1. **Back up your existing data files**: see Procedure 5, page 35
2. **Upgrade TeamAgenda**: see Install TeamAgenda, page 30
Note: Choose Typical or Easy install if you need to install the Palm synchroni-
zation or FileMaker integration files.
3. **TeamAgenda Palm conduits**: see Procedure 2, page 32

3. TeamAgenda Installation Procedures

Note:
To decide which of these installation procedures you should follow, see Chapter 2. What Do You Want to Install? page 21.

Note: For installation instructions for the new Scalable TeamAgenda Server (STS) please refer to the STS Readme file included in the installation package.

Procedure 1
Install TeamAgenda

1. Open the TeamAgenda installer program:

   TeamAgenda Setup.exe in Windows, or

   TeamAgenda Installer on Macintosh.

2. Read the Software License Agreement and the ReadMe information.

3. Accept the default installation location, or choose a different one.

   We recommend keeping the default location.

4. Choose **Typical** install (Windows) or **Easy Install** (Macintosh),

   or

   Choose **Custom** install and check **TeamAgenda**,

   then click **Next** or **Continue**.

   • If you choose Typical or Easy install, you will be asked if you want to install the Palm synchronization.

5. Choose **Demo Version** or **Full Version**.

- If you choose Full Version, you will be asked to enter your TeamAgenda installation code.

Note: TeamAgenda will be installed in a folder named Teamsoft in the location you chose in step 3.

Procedure 2
Install the Palm Synchronization Conduits

1. Open the TeamAgenda installer program:

   TeamAgenda Setup.exe in Windows, or

   TeamAgenda Installer on Macintosh.

2. Read the Software License Agreement and the ReadMe information.

3. Accept the default installation location, or choose a different one.

   We recommend keeping the default location.

4. Choose **Custom** install and check:

   TeamAgenda Palm Conduits,

   then click **Next** or **Continue**.

5. Choose to install any or all of the TeamAgenda Palm conduits.

   The TeamAgenda Palm Conduits will be placed in the Conduits folder that was installed by the Palm Desktop software.

   In Mac OS X, the palm conduits must be moved from Teamsoft/Palm Conduits to the correct Palm folder.

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Procedure 3
Install TeamRepair

1. Open the TeamAgenda installer program:

   TeamAgenda Setup.exe in Windows, or

   TeamAgenda Installer on Macintosh.

2. Read the Software License Agreement and the ReadMe information.

3. Accept the default installation location, or choose a different one.

   We recommend keeping the default location.

4. Choose **Custom** install and check:

   TeamRepair,

   then click **Next** or **Continue**.

Note: When using a Custom Install, you can choose to install several TeamAgenda components simultaneously.

In Windows, TeamRepair will be installed in a folder named TeamRepair in the Teamsoft folder in the location you chose in step 3.

On the Macintosh, TeamRepair will be installed in the folder TeamAgenda in the Teamsoft folder in the location you chose in step 3.

Procedure 4
Install the TeamAgenda Guide

1. Open the TeamAgenda installer program:

   TeamAgenda Setup.exe in Windows, or

   TeamAgenda Installer on Macintosh.

2. Read the Software License Agreement and the ReadMe information.

3. Accept the default installation location, or choose a different one.

   We recommend keeping the default location.

4. Choose **Custom** install and check:

   TeamAgenda Guide,

   then click **Next** or **Continue**.

   The TeamAgenda Guide files will be installed in a folder named Team-Agenda Guide in the Teamsoft folder in the location you chose in step 3.

Note: When using a Custom Install, you can choose to install several TeamAgenda components simultaneously.

Procedure 5
Back Up Existing TeamAgenda Data File

When upgrading to a new version of TeamAgenda, the new version will convert your existing personal agenda files (.ta) automatically. For safety's sake, however, before upgrading you should always:

Note:

For a list of the default installation locations of TeamAgenda versions 2.5 to 4 on Windows and Macintosh, see the *TeamAgenda Guide*: Uninstalling your TeamAgenda System: **Manual Uninstall.**

1. Shut down TeamAgenda.

2. Make a backup copy of your Agenda before converting it.

3. Use the version of TeamRepair that came with your previous version of TeamAgenda to verify and compact your current agenda before opening it in your new version of TeamAgenda.

   For example, if you are converting from TeamAgenda 3.1 to TeamAgenda 4.1, use TeamRepair 3.1 to verify and compact your existing Agenda before converting.

By default, a user's personal agenda file is often saved in the same folder with TeamAgenda.