

Welcome to TeamAgenda



This guide will help you:

- learn about TeamAgenda;
- install and configure TeamAgenda's various components;
- set up your personal agenda and your team.

You may be reading this document directly from the TeamAgenda CD-ROM or from your local hard drive, if you have installed it with TeamAgenda. You may have purchased TeamAgenda already, or are trying out a demo version of the program.

In all these cases, most information and instructions are the same. Any exceptions are clearly marked as follows:



This icon identifies any specific instructions for CD-ROM users.



This icon identifies any specific instructions for users who have downloaded the TeamAgenda installer program from the Teamssoft web site.



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What is TeamAgenda

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TeamAgenda is both a personal organizer and a multi-user scheduling planner for the Windows™, Macintosh®, and World Wide Web environments.

TeamAgenda comes in three versions:

TeamAgenda Lite provides 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.

TeamAgenda Pro provides added features, including the Task Manager and the Workload window, worksets and templates. TeamAgenda Pro also lets you use TeamAgenda's optional modules.

TeamAgenda Web works with Scalable TeamAgenda Server (STS) to let you access TeamAgenda data from a web browser. It provides the essential tools to manage your schedule and organize your group. TeamAgenda Web is available both as a standalone, web-only version of TeamAgenda, and as an included module for TeamAgenda Pro.

Using any version of TeamAgenda you can:

- **Plan Your Schedule...**
TeamAgenda provides the sophisticated tools you need to plan your schedule, track your workload and manage your contacts.
- **Work with a Team...**
TeamAgenda's powerful Scalable TeamAgenda Server (STS) software lets you share your schedule with other team members, and have access to their schedules to plan meetings and delegate tasks.
- **Send Meeting Notifications to Contacts by E-Mail...**
Include any non-team member with an Internet e-mail address in a

TeamAgenda meeting. Contacts receive a meeting request and are notified of changes automatically.

Using TeamAgenda Web you can:

- **Access your schedule anywhere you can access the World Wide Web...**

Whether you are in the office, on the road or working at home, your schedule, to-do list, address book and team are always available. You can also publish public calendars on the Web.

- **Access your Schedule using a Web Phone...**

The optional PhoneAgenda module enables you to view and change your schedule and contacts list from a cellular phone equipped with a web micro-browser.

Using either TeamAgenda Lite or Pro you can:

- **Work in the Office and on the Road...**

TeamAgenda lets you take your personal schedule offsite on a laptop or PDA. In the office, other team members can consult your agenda as it stood when you left. When you reconnect to your Scalable TeamAgenda Server (STS), changes made by you or other team members will be merged.

- **Connect to your Team over the Internet...**

TeamAgenda is Internet ready, and team members can use any TCP/IP connection to connect their personal agenda to Scalable TeamAgenda Server (STS).

If you use TeamAgenda Pro you can also:

- **Manage Projects and Tasks**

The Task Manager and the Workload window help you organize TeamAgenda information by category for planning or reporting purposes.

- **Use Worksets**

Worksets let you save and name any combination of TeamAgenda windows for yourself or others and recall them easily.

- **Use Templates**

Templates let you store commitments, print settings, and import and export settings for future use.

- **Access your Schedule using a Web Browser...**

If your organization has a World Wide Web server, TeamAgenda Web works with your TeamAgenda Pro system to let you consult and modify your schedule from a web browser, and publish public calendars on the Web.

TeamAgenda Pro also lets you access TeamAgenda's optional modules:

- **Access your Schedule using a Web Phone...**

TeamAgenda's optional PhoneAgenda module enables you to view and change your schedule and contacts list from a cellular phone equipped with a web micro-browser.

- **Integrate with FileMaker Pro...**

If you use FileMaker Pro database software, TeamAgenda's optional TeamAgenda/FileMaker integration plug-in lets you link the two programs.

Note: In this document, any information that applies only to TeamAgenda Pro will be marked **TeamAgenda Pro only** and any information that applies only to TeamAgenda Web will be marked **TeamAgenda Web only**.

To continue, choose from the following options:

[Learn about TeamAgenda's components](#)

[Find out What's New in this version of TeamAgenda](#)

[Consult the TeamAgenda documentation](#)





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TeamAgenda Components

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The specific components you need depend on which version of TeamAgenda you are using: TeamAgenda Lite, TeamAgenda Pro, or TeamAgenda Web (see [What Is TeamAgenda?](#)).

Any TeamAgenda system requires:

- **Scalable TeamAgenda Server (STS)**

TeamAgenda's powerful STS software is what lets you share your agenda with other team members, and have access to their agendas to plan meetings and delegate tasks.

STS is the server side of the TeamAgenda client/server system. It must be installed on only **one** computer on your network and is supported on Linux, Sun Solaris, Mac OS X and Windows 2000/XP.

TeamAgenda Lite and TeamAgenda Pro also require:

- **TeamAgenda (client program)**

You use the TeamAgenda client program to access your schedule and those of other team members, plan your workload, delegate tasks, track projects and organize contacts.

TeamAgenda is the client side of the TeamAgenda client/server system. It must be installed on each individual user's computer, and each user must use it to create and manage a personal agenda file.

TeamAgenda Web also requires:

- **A web browser**

With TeamAgenda Web, you use a web browser to access your schedule and those of other team members. You do not need to install any special client software and you do not have a personal agenda file on your computer.

At present TeamAgenda Web requires you to use Microsoft Internet Explorer 5 or higher or Netscape 6 or higher for Windows or Macintosh.

(TeamAgenda Web can be purchased separately as a web-only version of TeamAgenda. It also comes as an included add-on for TeamAgenda Pro.)

TeamAgenda Lite and TeamAgenda Pro come with Palm synchronization included:

- **Palm PDA Synchronization**

TeamAgenda lets you synchronize your schedule, to-do list and contacts with the Palm organizer or any other PDA that supports the Palm OS. For further information see [TeamAgenda/Palm Synchronization](#).

TeamAgenda Pro also provides several other add-ons and options:

- **TeamAgenda Web (included)**

TeamAgenda Web is included with TeamAgenda Pro. It allows TeamAgenda Pro users access and modify their schedules from a web browser. You can also publish public calendars on the web. For further information see [TeamAgenda Web](#).

- **PhoneAgenda (optional extra)**

TeamAgenda's PhoneAgenda module is a special version of TeamAgenda Web that lets you access your schedule using a web-enabled mobile phone (an HDML, WAP (WML) or i-mode phone that includes a web micro-browser). It can also be added as an option to TeamAgenda Web. For further information see [PhoneAgenda](#).

- **FileMaker Pro Integration (optional extra)**

TeamAgenda's FileMaker Pro Integration makes TeamAgenda's sophisticated calendaring and group-scheduling capabilities accessible to FileMaker users, while TeamAgenda users can access FileMaker databases from within TeamAgenda. For further information see Integrating TeamAgenda with FileMaker Pro.

Contact your Teamsoft distributor for information about purchasing any of these optional components.

To continue, choose from the following options:

[Find out What's New in this version of TeamAgenda](#)

[Learn about TeamAgenda's add-ons and options](#)

[Install TeamAgenda for the first time](#)

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TeamAgenda Add-ons and Options

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Teamsoft produces several add-ons and options that add capabilities to TeamAgenda's built-in functions.

These options let you access TeamAgenda from a web browser or web phone and synchronize your TeamAgenda data with a PDA.

Which options are available depend on your version of TeamAgenda: TeamAgenda Pro, TeamAgenda Lite or TeamAgenda Web (see [What Is TeamAgenda?](#)). Some options are included free with TeamAgenda, while others require special license numbers that can be purchased from your [TeamAgenda distributor](#).

Please choose from the following links to learn more about TeamAgenda add-ons and options.

Included Add-ons with TeamAgenda Lite and Pro:

[Palm PDA Synchronization](#)

Included Add-on with TeamAgenda Pro:

[TeamAgenda Web](#)

Enable your TeamAgenda users to access their schedules from a web browser.

Optional Components available with TeamAgenda Pro:

PhoneAgenda

Let your TeamAgenda users access their schedules from a web-enabled cellular phone.
(Also available for TeamAgenda Web.)



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What's New in Version 4

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New in Version 4.5

Scalable TeamAgenda Server (STS) is capable of handling large teams and is supported on multiple platforms including Linux, Sun Solaris and Apple OS-X native. The new architecture is based on the STS platform for which additional software modules are made available regularly. For example, a SynchML module will be available to synchronize TeamAgenda with various Personal Organizers and an Outlook bridge to import and export contact information to TeamAgenda.

The new STS database runs on MySQL or PostgreSQL, which are included in the TeamAgenda installation package. MS SQL and Oracle are also supported.

- Users can access the team database using ODBC or JDBC (Open/Java Database Connectivity) to retrieve and store data making from other applications. (for example Microsoft Excel and Access)
- The connection between the client and server is no longer 'session oriented'. With STS, the connection to the team is dynamic (the client communicates to the server only when needed). Thus, there is no longer a limit to the number of users in a team.
- The STS command line interface allows administrators to access the MySQL and PostgreSQL database.

- Supports multi-homed teams, (i.e. multiple teams stored on a single server).
- Supports teams running both Pro and Lite versions.

- New Platforms Supported

STS is available on Linux, Sun Solaris and OS-X native. The Windows version of STS will be available in March 2003.

- Directory Server

A Directory Server, stores user and contact information. It is accessible through LDAP (Lightweight Directory Access Protocol). This allows users to import and export contact information easily from other applications (i.e. Outlook).

- WebAgenda

Improved Web Interface, such as the ability to change a scheduled commitment into a to-do item. TeamAgenda web is included in the STS installation, and supports all available languages without any additional installation. The language is selected automatically as per the user's browser default language or can be changed manually.

- TeamAgenda Client

The features of the PC and Mac TA 4.5 clients remain unchanged with all the same great features.

- Team Administration

Administrators can easily perform team administrative commands with the help of a user-friendly Web Administration Interface. A Team Administration command line interface is available for advanced users. STS supports Hot Backup/Restore, which allows the backup of the Team Database while it is in use.

- Migration

A single command migrates a version 3.1/4.1 TA Server database to STS.

TA Clients 3.x and 4.1 can connect to the STS using a classic emulation mode. This provides additional flexibility allowing clients to upgrade to version 4.5 over a period of time.

New in Version 4.1

- Macintosh OS X Support

Both TA-Server and TeamAgenda have been carbonized to run under Macintosh OS X, as well as under Mac OS 8.6 through 9.2.

- Please note that, starting with version 4.1, the following are **no longer supported** by TeamAgenda:

- FirstClass integration
- Psion 3 synchronization
- AppleShareIP on Macintosh
- AppleTalk networking on Macintosh

New in Version 4.0

- Three Different Versions

TeamAgenda now comes in three different versions: TeamAgenda Pro, TeamAgenda Lite and TeamAgenda Web. Choose the particular version that best meets your needs. For more information, see [What Is TeamAgenda?](#)

- PhoneAgenda ([TeamAgenda Pro option](#))

Now access TeamAgenda information from any Internet-

ready phone (WAP, HDML, i-Mode). Our optional PhoneAgenda module works with your web server to let you:

- view your calendar and add or modify items;
- find colleagues or contacts in your Address Book, then include them in meetings or let PhoneAgenda dial their number for you;
- receive immediate phone notification of changes to your schedule thanks to audio "Net Alerts" (if supported by your phone provider).

- Worksets ([TeamAgenda Pro](#))

Give any combination of TeamAgenda windows a name, then save it as a "workset". Recall any workset instantly by choosing it from the Worksets menu in the Tool Bar.

Worksets store all window parameters and can also include information for any combination of TeamAgenda users. Worksets are an ideal tool for people who manage other people's schedules, since you can easily display several agendas with a single menu selection.

- Templates ([TeamAgenda Pro](#))

Reusable templates now make TeamAgenda even easier to use.

- Input Templates

Give any commitment a name and save it for future use as a public or private Input Template. Recall any template by choosing it from the Template menu in the Tool Bar, then click the Insert button to add it to any TeamAgenda schedule or window.

Commitment templates store virtually all commitment information, including the participants list.

- Print Templates

Choose the print settings for any window in the Print dialog box, then give them a name and save them as a Print Template. Recall any template by choosing it from the Print Templates menu, then print normally using the stored settings.

- Import and Export Templates

For regular importing and exporting, save your import or export settings as a named template that stores the field order and selection.

Recall any Import or Export Template by choosing it from a menu, then import or export normally.

(The interface for selecting fields for import or export has also been improved.)

- Separate To-Do List

TeamAgenda now includes a separate To-Do List window for all unscheduled to-do items. Enter to-do items directly or using a template. Convert scheduled items into to-do items by dragging them into the To-Do List, or schedule To-Do items by dragging them into a calendar.

You can still create Untimed items, with a date but no start and end times, in the Untimed area of the Weekly or Daily calendars.

- Priorities

Every TeamAgenda commitment now has a priority from 1 to 5. By default all commitments are given priority 1, but this can be changed by clicking the desired priority number in the Tool Bar.

Priorities are visible in the new To-Do List, where items can be sorted by priority. Untimed items, in the Untimed area of

calendar windows, are sorted by priority automatically.

- Integrated Installer Program

TeamAgenda now comes with an integrated installer program that lets you install some or all of TeamAgenda's components and options, update your current versions, or uninstall any or all TeamAgenda components.

A web installer version lets you install your TeamAgenda system directly from the Teamsoft web site.

- Setup Wizards

Setup wizards now guide you step by step as you set up your personal agenda and join or set up a TeamAgenda team.

- Personal Setup Wizard

When you create a new personal agenda file, TeamAgenda guides you through the process step by step, prompting you to set your name, password and personal preferences, and helping you share your personal agenda with your team.

- Team Setup Wizard

When you are the first person to join a team, TeamAgenda prompts you to act as team administrator, asking you to define team passwords and default access rights, and create public agendas, resource agendas and categories.



Improvements in Version 4.0

- Improved Searching

The same shortcut key — CTRL-F in Windows, Command-F on Macintosh — will now display the appropriate search box in any TeamAgenda window.

In the Address Book list view you can now search on any field.

- Copy Address Book Information Easily

You can now select any user or contact in the Address Book list and copy their information to the Clipboard with CTRL-C (Windows) or Command-C (Macintosh).

- Banners

Linked events or unavailable markers on successive days now display as single banners in the Untimed area. Each item can still be modified individually.

- Categories

TeamAgenda domains are now known as "categories" to avoid any confusion with Internet terminology.

Categories can now be moved between the Public Category list and your Personal list while you are in the commitment Input window.

- Multiple Category Selection in the Task Manager

The Task Manager window now allows you to select and summarize multiple categories, making it easier to track projects and sub-projects.

- Date Selection in the Input Window

A new date popup lets you select or change a commitment's

date from inside the Input window. You can also change a scheduled commitment into a To-Do item, or vice versa.

This means that all commitment information can now be modified without closing the Input window.

- Easy Connection to your Team

A toolbar icon shows if you are connected to your team, and lets you connect or disconnect with one click.

- Palm Synchronization Improvements

- Improved Control over Data Transfer

The TeamAgenda/Palm conduits have been divided into three independent conduits: Schedule, To-Do List and Address Book. This lets the user decide which information to transfer, and how often to transfer it.

For example, you might decide to transfer To-Do list and Schedule information every day, but only transfer Address Book entries once a week.

If you prefer to keep using another address book program, you don't have to transfer TeamAgenda Address Book entries at all.

- Improved Correspondence between Palm and TeamAgenda Data Models

TeamAgenda's new To-Do List means that TeamAgenda and Palm information now correspond more completely. TeamAgenda scheduled information (including Untimed items) is synchronized with the Palm Date Book, to-do items are synchronized with the Palm To Do List, and TeamAgenda Address Book information is synchronized with the Palm Address Book.



New in Version 3.1

- Support for Palm Organizers

Now you can synchronize TeamAgenda data with your Palm organizer. Take schedule and contact information with you on the Palm. When you return to the office, use the HotSync button on the Palm cradle to re-synchronize with TeamAgenda. For more information, see [Connecting TeamAgenda to your Palm Organizer](#).

- New Workload Window Features

New one-day and one-month views; display data in numeric or graphic format; display unavailable markers and include them in totals.

- Timesheet Printing

Print timesheets for any combination of time period and users, including overtime or shortfall relative to standard daily workload.

- Contextual Menus

TeamAgenda now provides contextual menus (right mouse button in Windows, control-click on Macintosh).

- Full 32-Bit Support for Windows

In Windows, all TeamAgenda elements are now 32-bit applications.

- FileMaker Integration

TeamAgenda's optional plug-in for FileMaker Pro enables real-time integration between TeamAgenda and FileMaker. You can synchronize contacts between a FileMaker database and the TeamAgenda Address Book, and then track TeamAgenda meetings in FileMaker Pro. For more information, see [Integrating TeamAgenda with FileMaker](#)



New in Version 3.0

- Task Manager

The Task Manager lets you display and organize commitments by category or by project, both for yourself and for other team members. You can see at a glance if a project has exceeded its budgeted time.

- Workload Window

Use the Workload window to see how your time, and that of other team members, is being allocated to various projects. Produce and export timesheet data.

- Integrated Address Book, including external contacts

The Address Book lets you manage all your contacts, not just TeamAgenda users. Enter address, telephone, e-mail and other information for each contact. Make contacts public (accessible to the entire team) or private (accessible to you only).

- Integrated E-Mail

Invite people to meetings even if they aren't part of your TeamAgenda team! If you have access to Internet e-mail, TeamAgenda can automatically send a meeting invitation to anyone that can be reached by e-mail, directly from your personal agenda. When that person replies, their answer shows up right in your TeamAgenda schedule.

- Stop Watch Function

Use the Input window as a timer to record telephone and service calls as they occur.

- Spill Function

TeamAgenda can now "spill" lengthy commitments over more than one day automatically, while taking into account your preferred working hours, lunch breaks and Untimed items.

- Tool Bar

The new Tool Bar provides easy access to the most common TeamAgenda commands, and includes a short, context-sensitive explanation of each active command.

- Online User Guide

Our comprehensive Online User Guide provides the help you need to use TeamAgenda in every situation.

- Accessible from a Web browser

If your organization has a Web server, Teamsoft's optional Internet extension (now called TeamAgenda Web) lets Team members access TeamAgenda from a Web browser. You can even make specific calendars accessible to the public. For more information, see [Accessing TeamAgenda over the Internet](#)



Improvements in Version 3.0

- In the Startup Preferences (Context menu), it is now possible to choose to display your agenda at startup or not.
- The repetition period defined using the Repeat command (Edit menu) can now be set as a time period, as a number of repetitions, or with a termination date.
- Saturdays and Sundays can now be skipped separately from other holidays: see Repeat command (Edit menu), Options sub-menu (Context menu).

- The Input window can now be stretched to fit the screen size. The owner of a commitment can be changed directly in the Input window for easier delegation. Checking the "Allow overlaps" box will make the commitment's time period available to the Find Available command.
- The "Display" popup (Input window, Grant Access, etc.) is now called "Visibility": the old "Public" level is now called "Internal"; a new "External" level has been added for visibility on the Web.
- A new Default access for external guests has been added for Web visitors (see "Grant Access to..." in the Context menu).
- Newly created categories can now be added automatically to everyone's personal directories without the explicit intervention of any user. It is also possible to limit access to specific categories on a user basis (see "category Access ..." from the Context menu).
- Graphical action buttons have been added to the Notifications and Meeting Status windows.
- A Display My Agenda command has been added to the Windows menu.
- Most windows can be hidden with the Hide Window command (Window menu) and recalled by selecting them in the window list at the bottom of the Window menu.
- The Close Window and Close Other Agendas commands have been relocated from the File menu to the Window menu.
- The "Attention" window has been renamed the "Custom List".

To continue, choose from the following options:

[Consult the TeamAgenda documentation](#)

[Upgrade to a new version of TeamAgenda](#)

[Install TeamAgenda for the first time](#)



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TeamAgenda Installer and Documentation

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If you are reading this document from the TeamAgenda CD-ROM, or if you downloaded the TeamAgenda installer program from the Teamssoft web site, you already have all the files you need to install all TeamAgenda components. (For an explanation of the three varieties of TeamAgenda: TeamAgenda Lite, Pro and Web, see [What Is TeamAgenda.](#))

The TeamAgenda client installer program is called **TeamAgenda Setup.exe** for Windows or **TeamAgenda Installer** for Macintosh. The same installer is used to install either a demonstration or full version of TeamAgenda and its components. You will need a serial number to install the full version.

The TeamAgenda client installer program is downloaded as a complete, self-contained program.

To Install the Scalable TeamAgenda Server (STS) see the STS Readme File for installation instructions.

If you need the TeamAgenda installer program or PDF documentation, you may download it from the Teamssoft web site. You will be asked to fill out an information form.

[Go to the Teamssoft web site](#)

You can also find out more about the TeamAgenda demo version:

[What are the limits of the TeamAgenda demo](#)

You can download some TeamAgenda documentation in PDF format without filling out a form.

- TeamAgenda/FileMaker Integration Manual

The complete TeamAgenda/FileMaker integration manual

(TAFM Integration Manual.pdf) is provided in Adobe Acrobat format (PDF).

- Using TeamAgenda with FileMaker Server

Special instructions are available if you intend to use TeamAgenda integration with FileMaker Server..

Acrobat Reader is available free of charge from [Adobe Systems](http://www.adobe.com) on the World Wide Web.





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TeamAgenda Documentation

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TeamAgenda documentation is provided in three ways:

- This [Guide for TeamAgenda Users](#) provides the basic information you need to install TeamAgenda and its various components; To install the STS (Scalable TeamAgenda Server) please refer to the STS Readme file.
- [Online help](#) is provided from within the TeamAgenda program;
- [Printable documentation](#) is provided on the CD-ROM in Adobe Acrobat (PDF) format. It can also be [downloaded](#) from the Teamssoft web site.

Guide for TeamAgenda Users

The document you are reading provides the following information:

- [Installing TeamAgenda](#)
- [Upgrading TeamAgenda](#)
- [Uninstalling TeamAgenda](#)

TeamAgenda Add-ons and Options:

- [Palm PDA Synchronization](#)
- [TeamAgenda Web and PhoneAgenda](#)
- TeamAgenda/FileMaker Integration

Online Help

- TeamAgenda Online User Guide

TeamAgenda's online help provides the step-by-step instructions needed to use TeamAgenda on a daily basis.

To get online help inside TeamAgenda, click the Help button on the TeamAgenda Tool Bar. Alternately, choose TeamAgenda Help from the Windows or Macintosh Help menu.

Documents in PDF format on the CD-ROM

- TA Guide.pdf

A printable version of this TeamAgenda Guide document

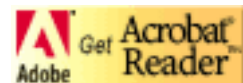
- TA Help.pdf

A printable version of the online help available inside TeamAgenda.

- TeamAgenda/FileMaker Integration Manual

The complete TeamAgenda/FileMaker integration manual (TAFM Integration Manual.pdf) is provided in Adobe Acrobat format (PDF).

Acrobat Reader is available free of charge from [Adobe Systems](http://www.adobe.com) on the World Wide Web.



You don't have the PDF documentation?



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System Requirements

Scalable TeamAgenda Server (STS)

Linux

RedHat Linux 7.0 and higher

SUSE Linux 8.0 and higher

Mandrake 8.2 and higher

TunboLinux 7.0 and higher

Sun Microsystems

Sparc Solaris 2.6

Sparc Solaris 7

Sparc Solaris 8

Sparc Solaris 9

FreeBSD x 86 version 5.0 and higher

PC

Windows NT/2000/XP

Macintosh

Mac OS 10.2

TeamAgenda Client

PC

486 or higher

Win 98, ME or NT/2000/XP

Macintosh

Mac Power PC or higher

Mac OS 9.and higher

TeamAgenda Web client

Microsoft Internet Explorer 5 or higher

Netscape version 6 and higher

Opera 5.0 and higher

Mozilla 1.0 and higher

Konqueror 2.0 and higher

Databases

MySQL (included)

PostgreSQL (included)

Microsoft SQL

Oracle 8i and higher

Database Connectivity

ODBC (Open Database Connectivity)

JDBC (Java Database Connectivity)

Directory Server

OpenLDAP (Lightweight Directory Access Protocol)

Connectivity with LDAP

Network Protocol

TCP/IP

Personal Organizers

Palm OS version 3.1 to 4.1 (including Visor)
Palm HotSync Manager version 3.0 or higher (from Palm Desktop
version 4.0)

Phone Agenda

Supported protocols: HDML, WAP (WML), i-mode
Net Alerts must be supported by your mobile phone provider

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TeamAgenda Demo

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Teamsoft provides a complete, demonstration copy of TeamAgenda that lets you install and try out TeamAgenda Lite, TeamAgenda Pro and TeamAgenda Web, as well as the optional PhoneAgenda and FileMaker Integration modules. (For an explanation of the three varieties of TeamAgenda, see [What Is TeamAgenda?](#))

The TeamAgenda client installer program is called **TeamAgenda Setup.exe** for Windows or **TeamAgenda Installer** for Macintosh. The same installer is used to install either a demonstration or full version of TeamAgenda and its components.

To install the Scalable TeamAgenda Server, please see the STS Readme file.

The TeamAgenda installer program is downloaded as a complete, self-contained program.

If you want to install the TeamAgenda demo version, you can download the installer program from the Teamsoft web site. You will be asked to fill out an information form.

[Go to the Teamsoft web site](#)

Contact your [TeamAgenda distributor](#) to obtain a demo license for a fixed amount of time.

Converting your demo copy into a full working version:

Customers can convert a demo copy of TeamAgenda to a fully working version by purchasing STS licenses from their TeamAgenda distributor (see

[For Further Information](#)). The license numbers you purchase will determine whether your TeamAgenda system operates as TeamAgenda Lite, Pro or Web.

- TheSTS demo may be turned into a fully functional version by entering a valid license number for one or more users using the Team Administration Web Interface (Please refer to the TeamAgenda Administration Guide)
- The TeamAgenda client demo will be turned into a fully functional version the first time that a user connects to their full version STS.
- PhoneAgenda and FileMaker Integration are optional modules. After your demo period is over, each one must be unlocked using a special STS license number that may be purchased from your TeamAgenda distributor.

If you decide to purchase TeamAgenda after your trial period, you can continue to use the data files created during the trial with no loss of information.

To continue, choose from the following options:

[Go to the TeamAgenda download page](#)



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TeamAgenda Installation

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TeamAgenda components and options are installed using the TeamAgenda installer program. To install the Scalable TeamAgenda Server (STS) please refer to the STS Readme File.

TeamAgenda Administrator

One user should take on the role of TeamAgenda administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda environment.

To begin using TeamAgenda in a work group, the TeamAgenda administrator must first install STS and TeamAgenda, and then [configure and set up the team](#). Please refer to the STS Readme File.

System Requirements

Before installing TeamAgenda, you should check TeamAgenda's [system requirements](#).

To install any or all TeamAgenda components:

- Open the TeamAgenda installer program:

TeamAgenda Setup.exe for Windows, or

TeamAgenda Installer for Macintosh.

The installer will guide you through the installation process.

If you need further information:

To upgrade an existing TeamAgenda system, see:

[Upgrading TeamAgenda](#)

To uninstall a TeamAgenda system, see:

[Uninstalling TeamAgenda](#)

If you need more information before installing, see:

[What is TeamAgenda?](#)

[TeamAgenda Components](#)

or

[TeamAgenda Documentation](#)

 [TOP](#)



Uninstalling your TeamAgenda System

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Contents](#)

To uninstall TeamAgenda components...

...in Windows

To uninstall TeamAgenda components:

- Click the Windows Start button, choose Programs, Teamsoft, Uninstallers, then select the Uninstaller for the component to be removed;
- or
- Click the Windows Start button, choose Settings, Control Panel, then select Add/Remove Programs. Choose the component to be removed.

...on Macintosh

To uninstall any or all TeamAgenda components on Macintosh

Open the TeamAgenda Installer program and choose the Custom Remove option. Choose the components to be removed.

Manual Uninstall

If for any reason you want to manually uninstall TA-Server (4.1 or lower) or TeamAgenda, please follow the instructions on the these pages. To uninstall STS 4.5 please see the STS Readme File.

- **TA-Server (3.1 and 4.1):**

[TA-Server for Windows Manual Uninstall](#)

[TA-Server for Macintosh Manual Uninstall](#)

- **TeamAgenda:**

[TeamAgenda for Windows Manual Uninstall](#)

[TeamAgenda for Macintosh Manual Uninstall](#)



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TeamAgenda Manual Uninstall - Windows

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Follow these instructions to uninstall TeamAgenda manually in Windows.

Default Install Locations

The default install location for TeamAgenda (version 3.1) is
C:\TAGENDA\

The default install location for TeamAgenda (version 4.0 and higher) is
C:\Programfiles\Teamsoft\TeamAgenda\

To uninstall TeamAgenda manually:

TA version 3.1 - remove the TAGENDA folder created by the TeamAgenda installer. This folder is found at the root level of your hard drive.

TA version 4.0 and higher - remove the TeamAgenda folder created by the TeamAgenda installer. This folder is found in the Teamsoft folder in the Program Files folder at the root level of your hard drive.

To uninstall TeamNotify manually:

- In Windows 95/98:
 - In Notepad, open your WIN.INI file (the path is C:\WINDOWS\WIN.INI) and remove the "C:\TAGENDA\TNotify.EXE" reference from the RUN line in the [WINDOWS] section.
 - Reboot your computer.

- Remove the TeamNotify control panel (TANOTIFY.CPL) from your Windows System directory (the path is C:\WINDOWS\SYSTEM\TANOTIFY.CPL).

- In Windows NT, XP:

- In RegEdit, search for "tnotify.exe".

- Remove the "Run" line that refers to "tnotify.exe".

- Reboot your computer.

- Remove the TeamNotify control panel (TANOTIFY.CPL) from your Windows System directory (the path is C:\WINDOWS\SYSTEM\TANOTIFY.CPL).

To remove the TeamAgenda submenu from the Start Menu:

- Right-click on the Start menu to open the Start Menu folder, open the Programs folder, select the TeamAgenda folder, then press the Delete key to remove it.

Important Note: You may have saved your personal agenda file in the same folder with TeamAgenda.

If you intend to reinstall TeamAgenda, do not accidentally delete your personal agenda file when you delete TeamAgenda.

Go back to [Uninstalling your TeamAgenda System](#)





Team Agenda User Guide

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TeamAgenda Manual Uninstall - Macintosh

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Follow these instructions to uninstall TeamAgenda manually on Macintosh.

Default Install Locations

The default install location for TeamAgenda 3.x and earlier (all Macintosh versions) is a folder called TeamAgenda*f* at the root of your hard drive.

The default install location for TeamAgenda 4.0 and higher (all Macintosh versions) is a folder called TeamAgenda inside a folder called Teams*o*ft at the root of your hard drive. (Mac OS X, the TeamAgenda folder is in the Teams*o*ft folder in the Applications folder at the root of your hard drive.)

To uninstall TeamAgenda manually:

- Remove the TeamAgenda folder created by the TeamAgenda or Teams*o*ft installer.

On Classic Macintosh, also:

- Remove the "TeamNotify" file from the Control Panels folder inside the System Folder.
- Remove the "TeamNotify" and "TeamNotify!" files from the Extensions folder inside the System Folder.

Important Note: You may have saved your personal agenda file in the same folder with TeamAgenda.

If you intend to reinstall TeamAgenda, do not accidentally delete your personal agenda file when you delete TeamAgenda.



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TA-Server Manual Uninstall Windows 98 and NT/2000

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Follow these instructions to uninstall TA-Server (4.1 and lower) manually in Windows. To Uninstall STS 4.5 please refer to the STS Readme File.

Default Install Locations

The following list shows the default install locations for TA-Server in Windows:

- TeamServer version 2.5 default directory is C:\TSERVER\
- TA-Server (application) version 3.0 and higher default directory is C:\TASERVER\
- TA-Server (service) versions up to 3.1.5 default directory is C:\WINNT\SYSTEM32\TASERVER
- TA-Server (service) versions 3.1.6 and higher default directory is C:\PROGRAM FILES\TEAMSOFT\TASERVER
- TA-Server (application) versions 4.0 and higher default directory is C:\PROGRAM FILES\TEAMSOFT\TASERVER Application
- TA-Server (service) versions 4.0 and higher default directory is C:\PROGRAM FILES\TEAMSOFT\TASERVER Service

If the previous version has been moved from this location you should remove it manually following the instructions provided here.

Important Note:

In both Windows 95/98 and Windows NT, your team database file (taserver.tdb) is normally found in the TASERVER folder (located according to the paths shown above). With TeamServer 2.5 and earlier, the team database is called tserver.tdb and is found in the TSERVER folder.

If you intend to reinstall TA-Server, do not forget to make a backup copy of your team database file before deleting TA-Server.

To uninstall TA-Server manually:

To uninstall TA-Server (application) in Windows 95/98:

- Versions 4.0 and higher:
 - remove the TASERVER Application folder created by the TA-Server installer. This folder is found at the C:\PROGRAM FILES\TEAMSOF\T
- Versions 3.0 and higher:
 - remove the TASERVER folder created by the TA-Server installer. This folder is found at the root level of your hard drive.
- Versions 2.5 and earlier:
 - remove the TSERVER folder created by the TeamServer installer. This folder is found at the root level of your hard drive.

To uninstall TA-Server (service) versions up to 3.1.5 in Windows NT:

- remove TA-Server from the NT services list using the Network control panel, Services tab.
- remove the TASERVER folder created by the TA-Server installer. This folder is found at C:\WINNT\SYSTEM32\TASERVER.

To uninstall TA-Server (service) versions 3.1.6 (including versions of 4) and higher in Windows NT/2000:

- remove TA-Server by using the Add/Remove Programs control panel.

Note: Some items may be removed only after you restart Windows.

To remove the TA-Server or TeamServer submenu from the Start Menu:

- Right-click on the Start menu to open the Start Menu folder, open the Programs folder, select the TA-Server or TeamServer folder, then press the Delete key to remove it.

Note: This step is only necessary when removing the application version of TA-Server.

Go back to [Uninstalling your TeamAgenda System](#)





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TA-Server Manual Uninstall Macintosh

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Follow these instructions to uninstall TA-Server (4.1 or lower) manually on Macintosh. To uninstall STS 4.5 please refer to the STS Readme file.

Default Install Locations

The following list shows the default install locations for TA-Server on Macintosh:

- TeamServer version 2.5 default location is a folder called TeamServer*f* at the root of your hard drive.
- TA-Server version 3.x default location is a folder called TA-Server*f* at the root of your hard drive.
- TA-Server version 4.0 and higher default location is a folder called TA-Server inside a folder called Teamsoft at the root of your hard drive (Mac OS X, in the Applications folder).

If the previous version has been moved from this location you should remove it following the instructions provided here.

To uninstall TA-Server manually:

- Simply remove the TA-Server*f* folder created by the Teamsoft or TA-Server installer.

Important Note: You may have saved your team database file in the same folder with TA-Server.

If you intend to reinstall TA-Server, do not forget to make a backup copy of your team database file before deleting TA-Server.



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Upgrading you TeamAgenda System

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You can easily upgrade from an earlier version of TeamAgenda to the current version.

To upgrade to Scalable TeamAgenda Server (STS)

- When upgrading your TA Server make a backup copy of your Team Database.
- The migration command in the Team Administration Web Interface will migrate your database in one step. See the TeamAdministration Guide migration for further instructions.

To upgrade TeamAgenda components:

- Open the TeamAgenda installer program:

TeamAgenda Setup.exe for Windows, or

TeamAgenda Installer for Macintosh.

The installer will guide you through the installation process.

If you need further information before upgrading, see:

[TeamAgenda System Requirements](#)

[TeamAgenda Documentation](#)



Team Agenda User Guide

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Using your Agenda

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Once you have installed TeamAgenda on your computer, to start using the program you must:

- [log in to your personal agenda file;](#)
- [set up your personal agenda using the Personal Agenda Setup wizard](#) (this includes connecting to your TeamAgenda team);
- [import existing data](#), if you wish.

Note: If you are a TeamAgenda Web web-only user, you do not have a personal agenda file. You connect to your team directly from your TeamAgenda Web home page.

Log in to your Personal Agenda

TeamAgenda stores all your schedule and other information in a personal agenda file.

To log in to your personal agenda file:

1. Double-click TeamAgenda to start the application or choose it from the Start menu (Windows).
2. In Windows, enter a name for your agenda (e.g., your name), choose where your personal agenda should be saved, and click OK.

or

On Macintosh, click the New button in the Open dialog box., enter a name for your agenda (e.g., your name), choose where your personal agenda should be saved, and click OK.

Your new personal agenda will open, and launch the Personal Agenda Setup wizard.

Set Up your Agenda using the Personal Setup Wizard

When you log into your personal agenda, the Personal Agenda Setup wizard will offer to guide you through the setup process.

You must first choose to work "Standalone", without connecting to a TeamAgenda team, or "With Team".

- If you choose to work "Standalone", the wizard will guide you through setting a password, importing holidays, creating personal categories, consulting the online user guide and setting your preferences.
- If you choose to work "With Team", the wizard will guide you through entering your name, connecting to your team, creating personal categories, consulting the online user guide and setting your preferences. Be sure to enter your last name so other team members can correctly see your name in the Public Address Book, (which is sorted alphabetically by last name)

If you would rather setup your personal agenda later, just click the Done button on any of the setup wizard screens. You can launch the Personal Agenda Setup wizard again by choosing it from the Context menu, or you can set up your agenda manually using the various Context menu commands.

Import data from other programs

If you are switching from another scheduling program or contact manager, you may want to import commitment information and/or contacts into TeamAgenda.

Data should first be exported in text format from the other program. Then, to import, choose the Import from... command in TeamAgenda's File menu. If TeamAgenda does not recognize the field order of the import file, it will display the Import Setup box. This allows you to set the order in which

fields should be imported into TeamAgenda. (For full instructions, see "Importing" in the Online User Guide.)

Note that each user may import information into their own schedule and their personal contact list. Only the TeamAgenda administrator can import public information and contacts.

Connect to a Team Manually

If you want to log into your team manually, without using the setup wizard, follow these instructions.

To connect to your team:

1. Double-click on your personal agenda to start TeamAgenda.
2. From the File menu, choose Connect to Team.

The Network Connection box will appear.

3. Enter the Hostname or IP Address of your team, Port number and your password for the team.

Note: The default port number in TeamAgenda version 3.1 was 605. The default port number in TeamAgenda version 4.0 and higher is 3552. Check with your Team Administrator for the correct Port Number.

4. Click OK.

Go back to:

[Configuring TeamAgenda and its Components](#)

[Setting Up your Team with TA-Server](#)



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Setting Up your Team with STS

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One user should take on the role of TeamAgenda administrator. This is the person responsible for installing, setting up and configuring the TeamAgenda environment, including the Scalable TeamAgenda Server (STS) application. Please refer to the TeamAgenda Administration Guide for more instructions.

Once STS has been installed, the team administrator must:

- [install TeamAgenda on each Team member's computer](#) (TeamAgenda Lite and Pro), after which each member can join the new Team;
- [set any special user authorizations the Team may require](#);

Set Up the Team using the Team Setup Wizard

The administrator should first create a personal agenda, joining the new team when the Personal Agenda Setup wizard suggests it (see Setting Up TeamAgenda for details).

As the first person to join the team, the administrator will be guided through the setup process by the Team Setup wizard, which helps you define important team parameters, including holidays, common resources, public agendas, public categories, and passwords.

If you would rather setup your team later, just click the Done button on any of the setup wizard screens. You can launch the Team Setup wizard again by choosing it from the Context menu.

Install TeamAgenda for each Team Member

Next, TeamAgenda should be installed on the computers of all Team

members, who should then create their personal agendas and join the Team (see [Installing TeamAgenda](#)).

Define Special Authorizations

Once all team members have joined the team, the administrator may wish to delegate the tasks of maintaining certain team features such public events, holidays, etc. to others, without disclosing the Team Administration password. For this reason, the administrator can provide particular users with the authorization to define resources, public agendas, public categories, holidays and/or public contacts.

To define special user authorizations:

1. Choose Team Administration from TeamAgenda's Context menu, entering the Team Administration password if you defined one earlier.
2. Choose Directory Maintenance from the list in the Team Administration window and click Do it.
3. Choose a user and then click the Edit... button
4. Change the user's authorizations by selecting or deselecting the appropriate check boxes: Define Resources, Define Public Agendas, Define Public Categories and Templates, Define Holidays & Public Events, Define Public Groups, Define Public Contacts and Export Other Users.

Go back to:

[Configuring TeamAgenda and its Components](#)



Team Agenda User Guide

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TA-Server Manual Setup Instructions

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If you would rather set up the team manually, using the Team Administration command instead of the Team Setup Wizard, follow these instructions after creating your personal agenda and joining the team.

1. Setting Passwords

To set Team Administration and Team Membership Passwords:

1. Open your personal agenda in TeamAgenda.
2. Choose Team Administration from the Context menu.

This command is active only when you are connected to the TeamAgenda server. Once a team has been configured, a password may be required to access the Team Administration window. No default password is defined, however, so the first time you are asked for the password, simply click the OK button. This will display the Team Administration window.

As administrator you can now define one password that limits access to the Team Administration window, and another that limits team membership. Without the first password a user cannot make changes to the team configuration, and without the second a user cannot join the team at all. This can be used to prevent people from outside your team or company from making a remote connection to your team.

2. Defining Default Access Rights

To set users' default access to each other's agendas:

1. Choose Change Team Default Access from the list in

TeamAgenda's Team Administration window and click Do it.

2. Choose the desired default access level and visibility in the dialog box.

The initial internal default setting permits all users to add to each other's agendas, in order to create meetings, and to see everyone's internal level commitments only.

(For a full explanation of TeamAgenda access rights, see "Access to Other Users" in the TeamAgenda online help.)

To set External Default Access:

With TeamAgenda Web, you can make your Team accessible through a web browser over the Internet.

The default access level for external guests connecting over the Internet is always set to "No Access", with a visibility level of "No Detail". This default cannot be changed. You must explicitly decide if a specific agenda or resource will be accessible to guests over the Internet (see the TeamAgenda online help).

3. Defining Resources

Resource agendas may be defined to schedule items such as meeting rooms, company vehicles, demonstration computers, large screens or other equipment.

To define a resource:

1. Choose Directory Maintenance from the list in the Team Administration window and click Do it.
2. Click the Add... button.
3. Choose Resource in the "What would you like to add" dialog.

4. Enter the resource name.
5. Click OK to save, or click New to save the resource and then add another one.

By default any user can add to a resource's schedule, and modify the items he or she has added). By default the resource is not accessible over the Internet. However, the administrator can define different default access levels for the resource if necessary:

To change the default access level for a resource:

1. Choose Access Maintenance from the list in the Team Administration window and click Do it.
2. Choose the resource for which you want to redefine the default access levels.
3. Change the internal default access by using the Default for internal users pop-up menus.
4. If the resource will be accessible over the Internet, choose the desired external access level and visibility from the Default for external guests pop-up menus.

4. Defining Public Agendas

Public agendas may be defined to schedule items such as group vacations, lunch breaks, car pools, courses, or special projects. Public Agendas are similar to Resources, except that the creator's name appears in front of the commitment title in the case of a synchronized commitment. Public agendas are defined in a similar fashion as resources; see above.

5. Defining Public Categories

Categories are used in TeamAgenda to classify commitments. For time-billing purposes, for example, every customer or major project could be a separate category, while, for confidential projects, specific categories may be made accessible to only some team members. You may assign each category a color.

To define a category:

1. Choose Public Category Maintenance from the list in the Team Administration window and click Do it.
2. Click the Add... button.
3. Enter the category name.
4. Enter a clear description.
5. Choose a color, if you wish.

By default, new public categories are entered in every user's list of personal categories. If the new category should NOT be added to each user's list of personal categories, uncheck the Include in Everyone's Personal Directory box.

6. Click OK to save, or click New to save the category and then add another one.

To restrict access to categories:

Public categories are normally accessible to all team members. If necessary, that access can be limited to certain team members only, for confidential projects, for example (see "Limiting Access to Public Categories" in the TeamAgenda online help).

6. Defining Holidays

Any user with authorization (see below) can add or change holidays as they would regular commitments. Use the Commitment Type pop-up menu in the Input window to define a working or a non-working holiday. Holidays appear automatically in all user and resource agendas, and are imported automatically into the personal agenda of anyone who joins the Team.

To import holidays:

1. Choose Team Administration... from the Context menu.
2. Choose Import from the list in the Team Administration window, then click Do It.
3. Locate the Holidays folder on the TeamAgenda CD-ROM or on your hard drive; open it and locate the holiday import document corresponding to your country.
4. Click OK.

The holidays will be imported.

Your team has now been set up.

Click this link to continue to the TA-Server options page:

[Setting Up TA-Server Options](#)

Go back to:

Configuring TeamAgenda and its Components



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Setting STS Options

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Although most setup tasks must be done from within the TeamAgenda program, using the Team Administration dialog box, some options must be configured or enabled using STS command lines or the TeamAgenda Administration Web Interface. These include:

- [entering additional license numbers](#);
- [enabling STS e-mail integration](#);

To access STS configuration options:

Please refer to the STS Readme for more information.

Additional License Numbers

Additional license numbers may be added to STS to permit more users to become team members, or to unlock TeamAgenda options such as TeamAgenda Web and FileMaker Integration.

To enter additional license numbers in TA-Server:

Please refer to the STS Readme guide for instructions.

STS E-mail Integration

STS can integrate with your Internet e-mail system. Contacts who are not members of a TeamAgenda team may be invited to meetings via e-mail, directly from TeamAgenda, and their responses will appear right in the appropriate TeamAgenda schedule.

TeamAgenda e-mail integration requires two basic steps. First, STS must be given an account and password on your mail system; ask your mail or network administrator to do this. Next, e-mail integration must be turned on and configured from STS. Once STS's Internet Mail Gateway has been

activated, any external contacts invited to TeamAgenda meetings who have an e-mail address will receive automatic notification by e-mail.

To turn on and configure e-mail integration from STS:

Please refer to the STS Readme guide for instructions.

Go back to:

[Setting Up your Team with STS](#)

[Configuring TeamAgenda and its Components](#)



Team Agenda User Guide

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TeamRepair

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TeamRepair is a utility provided with TeamAgenda that can repair damaged personal agenda and team database files (4.1 or lower). It is installed automatically with TeamAgenda. You can also install it using a Custom Installation.

The TeamRepair utility is needed only if your personal agenda is damaged, and TeamAgenda will normally ask you to use it if it is needed.

TeamRepair may also be used to compress a personal agenda file or team database (4.1 or lower) to save disk space.

For safety's sake, TeamRepair will always make a backup copy of your personal agenda file or team database before operating.

Go back to:

[Configuring TeamAgenda and its Components](#)



Team Agenda User Guide

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TeamAgenda over the Internet

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If you need to access your TeamAgenda schedule while you are not in your office, you can now do it over the World Wide Web, via your corporate Intranet or using your cellular phone's web micro-browser.

TeamAgenda Web is part of STS and allows team members to access the team from a web browser, without using the TeamAgenda client program. If you wish, you can even make specific calendars accessible to the general public over the Web. (TeamAgenda Web is available as a standalone module providing web-only access, or as an included add-on for TeamAgenda Pro.)

PhoneAgenda is a special version of TeamAgenda Web that lets you access your schedule using a web-enabled telephone (an HDML, WAP, or i-Mode telephone that includes a web micro-browser).

Installation

TeamAgenda Web files are installed with the STS.

Special License Numbers

To use TeamAgenda Web (standalone) or PhoneAgenda you must purchase a special STS license number. You will be asked to enter this special license number when you install STS, but you can enter the number later in Administration Web Interface if you wish. See the TeamAgenda Administration Web Interface for more information.

Contact Teamsoft or your local TeamAgenda reseller for license information.

To continue, choose from the following options:

- **TeamAgenda Web**

[Consulting TeamAgenda using your Web Browser](#)

[What You **Can** Do using TeamAgenda Web](#)

[What You **Cannot** Do using TeamAgenda Web](#)

- **PhoneAgenda**

[Consulting TeamAgenda using PhoneAgenda](#)

[What You **Can** Do using PhoneAgenda](#)

[What You **Cannot** Do using PhoneAgenda](#)

Go back to:

[TeamAgenda Add-ons and Options](#)

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Consulting TeamAgenda using your Web Browser

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To consult TeamAgenda using your web browser:

1. Open your Web browser, then enter the URL required to display your TeamAgenda Web home page.

If you do not know the correct URL, ask your TeamAgenda administrator.

2. If you are a TeamAgenda user, when your TeamAgenda Web home page appears, log in by entering your user name and password, then clicking the Log In button.

Note:

If you are a **TeamAgenda Pro user**, before you can log in to TeamAgenda Web, you must protect your agenda with a password using the Protect command in TeamAgenda's File menu. (Passwords are case-sensitive in TeamAgenda Web.)

If you are a **TeamAgenda Web web-only user**, the first time you connect to TeamAgenda Web you must join your team by clicking the "New User" button. You will be asked to enter your name and other details, as well as a user name and password.

or

If you are a **Guest**, when the TeamAgenda Web home page appears, log in by clicking the *Enter as GUEST* link.

Note: If you log in as a guest, you will be able to see only

those agendas and commitments that have specifically been made accessible to external guests by their owners

Your Weekly Schedule appears, with the TeamAgenda Web Main Tool Bar displayed above it. (If you enter as a guest you will see the list of schedules accessible to visitors.)

From the Main Tool Bar you can:

- Consult the **Schedule** of one or more TeamAgenda users
- View **Contacts** in the TeamAgenda Address Book
- Display your **To-Do List**
- Set certain **Options**
- **Exit** TeamAgenda Web

Each TeamAgenda Web window also has a secondary Tool Bar providing specific commands for that window.

See also:

[What You **Can** Do using TeamAgenda Web](#)

[What You **Cannot** Do using TeamAgenda Web](#)

Or go back to [Accessing TeamAgenda over the Internet](#)

 [TOP](#)



Team Agenda User Guide

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What you *Can* Do using TeamAgenda Web

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TeamAgenda Web enables TeamAgenda users to access their schedules and those of their team from a web browser, without using the TeamAgenda client program.

If you are out of your office for any reason, you can get up-to-date schedule information from any computer with internet access, and then add new items or modify existing ones.

The following TeamAgenda functions are available through TeamAgenda Web:

Scheduling

- Display your schedule, or the individual schedules of other team members, in daily, weekly or monthly views.
- Display your to-do list.
- Display several schedules simultaneously (in daily view only).
- Display Free/Busy times for several users and create a new meeting by double-clicking on a free time slot.
- View and respond to any notifications received since you last checked your schedule.
- Add new commitments to your own schedule, or the schedules of other team members (according to your usual access rights).
- Modify existing commitments in your own or other schedules (according to your access rights).

Note for Pro users: Using TeamAgenda Web, you have the same access rights that you have when using TeamAgenda Pro.

Address Book - Personal Directory

- View information for TeamAgenda users and outside contacts in

your Personal Directory.

- Search your Personal Directory.
- Export contacts from your Personal Directory (in vCard format).
- Add, modify or delete private contacts in your Personal Directory.

Note: Contacts in your Personal Directory may be your own private contacts, or personal copies of public contacts from the General Directory.

Address Book - General Directory

- View information for TeamAgenda users and outside contacts in your company's General Directory.
- Search the General Directory.
- Export contacts from the General Directory (in vCard format).
- Transfer a personal copy of a public contact from the General Directory to your Personal Directory.
- Add contacts in the General Directory, if you have authorization.
- Modify or delete contacts in the General Directory, if you originally created them.

Options

- Change the access rights to your schedule that you grant to other users.
- Change your password.

See also:

[What You **Cannot** Do using TeamAgenda Web](#)

[Consulting TeamAgenda using your Web Browser](#)

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Team Agenda User Guide

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What you *Cannot* Do using TeamAgenda Web

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TeamAgenda Web lets you access your schedule and those of other team members. However, it does not provide all the capabilities of the full TeamAgenda client program.

The following TeamAgenda functions are NOT available when using TeamAgenda Web:

Scheduling

- You cannot customize the daily, weekly or monthly views.
- Multiple schedules cannot be displayed in weekly and monthly views; only day view is available.

Various specific scheduling commands are not available, including:

- Repeat
- Add to Others
- Delegate to Other
- Carry Over

Other Windows

Several TeamAgenda windows are not available in TeamAgenda Web. These include:

- Task Manager.
- Workload window.
- Custom List.
- Meeting Status

General Functions:

- PDA Synchronization
- Import
- Export
- Archive
- TeamAgenda Preferences and Options
- Alarms

See also:

[What You **Can** Do using TeamAgenda Web](#)

[Consulting TeamAgenda using your Web Browser](#)



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Consulting TeamAgenda using PhoneAgenda

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To consult TeamAgenda using PhoneAgenda:

Note: Before you can log on to PhoneAgenda, you must protect your agenda with a password using the Protect command in the TeamAgenda File menu. This is to prevent unauthorized access to your schedule.

1. Open your web phone's micro-browser, then enter the URL required to display your PhoneAgenda home page.

The default URL to access PhoneAgenda is the IP Address of your web server followed by /Calendar/wml. (Example: 111.222.3.4/calendar/wml). If you do not know the correct URL, ask your TeamAgenda administrator.

Tip: Remember to save this URL in a bookmark for future use.

2. The first time you log on to PhoneAgenda, you must enter your TeamAgenda user name, then choose OK.

You will not have to enter your user name again unless you change or reinitialize your web phone.

You must enter your password, then choose OK.

You only need to enter your password once every 8 hours. This lets you consult PhoneAgenda easily throughout the day.

3. The PhoneAgenda Main Menu appears.

From the Main Menu you can choose to view your:

- Schedule;
- Contacts;
- Notifications
- Exit PhoneAgenda

Once logged on to PhoneAgenda, you simply select from the various choices available.

Customizing PhoneAgenda's Phone Registration Instructions

When PhoneAgenda users first join their team using TeamAgenda Web, the web browser displays a page of general instructions explaining how to register their web phones for use with PhoneAgenda.

The TeamAgenda administrator can replace this page if more specific instructions are needed.

Simply replace the text file, "phoneregistration.txt", (found in the Calendar folder installed by TeamAgenda Web in your web server) with a text file with the same name that gives the instructions needed for your web phone system.

See also:

[What You **Can** Do using PhoneAgenda](#)

[What You **Cannot** Do using PhoneAgenda](#)

Or go back to [Accessing TeamAgenda over the Internet](#)



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What You *Can* Do using PhoneAgenda

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PhoneAgenda lets you access your schedule and your contact list, and create meetings with other team members, without using the TeamAgenda client program.

If you are out of your office, you can get up-to-date schedule information from your web phone, and then add new items or modify existing ones.

The following TeamAgenda functions are available through PhoneAgenda:

Scheduling

- Display your schedule in daily, weekly, monthly and yearly views.
- View and respond to any notifications received since you last checked your schedule.
- Add new commitments (both scheduled and untimed) to your own schedule.
- View and modify existing commitments in your own schedule.

Address Book - Personal

- View information for outside contacts in your Personal Directory.
- Search or browse your Personal Directory.
- Add, modify or delete private contacts in your Personal Directory.

Note: Contacts in your Personal Directory may be your own private contacts, or personal copies of public contacts from the General Directory.

Address Book - General

- View information for TeamAgenda users and outside contacts in your company's General Directory.
- Search or browse the General Directory.

- Add contacts to the General Directory, if you have authorization.
- Modify or delete contacts in the General Directory, if you originally created them.

See also:

[What you **Cannot** Do using PhoneAgenda](#)

[Consulting TeamAgenda using PhoneAgenda](#)



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What You *Cannot* Do using PhoneAgenda

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PhoneAgenda lets you access your schedule and your contact list, and create meetings with other team members. However, it provides only a small proportion of TeamAgenda's capabilities.

The following TeamAgenda functions are NOT available when using PhoneAgenda:

Scheduling

- In PhoneAgenda you can view untimed items (which have a date, but no start and end time) but you cannot view To-Do list items (which have neither a date nor a time).
- You cannot view the schedules of other team members.

Various specific scheduling commands are not available, including:

- Repeat
- Find Available
- Add to Others
- Delegate to Other
- Carry Over

Other Windows

PhoneAgenda cannot display many TeamAgenda windows, including:

- To-Do List
- Task Manager.
- Workload window.
- Custom List.
- Meeting Status

General Functions:

- PDA Synchronization
- Import
- Export
- Archive
- Access Rights commands
- TeamAgenda Preferences and Options
- Alarms

See also:

[What you **Can** Do using PhoneAgenda](#)

[Consulting TeamAgenda using PhoneAgenda](#)



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TeamAgenda/Palm Synchronization

You can easily synchronize your personal agenda with the Palm organizer. Changes to your schedule, to-do list or contacts made either in TeamAgenda or on the Palm will be transferred upon synchronization.

Three TeamAgenda conduits are provided:

- the Date Book conduit synchronizes your TeamAgenda calendar with the Palm Date Book;
- the ToDo conduit synchronizes your TeamAgenda To-Do list with the Palm To-Do list;
- the Address conduit synchronizes your TeamAgenda Address Book with the Palm Address Book.

You may install any or all of the three conduits, depending on which information you wish to synchronize with the Palm. If, for example, you want to synchronize TeamAgenda calendar and To-Do list with the Palm, but use a different program to synchronize your contacts, you would install only the Date Book and ToDo conduits.

System Requirements

TeamAgenda 4.0 or higher.

Palm HotSync Manager version 3.0 (from Palm Desktop version 4.0 for Windows or Macintosh).

Note:

You should have already installed the HotSync Manager software on your computer before proceeding. Refer to your Palm documentation for instructions.

For the most recent version, please check the following web site:

<http://www.palm.com>

Installation

TeamAgenda's Palm conduits are installed using the [TeamAgenda Installer](#) program.

To continue, choose from the following options:

[Setting up the TeamAgenda Palm Conduits](#)

[Synchronizing your Palm](#)

[Palm Synchronization and Exceptions](#)

[Differences between the TeamAgenda and Palm Address Books](#)

[Palm Groupware Enhancements](#)

Go back to:

[TeamAgenda Add-ons and Options](#)

[Installing your TeamAgenda System](#)



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Setting Up the TeamAgenda Palm Conduits

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The TeamAgenda Palm Conduits are installed using the [TeamAgenda Installer](#) program. However, before you can synchronize with the Palm, for each TeamAgenda conduit you have installed you must:

- turn on synchronization;
- define the conduit's specific settings; and
- choose the TeamAgenda agenda file the Palm should synchronize with.

Note: After installing the TeamAgenda Palm conduits on Macintosh, there may be conflicts with previously installed conduits. You should resolve these conflicts before continuing; see [Resolving Palm Conduit Conflicts on Macintosh](#).

To open the TeamAgenda Conduit Settings dialog box:

- In Windows
 1. Right-click on the HotSync Manager icon in the Windows Taskbar Tray and select "Custom..."
 2. Select a TeamAgenda conduit and press the Change button.
- On Macintosh
 1. Open the HotSync Manager program.
 2. Choose Conduit Settings from the HotSync menu.
 3. In the Conduit Settings window, select a TA conduit then click the Conduit Settings button.

To set up the TeamAgenda Date Book conduit:

In the Settings dialog box:

1. Click the Reinitialize Synchronization button. Click Yes.

This is needed if you are synchronizing for the first time, have just upgraded, have reset the palm or are synchronizing with a new agenda.

2. Click "Synchronize" to turn on synchronization, or click "Do Nothing" to turn it off.

3. Check "Generate a log entry for every transaction during synchronization (results in slower synchronization)" if you want to keep a log file of all transactions.

This is needed only if you are trying to track synchronization problems. Normally this should **not** be checked.

4. Specify the time period to be synchronized: select one of three options.

To set a specific time period or synchronization (e.g., May 1, 2003 to June 30, 2003):

- Click the "Fixed" button;
- Enter a specific starting date (e.g., "From: May 1, 2003");
- Enter a specific ending date (e.g., "To: June 30, 2003").

All commitments included in this range will be synchronized.

To set a time period relative to the synchronization date (e.g., 1 week before and 2 weeks after):

- Click the "Relative to Synchronization Date" button;
- Enter the number of Weeks before the synchronization date (e.g., "1");
- Enter the number of Weeks after the synchronization date (e.g., "2").

In our example, synchronization will include all commitments that fall within a period starting 1 week before the date when you synchronize and ending 2 weeks after the date when you synchronize.

Once set, this time period will be maintained permanently until you reset it.

To synchronize all data:

- Click the "Synchronize Everything" button.

All commitments will be synchronized. If your TeamAgenda file is large, make sure your Palm has enough free memory to process all the information.

5. Click the Choose... button to select the TeamAgenda personal agenda file that should be synchronized with the conduits. Whether you are using one or more TeamAgenda conduits you can synchronize them with only one personal agenda file

To set up the TeamAgenda To-Do list conduit:

In the Settings dialog box:

1. Click the Reinitialize Synchronization button. Click Yes.

This is needed if you are synchronizing for the first time, have just upgraded, have reset the

palm or are synchronizing with a new agenda.

2. Click "Synchronize" to turn on synchronization, or click "Do Nothing" to turn it off.
3. Check "Remove completed To Do items from the Palm" if you want completed To-Do items removed from the Palm during synchronization.
4. Check "Generate a log entry for every transaction during synchronization (results in slower synchronization)" if you want to keep a log file of all transactions.

This is needed only if you are trying to track synchronization problems. Normally this should **not** be checked.

5. Click the Choose... button to select the TeamAgenda personal agenda file that should be synchronized with the conduits. Whether you are using one or more TeamAgenda conduits you can synchronize them with only one personal agenda file.

To set up the TeamAgenda Address Book conduit:

In the Settings dialog box:

1. Click the Reinitialize Synchronization button. Click Yes.

This is needed if you are synchronizing for the first time, have just upgraded, have reset the palm or are synchronizing with a new agenda.

2. Click "Synchronize" to turn on synchronization, or click "Do Nothing" to turn it off.
3. Check "Generate a log entry for every transaction during synchronization (results in slower synchronization)" if you want to keep a log file of all transactions.

This is needed only if you are trying to track

synchronization problems. Normally this should **not** be checked.

4. Click the Choose... button to select the TeamAgenda personal agenda file that should be synchronized with the conduits. Whether you are using one or more TeamAgenda conduits you can synchronize them with only one personal agenda file.

Note on Contact Synchronization:

Only TeamAgenda contacts from your Personal Directory will be synchronized with the Palm, and any new contacts you create on the Palm will appear in your Personal Directory.

Note that your TeamAgenda Personal Directory contains both your private contacts (which are not visible to other TeamAgenda users) and public contacts that you have copied into your Personal Directory. If you are authorized to modify public contacts in TeamAgenda, you must be connected to your team to do so.

As a result, if you modify public contacts on your Palm, you must make sure that your personal agenda is connected to the team when you resynchronize with the Palm. Otherwise any changes made to public contacts on the Palm will be lost.

To continue, choose from the following options:

[Synchronizing your Palm](#)

[Palm Synchronization Exceptions](#)

[Differences between the TeamAgenda and Palm Address Books](#)

[Palm Groupware Enhancements](#)

Go back to:

[Configuring TeamAgenda and its Components](#)

[TeamAgenda/Palm Synchronization](#)

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Resolving Palm Conduit Conflicts on Macintosh

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There may be conflicts with previously installed conduits. Run HotSync Manager to resolve them.

1. Open the HotSync Manager program.
2. Choose Conduit Settings from the HotSync menu.

When more than one conduit is present for a type of information (schedule, to-do list, address book), the HotSync manager will present you with a dialog box listing them, asking you to select the one to use: choose one of the conduits you have just installed.

You may need to quit and restart HotSync Manager at least three times (for each type of conduit).

Note: If necessary, you may resolve these conflicts manually by moving any unnecessary conduits into a folder named "Disabled Conduits". You should restart HotSync Manager after doing this.

Go back to [Palm Conduit Setup](#)



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Synchronizing your Palm

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Important Note:

If you perform a hard reset on your Palm, always access the Palm Date Book once before synchronizing with TeamAgenda, otherwise the Palm Date Book may be corrupted and become inaccessible.

To synchronize with your Palm:

On your computer:

1. Start TeamAgenda and open the agenda you selected in the TeamAgenda Conduit Settings dialog box.

Note: On Macintosh, if you have not chosen to "Enable HotSync software at system startup" in your HotSync settings, you must first start the "Serial Port Monitor" program.

On your Palm:

2. Place your Palm in its cradle and press the HotSync button.

If you synchronize your TeamAgenda file with your Palm and then import new data into TeamAgenda, this new data may not be transferred to the Palm at the next synchronization. If this occurs, simply increase the length of the synchronization period defined in the TeamAgenda Conduit settings (from four weeks to five weeks, for example) and re-synchronize. The imported data will now appear on the Palm.

Note for Macintosh Laptop Users on a Network:

- **The problem:**
HotSync Manager may not activate when you press the HotSync

button on the Palm cradle if you are not connected to your network. (This can happen only if the cradle is connected to your PowerBook Printer/Modem port.)

The Printer/Modem port may be in use by AppleTalk. Your Mac may switch AppleTalk from Ethernet to the Printer/Modem port automatically if Ethernet is not available when you start your computer.

- **The solution:**

Open the AppleTalk control panel and choose a different port from the popup menu. The serial port will now be available for your Palm.

To Reinitialize Synchronization:

Normal synchronization with the Palm transfers only additions, modifications, and deletions.

For each TeamAgenda conduit, the "Reinitialize Synchronization" button in Conduit Settings lets you reset synchronization completely. This means that the next synchronization session will be slower, but will re-send all information.

Note: If you share your TeamAgenda personal agenda file with a TeamAgenda team **after** synchronizing with your Palm, it is recommended that you reinitialize synchronization.

To continue, choose from the following options:

[Palm Synchronization Exceptions](#)

[Differences between the TeamAgenda and Palm Address Books](#)

[Palm Groupware Enhancements](#)

Go back to:

[TeamAgenda/Palm Synchronization](#)



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Palm Synchronization and Exceptions

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The Palm and TeamAgenda use different scheduling models, which do not always correspond exactly. As a result, some information cannot be transferred, or is modified in the process.

From TeamAgenda to Palm

Transfers:

1. Scheduled commitments from TeamAgenda will be displayed at the correct date and time in the Palm Date Book. This includes Events and Unavailable markers that appear in the time grid.
2. All untimed commitments from TeamAgenda (in the Untimed area at the bottom of the weekly time grid) will appear in the Palm Date Book as untimed items displayed on their respective dates. This includes all-day Unavailable markers, public or private Events, and Holidays.
3. All to-do items from TeamAgenda will be displayed in the Palm To-Do List. Priorities set in TeamAgenda will carry over to the Palm.

Exceptions:

1. TeamAgenda will not transfer cancelled commitments.

From Palm to TeamAgenda

Transfers:

1. Items from the Palm Date Book will be displayed at the correct date and time in the TeamAgenda calendar.

2. An untimed item from the Palm Date Book (appearing at the beginning of a particular day) will be displayed as a TeamAgenda event for that day (in the Untimed area at the bottom of the weekly grid).

3. All to-do items created on the Palm will appear in TeamAgenda's To-Do List. Priorities set on the Palm will carry over to TeamAgenda.

Exceptions:

1. The Palm will not transfer repeating items. If you require repeating items, create them in TeamAgenda and then transfer them to your Palm.

2. The Palm will let you modify a synchronized commitment, but the modifications will be discarded during synchronization with TeamAgenda unless you have authorization in your team to modify the commitment.

3. When you delete a commitment or to-do item on the Palm, it will be marked as canceled in TeamAgenda instead of deleted.

To continue, choose from the following options:

[Differences between the TeamAgenda and Palm Address Books](#)

[Palm Groupware Enhancements](#)

Go back to:

[TeamAgenda/Palm Synchronization](#)

[Configuring TeamAgenda and its Components](#)



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Differences between TeamAgenda and Palm Address Books

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The TeamAgenda and Palm address books do not have exactly the same fields. As a result, some contact information in TeamAgenda will not be transferred to the Palm, and some Palm contact information will not be transferred to TeamAgenda. This information will not be lost when synchronizing, however, but will be left on each platform.

The following list shows the correspondence between TeamAgenda and Palm contact fields. - N/A - indicates that a field does not exist on one side or the other:

• **TeamAgenda**

Last Name

First Name

Middle Name

Full Name

Nick Name

Company

Department

Job Title

Business Street

Business City

Business State

Business Zip Code

Business Country

Business Phone

Business Message

Business Fax

Business Cellular

Business EMail Address

Business Web Page

Home Street

Home City

Home State

Home Zip Code

• **Palm**

Last Name

First Name

- N/A -

- N/A -

- N/A -

Company

- N/A -

Title

Address

City

State

Zip Code

Country

[Work]

- N/A -

[Fax]

[Mobile]

[E-mail]

- N/A -

- N/A -

- N/A -

- N/A -

- N/A -

Home Country	- N/A -
Birthday	- N/A -
Home Phone	[Home]
Home Fax	- N/A -
Home EMail Address	- N/A -
Home Web Page	- N/A -

Notes	Note
- N/A -	[Other]
- N/A -	[Main]
- N/A -	[Pager]
- N/A -	Custom 1
- N/A -	Custom 2
- N/A -	Custom 3
- N/A -	Custom 4

IMPORTANT NOTE:

To ensure that no data is lost because of the different fields in TeamAgenda and the Palm:

- 1) After creating private contacts in TeamAgenda, connect to your team before synchronizing with the Palm.

- 2) After creating contacts on the Palm, connect your personal agenda to your TeamAgenda team before synchronizing with the Palm.

To continue, choose from the following options:

[Palm Groupware Enhancements](#)

Go back to:

[TeamAgenda/Palm Synchronization](#)

[Configuring TeamAgenda and its Components](#)



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Palm Groupware Enhancements

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Palm Enhancements

TeamAgenda will insert in the Palm's Note window the commitment category and participants for a meeting. This information will be inserted between {*...*} at every synchronization session. When an item is modified, the previous information between {*...*} will be erased. Therefore, do NOT use {*...*} in your notes on the Palm or even in the TeamAgenda Comments field. You cannot create a meeting on the Palm: any participants between {*...*} will be ignored. Likewise you cannot assign a TeamAgenda category on the Palm.

Synchronization Conflicts

If the same commitment has been modified by you, on the Palm, and by someone else, on your network, the Palm version of the commitment will appear in TeamAgenda's Notifications window as cancelled, with the prefix "PDA:", and it is the commitment originating from TeamAgenda that will be synchronized with your team. However, you can then decide which version of the commitment is correct and eliminate the other one.

If the same contact has been modified on the Palm and in TeamAgenda, a copy of the Palm's contact will be archived to disk as a vCard file (.vcf) in the same directory as your TeamAgenda personal agenda file.

Go back to:

[TeamAgenda/Palm Synchronization](#)

[Configuring TeamAgenda and its Components](#)



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Contact your local TeamAgenda distributor or reseller,

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[TeamAgenda Resellers and Distributors](#)