



TeamSoft PDA Synchronization

Additional Information

Introduction

TeamSoft has implemented a synchronization module within TeamAgenda that allows TeamAgenda to exchange information with handheld devices through Microsoft Outlook.

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

Requirements

TeamAgenda 4.8.8 or later, TeamAgenda 5.0
Microsoft Windows 2000/XP/Vista/7
Outlook 2003 with Office Service Pack 2, Office 2007

Note: Outlook does not need to be running for synchronizing TeamAgenda data with your PDA.

Synchronization Dialog Window

The Synchronization Dialog Window is divided in three sections.

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

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

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

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



Data Exchange Settings

For Address Book, Calendar and To Do data, you have the control over how the synchronization process exchanges information with Outlook.

Synchronize the files

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

TeamAgenda data overwrites Outlook data

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

Outlook data overwrites TeamAgenda data

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Do not exchange data

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



Creating an Outlook pst file for TeamAgenda synchronization

TeamSoft recommend to create and use a dedicated pst file for synchronization with TeamAgenda. Please follow the following steps to create a pst file:

- Start Outlook.
- Go into File, Data File Management, Add.
- Select Office Outlook Personal Folders File (.pst).
- Enter a filename (you can name it TeamAgenda).
- A new window will appear (Create Microsoft Personal Folders); Change the name to TeamAgenda.
- Select Close

Note: You will need to create an Agenda, Address Book and ToDo folders in your new pst file.

How to create a Calendar in a pst file ?

- Start Outlook.
- Right click on the newly created pst file and select New Folder.
- For "Name", type "TeamAgenda Calendar".
- For "Folder Contains", select "Calendar Items".
- For "Select where to place the folder", select the newly pst file that you have created.

How to create an Address Book in a pst file ?

- Start Outlook.
- Right click on the newly created pst file and select New Folder.
- For "Name", type "TeamAgenda Address Book".
- For "Folder Contains", select "Contact Items".
- For "Select where to place the folder", select the newly pst file that you have created.

How to create a ToDo list in a pst file ?

- Start Outlook.
- Right click on the newly created pst file and select New Folder.
- For "Name", type "TeamAgenda ToDo".
- For "Folder Contains", select "Task Items".
- For "Select where to place the folder", select the newly pst file that you have created.



What do I need to synchronize my Palm with TeamAgenda ?

You need to install the version of HotSync for Outlook. The software is available on the CD that is included with your Palm. The software is also available at the following URL:

<http://www.palm.com/us/support/outlooksupport.html>

Please make sure that you configure the software to synchronize with the right pst file.

What do I need to synchronize my PocketPC with TeamAgenda ?

You need to install the ActiveSync for PocketPC. The software is available on the CD that is included with your PocketPC. You can also get a copy of ActiveSync on the Microsoft web site.

Please make sure that you configure the software to synchronize with the right pst file.

Synchronization Steps

Here are the basic steps for synchronizing your PDA with TeamAgenda. The assumptions are that you have created a valid pst file (and folders) in Outlook.

- Start TeamAgenda.
- Go into File and select Synchronize using Outlook.
- The Synchronization Dialog Window will appear.
- Select your pst file and the synchronization options.
- Press Start
- When you will see "Please do the synchronization of your device with Outlook", manually sync your device with Outlook as describe in the documentation of your synchronization tool.
- Press Continue
- When you will see "Done" in the Progress Log, Press Close.

Note on synchronizing pst file with PDA

Some synchronization software only allow synchronization with the pst file who is flagged as the "Mail delivery location". Your pst file may need to be modified to become the "Mail delivery location". To do this, here are the steps:

- Go into Tools and "Email Accounts"
- Select "View or change existing E-mail account"
- In "Deliver new e-mail to the following location", select the pst file that you want to synchronize with your PDA.
- Select Finish.