teamSync brief introduction
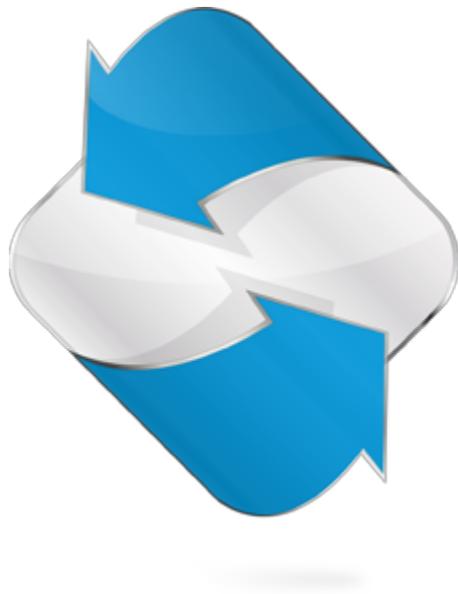
Version 4.0 - 19. November 2012

1 Introduction

With teamSync, you can synchronise the products teamspace and projectfacts with Microsoft Out-
look. Download teamSync here if you haven't already done so. Double click on the downloaded file to
start the installation.

2 The interface

When you launch teamSync for the first time, you will see the main window with a connection over-
view which is initially still empty.
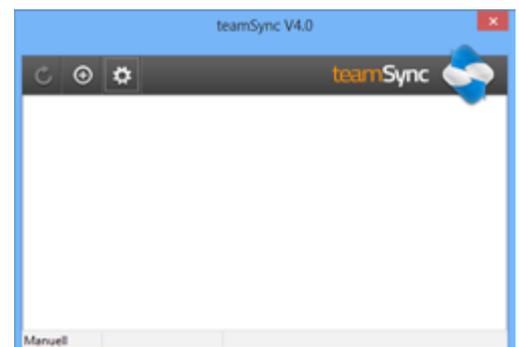
The following buttons are available here:

Launch manual synchronisation
(active, as soon as a connection is established)

Create a new connection

Change general teamSync settings

2.1 General settings

In the general settings you can chose the language and decide whether the
synchronisation should be carried out manually or automatically at specific
intervals.

You can also set the time period for which meetings will be synchronised.
This means that very old meetings and those very far in the future will not
be synchronised, in order to keep the volume of data low.

If you want to connect via a proxy server or the server you host yourself is
only accessible via an unsecured connection, you can adjust the settings
for that here.
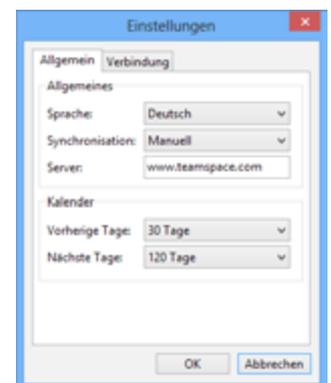
3 Setting up a new connection

3.1 Connections

A connection determines which data are synchronised with which calendar or address book in your Outlook. Each connection only ever synchronises one type of data, so either meetings, tasks or contacts.

If you create a new connection, you first have to select the product to which you want to connect.

3.2 Selection of the product

Here you can select whether you want to connect to teamspace or projectfacts. If you are operating teamspace or projectfacts on your own server, please select the third option, „customer server".

3.3 Access data

Enter the access data that you also use to log in to teamspace or projectfacts here.

If you are hosting your own server, you have to enter the server address here. In projectfacts you can find this address in the personal settings under the menu item synchronisation when you click on the synch profile that you want to use.
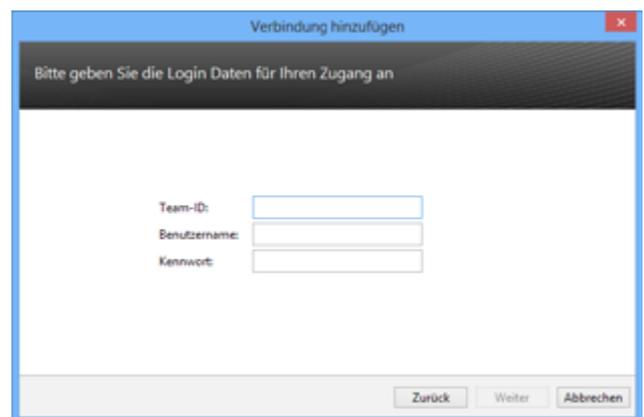
3.4 Connection type

Please select whether you want to create a connection to synchronise your calendar, address book or tasks. You need a separate connection for each data type

3.5 Direction of synchronisation

Using teamSync, you can synchronise in one direction or both directions. Only if you synchronise in both directions will changes and new meetings that you make in Outlook be synchronised with the server. Choose unidirectional synchronisation if you want to ensure that no data can be changed using Outlook.
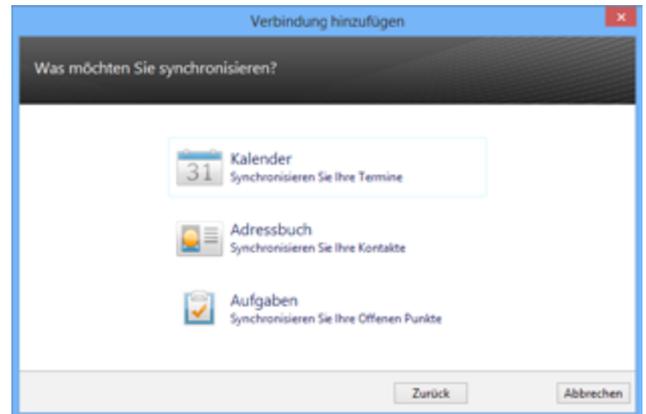
3.6 Selection of the Outlook folder

Here you can set which folder (in other words a calendar or address book) you want to connect to the server.

Since you can easily work in Outlook with several calendars and you can also create these on top of one another, we recommend using a separate calendar for synchronisation if you also have meetings which you do not want to synchronise (such as private meetings).

If you are synchronising with projectfacts, you can also choose a suitable synchronisation profile here. This determines which data are synchronised from the server and how data created in Outlook is imported into projectfacts.

3.7 Other settings

3.7.1 Labelling

If you do not want to use a separate calendar for synchronisation, you may want to mark the meetings you have synchronised in a specific way.

You can either specify a marker which is added in square brackets to the end of the subject of a meeting or a task,or you can label it using categories. Before you transfer it to the server the label will be removed again.
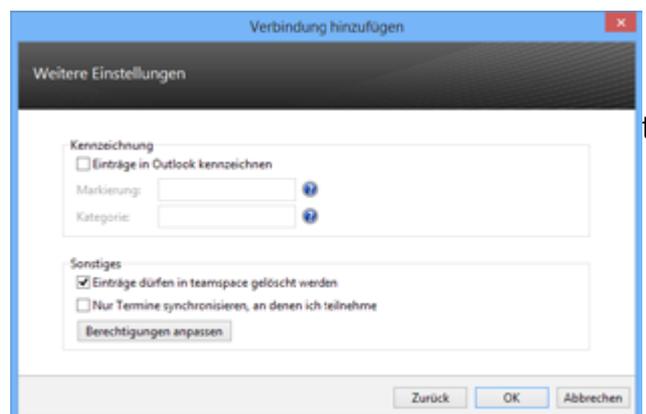
Please not that you cannot subsequently change the labelling of a category once you have establis-hed the connection.

3.7.2 Entries may be deleted (only teamspace)

You can only delete entries on the server via Outlook if this option is activated.

3.7.3 Only synchronise meetings I am taking part in (only teamspace)

In the standard settings, all meetings from teamspace to which you have access are imported into Outlook.

If you tick this box, only meetings in which you are marked as a participant will be imported into your Outlook.

3.7.4 Authorisations for new entries (only teamspace)

The authorisations decide who in your teamspace team can view or change data created via Outlook.

4 Expanded options for connections

Right click on an existing option to edit it. You have the following options:
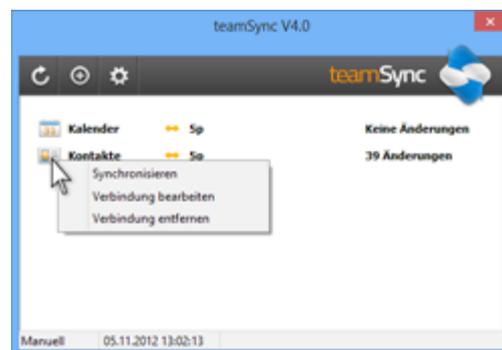
4.1 Join team (only teamspace)

A new browser window opens and you will be taken directly to the teamspace team which belongs to that connection without an additional login.

4.2   Edit connection

You can use this option to change the settings for the connection.

The same steps are carried out as for setting up the connection.

4.3 Remove connection

teamSync will ask whether the entries associated with this connection should also be deleted when the connection is deleted.

Keep data — The connection will be deleted. All data will be kept.

Delete data — The connection will be deleted. All entries in the linked Outlook folder will also be remover. (recommended)

We recommend that you delete the data. Otherwise all of the existing meetings will be duplicated if you create the connection again.

5 Contact, support

Please contact us directly if you have any further questions. We are available at any time by phone or via email.

teamSync-Support

Tel.:   06151-13097-0
E-Mail: support@teamspace.de   support@projectfacts.de