**TeamAgenda synchronization under Windows**

## 1. Requirements.
- TeamAgenda 5.1.1 (5.1.0 – no Autosync)
- Connection to TA-Server with a valid support license.
- Outlook 2003 or later

## 2. Synchronized data
TeamAgenda synchronizes with Outlook the following data:
- Address book.
- Calendar and To-dos.

## 3. Synchronization details
- TeamAgenda is disconnected from the server at the beginning of the synchronization procedure, and is then reconnected to the server at the end.
- TeamAgenda synchronizes with the default Outlook data file (pst-file).
- It's strongly recommended to disable Default reminder in Outlook (Tools->Options->Preference->Calendar section) the first time that synchronization is executed.
- After the synchronization procedure, the screen will display the last 'Workset' used.

## 4. Address Book synchronization details
- Only the personal directory of the Address Book is synchronized.
- Only TeamAgenda Contact information can be overwritten from Outlook. TeamAgenda Users and Resources appear in Outlook as Contacts and information for them cannot be overwritten in TeamAgenda from Outlook.
- Business e-mail from TeamAgenda goes to the field "E-mail 1" of Outlook.
- Home e-mail from TeamAgenda goes to the field "E-mail 2" of Outlook.
- Outlook field "E-mail 3" is not synchronized.

## 5. Calendar and To-dos synchronization details
- Priorities:

| TeamAgenda | Outlook |
|------------|---------|
| 1 | High |
| 2 | High |
| 3 | Normal |
| 4 | Low |
| 5 | Low |

- "Completed" status (checkmark) is supported only for Tasks/To-dos in Outlook. No such status exists for Appointments.
- The Appointment title field in Outlook will be truncated to 50 characters in TeamAgenda.

- Due to the possibility of "scheduling" To-do items (converting to a Commitment) in TeamAgenda, the corresponding Task in Outlook will be deleted and an Appointment will be created.
- Color coding scheme is not the same in Outlook and in TeamAgenda and is therefore not synchronized.
- Repeated Commitments from TeamAgenda are recognized in Outlook as unlinked Appointments.
- Recurrent Appointments from Outlook don't go to TeamAgenda as a set of Commitments, only the first appointment will go to TeamAgenda due to the way recurrent appointments are stored in Outlook.
- Alarms are not synchronized.
- Categories are not synchronized.
- "Spilled Commitments" are not supported in Outlook and therefore will appear as separate unlinked Appointments in Outlook.

6. **Usage**
   - The synchronization process may be launched from TeamAgenda's File menu item labeled "Synchronize using Outlook..." as seen on Figure 1.
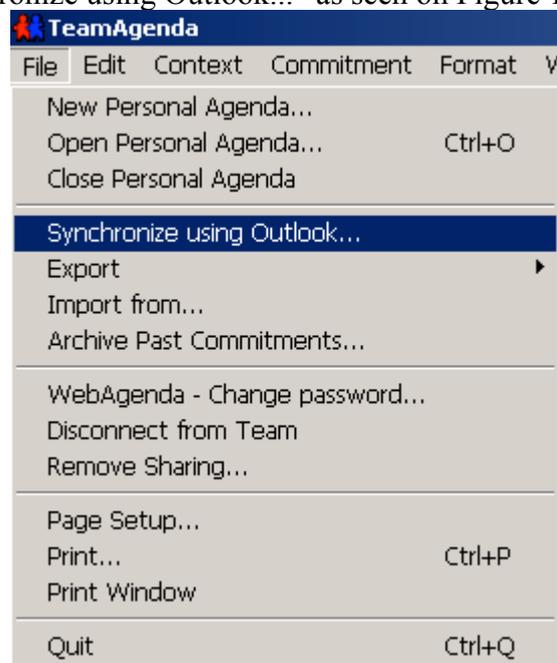


**Figure 1 - Synchronize using Outlook... File menu item.**

- Main synchronization window (see Figure 2) contains:
  - selection of items to be synchronized: Agenda/To-dos and/or Address Book;
  - behavior in case of conflicts: user can select either TeamAgenda or Outlook to override;
  - range of dates for synchronization;
  - parameters of the automatic synchronization (see details below);
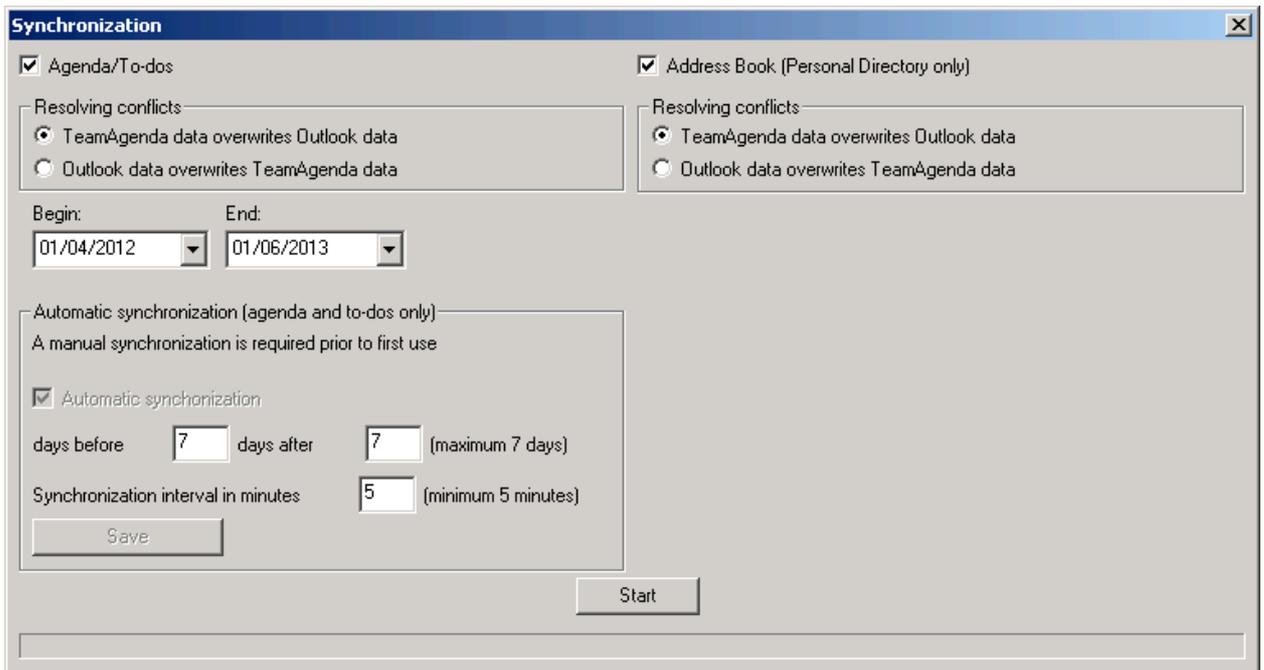
**Figure 2 - Main synchronization window.**

- o Synchronization procedure can be started by pressing the button "Start"
- o When synchronization procedure is done, user will see the message as displayed on Figure 3. Press "Ok" to close the message.
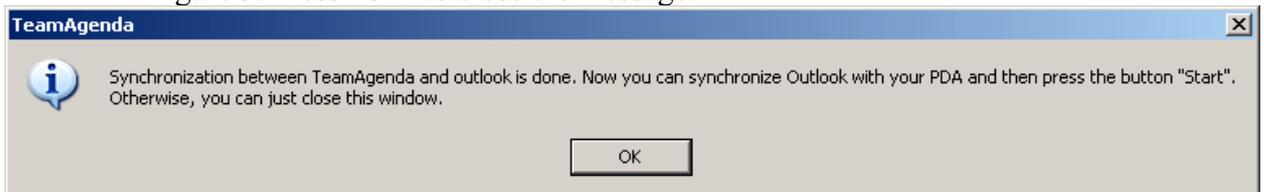


**Figure 3 - First phase of synchronization succeeded**

- o Now there are two possibilities:
    - ▪ Finish the synchronization operations by closing the main synchronization window;
    - ▪ Synchronize Outlook with a user's mobile device or any external environment and then press "Start" button again to synchronize back new data to TeamAgenda.
- o In order to keep data consistency between personal agenda and Outlook data-file, TeamAgenda stores "correspondence" token. In case of mismatched data TeamAgenda shows the error message as seen on Figure 4. This message contains information about the previous synchronization. Zero means that this file wasn't synchronized.
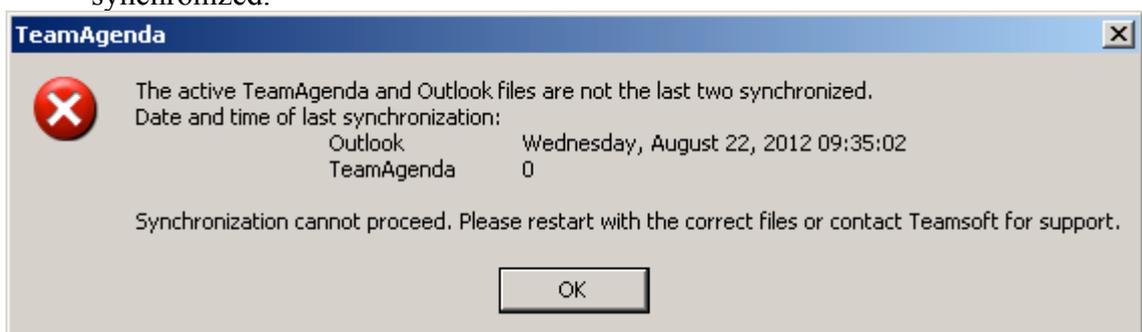


**Figure 4 - Mismatched data**

7. **Usage of automatic synchronization**
   - At the first opening of the synchronization window (as seen on the Figure 2) the automatic synchronization is not available. A manual synchronization is required before the first use.
   - The automatic synchronization has different parameters (see such as:
     - Range is reduced to maximum 7 days before and 7 after the current date;
     - Interval between synchronizations can be set between 5 and 1200 minutes.



**Figure 5 – Automatic synchronization preferences**

   - In order to apply your settings and lunch the automatic synchronization, just press the button "Save" and close the window.

8. **Known problems**
   - Sometimes the Address Book is not refreshed after the synchronization. Manual reconnection to the server is required.