

teamSync Quick Guide

Version 4.0

19. November 2012



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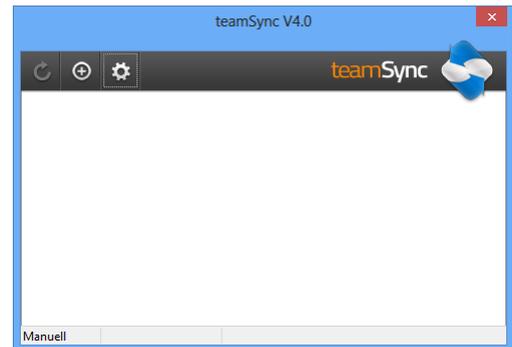
1 Introduction

With teamSync you can synchronize teamspace and projectfacts with Microsoft Outlook. You can download teamSync [here](#) if you haven't already. Double-click the download file to start the installation.

2 The user interface

If you use teamSync for the first time, you see the main window with a connection list, which is initially empty. The following buttons are available:

-  Start synchronization manually
(active as soon as a connection has been added)
-  Add a new connection
-  Edit general settings of teamSync

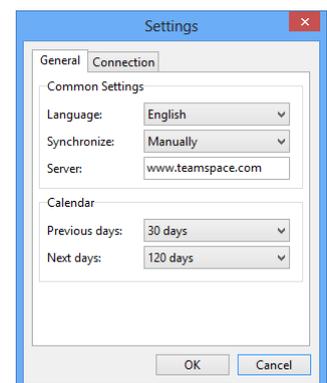


2.1 General settings

In the general settings you can set the language, and decide whether the synchronization should be started manually or automatically at specified intervals.

Additionally you can limit the time frame for appointments. Thus old and far in the future lying dates will not be synchronized to keep the data volume low.

If you need to connect through a proxy or your self-hosted server can be accessed only through an unsecured connection, you can set appropriate defaults.



3 Add a new connection

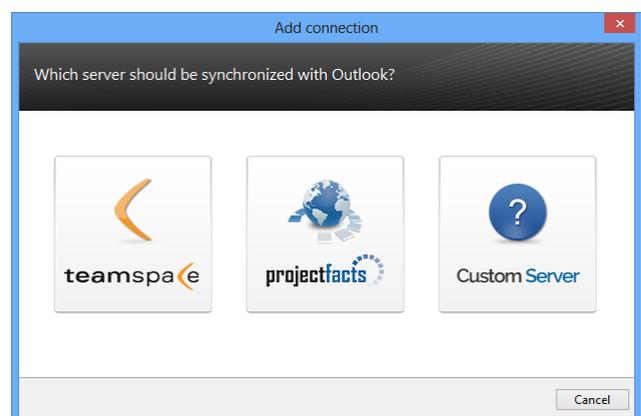
3.1 Connections

A connection defines what data is synchronized with which Outlook calendar or address book. Each connection synchronizes only one type of data. Either appointments, tasks or contacts.

When you create a new connection, in the first step you need to select the product with which you want to connect.

3.2 Select a product

Choose whether you want to connect to teamspace or projectfacts. If you have teamspace or projectfacts installed on your own server, please select the third option "Custom Server".



3.3 Login data

Then please enter your login details for teamspace or projectfacts.

If you run your own server, you must also specify the address of the server. In projectfacts you can find this address in your personal settings under the menu item synchronization, if you click on the desired sync profile.

3.4 Connection type

Please choose whether you want to create a connection to synchronize your calendar, address book or tasks. For each data type, you need a separate connection.

3.5 Direction of synchronization

With teamSync you can synchronize one- or two-way. The two-way synchronization ensures that all changes and new appointments are synchronized between Outlook and the server. If you select the one-way synchronization, only changes made on the server will be synchronized to Outlook.

3.6 Selection of the Outlook-folder

Here you can select which folder (e.g. a calendar or address book) you want to connect to the server.

Since you can work with multiple calendars in Outlook comfortably and you can also place one above the other, we recommend using a separate calendar for the synchronization. Thus you can easily control, which appointments should be synchronized and which ones not (e.g. private appointments).

If you synchronize with projectfacts, you can select a suitable synchronization profile here. This determines what data is synchronized from the server and how new Outlook entries should be imported into projectfacts.

3.7 Additional settings

3.7.1 Labeling

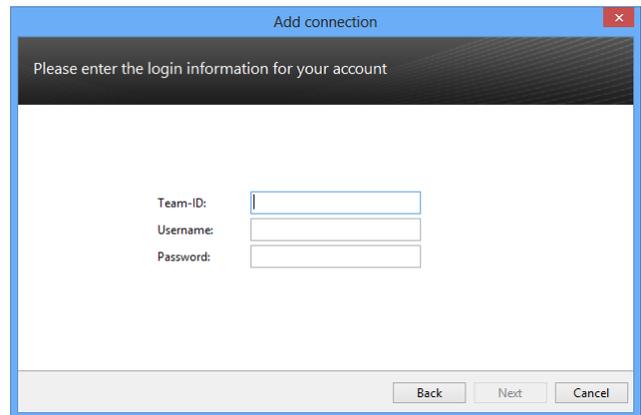
If you don't use a separate calendar for syncing, you might want to mark the synchronized appointments.

You can set a marker which is appended in brackets to the subject of an appointment or task.

Additionally you can enter a category, which will be added to each synchronized entry in Outlook.

Both labels remain in Outlook and won't be synchronized to the server.

Please note that the category can't be changed later, once you have created the connection.



Add connection

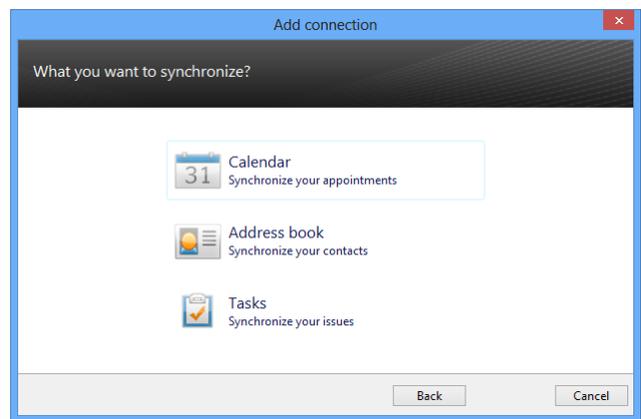
Please enter the login information for your account

Team-ID:

Username:

Password:

Back Next Cancel



Add connection

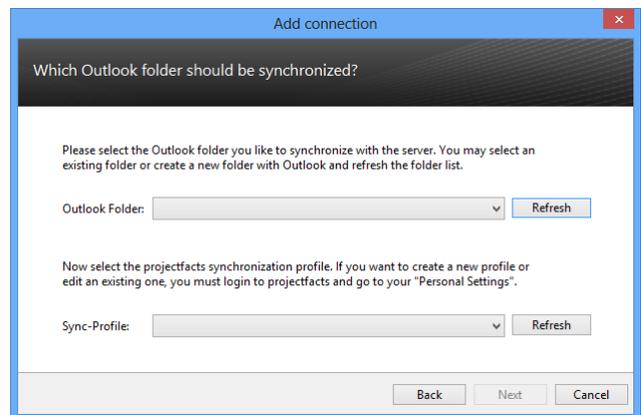
What you want to synchronize?

Calendar
Synchronize your appointments

Address book
Synchronize your contacts

Tasks
Synchronize your issues

Back Cancel



Add connection

Which Outlook folder should be synchronized?

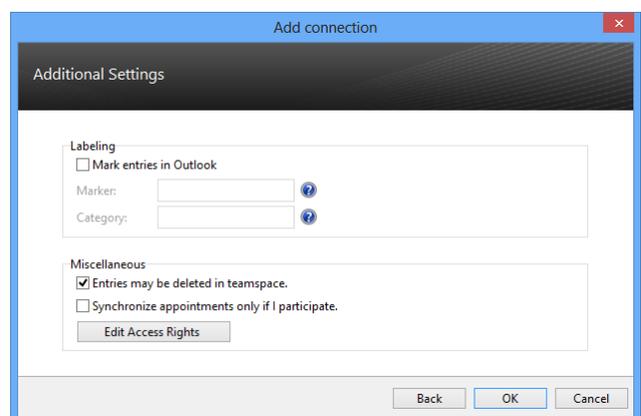
Please select the Outlook folder you like to synchronize with the server. You may select an existing folder or create a new folder with Outlook and refresh the folder list.

Outlook Folder: Refresh

Now select the projectfacts synchronization profile. If you want to create a new profile or edit an existing one, you must login to projectfacts and go to your "Personal Settings".

Sync-Profile: Refresh

Back Next Cancel



Add connection

Additional Settings

Labeling

Mark entries in Outlook

Marker: ?

Category: ?

Miscellaneous

Entries may be deleted in teamspace.

Synchronize appointments only if I participate.

Edit Access Rights

Back OK Cancel

3.7.2 Entries may be deleted in teamspace (teamspace only)

Only if this option is enabled, entries you delete in Outlook will be deleted on the server too.

3.7.3 Synchronize appointments only if I participate (teamspace only)

By default, all appointments from teamspace will be imported into Outlook, which are accessible to you. If you check the box, appointments will only be created in your Outlook if you're a participant.

3.7.4 Access rights for new entries (teamspace only)

By editing the access rights you can control who in your teamspace-team should be able to view or change the newly created entries in your Outlook.

4 Advanced options for connections

To edit an existing connection, do a right-click on it. You have the following options now:

4.1 Enter team (teamspace only)

A new browser window will be opened and you'll be redirected to your teamspace team without the need to enter your login data.

4.2 Edit connection

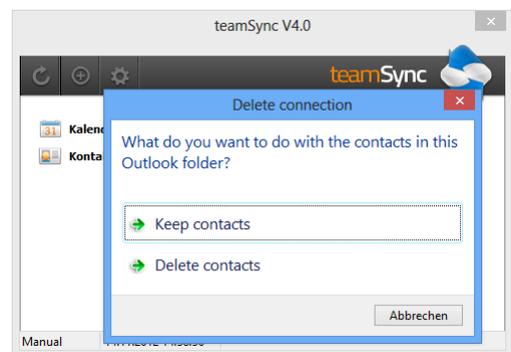
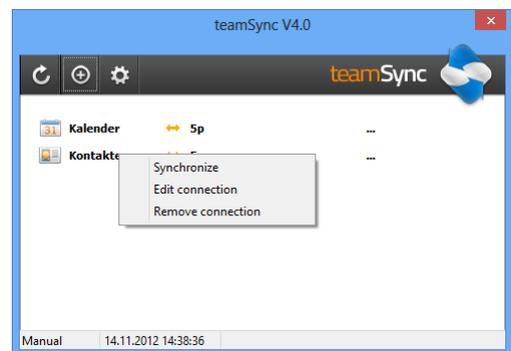
With this option, you can change the settings of the connection. You'll get a wizard similar to the one you had when you created the connection.

4.3 Delete a connection

teamSync asks, whether the entries (e.g. appointments, tasks or contacts) which belong to this connection should be deleted as well.

Keep entries	The connection will be deleted. All entries are kept.
Delete entries	The connection will be deleted. Additionally all associated entries will be deleted in Outlook. <i>(recommended)</i>

We recommend deleting the data. Otherwise, it might be possible to double every existing entry when you create the connection again.



5 Contact, Support

If you have any questions, please contact us directly.

teamSync-support

Tel.: +49 (0) 6151-13097-0

E-Mail: support@teamspace.com support@projectfacts.com