

2 Way Outlook & WorkCenter Contacts and Calendar Syncing Information

We have created an add-on module that will allow you to sync your Outlook Contact and Calendar items into WorkCenter and also back into Outlook from WorkCenter. This is a very useful tool if you are using a PDA or other programs that sync data from Outlook to a third party program. If you have acquired this add-on module, there are a few important items to know and understand before you synchronize your calendar or contact data from WorkCenter into your Outlook software.

Just a quick reminder, if you are syncing data to and from Outlook, Outlook needs to be set as your primary email system.

You can verify that by clicking on your Microsoft Internet icon, the big blue E. Once this program is open and you have your default internet page showing, click on TOOLS, INTERNET OPTIONS, and THE PROGRAMS TAB. THE EMAIL DEFAULT LINE should show MICROSOFT OUTLOOK.

Item #1: Let's review your WorkCenter software system setup screens to see if you have acquired this module and if it is activated. Click on TOOLS, vSYNC and select Outlook Contacts. You will notice the "Update Contacts" screen appear. This screen will show three options. If your copy of WorkCenter is activated for the two-way synchronization, you will be able to click into the circle next to the two-way sync option.

Item #2: When syncing contact data or calendar items from WorkCenter to Outlook, you will need to declare which program, Outlook or WorkCenter, has priority. If you select WorkCenter, the data in WorkCenter will overwrite the Outlook data. The same is true if you select Outlook to overwrite WorkCenter data.

Item #3: Before you synchronize any data between programs, we suggest you backup your WorkCenter database. We would also suggest you speak with your technical staff and backup your Outlook calendar and contact data files.

Item #4: Make sure you have selected which program has priority by clicking on the drop down arrow directly under the two-way syncing option. Once you have selected the appropriate priority setting, click on the "Update" button to complete the synchronization.

Item #5: The same procedures are used if you are syncing Outlook or WorkCenter calendar items. You will need to click on TOOLS, vSYNC and then select "Outlook Calendar" option.

If you wish to know more about WorkCenter, read the WorkCenter Quick Start Reference Guide, watch the other flash videos and watch for the next upcoming Coaching and Training WEBnR classes.