



PlanningPME

Schedule easily

Synchronization with Outlook

I. Description of this feature

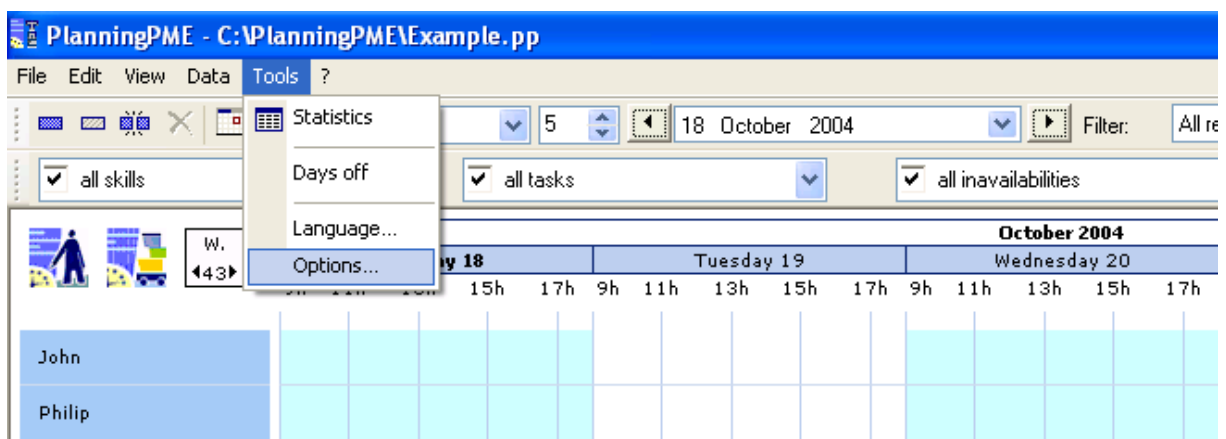
PlanningPME is compatible with Outlook.

When a task is created on PlanningPME, it can be automatically synchronized with Outlook.

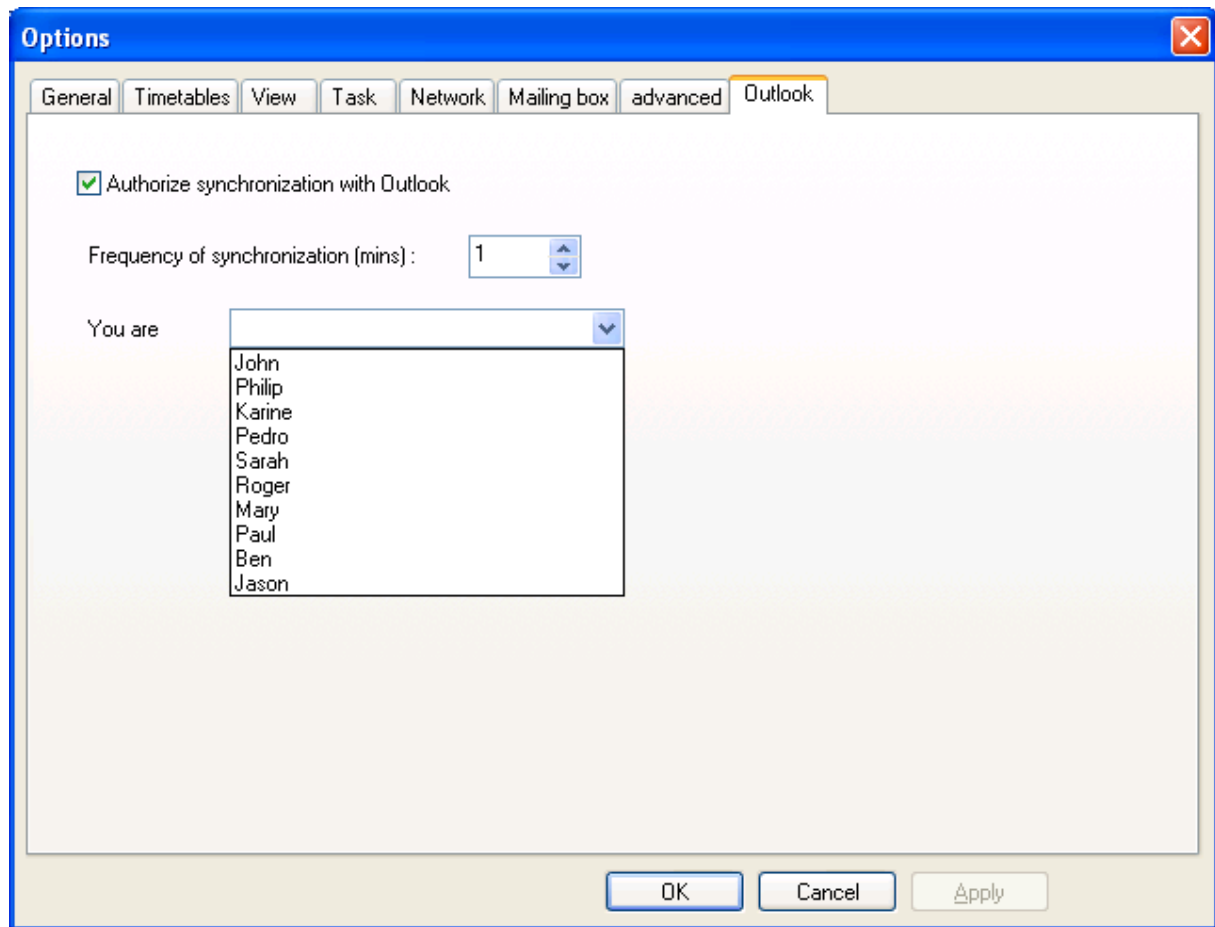
Careful! The synchronization works only from PlanningPME to Outlook! A task first created with Outlook will not be synchronized with PlanningPME!

II. How to set up Outlook?

a. From PlanningPME, go to “Tools” -> “Options”



b. Choose the tab « Outlook ». The following window appears.



c. Tick on the box « Authorize synchronization with Outlook »

d. **Frequency of synchronization:** It is the frequency of the synchronization between PlanningPME and Outlook.

e. **You are:** Choose on the list of human resources your name. Tasks created on your line will be displayed on your Outlook.

f. Click on « Ok »

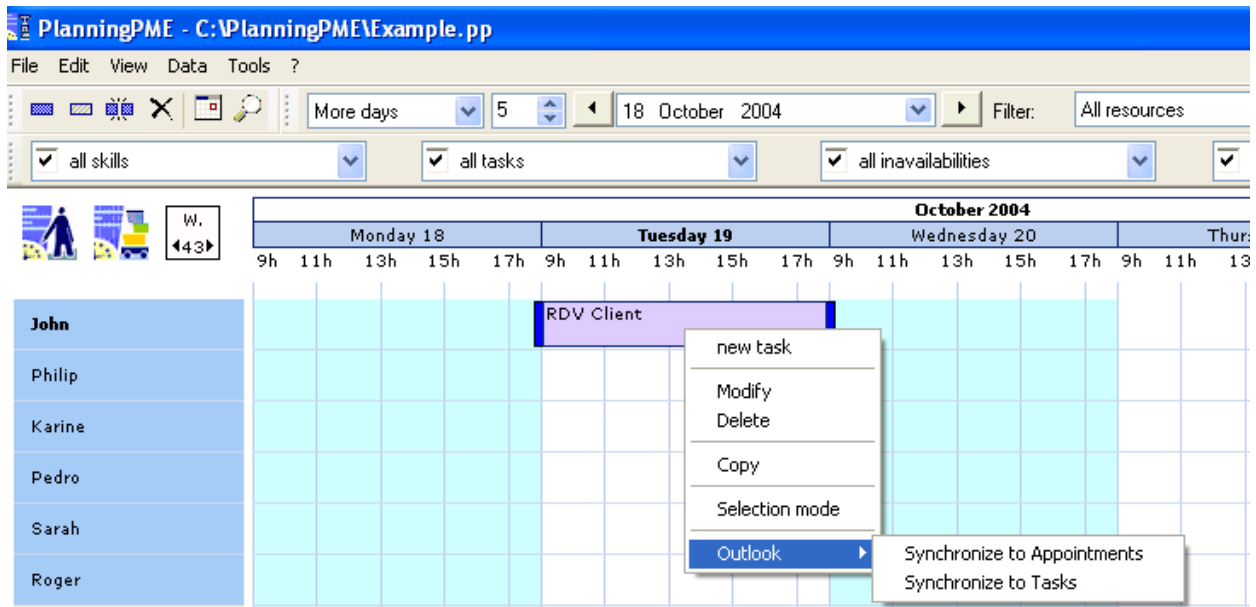
g. Go back to PlanningPME.



III. Tasks synchronization with Outlook

Create a task on your schedule line. On this example, we create the task « RDV-VS Client » for the resource « John ».

Then, put your mouse on the task and click right. Then, choose « Outlook ».



You can synchronize your task to Appointments or Tasks on Outlook.

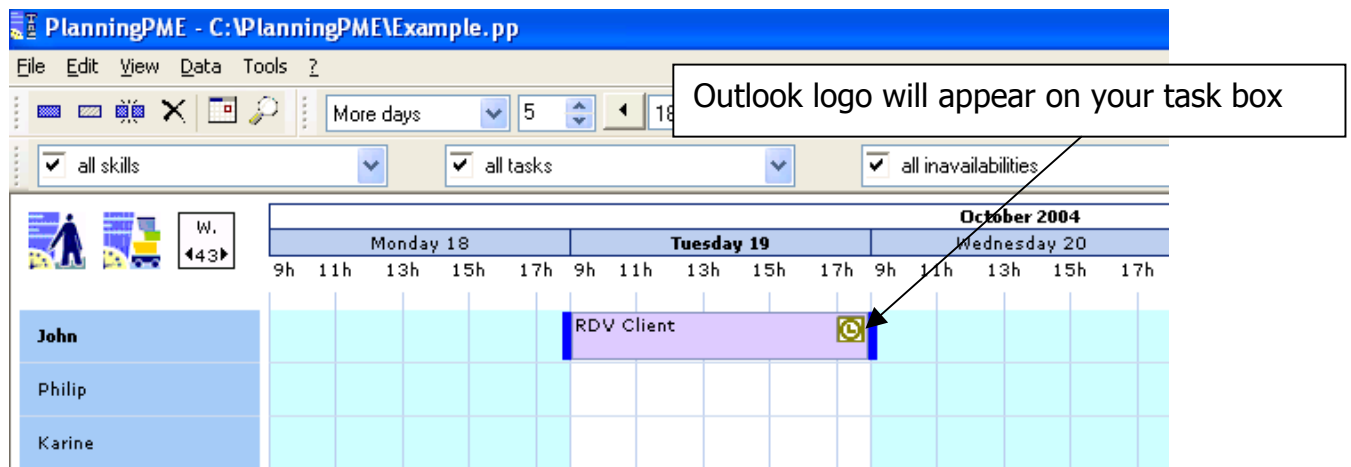
« Synchronize to Appointments »



« Synchronize to Tasks »



Then the synchronized task will appear this way on your schedule:

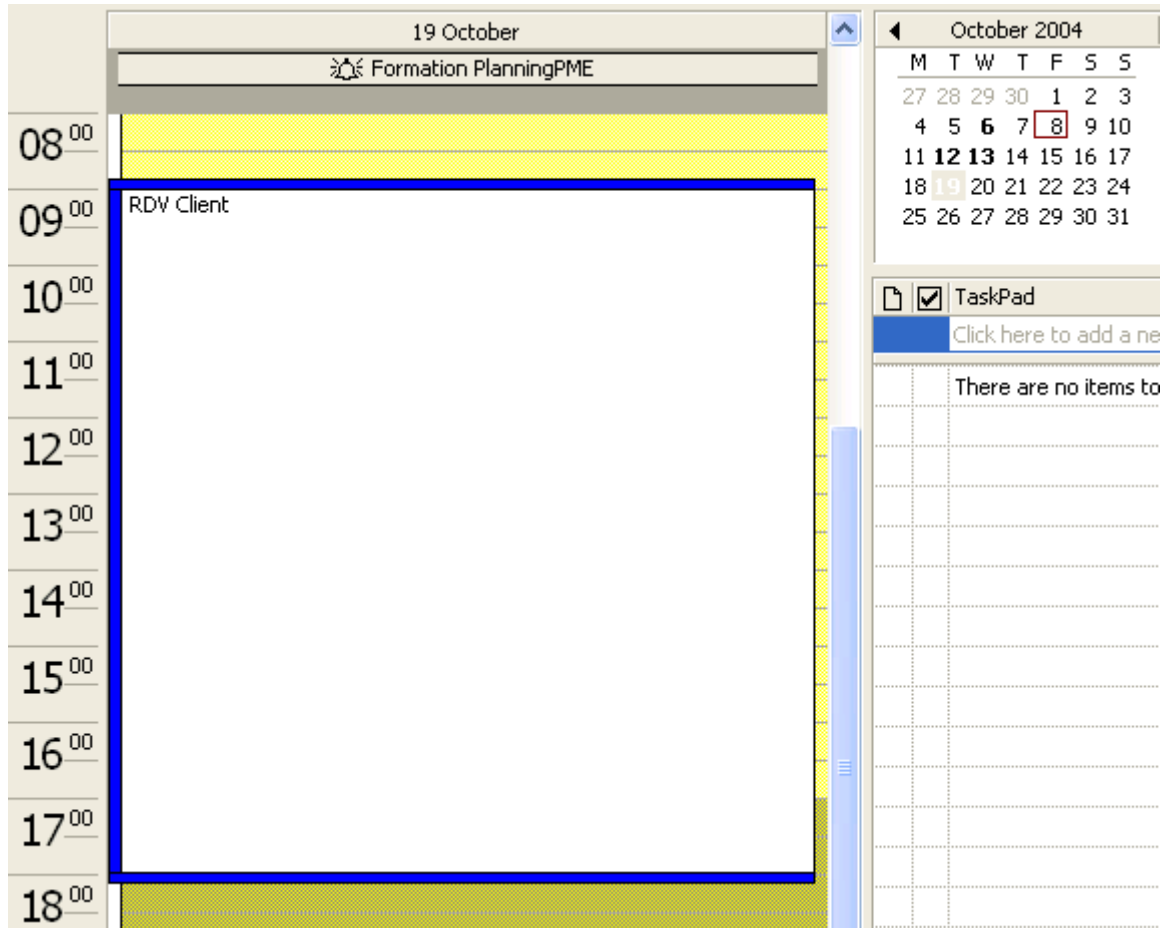




Visualization on Outlook:

In Outlook, tasks appear this way:

- Outlook “Appointments” :

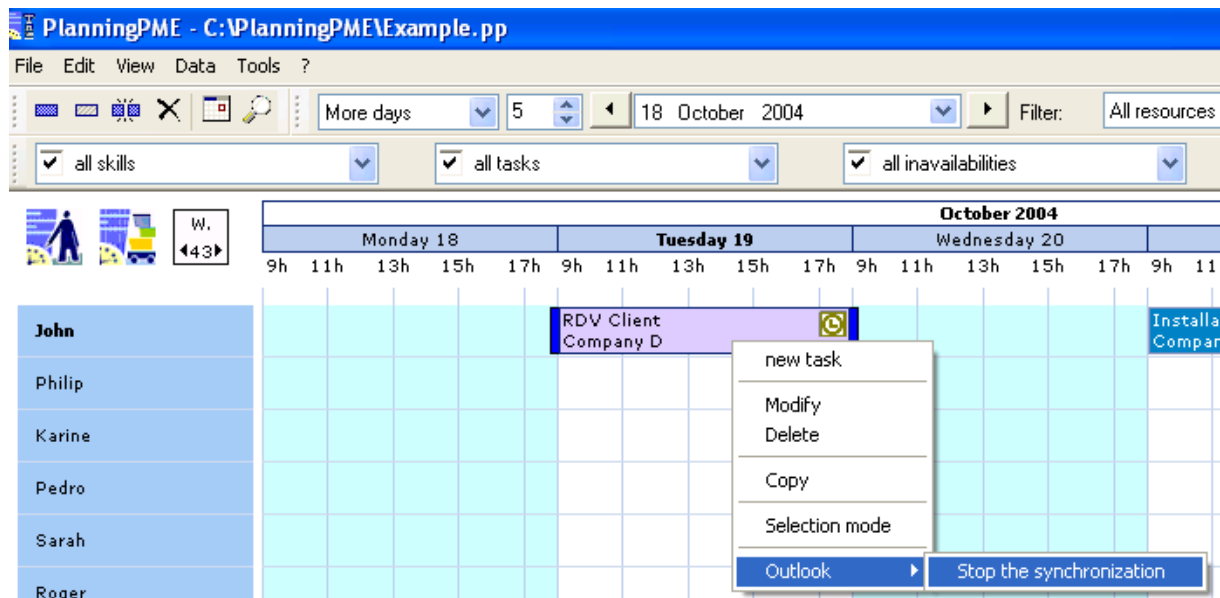


- Outlook « Tasks »

<input checked="" type="checkbox"/> Subject	Due Date
Click here to add a new Task	
<input checked="" type="checkbox"/> Installation	Wed 20/10/2004
<input checked="" type="checkbox"/> Installation	Wed 13/10/2004



- You can assign several tasks on a same time to one resource
- You can also assign a task to several resources. In this case, the task will appear on each resources Outlook schedule.
- Each time a task will be modified in PlanningPME, automatically, changes will be updated in Outlook and conversely. When you change a synchronized task in Outlook, it will be updated in PlanningPME.
- To stop the synchronization, Put your mouse on the task and click right. Then, select "Outlook" -> "Stop the synchronization".



With this synchronization, you will save time avoiding a double typing of your appointments and other tasks.



IV. Contact PlanningPME

For any help or information about the software PlanningPME, the team of TARGET SKILLS is at your entire disposal.

PlanningPME

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<http://www.planningpme.net>

TARGET SKILLS

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