

# **Teambox Suite**

**Including Microsoft ® Outlook 2003 & 2007 Connector**

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## **User Guide**

**VERSION 2.1.7**

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## I • An Introduction To The Teambox Suite

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Welcome to the Teambox Suite User Guide, this guide will allow you to get familiar with the Suite and its many functions.

Through the use of Teamboxes, the Suite enables you to collaborate securely with your clients and partners in a variety of ways:

- **Attachment Management**
- **Sharing Files**
- **Sharing your screen**
- **Instant Messaging**

So by creating a Teambox you can get everyone on the same page and have the proper tools to get your work done.

The Suite is accessible to everyone; for example if you've been invited to a Teambox you can access its contents, share information with its members without needing a license. However you will need a license to create your own Teamboxes and invite who wish to your new Teamboxes.



*The Teambox Logo*





## II • Working With The Suite Installed

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This section details how to use the Suite once it's been installed on your PC. If you don't have the Suite installed or can't install it, [click here](#) for instructions.

**NOTE:** Make sure you complete the registration process by going to the “Help” menu and clicking on “Register...”. If you have a license, enter your information in the appropriate fields, if not you can still use the Suite to participate to the Teamboxes you're invited to.

When Outlook 2003/2007 is present the Suite will automatically install the Teambox Outlook Connector. The Connector simplifies access to the Suite's basic functionalities by integrating them to your email client.

For example, using the Connector you can create a Teambox, add participants to a Teambox or join a Teambox right from Outlook.

**NOTE:** All these functionalities are present in the Teambox Manager; the Connector isn't required to make full use of the Suite's capabilities.

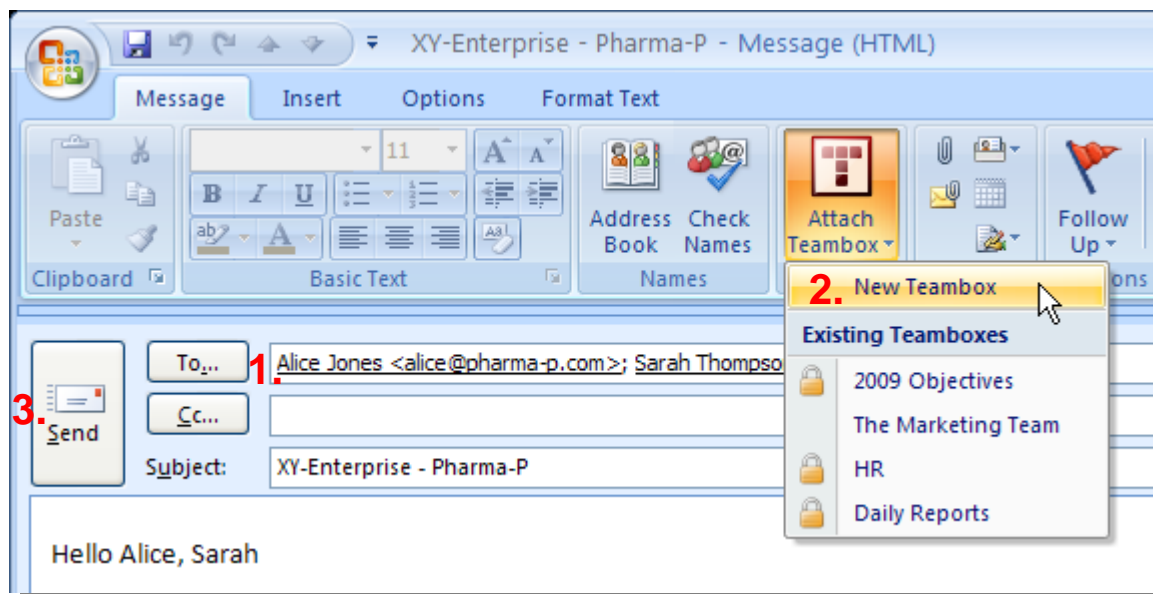
## 1. Using The Outlook 2003/2007 Connector

The next headings explain how to use the Suite's basic functions through Outlook. If you prefer using the Teambox Manager or don't have access to the Outlook Connector, [click here](#) for the corresponding instructions.

### 1.1. Creating a Teambox with the Outlook Connector

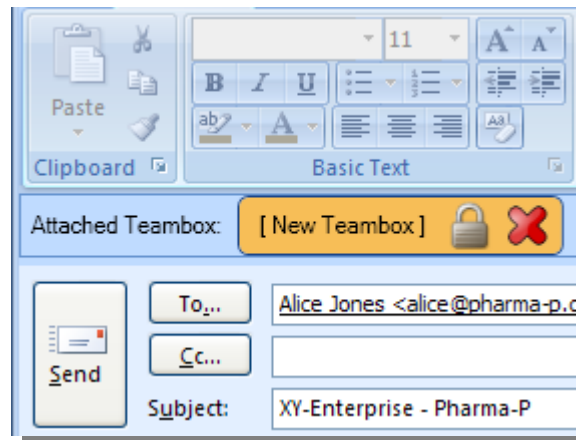
Creating a Teambox is as easy as 1 - 2 - 3, in a **new email**:

1. Add who you want to invite to your Teambox to the **recipient list**.
2. Click on the Teambox icon and select "**New Teambox**".  
Optional: Click on the **Lock** icon to change what **type** of Teambox you'd like to create.
  - a. **Standard Teamboxes** (default) require the recipient(s) to have the email invitation to access it.
  - b. **Secure Teamboxes** work the same way but also require the recipient(s) to enter a password set by you. If selected, you'll be prompted to enter the password(s) for each recipient once you send the email.
3. Enter the **name** of your new Teambox in the **subject** line and click on the "**Send**" button.



*Creating a Teambox in Outlook 2007*

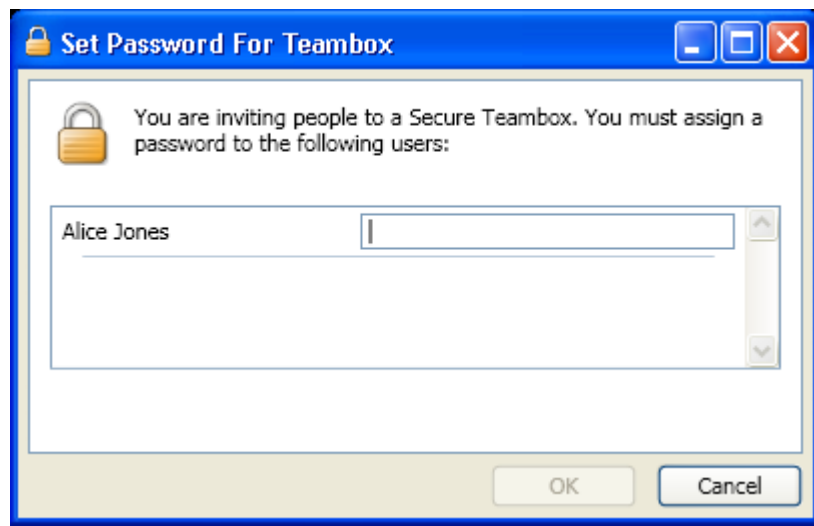
If you wish to give your Teambox a different name than the subject of your email you can do so by selecting the **"New Teambox"** text and entering the name you'd like to give to your new Teambox.



*Naming a new Teambox*

When a secure Teamboxes is created, this is the window which allows you to enter the password for each recipient. Make sure you communicate this password to your recipients so they are able to access the Teambox.

**NOTE:** For instructions on how to reset someone's password, [click here](#).



*Setting a Password for Recipients*

Once your email goes out you'll be taken to the Teambox you just created, or the one you selected. From there you'll be able to share files, share your screen or instant message the recipients you invited, [click here](#) to see how.

To do this through the Teambox Manager, [click here](#) for the corresponding instructions.

## 1.2. Inviting Others To An Existing Teambox With The Outlook Connector

Much like creating a new Teambox, inviting others to one is simple and done from a **new email**:

1. Add who you want to invite to your Teambox to the **recipient list**
2. Click on the **Teambox icon** and select the one you'd like to invite participants to
3. Click on the **"Send"** button

**NOTE:** You need to be the Administrator/Creator or Manager of a Teambox to do this. [Click here](#) for more details.

To do this through the Teambox Manager, [click here](#) for the corresponding instructions.

## 1.3. Joining A Teambox With The Outlook Connector

With the Outlook Connector joining a Teambox is a breeze:

1. **Open** the **email** containing the invitation
2. The Teambox Toolbar will change color to orange, click on the **"Join Now!"** button



*Joining a Teambox with Outlook*

The Teambox Manager will automatically pop-up and display the new Teambox. If it's a secure Teambox you'll be prompted to enter your password, contact the sender if they haven't told you what it is.

To do this through the Teambox Manager, [click here](#) for the corresponding instructions.

## 2. Attachment Management With The Outlook Connector

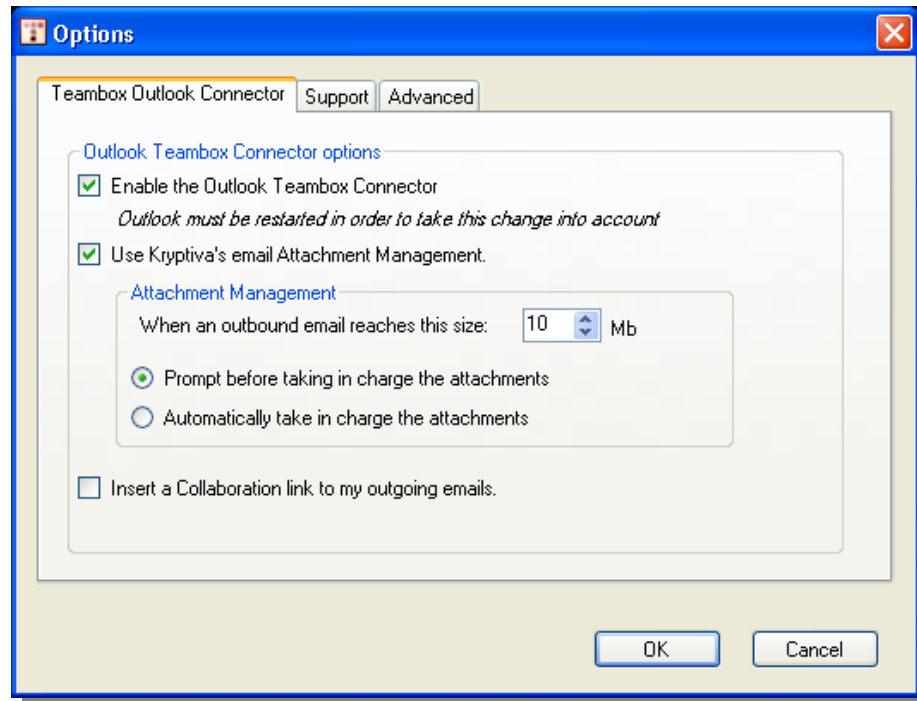
Another great feature the connector provides is an easy way to seamlessly add attachments of any size to your emails, ensuring they get through and eliminating the need to rely on Extranets/FTP.

Attachment Management automatically detects when an email's attachments are too large for it to reach its recipients (you can set the size threshold). When that happens, the attachments are replaced with a link that will allow your recipients to retrieve the files, without requiring any special actions from you or them.

The Teambox Manager will also **notify** you with a pop-up when your **recipients** first **download** the files.

To enable Attachment Management, follow these steps:

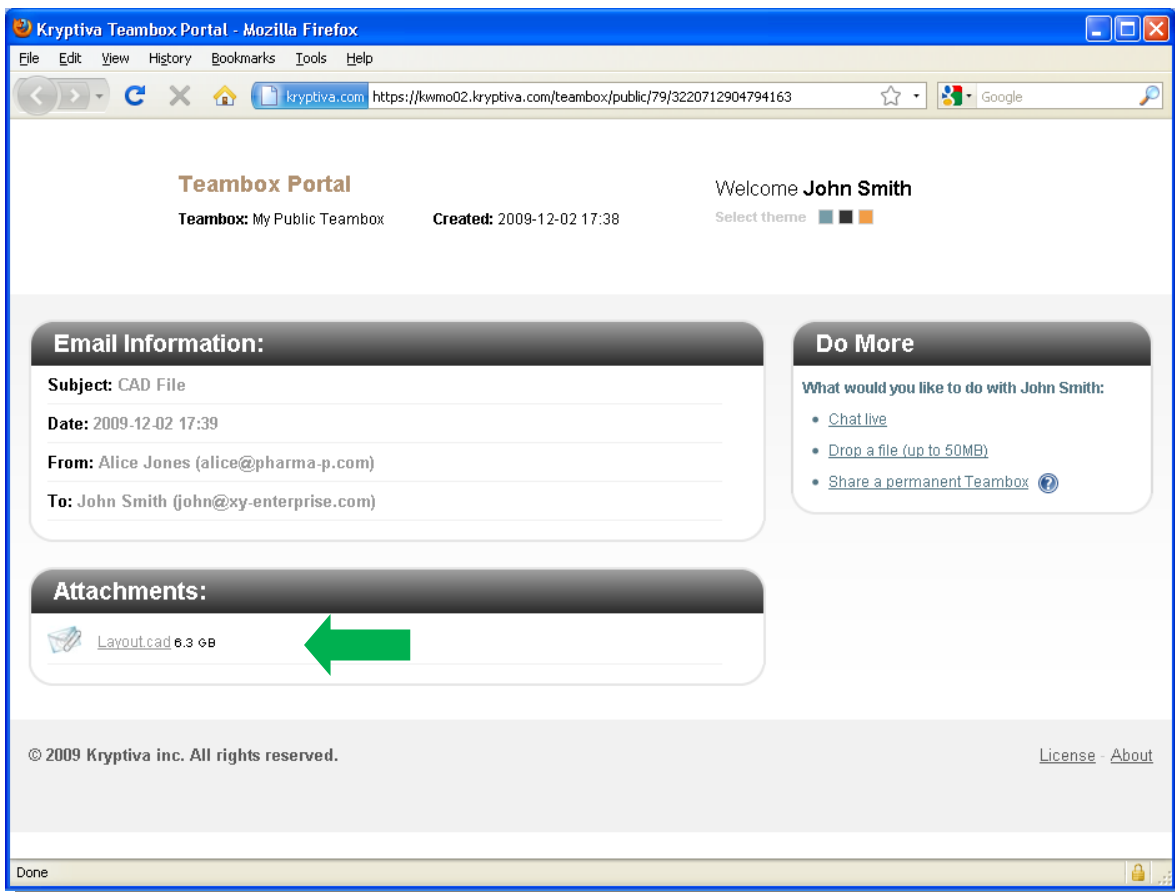
1. In the Teambox Manager, go to the **"Tools"** menu and select **"Options"**
2. Go to the **"Teambox Outlook Connector"** tab
3. Check the **"Use Teambox's email Attachment Management."** Checkbox
  - a. Enter the **size** threshold beyond which Attachment Management will be activated
  - b. **Choose** whether to be asked every time or use it automatically
4. Click on **"OK"**



**Attachment Management Settings**

To use Attachment Management simply **add** the **files** you want to your **email** (depending on your settings you might be asked if you want to use the feature), and **send** your email.

When your recipients click on the attachments, they'll be taken to a Portal from where they'll be able to download your attachments:

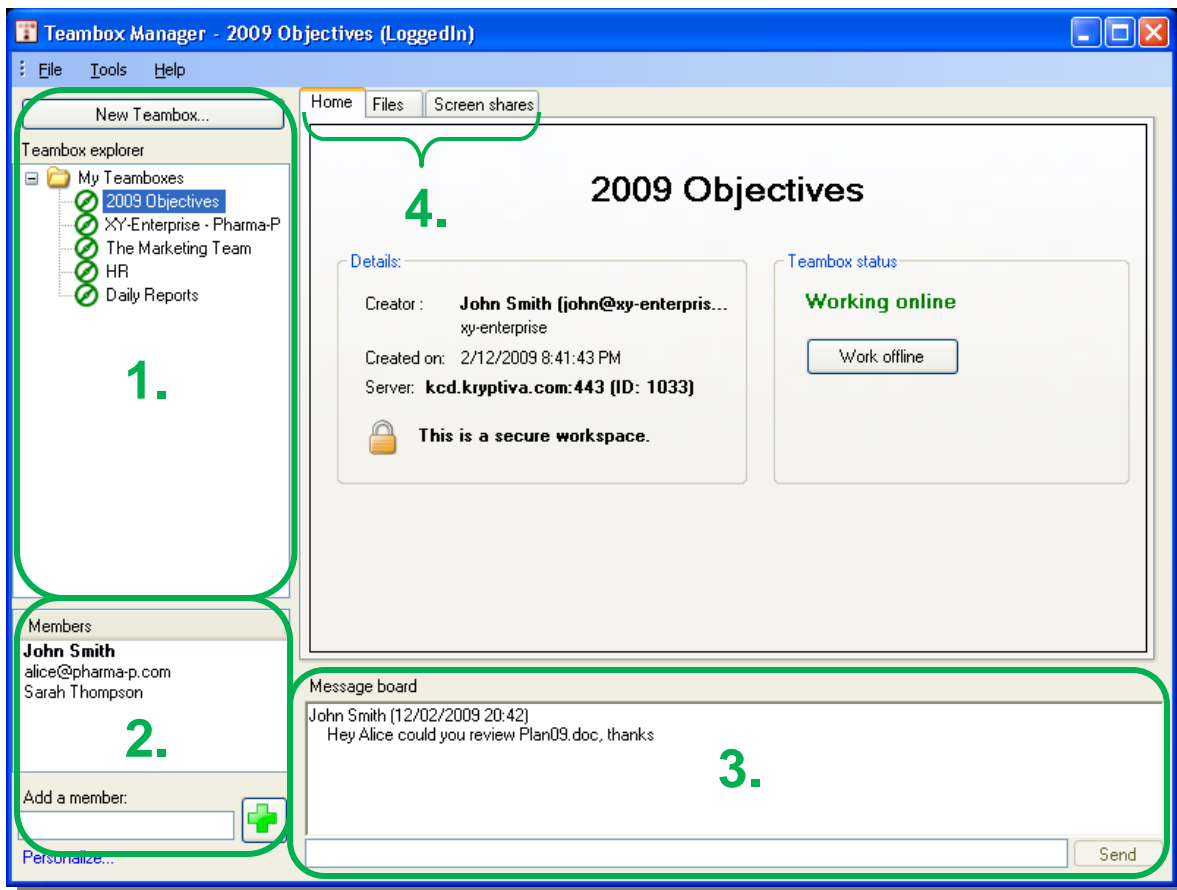


***Attachment Management Reception***

### 3. Using The Teambox Manager

The Teambox Manager is what allows you to browse and sort your different Teamboxes. The main window is split into four areas:

1. The Teambox Explorer
2. The Members of the selected Teambox
3. The Message Board
4. The application tabs: Home, Files and Screen Shares

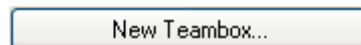


*The Teambox Manager*

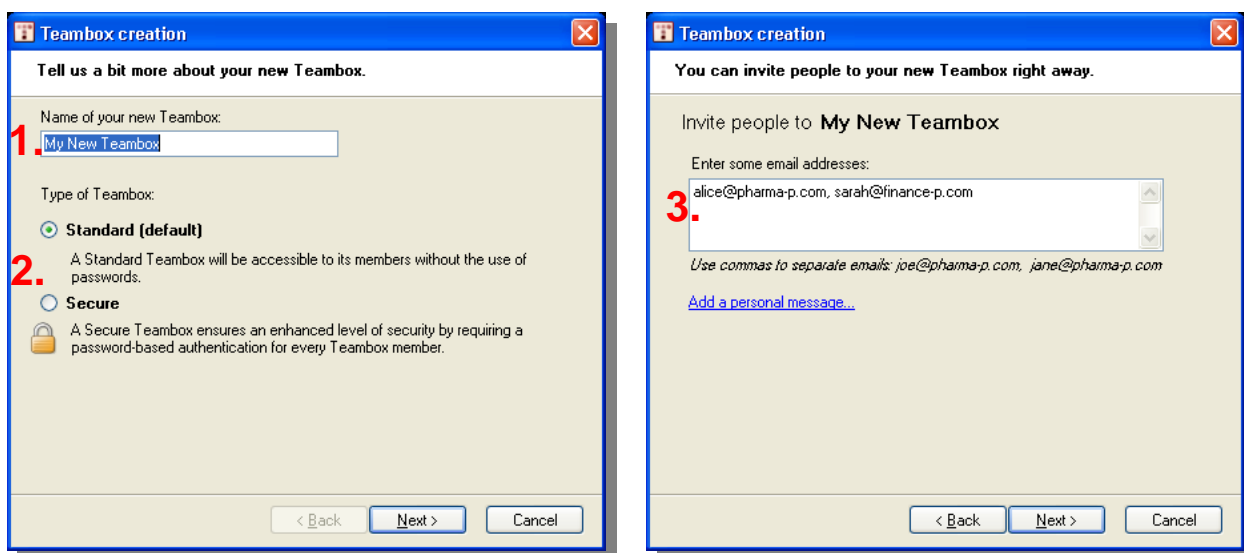
The next headings explain how to use the Suite's basic functions through the Teambox Manager. If you have the Outlook Connector installed you can access the same functionalities right from your email client, [click here](#) for the corresponding instructions.

### 3.1. Creating a Teambox with the Teambox Manager

Creating a Teambox is quite simple. In the Teambox Manager just click on the “**New Teambox...**” button on the top left corner of the application. A wizard will appear to guide you through the necessary steps:



1. Enter the **name** of your new Teambox.
2. Select what **type** of Teambox you'd like to create and click “Next”.
  - a. **Standard Teamboxes** require the recipient(s) to have the email invitation to access it.
  - b. **Secure Teamboxes** work the same way but also require the recipient(s) to enter a password set by you. If selected, you'll be prompted to enter the password(s) for each recipient at the end of the process.
3. Enter the **email address(es)** of the person(s) you wish to invite to the Teambox and click “Next”.



*Creating a Teambox with the TBX Manager*

Once the invitation goes out you'll be taken to the Teambox you just created. From there you'll be able to share files, share your screen or instant message the recipients you invited, [click here](#) to see how.

**NOTE:** For instructions on how to reset someone's password, [click here](#).

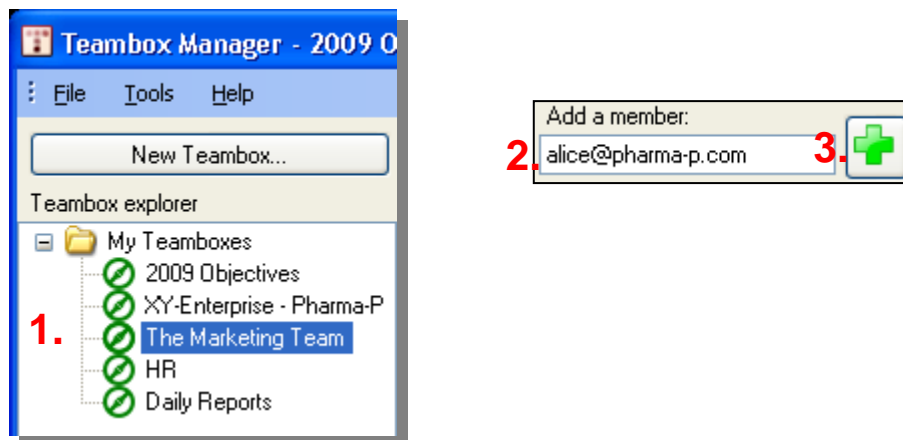
To do this through the Outlook Connector, [click here](#) for the corresponding instructions.



## 3.2. Inviting Others To An Existing Teambox With The Teambox Manager

Once you've created a Teambox inviting others to work and share information with is simple:

1. Select the **Teambox** you wish to invite someone to
2. Enter their **email address** in the field at the bottom left side of the Teambox Manager
3. Click on the "+" button



*Inviting Someone to a Teambox*

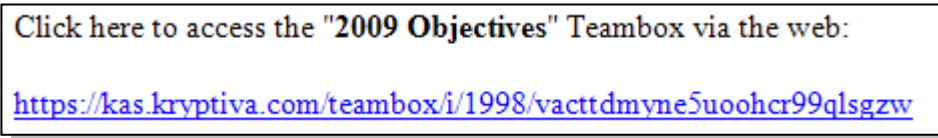
**NOTE:** You need to be the Administrator/Creator or Manager of a Teambox to do this. [Click here](#) for more details.

To do this through the Outlook Connector, [click here](#) for the corresponding instructions.

## 3.3. Joining A Teambox With The Teambox Manager

If you've received a Teambox invitation and you don't have access the Outlook Connector:

1. Click on the **URL** at the bottom of the invitation email.



2. You'll be taken to the Teambox Web Portal for that Teambox, click on the "**Desktop Access**" button.
3. The browser will prompt you to save a file or open it, this file is what gives your Teambox Manager access to the Teambox. Click on "**Open**".

Desktop Access

The Teambox Manager will automatically pop-up and display the new Teambox. If the invitation is for a secure Teambox, you'll need to enter your password first; contact the sender if they haven't told you what it is.

**NOTE:** Joining a Teambox using this method will work regardless of whether the Outlook Connector is present or not.

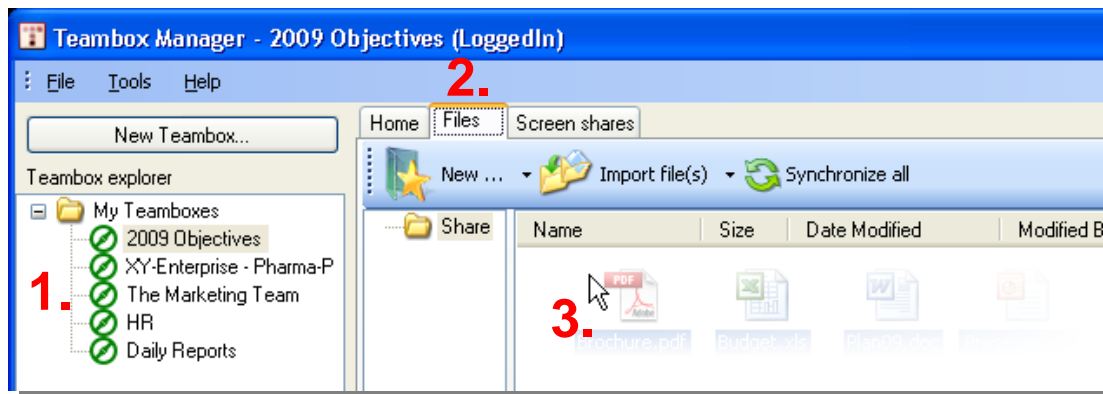
To do this through the Outlook Connector, [click here](#) for the corresponding instructions.

## 4. Using A Teambox To Share Files

To share files with your team members open your Teambox Manager by clicking on the **tray icon**:



1. Select the **Teambox** with the team members you want to share files with
2. Select the **"File"** tab
3. **Drag-and-drop** the files or folders you wish to share



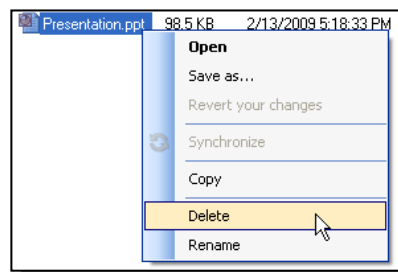
### Sharing Files

Alternatively, you can use the **"Import"** button from the toolbar to select the files or folders you wish to share.



### 4.1. Removing Files From A Teambox

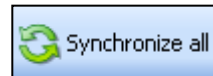
In the **"File"** tab of your Teambox, select the file(s) you wish to remove, **right click** and select **"Delete"** from the context menu.



### Deleting Files

## 4.2. How The Teambox Manager Keeps Your Files In Sync

One of the main features of the Collaboration Suite is to keep the files you and your team members are working on up to date. Just like your PDA, clicking on the “**Synchronize all**” button will make sure you get the latest version of the files being shared in the Teambox selected. Also, your team members (who are using the Teambox Manager) will be **notified** of any files you’ve added or updated.



By looking at the “**Status**” column in the “File” tab of your Teambox, you can check the state of the different files you are sharing. Here’s a list of the different states and their definition:

Home

Files

Screen shares

Whiteboard

New ...

Import file(s)

Synchronize all

View Offline Files

Share

Name	Size	Date Modified	Modified By	Status
Brochure.pdf	212.68 KB	2/12/2009 8:42:29 PM	John Smith	Up to date
Budget.xls	113.5 KB	3/6/2009 3:37:43 PM	John Smith	Modified by you
Plan09.doc	26.5 KB	3/18/2009 6:53:32 PM	alice@pha...	New version available
Presentation.ppt	98.5 KB	2/12/2009 8:42:29 PM	John Smith	Up to date
Sample.bmp	351.62 KB	3/6/2009 3:37:14 PM	John Smith	Not yet shared
Requests.txt	897 Bytes	3/18/2009 8:16:22 PM	Sarah Tho...	Not Downloaded

**File Status**

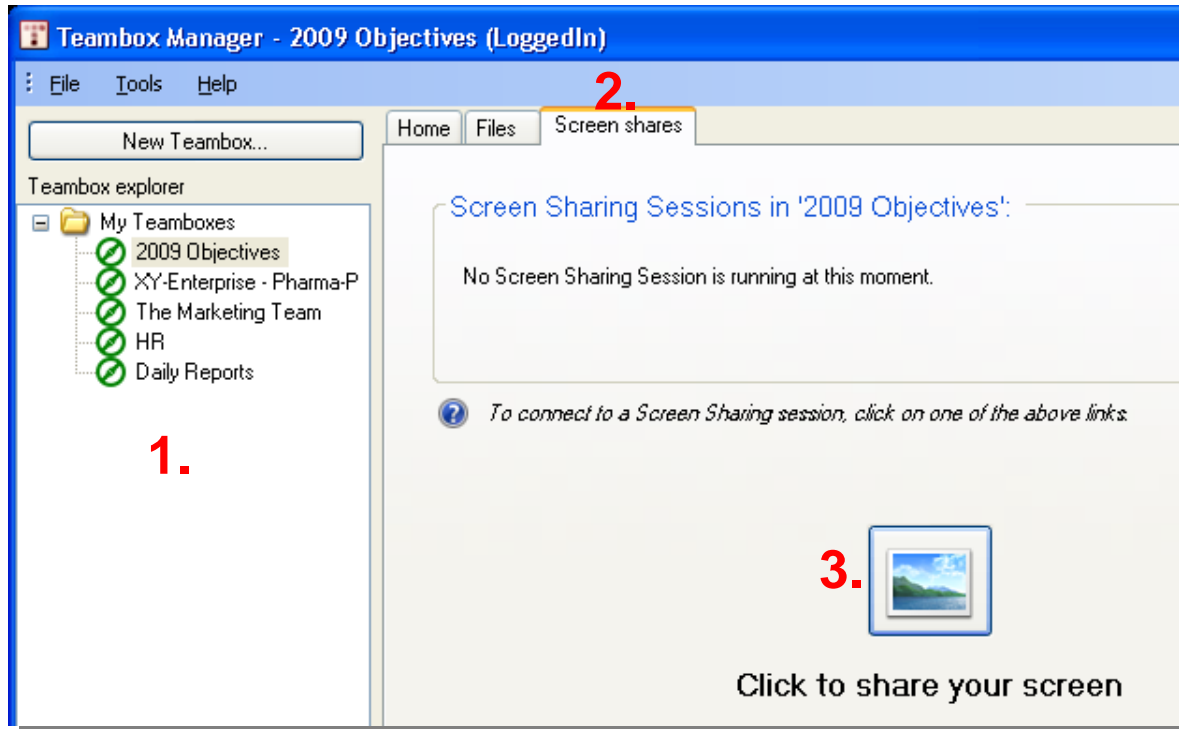
- **Up to date:**
  - Meaning you have the latest version of the file
- **New version available:**
  - The file has been updated since you last synchronized your Teambox
- **Modified by you:**
  - You’ve modified the file since you last synchronized your Teambox
- **Not Downloaded:**
  - This file has been added to the Teambox since you last synchronized
- **Not yet shared:**
  - You’ve added this file to your Teambox but it’s not being shared with the other members. To share it, right click it and select “Share local file(s)” from the context menu.
- **File opened:**
  - You’ve opened the file and are editing it. If you’ve closed the file and the status hasn’t changed, wait a few a moments and the proper state will appear.

There are other states that might require your action by either right clicking the file or following the onscreen instructions.

## 5. Using A Teambox To Share Your Screen

To share your screen with other team members open your Teambox Manager:

1. Select the **Teambox** with the team members you want to share your screen with
2. Select the “**Screen shares**” tab
3. Click on the “**share your screen**” button



### Sharing Your Screen

The **wizard** will guide you through the steps necessary to share your screen

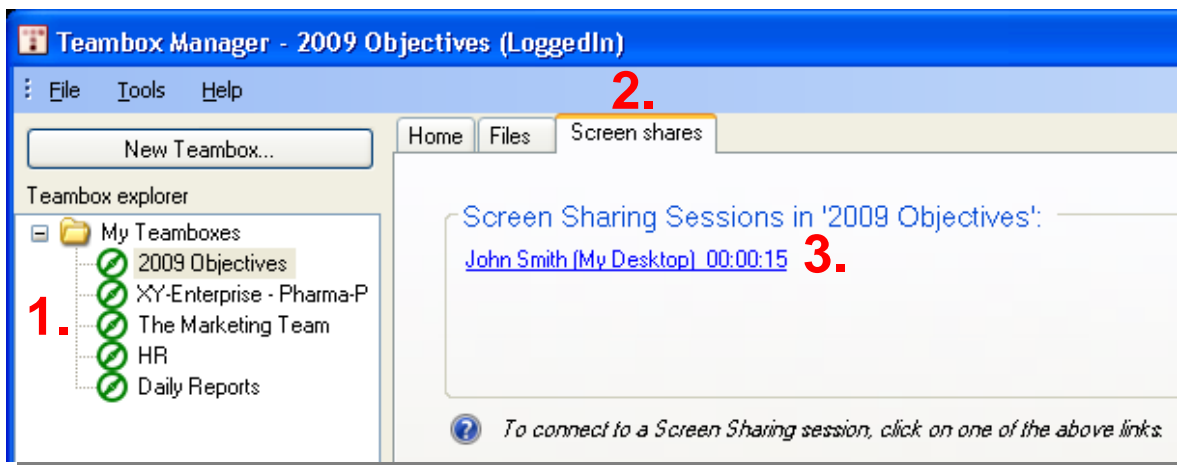
- I. Choose if you want to share your **entire screen** or just **one application**
- II. Choose if you want to **share control** of your PC with your team members
- III. Enter a **title** for your Screen Sharing Session

Once your session is initiated, your team members will be able to join it and see your screen.

## 5.1. Joining A “Screen Share”

To join a “Screen Share” open your Teambox Manager:

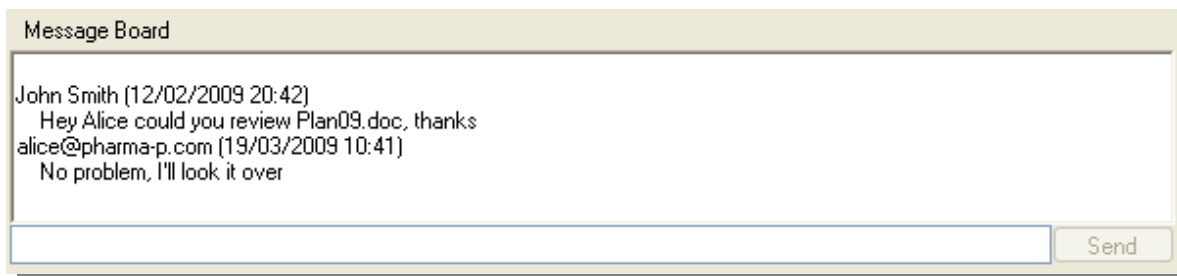
1. Select the **Teambox** where the “Screen Share” is taking place.
2. Select the “**Screen shares**” tab.
3. In the “Screen Sharing Sessions in <Teambox name>” section, click on the **title** of the “Screen Share”.



*Joining a “Screen Share”*

## 6. Using A Teambox To Chat

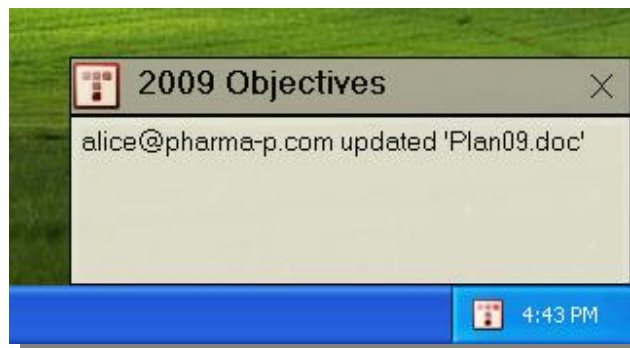
To chat with others, select the **Teambox** with the team members you wish to chat with and use the **text box** at the bottom of your Teambox Manager to type your message.



*Chatting*

## 7. The Teambox Manager Notifications

The Teambox Manager helps you stay up to date via real-time **notifications**. Whenever changes are made to one of your Teamboxes, such as a new message, a change to the files shared or a new screen sharing session, a **pop-up** will appear at the bottom right corner of your screen. The pop-up will tell you in what Teambox the change occurred, who triggered it and whether it's a new message, a change to the files shared, a new screen sharing session, etc.



**Notification Pop-Up**

**Clicking** on the **pop-up** will open up the appropriate Teambox so you can see the **changes**.

If you were away from your desk at the time and missed the pop-up, the **tray icon** of the Teambox Manager will periodically **rotate** to notify you that **changes** have been made. Once you reopen your Teambox Manager, the Teambox(es) that was modified will be **highlighted** in orange.



**Notification Highlight**

This way you'll be able to stay up to date on the changes even if you were absent from your desk.

## 8. Email Notifications

Another way to keep track of what goes on in your Teamboxes is the email notification. This is particularly useful for those who don't have access to the Teambox Manager and can only access Teamboxes through their Web Portals. There are two types of email notifications:

1. **Real-time Events:** send you an email for each event, so you are always up-to-date.
2. **Daily Summaries:** give you an overview of the events that happened in your Teamboxes over the last 24 hours.

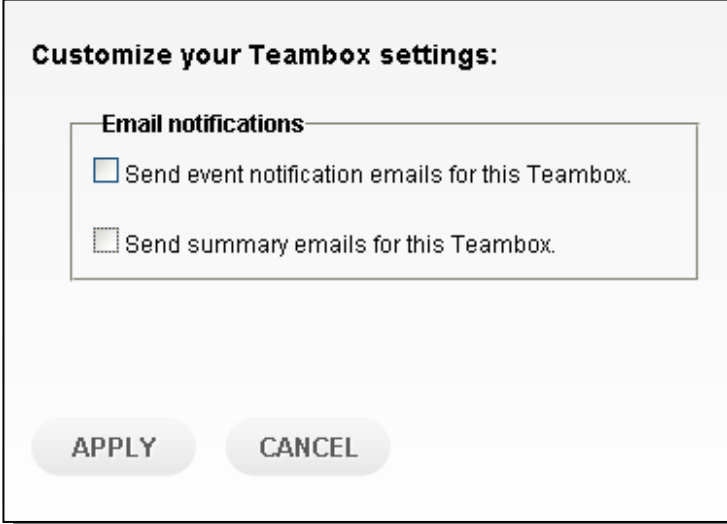
You can choose what level of notification you would like for each of your Teamboxes. Managing your notifications works the same regardless of whether you have the Teambox Suite installed or not. To change your Email Notifications settings for a Teambox, follow these steps:

1. Click on the **URL** at the bottom of the Teambox invitation or notification email.

Click here to access the "2009 Objectives" Teambox via the web:

<https://kas.kryptiva.com/teambox/i/1998/vacttdmyne5uoohcr99qlsgzw>

2. You'll be taken to its Web Portal, once there, click on "**Manage notifications**"
3. **Select** the types of notifications you'd like to receive.
4. Click on "**Apply**"



**Customize your Teambox settings:**

**Email notifications**

☐ Send event notification emails for this Teambox.

☐ Send summary emails for this Teambox.

**APPLY** **CANCEL**

*Email Notification Settings*

**NOTE:** By default, only the Daily Summary email is enabled.



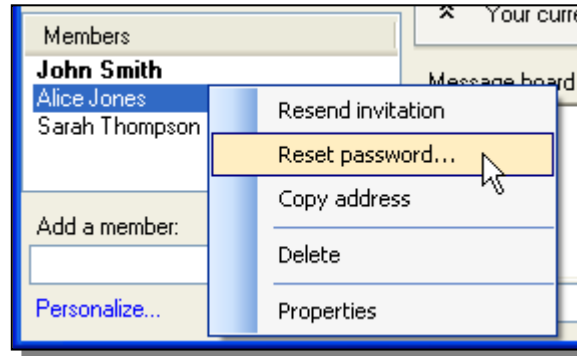
## 9. Teambox Administration

Just like other information sharing tools, the Teambox Manager allows you to change the properties of a given Teambox and determine who has the right to perform what actions.

### 9.1. Resetting A Member's Password

If someone you invited **forgot** their **password** you can reset it easily.

1. **Open** the Teambox Manager and go to the appropriate **Teambox**
2. In the "Members list", **right-click** their **name**
3. Select "**Reset password...**" from the context menu



*Resetting a Password*

**NOTE:** You need to be the Administrator/Creator or Manager of a Teambox to change someone else's password. [Click here](#) for more details.

### 9.2. Removing Members

If you invited someone to a Teambox by mistake or that person has left your organization you can easily remove them from the Teambox. Here are the steps to follow:

1. Select the **Teambox** from which you want to remove a member
2. In the "Members list", **right-click** the **name** of the person you want to remove
3. Select "**Delete**" from the context menu

**NOTE:** You need to be the Administrator/Creator or Manager of a Teambox to do this. [Click here](#) for more details.

### 9.3. Member Properties

To help you manage your Teambox you can modify Member's rights by giving them more liberties or restraining their actions. To change a Member's properties right click their name in the "Member's list" (bottom left corner of the Teambox Manager) and choose "Properties" in the context menu. From here you'll be able to:

1. Rename the Member
2. Change their Role
3. Lock their account

**NOTE:** A User can only rename himself, for the other actions listed you need to be the Administrator/Creator or Manager of the Teambox. [Click here](#) for more details.

Also, Roles do not affect a Member's ability to use the different applications of a Teambox.

- **1. Name:** Enter another name in this field to rename the Member.
- **2. Role:** This determines what level of access a Member has to the selected Teambox and how he can affect others.
  - **Administrator:** typically the Creator of the Teambox, an Administrator has the right to edit the properties of all other members and also the properties of the Teambox.
  - **Manager:** they also can edit the properties of other Members, but they cannot change the properties of the Teambox.
  - **User:** a user can only change their own name.
- **3. Account is locked:** Disables the Member's access to that Teambox, stopping them from logging into it.



**Member Properties**

## 9.4. Teambox Properties

Once you've created a Teambox you can view and change its properties by right-clicking its name in the Teambox Explorer (list on the left side of the Teambox Manager). From here you'll be able to:

1. Rename the Teambox
2. Change its Type from Standard <-> Secure
3. Enable "Read Only" mode
4. Enable File History

**NOTE:** You need to be the Administrator/ Creator of a Teambox to edit any of the options below.

- **1. Name:** Enter another name in this field to rename the Teambox. You can also do this by single clicking the Teambox in the list, like you would to rename a file.
- **2. Type:** If you've created a Standard Teambox and you now want to restrict access to it you can do so by changing its type to a Secure Teambox, or vice-versa.
  - **Public:** This Teambox is unique and is used for the Attachment Management.
  - **Standard:** Can be accessed by users who receive a Teambox invitation email.
  - **Secure:** Requires the invitation email and also a password.
- **3. Status:** Allows you to change the status of a Teambox.
  - **Moderated:** This mode allows the Administrator/Creator to "freeze" a Teambox so that no one but him can edit the files shared or start a "Screen Share". This is particularly useful when you want to use a Teambox only to distribute information.
- **4. Preserve file history:** By default when files are deleted from a Teambox, they are also deleted from the Teambox server. If you want to keep your file history you can override this setting by enabling this checkbox.



**Teambox Properties**

**NOTE:** When changing a Teambox from Standard to Secure keep in mind you will need to set a password for all the Members of the Teambox, including yourself, otherwise you and the other Members will no longer be able to access the Teambox.

## 9.5. User Management Reference Table

This table will help you keep track of who can do what in a Teambox.

Role/ Actions	Rename Members	Reset Password	Add Members	Remove Members	Lock Accounts	Edit Member's Roles	Modify TBX Properties
User <sup>1</sup>	•	•					
Manager <sup>2</sup>	•	•	•	•	•		
Administrator	•	•	•	•	•	•	•

<sup>1</sup>: Users can only change their own name and password

<sup>2</sup>: Managers can only take actions on Users, not Administrators

## III • Using The Teambox Web Portal

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If you don't have access to the Teambox Suite you can access Teamboxes you've been invited to via a web portal.

**NOTE:** Although the Teambox Portal enables you to access your Teamboxes from anywhere, keep in mind it doesn't offer some of the functionalities the Teambox Manager provides such as real-time pop-up notifications, initiating "Screen Sharing" sessions, easy access to multiple Teamboxes, and more. You can get the Teambox Manager to take advantage of the full set of features Teambox provides at <http://teambox.co/downloads>.

### 1. Joining A Teambox With The Teambox Web Portal

To join a Teambox through the web click on the **URL** included at the bottom of the invitation email:

Click here to access the "2009 Objectives" Teambox via the web:  
<https://kas.kryptiva.com/teambox/i/1998/vacttdmyne5uoohcr99qlsgzw>

*Teambox Portal URL*

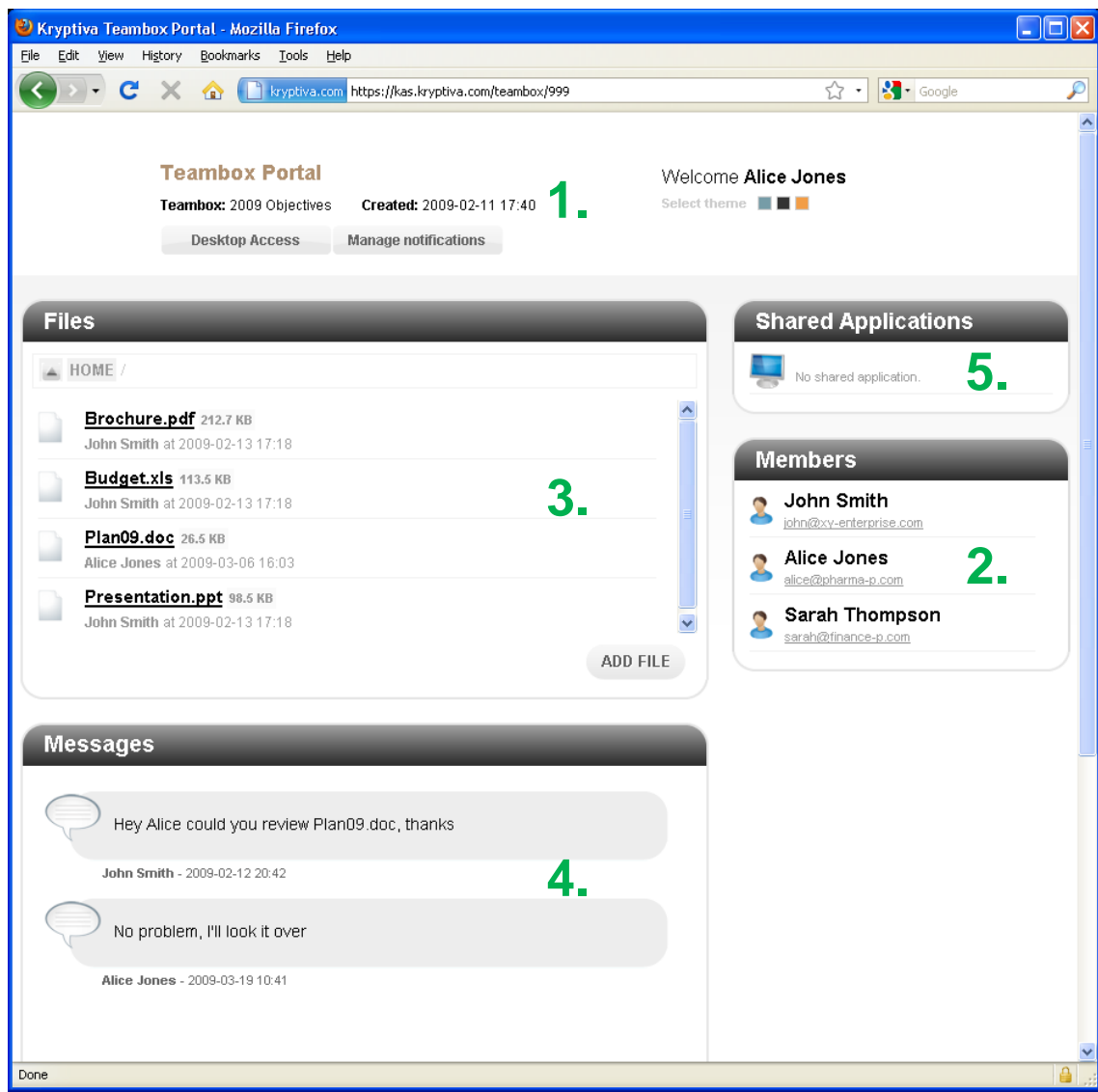
A browser window will open and you'll be taken to the Teambox Web Portal for that Teambox. If the invitation is for a **secure** Teambox, you'll need to enter your **password** first; contact the sender if they haven't told you what it is.

**NOTE:** You can **bookmark** the Teambox Portal page so that you can easily return to it later on. In any case, you can always return to a Teambox Portal by repeating the previous steps.

## 2. The Teambox Web Portal

Similar to the Teambox Manager, the web version is split into five different sections:

1. The Teambox details
2. The Members of the Teambox
3. The Files being shared
4. The Message Board
5. The current Screen Shares



*The Teambox Web Portal*

### 3. Downloading & Modifying Files

The “Files” section of the Teambox Web Portal always shows you the latest versions of the files in that Teambox. To work on the files you’ll need to download them first, to do so:

1. Click on the **file** you wish to work on.
2. Save it to your “station”.



#### Downloading & Modifying Files

Once you’ve done your **modifications**, follow the instructions of the next section to share your changes with the other team members.

### 4. Using The Teambox Web Portal To Share or Sync Files

Much in the same way as with the Teambox Manager you can share files with your team using the web version. To **share** files or **synchronize** changes you’ve made, in the “Files” section:

1. Click on “Add File”
2. Click on “Browse” and **select** the file you wish to share or synchronize.
3. Then click the “Upload” button.

ADD FILE

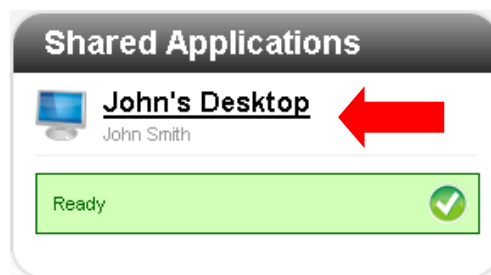
File:

## 5. Joining A “Screen Share” With The Teambox Web Portal

Once you’ve joined a Teambox Portal, when someone starts a “Screen Share” a **pop-up** will appear asking you if you wish to view the session taking place.

If you choose not to join the “Screen Share” at that time and it’s still ongoing, you can still join it. In the “**Screen Share**” section you’ll see the **title** of the ongoing session, simply **click** on the underlined text and you’ll be able taken to the “Screen Share”.

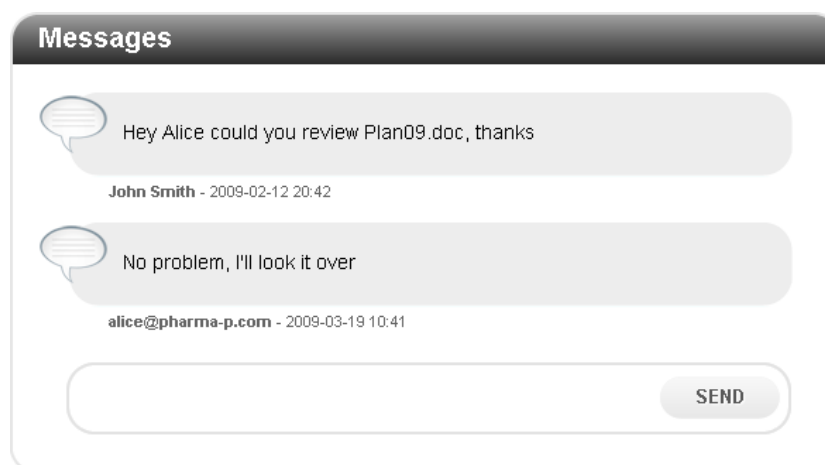
**NOTE:** Java 5.0, or newer, is required in order to join a “Screen Share”. [Click here](#) to download the latest version.



*Joining a “Screen Share” with the Teambox Web Portal*

## 6. Instant Messaging Using The Teambox Web Portal

To chat with the others use the text box at the bottom to type your message.



*Chatting through the Web*



## **IV • License**

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