

## TechnoFeature™

Practice management and technology articles written by experts.

### Review: ClearSync 2 for Syncing and Sharing Calendars and Contacts

By Christel Burris

#### TechnoScore: 4.0

1 = Lowest Possible Score; 5 = Highest Possible Score

[www.clearsync.com](http://www.clearsync.com)

#### INTRODUCTION

ClearSync 2 is the latest version of Tanner Research's application for sharing multiple calendars and contacts on Windows, Mac, and Linux/Unix platforms.

Using ClearSync, you can add, delete, and edit multiple shared and private calendars and contacts. You can view calendars one at a time, side-by-side, or merged for an integrated view, and by day, week, or month. You can also organize contacts by category and access them on your local PC as well as through the ClearSync Server using one of the supported Web browsers. You can also view contacts and calendars on your Palm OS device via csContacts and csCalendars.

While the ClearSync desktop client and online browser applications work on Windows, Macintosh, and Linux/Unix computers, syncing to Palm OS PDAs and smartphones is available for Windows PCs only.

ClearSync enables you to sync, access, and share your calendars and contacts with others, from your office, home, or while on the road. It also has a wireless feature that enables you to sync to your Internet-enabled PDA. Through the use of "communities," you can control who can view and edit your calendars and contacts. Automatic synchronization with the ClearSync Server keeps your desktop calendars and contacts synchronized with the others in your communities.

A side benefit of using ClearSync is that your calendars and contacts are always backed up on

the ClearSync Server. If you have a catastrophic hardware failure, you would still have access to that data.

Searching for events and contacts is easy from the ClearSync Desktop and ClearSync Web Viewer. There is also an import feature to import iCal Calendars, and an import feature for contacts via a CSV file.

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ClearSync has two types of membership: Silver and Gold. Both memberships have all the benefits mentioned above. With the Gold membership, you also get wireless syncing for your Palm handheld (no PC required), encrypted communications via the Internet, and technical support by phone. Synchronization frequency for the Silver membership is every 12 hours; for Gold, as frequently as every minute. Silver membership costs \$19.95/year plus \$9.95/year for additional users with a single purchase. Gold membership costs \$59.95/year plus \$29.95/year for additional users with a single purchase.

#### REVIEW ENVIRONMENT

I am the CEO of Push One Button, an authorized reseller of Worldox and TABS3/PracticeMaster.

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We specialize in installation, integration/configuration, and training of legal-specific software as well as Microsoft Office applications. I have been working in the legal IT field for over 20 years supporting law firms in-house and as a consultant.

In the normal course of my business, I use a Moto Q that syncs via ActiveSync to my Exchange server. I have installed and configured BlackBerry devices and Palm and Windows Mobile devices for some of our clients.

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To test the ClearSync service/products, I installed the ClearSync Desktop application on a Windows XP Professional (SP2) workstation (Pentium 4 2.40GHz/1GB memory) and the ClearSync Conduit on a Palm Z22 handheld (although a Palm device is not required). I used the Palm Z22 to first sync my existing Outlook Calendar and some of my Outlook Contacts (by category), then synced the Palm Contacts and Calendars apps to csContacts and csCalendars (these are the ClearSync apps installed on the Palm devices). Next, I synced from csContacts and csCalendars to ClearSync Desktop which then syncs to the ClearSync Web Viewer. I also used a Gold Membership level in my testing. I did not test the option for wireless syncing of a Palm handheld as my testing device did not have that capability.

System Requirements:

- If a Palm device is used: Palm OS 3.x through OS 5.x (Garnet).
- Java 5.0 or higher on the desktop.
- Windows 2000, XP Home, and XP Pro.
- Browsers: Microsoft Internet Explorer 6.0 or higher, Mozilla Firefox, Netscape, Apple Safari, Opera.

## INSTALLATION AND CONFIGURATION PROCESS

Because there seems to be so many steps, the initial installation and configuration process for ClearSync can be a bit frustrating. To start, make sure you have the most current version of Java installed. The ClearSync install process will take you through this requirement.

Next, you need to download and install ClearSync Desktop. This is where I ran into my first issue. The ClearSync Desktop install files are in \*.jnpl file format which some firewalls/routers block. In my case, my Sonicwall TZ170 with Intrusion Prevention Service (IPS) did block the download of this file. I had to disable IPS on the Sonicwall to allow this file to download and then enable IPS after download was complete.

If you are using a Palm device, download and install the ClearSync Palm OS applications and conduits. Be sure you already have the Palm HotSync software installed on your PC and working correctly.

Once everything is installed, you should perform initial synchronizations. Then, log in to the ClearSync site to access the ClearSync Web Viewer, which will sync with the ClearSync Desktop automatically. Set up "Communities" for sharing calendars and contacts. And, finally, to share your calendars and/or contacts, send out "invitations" from the ClearSync site.

## USAGE

I encountered my next issue upon initial syncing. While the csCalendars and csContacts applications on the Palm device had received all my data when they synced with the Palm applications, the csCalendar syncing to the ClearSync Desktop application did not work until the second try. Syncing csContacts to the ClearSync Desktop took three attempts. However, after this last issue, ClearSync performed perfectly.

ClearSync can be used with or without a Palm device. If you are using Outlook for calendar and contacts, the only way to get your Outlook information into ClearSync is to first sync to a Palm

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device, then sync the Palm device to csContacts/csCalendars and then to ClearSync Desktop (which will then sync automatically to ClearSync Web Viewer). While this may seem a bit complex, it actually works seamlessly once initial configuration is complete.

Changes (adding, revising, and deleting calendar and contact information) made to the ClearSync Desktop seem to update to the ClearSync Web Viewer within seconds and vice versa. Of course, a Gold membership is required for this level of synchronization. Both the ClearSync Desktop and Web Viewer share the same interface making editing a breeze.

Adding new contacts and events is simple and intuitive. Events can be recurring and can be easily dragged and dropped to different days or times.

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Making changes to contacts and calendars on the ClearSync Desktop and Web Viewer applications is simple and intuitive as they share the same interface.

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Calendars and contacts are shared through Web-based ClearSync Communities. Setting up the share is very simple and easy to understand. There are two levels of sharing, member and admin. (The admin level enables a user to invite and remove members, assign admin privileges, and delete a Community.. Steps to share your calendars and/or contacts are: (1) Sign onto your account at the ClearSync site; (2) Create a "Community"; (3) Share the community resource(s); (4) Invite new members, specifying their new member name, email address, and whether they are an admin or member. You can also add a message to the invitation. (Of course, anyone who needs access to your contacts/calendar will have to sign up for a ClearSync account.)

You can modify the Contacts view of both the ClearSync Web Viewer and Desktop apps to include/exclude contact information. For instance, if you wanted to see the Display Name

and Display Phone Number only, you can easily modify the ClearSync Contacts view by selecting and deselecting the appropriate fields from the "Field Selector" button on the toolbar. If you have a contact that has an email address but no phone, the Contacts view will display the email in the "Display Phone" column of the main Contacts view. However, if you open the contact, the email information is in the correct field in the "Contacts Properties" window.

#### PROS

The ability to share different calendars with users who do not have local access to those calendars is definitely ClearSync's best feature.

In addition, if you use multiple categories for contacts (business, personal, client, etc.), those contact categories move to the ClearSync Desktop application smoothly.

Also, making changes to contacts and calendars on the ClearSync Desktop and Web Viewer applications is simple and intuitive as they share the same interface.

#### CONS

First, according to the ClearSync Web site, the product is not supported on Vista. I originally tried to test ClearSync on my laptop (Vista OS), but ran into issues. Then, I noticed that the stated requirements were Windows XP Pro, Home, or Windows 2000. So I moved to a Windows XP Pro machine to complete the test. Another requirement (if using a handheld) is the Palm OS which, of course, means ClearSync does not work with Windows Mobile.

As I mentioned earlier, installation can be a bit cumbersome. It would be nice if this process were streamlined a bit.

Lastly, the instructions on the ClearSync Web site are obviously for an earlier version of ClearSync as the screen shots are not exactly the same and some instructions have incorrect information when applied to ClearSync 2. For instance, when "inviting" someone to join a community, the online instructions say "Check the optional 'Admin Privileges' box. However, there is no "Admin Privileges

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box” on the “Invite New Members” section; instead there are two radio buttons, “admin” and “member.”

### MY CLEARSYNC WISH LIST

If ClearSync 2 synced directly with Outlook and had a Windows Mobile version, this would be “syncing and sharing nirvana”! Also, updating the online instructions so that they are relevant to the current version should be a priority on ClearSync’s task list.

### TECH SUPPORT

As mentioned above, I had a problem getting my contacts to sync. So, I contacted tech support. They responded within a couple of hours and were very courteous. However, by the time they had responded, my contacts started syncing. I am still not sure why they would not sync initially. I tried three times and on the fourth try, everything worked perfectly.

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### CONCLUSION

For sole practitioners and small firms who use an email client that does not include calendaring and contacts, ClearSync can help fill in the missing components of a PIM. Having that information available via the Internet is useful if trying to coordinate multiple calendars and contacts with people who do not have direct access to your calendar/contacts. For instance, I have several clients who are mediators. Scheduling is always a challenge. Having a publicly accessible calendar would make scheduling much easier. I also know of an attorney who set up ClearSync so his “better half” could have up-to-the-minute information about his calendar.

Because of the problems I had with downloading and initial syncing (and the lack of relevant online instructions), I give this product a 4.0 rating. However, once ClearSync 2 is installed, it works flawlessly.

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### CLEARSYNC’S RESPONSE

We invited ClearSync to respond to this TechnoFeature. Vedran Solaja of ClearSync responded as follows:

“ClearSync would like to offer the following important clarifications to the review:

“• Free 30 Day Trial

“All prospective users get a free 30-Day Trial that provides full use of ClearSync at the Gold level. When the trial period expires, the User Account automatically reverts to being “Free”, which allows ongoing “view only” access to the resources you have shared. This allows larger groups of people who may only be interested in looking at specific types of schedules and contact lists, such as a soccer team or community group, without having to pay for the service. A Silver or Gold License is required to make changes, and also sync them to a Palm OS handheld

“• Windows Vista Is Supported

“As Windows Vista is in fact a ClearSync supported operating system, that it was not included under the System Requirements section of our Web site was an unfortunate oversight that we have corrected. The only issue we are currently aware of that affects ClearSync (indirectly) is when Palm OS handheld users are not able to perform successful HotSync operations because they have not installed the Vista compatible version of HotSync Manager which is available from the Palm Support Web site. If Ms. Burris had contacted ClearSync Support regarding the problems she encountered getting ClearSync to work on her Vista computer — which she was apparently not in a position to do at the time — we are confident we would have been able to resolve them.

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“• Supported Handhelds

“Unfortunately, the Tungsten E2 Series are the only Palm OS devices not supported, due to a

design flaw with the native handheld calendar database structure that Palm has decided not to fix.

“• Syncing of Changes

“In the USAGE section of the review, Ms. Burris states: “Changes (adding, revising, and deleting calendar and contact information) made to the ClearSync Desktop seem to update to the ClearSync Web Viewer within seconds and vice versa. Of course, a Gold membership is required for this level of synchronization.”

“Actually, changes synced to the ClearSync Server being immediately accessible to other users, regardless of how the sync occurs — via a HotSync, directly from the ClearSync Desktop or wirelessly from the ClearSync handheld applications — is a basic feature of ClearSync for all users. The unique sync feature of the Gold level is allowing automatic syncing as often as every minute to/from the ClearSync Desktop and Web Viewer applications.

“• QuickStart Guide Updates

“The ClearSync QuickStart Guides are in the process of being updated and the new versions

will be posted to our Web site as soon as they become available.

“• Installation & Sharing Setup Improvements

“We are working on a significantly streamlined and more “user friendly” installation and sharing setup process that is planned for release sometime in the Q2 of this year.”

**ABOUT THE AUTHOR**

Christel Burris has been providing legal technology consulting and implementation to law firms of all sizes for over 20 years. She is CEO of [Push One Button, Inc.](http://PushOneButton.com), a legal technology firm that provides training, legal-specific technology and consulting to businesses from California to the UK. Having started her legal career as a receptionist for a small law firm in San Francisco, she has held positions in law firms ranging from the previously mentioned receptionist to IT Manager (and everything in between). She understands how law firms work and how lawyers think.

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