

CorporateSync 3.0 for Palm

User's Guide

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Contents

Customizing your HotSync Settings.....	1
Synchronization Settings.....	1
Setting sign-in preferences.....	2
User information	2
Server information	2
Setting synchronization preferences for Date Book Events	3
Synchronizing Refused Events	3
Adding attendee names to the Notes section of an Event	3
Checking attendance status	3
Limiting details.....	4
Adding a location to an Event title.....	4
Setting a date range for Date Book Events.....	5
Setting synchronization preferences for To Do Items.....	6
Setting a date range for To Do Items	7
Synchronizing your Address Book.....	8
Transferring a new Contact from the calendar server to your Palm.....	8
Transferring a new Contact from your Palm to the calendar server.....	9
Modifying an existing Contact	10
Setting synchronization rules.....	12
Performing a Full Synchronization for a conduit	13
What is a Full Synchronization?	13
When should you perform a Full Synchronization?	13
Troubleshooting Connection problems.....	15
Troubleshooting Entry problems.....	16

Customizing your HotSync Settings

(Right-click HotSync icon | Custom)

Use the HotSync Custom dialog box to control the default synchronization action of your HotSync conduits. HotSync provides a list of conduits in use and the current default synchronization action for each conduit. If you have correctly installed CorporateSync, the Date Book, To Do List and Address conduits should have CorporateSync listed in parentheses (e.g. “Date Book (CorporateSync)”).

To change the synchronization action of a conduit:

1. From the HotSync Custom dialog box, choose a conduit and click **Change**.
2. Choose an option from the list:
 - **Quick Synchronization:** CorporateSync will synchronize items for this conduit normally.
 - **Do Nothing:** CorporateSync will not synchronize items for this conduit.
 - **Full Synchronization:** CorporateSync will compare every item on the calendar server and mobile device within your specified date range when synchronizing this conduit. See Performing a Full Synchronization for a conduit for more information on when and how to perform Full Synchronizations.

You can also request a Full Synchronization for a particular conduit by selecting Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Full Sync Setup. If you enable or disable Full Synchronization of a conduit in the Full Sync Setup dialog box, the change will be displayed in the Change HotSync Action dialog box, and vice-versa.

Synchronization Settings

To change a conduit setting:

1. From the HotSync Custom dialog box, choose a conduit and click **Change**.
2. Click **Settings**.
3. Modify the settings on each tab.
4. Click **OK** when you are done.

Setting sign-in preferences

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Settings | Sign In)

Enter your user and calendar server information to allow CorporateSync to sign you in automatically whenever HotSync synchronizes your mobile device with the calendar server. If you cannot provide the information required, please contact your system administrator.

User information

If there are multiple users with the same name on the calendar server, specify an organization unit in the user field (e.g. John Smith/Finance or S=Smith/G=John/OU1=Finance).

If you are using ticket-based authentication, you do not need to enter a user name and password. Consult your system administrator to find out what method of authentication you are using.

Server information

If you are using a master node connection, you must enter the node ID.

Setting synchronization preferences for Date Book Events

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Settings | Date Book)

Control how refused Events, attendee lists, location titles and details are synchronized with your mobile device.

Synchronizing Refused Events

If you select this option, CorporateSync will synchronize any Event that falls within the date range you specify, regardless of whether or not you have accepted the Event.

Adding attendee names to the Notes section of an Event

Include attendee names and attendance status in the Notes section of the Event.

Important: CorporateSync uses a special format to indicate the presence of an attendee name in the Notes section of the Event. **Do not** enter changes to Notes in this area, as these changes will not be retained when you perform a synchronization. If you need to edit the Notes of an Event, please do so within the area specified in the Notes section and not within the attendee list.

Checking attendance status

The attendance status of a user is indicated by a symbol:

- + will attend
- - will not attend
- ? has not yet confirmed

If you have enabled the **Add attendee names to Notes** feature, the attendance status of all attendees will appear in the Notes section of the Event. Additionally, your attendance status appears beside the title of any Event you synchronize, regardless of whether or not you own the Event.

Important: The * symbol appears beside the title of any Event you do not own.

For example:

- **[+] yourevent:** An Event you own and are attending
- **[-] yourevent:** An Event you own but are not attending
- **[?]yourevent:** An Event you own but for which you have not yet confirmed your attendance status
- **[*+] anotherevent:** An Event you do not own and are attending
- **[-] anotherevent:** An Event you do not own and are not attending
- **[*?] anotherevent:** An Event you do not own and for which you have not yet confirmed your attendance status

Limiting details

Control the size of details included with Events when you synchronize your Calendar. The maximum size is 64k. If you do not specify a size, CorporateSync will use the default value provided by your mobile device.

Adding a location to an Event title

Include locations in Event titles when transferring Events **from** the calendar server **to** your mobile device.

If you are transferring Events from your mobile device to the calendar server:

In order for CorporateSync to recognize the location of an Event on your mobile device, you must enclose the location in parentheses () preceded by @: for example, Business Lunch @(Restaurant). If you do not encode the location, it will appear as part of the Event title.

Setting a date range for Date Book Events

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm | Date Book | Date Range)

The settings here only affect how CorporateSync treats changes to Events on the calendar server. Whenever you change an Event on your mobile device, CorporateSync will always consider the Event during synchronization, regardless of the date range.

Use the edit boxes to enter date ranges, or click the appropriate pull-down menu to use the calendar.

Important: If any instances of a Repeating Event fall within the date range you specify, CorporateSync will synchronize all instances of the Event.

If it is taking too long to synchronize your mobile device with the calendar server: Your date range is too large. It is recommended that you consider the calendar server the master repository for all your calendar data, and use your mobile device to access calendar information that is currently relevant in your schedule.

Note: CorporateSync will not delete Events on your mobile device that fall outside the date range you specify.

Setting synchronization preferences for To Do Items

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Settings | To Do List)

Limit Details: Control the size of details included with To Do Items when you synchronize your Calendar. The maximum size is 64k. If you do not specify a size, CorporateSync will use the default provided by the mobile device.

Setting a date range for To Do Items

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Settings | To Do List | Date Range)

The settings here only affect how CorporateSync treats changes to To Do Items on the calendar server. Whenever you change a To Do Item on your mobile device, CorporateSync will always consider the To Do Item during synchronization, regardless of the date range.

Use the edit boxes to enter date ranges, or click the appropriate pull-down menu to use the calendar.

CorporateSync will synchronize all active To Do Items within your date range. A To Do Item is active if any of the following are valid:

- The To Do Item has no start date.
- The To Do Item's start date falls within the synchronization date range.
- The To Do Item's completed date falls within the synchronization date range and before the end date.
- The To Do Item has no completion date.

If it is taking too long to synchronize your mobile device with the calendar server:

Your date range is too large. It is recommended that you consider the calendar server the master repository for all your calendar data, and use your mobile device to access calendar information that is currently relevant in your schedule.

Note: CorporateSync will not delete To Do Items on your mobile device that fall outside the date range you specify.

Synchronizing your Address Book

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Settings | Address)

Limit Details: Control the size of details included with Address Books when you synchronize with the calendar server. The maximum size is 64k. If you do not specify a size, CorporateSync will use the default value provided by your mobile device.

- Transferring a new Contact from the calendar server to your Palm
- Transferring a new Contact from your Palm to the calendar server
- Modifying an existing Contact

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Transferring a new Contact from the calendar server to your Palm

If you create a Contact on the calendar server and you perform a synchronization, the calendar server will create the Contact on your Palm using the following mapping information:

Calendar server	Palm	
Telephone field	Telephone label	Telephone field
Work 1	Work	Phone 1
Home 1	Home	Phone 2
Work fax	Fax	Phone 3
Mobile 1	Mobile	Phone 4
E-mail 1	E-mail	Phone 5

If you had information in any other telephone field on the calendar server (for example, Business 2 or Fax 2), CorporateSync **will not** transfer this information.

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Transferring a new Contact from your Palm to the calendar server

If you create a Contact on your Palm and you perform a synchronization, CorporateSync will create the Contact on the calendar server using the following mapping information:

Palm telephone label	Calendar server label
Work	Work
Home	Home
Fax	Work fax
E-mail	E-mail
Other	Other
Main	Primary
Pager	Pager
Mobile	Mobile

If you had information in any other telephone field on your Palm (for example, Work phone 2 or Home phone 2), CorporateSync **will** transfer this information to the calendar server. However, you will only be able to view the additional fields if they fall within the maximum number of telephone fields displayed by your time management application (CorporateTime®, Microsoft Outlook®, etc.).

Example: You have a Palm Contact with four Work phone numbers (Work 1 through 4). After synchronizing with the calendar server, you open CorporateTime. Although CorporateSync retains all four Work phone fields during synchronization, CorporateTime only displays up to two Work phone fields, so you **will not** be able to edit information in the Work 3 and Work 4 phone fields using CorporateTime. You can modify information in those fields on your Palm normally.

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Modifying an existing Contact

If you have modified a Contact on your Palm, but not on the calendar server:

CorporateSync will synchronize your information using the mapping scheme outlined in Transferring a new Contact from your Palm to the calendar server.

If you have modified a Contact on the calendar server, but not on your Palm:

CorporateSync will synchronize your information using the mapping scheme outlined in Transferring a new Contact from the calendar server to your Palm. CorporateSync **will** preserve any device-specific fields that do not appear on the calendar server.

For example, you have a Contact with the following information:

Field	Label	Information
Phone 1	Work	572-8459
Phone 2	E-mail	generation@acme.com
Phone 3	Home	337-1549
Phone 4	Main	775-2848
Phone 5	Work	572-8488

On the calendar server, you modify the content of the first Work field and add a second E-mail field:

Label	Information
Work	365-1414
E-mail 2	lostgeneration@acme.com
Home	337-1549
Main	775-2848
Work	572-8488

Then you synchronize your Palm with the calendar server. Your Palm Contact now looks like this:

Field	Label	Information
Phone 1	Work	365-1414
Phone 2	E-mail	generation@acme.com
Phone 3	Home	337-1549
Phone 4	Main	775-2848
Phone 5	Work	572-8488

CorporateSync did not transfer the E-mail 2 field you added when you modified the Contact on the calendar server, because it **was not** mapped to any field on your Palm. However, CorporateSync did transfer your first work number, because it **was** mapped to the Phone 1 field on your Palm.

If you have modified a Contact both on your Palm and on the calendar server:

- If you have modified the **contents** of a particular Contact field on both your Palm and the calendar server, CorporateSync will retain either the Palm Contact or the calendar server Contact based on the synchronization rule you specified (see Setting synchronization rules).
- If you have modified the **label** of any Contact field on your Palm (for example, changing a label from Phone to Home), CorporateSync will preserve those changes.

Setting synchronization rules

(Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Settings | Rules)

Choose how to resolve conflicts when synchronizing items **you own** that have been modified on both the calendar server and your mobile device.

- **Replace calendar server item with mobile device item:** If an item you own has been modified in both locations, CorporateSync **keeps** the mobile device item and **discards** the calendar server item. However, if an attendee changes his reply status on the calendar server, CorporateSync will retain the change.
 - **Example:** You create an Event for a department review and add the other members of your department to the attendee list. Later, on your mobile device, you add details to the Event and change the location, but during this time, one of the attendees has changed his reply status for the Event on the calendar server. If you have enabled **Replace calendar item with mobile device item**, your mobile device item (containing the new location and details) will overwrite the calendar server item, but retain the attendee's changed reply status.
- **Replace mobile device item with calendar server item:** If an item you own has been modified in both locations, CorporateSync **keeps** the calendar server item and **discards** the mobile device item.

Exception: If an attendee is added or removed from the list on the calendar server, CorporateSync will always retain those changes during synchronization. If you have enabled the **Add Attendee Names to Notes** feature, CorporateSync will update the list of attendees in the Notes section of your Event accordingly (see Adding attendee names to the Notes section of an Event for more information).

Performing a Full Synchronization for a conduit

(Start menu | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Full Sync Setup)

What is a Full Synchronization?

To minimize duplication, CorporateSync uses mapping tables to match items on your mobile device with those on the calendar server. The first time you synchronize, CorporateSync will create these tables by comparing every item that falls within your device's date range. This process, known as a **Full Synchronization**, may take a long time (up to 30 minutes), depending on the amount of data you are synchronizing with the calendar server.

After your initial Full Synchronization, CorporateSync will thereafter by default perform **Quick Synchronizations** that only consider changes made to items within the date range since the last synchronization.

When should you perform a Full Synchronization?

- You have deleted old data (before your specified date range) on your device to free up space and you **do not** want CorporateSync to purge that data from the calendar server during synchronization.
- You have deleted current data (within your specified date range) on your device accidentally and you **do** want CorporateSync to restore that data on your device during synchronization.

To perform a Full Synchronization for a conduit:

1. Select Start menu | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm Full Sync Setup.
2. Use the checkboxes to choose the conduit for which you want to perform a Full Synchronization.
3. Click **OK**.
4. Synchronize your mobile device with the calendar server.

If you enable or disable Full Synchronization of a conduit in the Full Sync Setup dialog box, the change will be displayed in the Change HotSync Action dialog box, and vice-versa.

Important

- If the title, start time or end time of an Event have changed, CorporateSync will treat it as a different Entry.
- If the mapping tables are ever deleted or corrupted, CorporateSync will perform a Full Synchronization.

Troubleshooting | Connection problems

You cannot establish a connection between your mobile device and the calendar server.

- Make sure your mobile device is properly placed in its cradle, and that the cradle is connected to your computer.
- If you are connecting through a serial port, make sure no other programs are using the same COM port as your mobile device.
- Consult the documentation included with HotSync.

It is taking too long to synchronize.

- If you are performing a Full Synchronization, the process will take longer than normal. See [Performing a Full Synchronization](#) for a conduit for more information.
- Narrow the date range and the size of details included during synchronization.

Troubleshooting | Entry problems

Some mobile device items do not appear in CorporateTime (your desktop calendaring application) or CorporateTime for the Web (your Web-based calendaring application) after synchronization.

- Because CorporateSync synchronizes your data with the calendar server, you may have to refresh your desktop calendaring application (CorporateTime) or refresh the Web page you are viewing (in CorporateTime for the Web) to view the changes.
- Make sure you own the Entry. If you do not own the Entry and attempt to modify it, CorporateSync will discard your modifications during synchronization.
- Make sure you are running CorporateTime in on-line mode. If you are off-line, you will not be able to view the changes to your calendar until you reconcile your off-line calendar with the calendar server.
- Make sure you have not already changed the mobile device Entry on the calendar server, **and** that you have not given priority to the calendar server when resolving Entries that have been modified in both locations (see Setting synchronization rules for more information).

Some Entries do not appear on the mobile device after synchronization.

- Make sure the Entries in question are within the date range you specified.
- Make sure your mobile device and cradle are properly connected.

I want to keep my mobile device synchronized with two desktop computers.

- Make sure you perform a Full Synchronization of all your data types when you switch from one machine to another. For example, you have a mobile device which you want to keep synchronized with Computer A, your workstation, and Computer B, your home computer. You perform a Full Synchronization of your mobile device with Computer A once, and then work normally. At home that night, you perform a Full Synchronization of your mobile device with Computer B once, and then work normally. When you return to Computer A the next day, you perform a Full Synchronization once, and then work normally.

I want to view a full report on my synchronization.

- Choose Start | Programs | CorporateSync for Palm | CorporateSync 3.0 for Palm View Log. CorporateSync archives the last five (5) logs for each Entry type. **Note:** Synchronization logs provide a full status report on every Entry processed during synchronizaion, while message logs report

any warnings or errors that may have occurred. A successful synchronization will produce a blank message log and a checkmark next to every Entry in the Synchronization log.

A

- Address Book 8
 - Contact 8
 - limit detail size 8
 - modified 10
 - telephone label 10
 - Contact, new 8
 - calendar server to device 8
 - device to calendar server 9
- Attendance 3
 - attendance status 3
 - attendee list 3
 - changed reply status 12

Authentication 2

C

- COM port 15
- Conduit 1
 - change synchronization action 1
- Conflict 12
 - item modified on device and calendar server 12
- Contact 8
 - limit detail size 8

D

- Data 13
 - purge from device 13
- Date Book 3, 5
 - date range 5

E

- Events 3, 5
 - adding attendee names to Notes 3
 - date range 5
 - duplication 13
 - events you do not own 3
 - limit detail size 4
 - location in title 4
 - refused 3
 - repeating 5

H

- HotSync Settings 1

L

- Location 4
 - encoding 4

M

- Mapping 13

- Contact 8
 - telephone field 8, 9
 - telephone label 10
- corrupt mapping tables 14
- mapping tables 13

S

- Server 2, 15, 16
 - master node 2
 - node ID 2
- Synchronization 1, 12, 13, 16
 - change conduit setting 1
 - Event 3, 5
 - attendee added or removed 12
 - Event duplication 13
 - HotSync Custom 1
 - no connection to calendar server 15
 - rules 12
 - settings 1
 - status report 16
- Synchronization, Full 13
- Synchronization, Quick 13
- Synchronizing
 - Events 3, 5
 - taking too long 5
 - missing items on calendar server after sync 16
 - missing items on mobile device after sync 16
 - taking too long 15
 - To-Do Items 6, 7
 - taking too long 7

T

- To-Do Items 6, 7
 - active 7
 - date range 7
 - limit detail size 6

U

- Users, multiple 2