



User Guide

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Notice: The contents of this manual reflect the Intellisync program at press-time. For information on changes to the software (or system support) that may have occurred since the manual was printed, refer to the Readme file or Help.

Chapter 1: Before You Begin

Introduction to Intellisync Lite

Intellisync Lite (Intellisync) software enables you to synchronize your Palm OS® handheld with a host of popular Windows applications. This means that if you want to maintain the same data in your handheld and on your desktop, there's an easy way to ensure that each system contains the same up-to-date information.

- With one press of the HotSync® button, Intellisync can transfer data of different formats between your handheld and your PC. But it does more than simply translate data and transfer it between your two systems. Intellisync compares the records in your handheld to the records in your PC. It then makes whatever changes are necessary in each system to keep them both up-to-date, and “in sync.”

Note: Intellisync can also perform one-way imports and exports of data between your handheld and supported PC applications. Refer to “Importing and Exporting Data” in Chapter 4 for more information.

Intellisync System Requirements

Before you install the Intellisync software, you must have the Palm Desktop installed on your PC. In addition, your PC must meet the following minimum requirements:

Windows 95/98 or Windows NT 4.0 Workstation

- 486 processor or higher
- 30 MB available hard disk space
- 16 MB RAM
- VGA monitor or better, 640 x 480 resolution
- CD-ROM drive
- One available serial port (requires serial cradle)
- HotSync 3.0 installed

Windows 2000 Professional Edition

- 133 MHz Pentium-compatible processor or higher
- 30 MB available hard disk space
- 64 MB RAM
- VGA monitor or better, 640 x 480 resolution
- CD-ROM drive
- One available USB or serial port
- HotSync 3.0 installed

System Requirements for Windows Me

- 150-MHz Pentium-compatible processor or higher
- 480 MB to 645 MB free hard-disk space
- 32 MB of RAM or better
- VGA or higher resolution monitor
- CD-ROM drive
- One available USB or serial port
- HotSync 3.0 installed

All systems

Internet access with Internet Explorer 4.x or Netscape 3.x and higher (suggested).

In addition, you will need a Palm OS® handheld and a docking cradle.

The Intellisync Icons

To access Help specific to the PC application you are using, click Supported Systems in the Help Contents screen and select your application from the list of supported systems.

These are the icons as they appear in the Intellisync Program Group:



The **Intellisync Configure** icon accesses the Intellisync **Configuration** dialog—the main dialog used to configure Intellisync operations.



The **Intellisync Help** icon accesses the **Intellisync Lite** Online Help system.



The **Intellisync Readme** icon displays a text file containing last-minute information not included in the manual or Online Help. It's advisable to read this information before you start using Intellisync.



The **Intellisync Support Tool** icon displays a tabbed dialog that provides information on various support-related topics and links to our web site for upgrades and registration.



The **Intellisync Uninstall** icon can be used to remove the Intellisync program from your system.



The **Intellisync User Guide** icon accesses the Intellisync Lite User guide in PDF format.



The **Favorites Folder** icon has web page links to allow you to easily access timely information on Intellisync promotions, technical issues, FAQs and products featured on Mobile Resource Central site.

In addition to the Intellisync icons, two shortcut icons for the HotSync Manager and Palm Install Tool applications are included in the program group for your convenience.

The HotSync® Manager

In order to use Intellisync Lite, you must already have Palm Desktop installed on your PC. Installing Palm Desktop installs HotSync manager in the Startup group on your PC. This application—which runs in the background, and which is activated by pressing the HotSync button on the handheld cradle—coordinates all communications between your handheld and your PC, including Intellisync synchronizations.

Installing Intellisync on your PC effectively takes over the HotSync Manager application. That is, when you press the **HotSync** button on the handheld cradle, the HotSync Manager initiates the synchronization configured in the Intellisync Configuration dialog.

If you want to use HotSync to synchronize a Palm OS® handheld application with Palm Desktop after Intellisync is installed, you must select **Palm Desktop** in the Intellisync **Choose Translator** dialog.

HotSync Notes:

- Once you have configured an Intellisync operation, you can synchronize any time by simply pressing the HotSync button on the handheld cradle. The HotSync Manager automatically runs the most recently configured Intellisync operation.
- You can synchronize a Palm OS handheld application with Palm Desktop, by selecting Palm Desktop in the Intellisync Choose Translator dialog. Note, however, that the operation performed will be a Palm Desktop operation (filtering, and Intellisync settings like Conflict Resolution do not apply).

Chapter 2: Quick Start

Using Intellisync: A Tutorial

Make sure you read “**The HotSync® Manager**” in Chapter 1 before beginning this tutorial.

This tutorial is for users who want to start synchronizing immediately. For more complete information on synchronization—including details on all the Intellisync settings and processes that affect synchronization—refer to “The Intellisync Dialogs,” and “Special Topics” in Chapters 3 and 4.

Synchronizing Data

See Chapter 3 for complete information on Intellisync settings.

Synchronizing the data stored in your Palm OS® handheld with data on your desktop is basically a one-button operation. When you press the **HotSync** button on the handheld cradle, synchronization starts immediately.

How does Intellisync know what to synchronize? That information is stored in a set of Intellisync dialogs. These dialogs specify the data you want to synchronize, and contain special settings affecting the operation.

Once you have settings in these dialogs configured the way you want them, you need never access them again unless you want to change specifications.

Note: For simplicity, this tutorial guides you through the process of configuring and running a *synchronization*. However, these instructions apply to *importing* and *exporting* as well. The only difference between configuring a synchronization and setting up a one-way transfer of data is in the selection of the operation in the Choose Translator dialog. For information specific to one-way data transfers, see “Importing and Exporting Data” in Chapter 4.

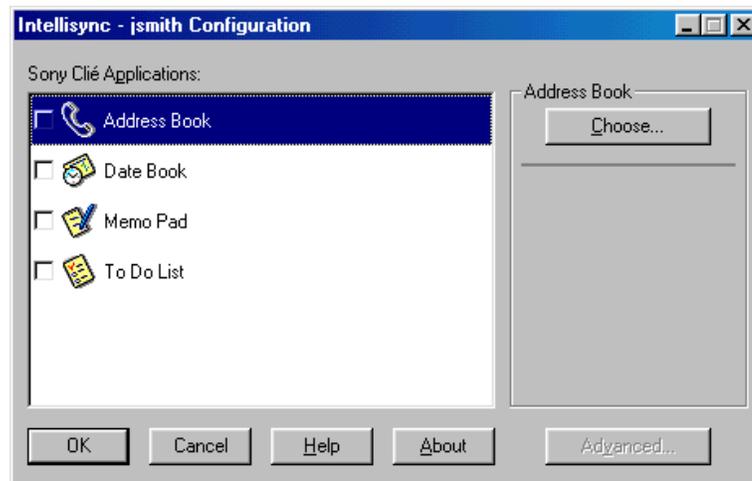
Follow these steps to configure and perform your first synchronization:



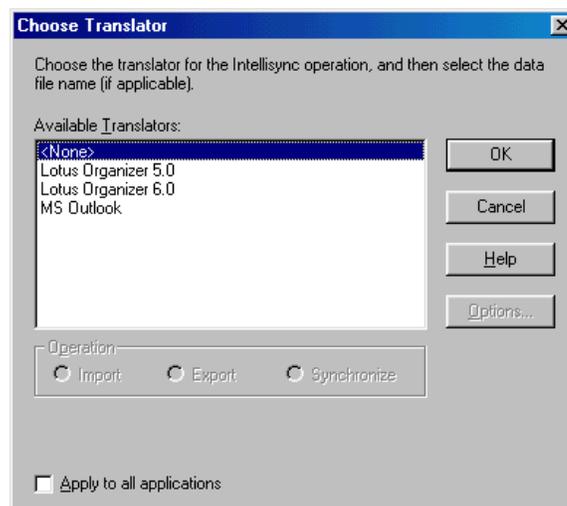
Selecting **Palm Desktop** in the Choose Translator dialog instructs the HotSync Manager to perform a **Palm Desktop** operation instead of an Intellisync operation.

See “**The HotSync Manager**” in Chapter 1 for more information on the HotSync Manager.

1. Click on the **Intellisync Configure** shortcut, or the Intellisync Configure icon in the **Intellisync Lite** program group. This displays the Intellisync Configuration dialog box.



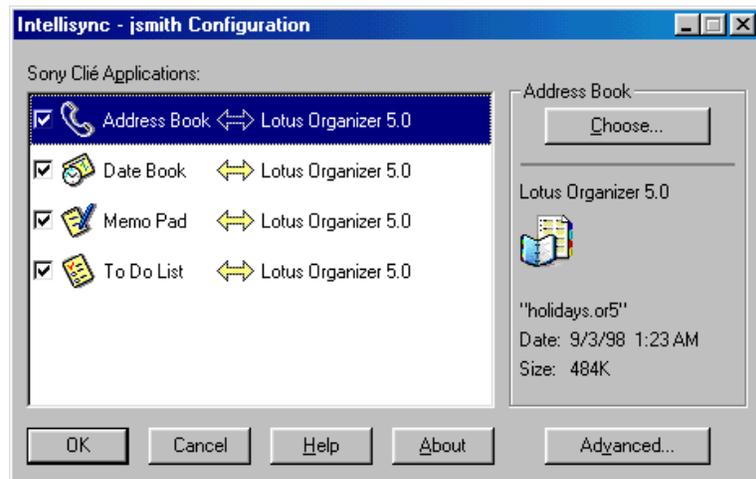
2. In the Configuration dialog box, click on the handheld application you want to synchronize. Then click the Choose button to display the Choose Translator dialog box.



3. In the Choose Translator dialog box, select the PC application you want to synchronize. If you select Lotus Organizer, a File Name box and Browse button appear, use Browse to select the file you want to synchronize.

Notes:

- Check **Apply to all applications** to have the selected application and file (or folder) synchronize with all applicable handheld applications.
 - Some PC applications do not require you to specify a filename. If this is the case, the “active” or last-used file is used by default, and the File Name text box is not present in the Choose Translator dialog box.
 - Using the Browse button to locate your data file prevents you from making typographical errors when specifying a filename.
4. If you selected MS Outlook the Options button is enabled, click it and make sure the correct user profile is selected. Then click **OK** to return to the Choose Translator dialog box.

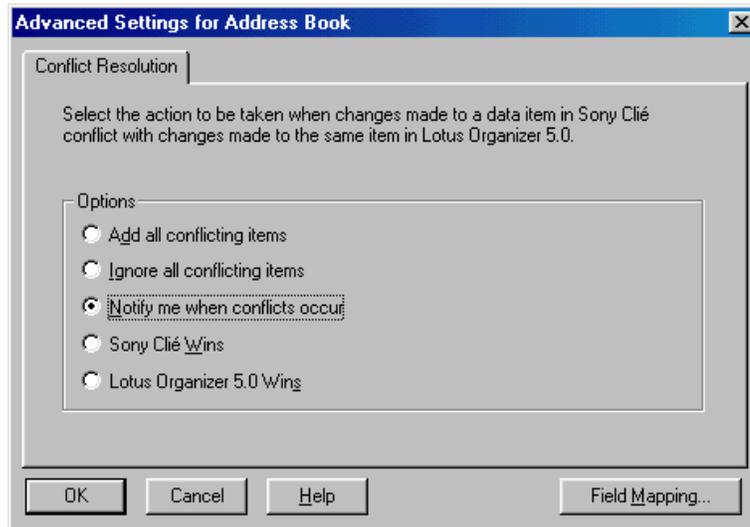


5. Click the **OK** button to return to the Configuration dialog box.

Now the PC application you selected appears next to the handheld application name, and a two-sided arrow appears between the handheld and PC application names.

Note the check box adjacent to the handheld application name. By default, this check box is checked, indicating that the data is activated for synchronization. (If you clear this box, the application data is not synchronized.)

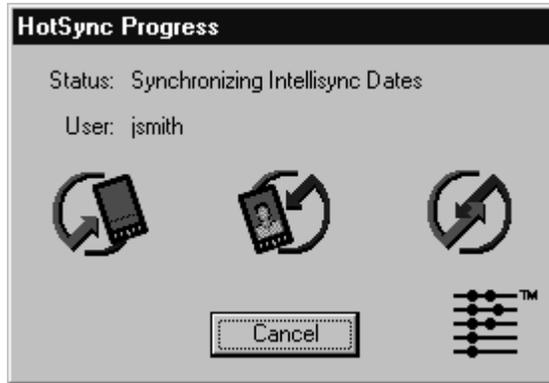
6. To review or alter settings affecting synchronization, select the **Advanced** button to access the Advanced Settings dialog. (Intellisync provides default values for all settings.)



7. When settings are configured as you want them, click **OK** to return to the Configuration dialog.
8. If necessary, repeat the above procedure for each of the handheld applications you want to synchronize. Then click the **OK** button to save specifications and exit the Configuration dialog.
9. With your handheld in the handheld cradle and the cradle connected to the appropriate COM port on your PC, press the **HotSync** button on the handheld cradle. The synchronization process begins, and a progress dialog appears.

Note that pressing the Cancel button on the progress dialog does not stop the synchronization until the section being synchronized has been completed.

If you have not already done so, read “**The HotSync Manager**” in Chapter 1 for important details on the HotSync Manager application.



10. If a Conflict Resolution dialog box appears, resolve “data conflicts” (see note below).

When the operation is complete, your handheld will display the message **HotSync complete**.

If any errors are reported during the operation, click the **HotSync Log** button on the handheld when the operation is finished. This will display information on the errors.

Notes:

For each set of data you synchronize, a history file is used to determine the changes that must be made in each of your systems to achieve synchronization. This file is *created* by the first synchronization of the data. Therefore, a first run synchronization is different from (and may take longer than) subsequent synchronizations.

First run synchronizations simply merge your handheld and PC data, and a Conflict Resolution setting is used to resolve data conflicts.

See “The Conflict Resolution Tab” in Chapter 3 for information on data conflicts and the Conflict Resolution setting.

For information on how history files are used in the process of synchronization, refer to “Synchronization and History Files” in Chapter 4.

Re-Running the Operation

Now that you have configured a synchronization, re-executing the operation is basically a one step operation.

- ▶ Simply press the **HotSync** button on the cradle (with the handheld in the cradle and the cradle connected to your PC), and synchronization begins.

You'll only need to access the Intellisync dialogs again if you want to change the nature of the operation.

Refer to "**Frequently Asked Questions**" in Chapter 5 if you have any trouble running a successful synchronization. The problem you're having may be addressed there.

Synchronization Notes:

- In order to run an Intellisync synchronization, your handheld must communicate with your PC. For this to occur, your handheld must be properly fitted into the handheld cradle, and the cradle serial cable must be securely attached to an available serial port on your PC. For complete details on connecting your handheld to your PC, refer to your handheld handbook.
- Be sure to read the Supported Systems Help topic for the PC application(s) you are using. Supported Systems topics contain important information on how Intellisync works with each of the PC applications it supports.
- Data can be transferred between records in your handheld and PC applications because fields in the two systems are "mapped" (linked). Intellisync provides default "field mapping," but you can alter mapping to re-direct (or prevent) the flow of data during data transfers. Refer to "The Field Mapping Dialog" in Chapter 3 for details.
- When you synchronize a handheld application, it is automatically synchronized with all sections in the selected PC application that are compatible with the handheld application. For example, if you select the handheld Date Book application and Lotus Organizer, handheld Date Book records are synchronized with records in the Lotus Organizer Anniversary, Calendar, and Planner sections.

Chapter 3: The Intellisync Dialogs

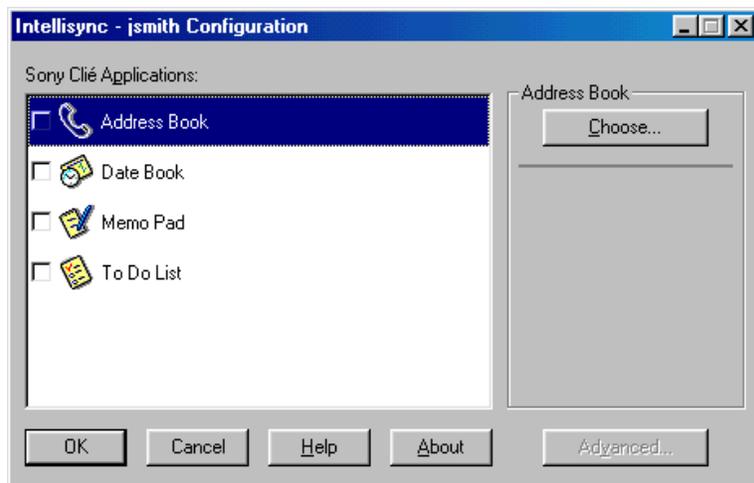
The Configuration & Choose Translator Dialogs

The Intellisync **Configuration** and **Choose Translator** dialogs are where you specify the handheld and PC applications you want to synchronize.

The Configuration Dialog



To open the Intellisync **Configuration** dialog, select the **Intellisync Configure** icon from the **Intellisync for Palm™ handhelds** program group or from a desktop shortcut icon.



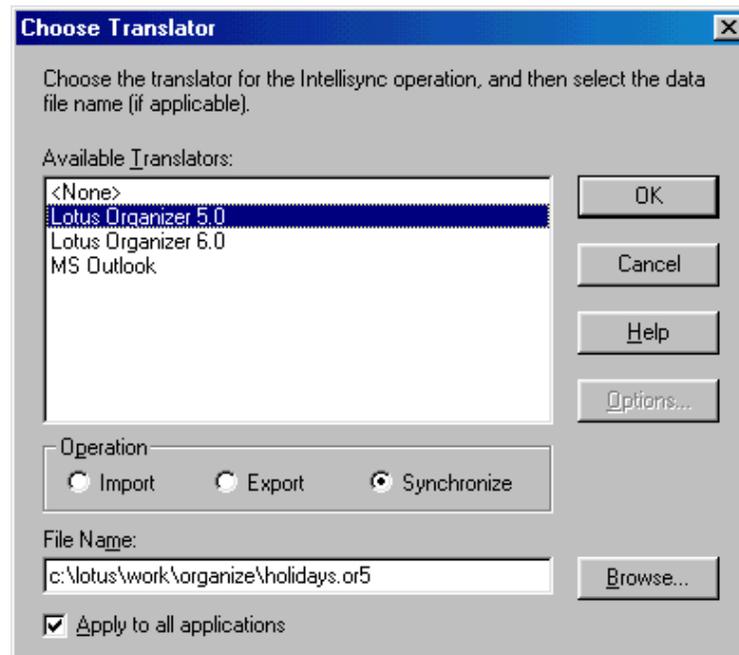
This dialog contains an “Applications” list containing each of the handheld applications.

- To select a handheld application in this dialog, click on it.
- To link the handheld application with a PC file for synchronization, click the **Choose** button. This displays the **Choose Translator** dialog.

The Choose Translator Dialog

The Choose Translator dialog contains an **Options** button that is enabled if you select MS Outlook. Refer to the **Supported Systems** section of Online Help for information on Options dialog settings that apply to the PC application you use.

Refer to “**Importing and Exporting Data**” in Chapter 4 for information on the Operation buttons in this dialog.

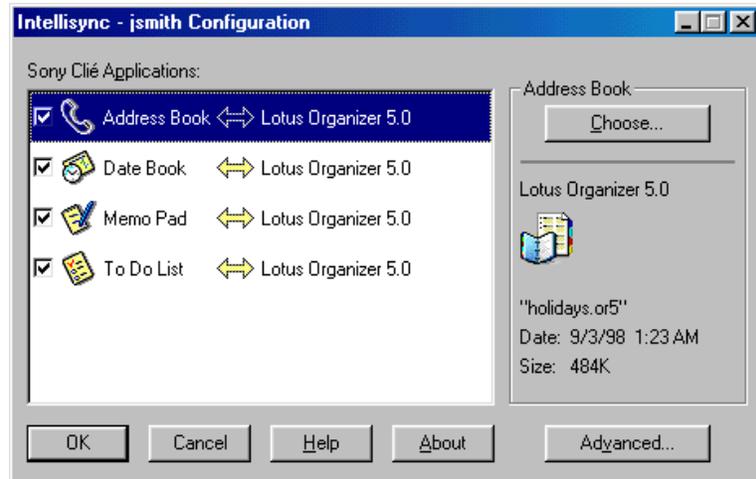


Select a PC application. If you selected Lotus Organizer, use the **Browse** button to select the data file.

Apply to All Applications

When enabled, you can check the Apply to all applications check box at the bottom of the Choose Translator dialog box to configure all compatible handheld applications with the PC application and file (or folder) you selected. If all of the data you want to synchronize is in a single file or folder, use this option to configure all of your handheld applications at once.

- When you've finished in the Choose Translator dialog box, click the **OK** button to return to the Configuration dialog box.



Now the PC application you selected appears next to the highlighted **handheld** application name, and the **check box** adjacent to the handheld application name is checked. In addition, a two-way arrow (for synchronization) appears between the handheld and PC application names.

Clearing a check box next to an application excludes that application from synchronization.

To access settings or field mapping for the highlighted applications, select the Advanced button at the bottom of the Configuration dialog.

Note: For information on Intellisync settings and field mapping, see *The Advanced Settings dialog box* and *The Field Mapping dialog box* later in this chapter.

Configuring Multiple Handheld Applications

In a single operation, you can synchronize as many handheld applications as you like.

Simply repeat the described procedure for every handheld application you want included in the operation.

Once a synchronization is configured, clicking the **HotSync** button on the handheld cradle starts the operation.

Refer to the “Quick-Start” tutorial in Chapter 2 for more specific instructions.

Dialog Buttons

The Configuration and Choose Translator dialogs contain the following buttons:

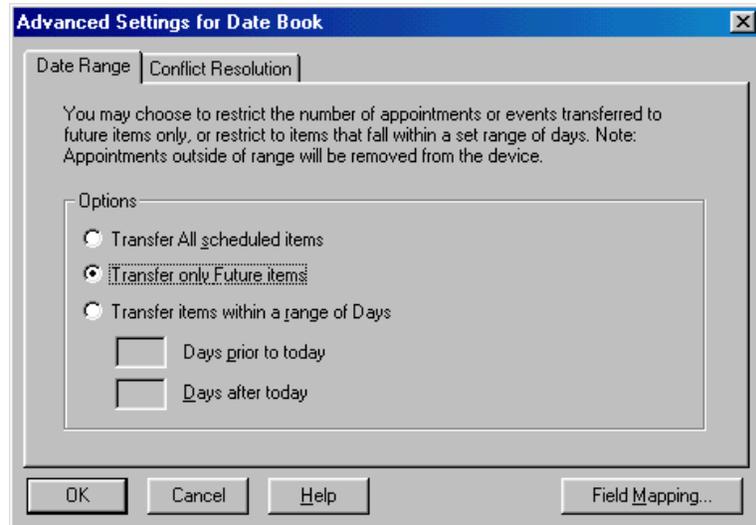
- **Advanced:** Accesses the tabbed Advanced Settings dialog. Note that this button is only enabled when you have configured a handheld and PC application for synchronization, and the applications are selected in the Configuration dialog.
- **Browse:** Opens a file selection dialog.
- **Choose:** Opens the Choose Translator dialog.
- **Options:** Displays the Options dialog, when available.
- **OK:** Saves specifications and exits the dialog.
- **Cancel:** Cancels changes and exits Intellisync.
- **Help:** Opens the Intellisync Online Help system.
- **About:** Displays information about this version of Intellisync.

Notes:

- If you select Palm Desktop in the Choose Translator dialog, the selected handheld application will be synchronized with **Palm Desktop** when you press the HotSync button. Note that the operation will be a **Palm Desktop** operation, which may differ significantly from the same type of Intellisync operation. For example, **Palm Desktop** Imports and Exports delete data in the target system before importing or exporting records. Intellisync Imports and Exports *merge* source and target records.
- For information on Intellisync Import and Export operations, refer to “Importing and Exporting Data” in Chapter 4.

The Advanced Settings dialog box

When you select the **Advanced** button in the Configuration dialog, the **Advanced Settings** dialog appears.



This tabbed dialog contains one or more of the following settings and features.

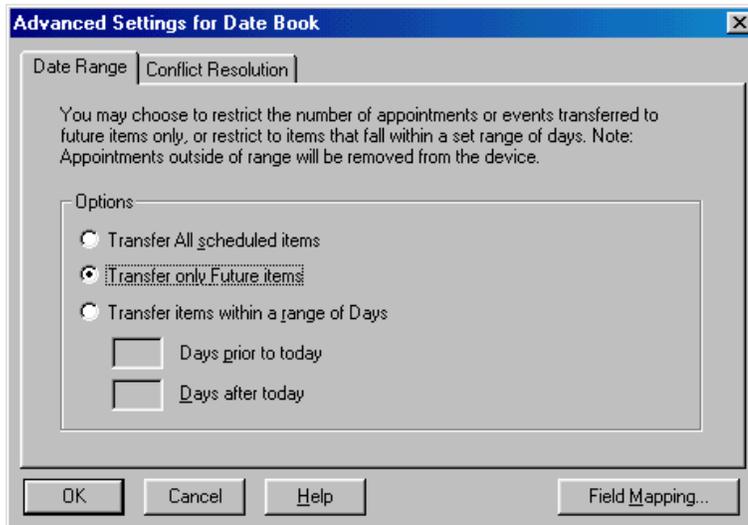
- **Date Range:** Determines the range of Date Book items that are included in an operation.
- **To Do List:** Determines if *all* To Do items, or only *pending* To Do items are included in an operation.
- **Conflict Resolution:** Determines how data conflicts are resolved if they are detected during a synchronization.

The **Advanced** button is only enabled when a handheld and a PC application are configured for synchronization. The settings accessed by the Advanced button only apply to the currently selected application.

If an Advanced setting isn't applicable to the handheld application selected in the Configuration dialog, the associated tab is not presented.

The Date Range Tab

The setting in this tab determines the range of Date Book items that will be included in a synchronization. **Transfer Only Future Items** is the default Date Range setting.



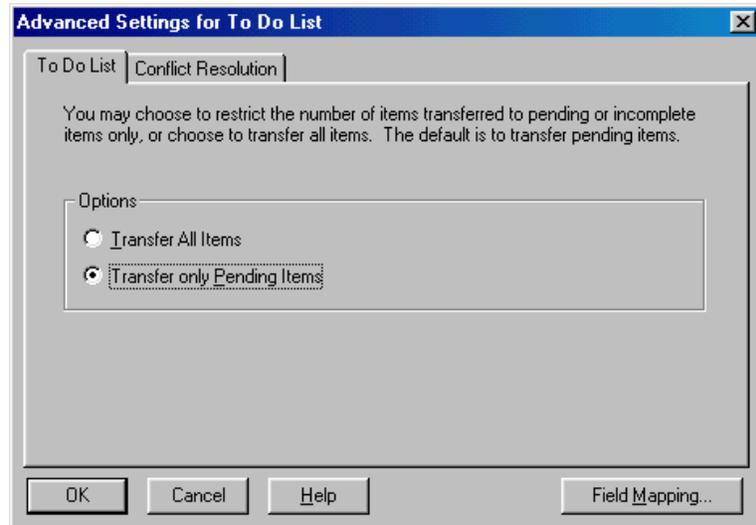
- **Transfer All Scheduled Items:** Includes all dated items.
- **Transfer only Future Items:** Synchronizes future items.
- **Transfer Items within a Range of Days:** Synchronizes a specified number of days before and after “today.”

To specify a Date Range, select the radio button next to the option you want. The **Transfer items within range of Days** option lets you set a date range that is always relative to the current date.

Note: When you run a synchronization, items that were included in the previous synchronization are synchronized whether or not they fall within the currently specified date range. (Intellisync identifies these items by looking at the history file for the previous synchronization.) Note, however, that only those items that fall within the currently specified date range are included in the update of the history file.

The To Do List Tab

The To Do List setting in this tab determines which To Do items are processed when you run a synchronization.



Transfer Only Pending Items is the default setting at installation.

- If you accept **Transfer Only Pending Items**, To Do items marked “completed” are *not* synchronized.
- If you select **Transfer All Items**, all To Do items, including those marked “completed,” are synchronized.

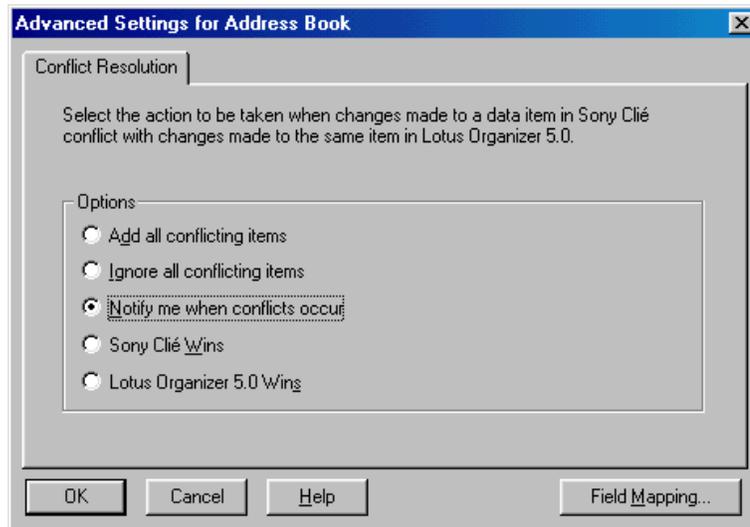
Notes:

- When a repeating To Do item is transferred to your handheld, it is fanned to a maximum of 3 items in the handheld To Do List application.
- Deleting an instance of a repeating To Do item on your handheld deletes the equivalent instance from the PC application on the next synchronization.
- Deleting all instances of a repeating To Do item from your handheld deletes the equivalent instances from the PC application and brings any additional instances on the PC side over to your handheld on the next synchronization.

The Conflict Resolution Tab

When a **data conflict** occurs during a data transfer, and Intellisync can't resolve it using the normal synchronization process, the **Conflict Resolution** setting selected in this tab is used to resolve it.

At installation, **Notify me when conflicts occur** is selected. This is the only setting that display a dialog when a data conflict is found, letting you decide which values should be used in each record.



What is a Data Conflict?

A data conflict exists when records that should be equivalent contain conflicting data in one or more mapped fields. Mapped fields are fields that are linked for transfer in the Field Mapping dialog. See **The Field Mapping Dialog** in this chapter for information on field mapping.

More specifically, a data conflict exists when two records contain the same **key field** values, but different values in other mapped fields.

Key Fields

Fields designated as key are those that are the most fundamental to a particular record. For example, name fields are key fields in Address Book records.

The use of key fields in detecting data conflicts is premised on the following: When key fields in a handheld record match the key fields in a PC application record, other mapped fields in the two records should also match. For example, if both of your systems have an address record for Ron Smith, the values in *Title*, *Company*, etc. should match. If they do not, a data conflict exists.

Letter case counts in key fields. If you have a record for *Diana VanWinkle* in your PC application, and one for *Diana Vanwinkle* in your handheld, Intellisync does not recognize the names as equivalent. Synchronization causes both records to occur in each system.

See **Key Fields** in Help for information on which fields are key fields for each data type.

The occasions when the Conflict Resolution setting is needed to resolve data conflicts are as follows:

- First run synchronizations.
- When new records have been added to each system since the last synchronization, and those records conflict. (For example, if you have added an address record for Brian Sawyer to each of your systems, but the City fields don't match.)
- When mapped fields have been edited in both systems since the last synchronization, but edited differently. (For example, if you have updated Brian's home phone number in both records, but made a typographical error in one of them.)

Conflict Resolution options work as follows:

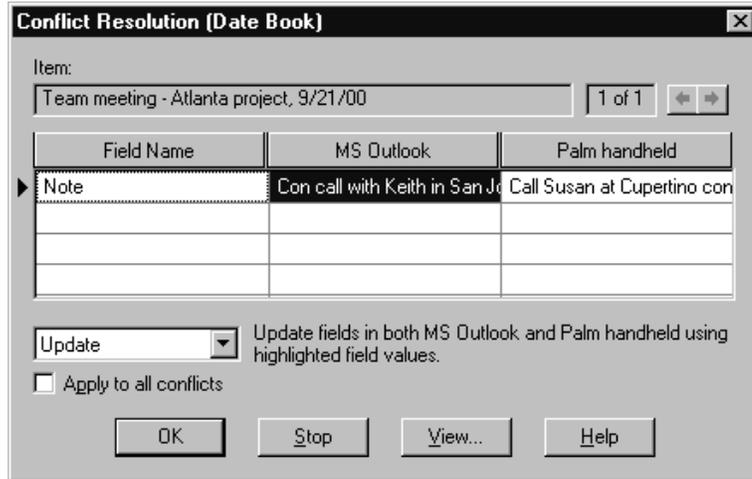
- **Add All Conflicting Items:** Creates a new record in each system containing mapped values from the record in the other system.
- **Ignore All Conflicting Items:** Makes no change to either system.
- **Notify me when conflicts occur:** Displays a dialog box each time a data conflict occurs, letting you decide which data to use on a case by case basis. (If you run a remote synchronization with this setting selected, the "Add" option is used in its place.)
- **Handheld Wins:** Uses handheld data when conflicts occur. Use this option when you're confident that your handheld contains the most accurate information.

- **Other Application Wins:** Uses PC data when conflicts occur. Use this option when you're confident that your PC application contains the most accurate information.

The Conflict Resolution Dialog Box

When “Notify” is the Conflict Resolution setting, a dialog is presented each time Intellisync needs help resolving a conflict.

A check box labeled **Apply to all conflicts** is located below the action list box. If you check this box, the action you choose for the current conflict will be applied automatically to any other conflicts detected for the handheld application currently being synchronized.



This dialog contains a table containing the conflicting fields from both systems. The field name is displayed in the left column. The PC field value is in the center. The handheld value is on the right.

A box labeled “Item” contains key field values. This helps identify the conflicting record.

If a record in one system conflicts with more than one record in the other system, a box to the right of the Item box will say **1 of 2**, or **1 of 3**, etc., and left and right arrow controls will let you switch between conflicts.

You can take the following actions to resolve a data conflict.

- **Add:** Adds a new record to each system. The original conflicting records remain intact.
- **Ignore:** Lets the conflict stand, making no change to either record. If you select the **Ignore** option, you will be prompted to resolve the conflict again the next time you run a synchronization.

- **Update:** Updates one or both records (as necessary) with the value or values highlighted in the grid.

Conflict Resolution Dialog Buttons

The Conflict Resolution dialog box also contains the following buttons:

- **OK:** Initiates the chosen action and continues the operation.
- **Stop:** Takes no action and terminates the synchronization.
- **View:** Displays a dialog showing the full contents of the selected field(s) for both systems. Use this to display complete values when lengthy values are truncated in the Conflict Resolution dialog box.
- **Help:** Displays Online Help text.

Conflict Resolution Notes:

- Except for first run synchronizations, the Conflict Resolution setting is not normally needed to resolve data conflicts. In most cases, Intellisync knows how to edit records to achieve synchronization. Refer to “Synchronization and History Files” in Chapter 4 for more information.
- Refer to “The Same Record Changed and Deleted Dialog” in Chapter 4 for information on what happens if Intellisync discovers a record that has been changed in one system and deleted in the other since the last synchronization.
- Overlapping appointments are not treated as data conflicts during synchronizations. (Note: Conflicts generated by repeating items are not always detected during one-way data transfers.)
- Do not leave Last Name fields blank in address records. Since Last Name fields are key fields, leaving them blank can generate false data conflicts.
- If you don’t have a name to enter into an address record—for example, if you have address data for a company, but you don’t have a contact name—place some other value in the Last Name field. For example, enter the company name in the Last Name field as well as in the Company field. Or, if you have only a contact’s first name, place the first name in the Last Name and the First Name fields.

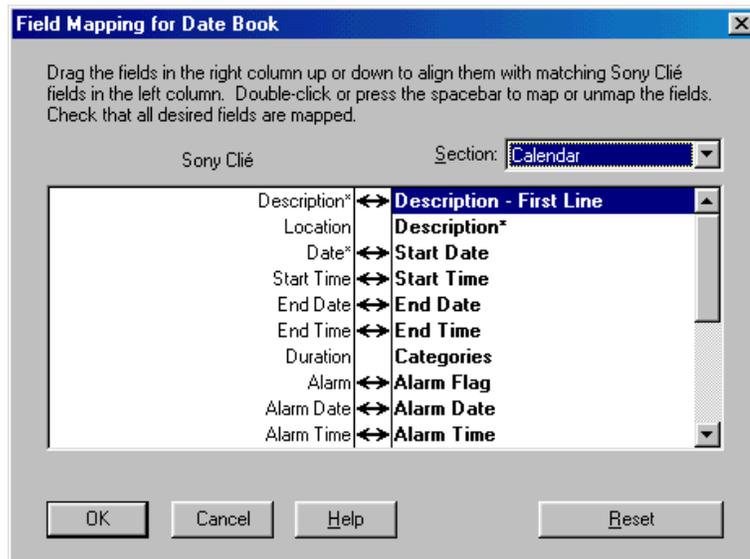
The Field Mapping Dialog

Fields that are not linked in the Field Mapping dialog are not transferred during synchronizations.

In order for data to be transferred between your handheld and your PC application file, corresponding fields in each application must be mapped to one another. Intellisync provides default field mapping, which links equivalent fields in your two systems. But you can edit mapping to re-direct (or prevent) the flow of data as needed.

To access field mapping for selected applications, click the **Field Mapping** button at the bottom of the Advanced Settings dialog. This displays the Intellisync Field Mapping dialog.

When a handheld application is compatible with more than one section in your PC application, it is automatically synchronized with each of them.



Note: Some PC applications have multiple data type sections that are compatible with the selected handheld application. When this is the case, a list box labeled **Section** appears over the right column. Select from this list to specify the section for which you want to display field mapping.

As you can see, the Field Mapping dialog lists handheld fields on the left, and PC fields on the right. Two-way arrows appear between fields that are “**mapped**,” or linked, for synchronization.

- **To un-map mapped fields:** Click on the arrow (or highlight the PC application field name and double-click or press the Spacebar).
- **To map adjacent fields:** Click between the fields (or highlight the PC application field name and double-click or press the Spacebar). An arrow will appear to indicate that the fields are mapped.
- **To map non-adjacent fields:** Drag the field in the right-hand column and drop it next to the field in the left-hand column.
- **To reinstate default field mapping:** Select the **Reset** button.

Field Mapping Dialog Buttons

At the bottom of the Field Mapping dialog, the buttons work as follows:

- **OK:** Saves changes made to field mapping and re-displays the Advanced Settings dialog.
- **Cancel:** Cancels changes made to field mapping.
- **Help:** Opens the Intellisync Online Help system.
- **Reset:** Resets field mapping to the installation default configuration.

Field Mapping Notes:

- Before you edit field mapping, scroll up and down the field list to see the available fields. They may not be organized as you'd expect.
- If you change field mapping after data has been synchronized, the next synchronization will be, in effect, a first run synchronization.
- When data is transferred between fields in your handheld and your PC application, data may be truncated in the target field if the source data is too lengthy to be accommodated. It is not wise to edit truncated data. If you do, the data in the other system will be truncated after the next synchronization. Refer to Chapter 5, "Frequently Asked Questions," for a workaround that allows you to edit truncated text.
- Intellisync enforces certain field mapping rules. For example, you cannot map *date* fields to *time* fields. If you attempt to map incompatible field types, an error message is displayed.
- Field names marked with asterisks in the Field Mapping dialog must be mapped (or one or more of their multi-line sub-fields must be mapped). If marked fields are not mapped, an error message appears when you try to exit the Field Mapping dialog.
- Though Intellisync provides default field mapping, it's advisable to review field mapping to make sure that it's set up to best suit your applications.
- Check the Supported Systems Online Help topic for the PC application(s) you're using to see if any special field mapping rules apply. For example, if your application allows for the creation of custom fields, the Help topic for that system will tell you how to map custom fields.

Chapter 4: Special Topics

This chapter is devoted to explaining in detail some aspects of Intellisync that have only been touched upon in previous chapters.

Topics include:

- Multi-User Support
- Synchronization and History Files
- The Same Record Changed and Deleted dialog box
- Remote Synchronization
- Importing and Exporting Data
- Virtual Fields

Multi-User Support

Intellisync can be used to synchronize multiple handhelds. A separate operation can be configured for each.

However, before you can configure an operation for a second (or third, etc.) handheld, a User name for that handheld must be added to the Palm™ Desktop Software User list. Instructions for adding User names are provided below.

When more than one User name has been added to the Palm Desktop Software User list, Intellisync prompts you to select a User name *each* time you configure (or re-configure) an Intellisync operation.

You are normally *not* prompted for a User name when you run a synchronization. The HotSync® Manager recognizes the handheld in the cradle and automatically runs the operation currently configured for that User name.

“Owner names” specified in the handheld are not the same as User names. User names can only be defined in Palm Desktop Software.

Adding a User Name

1. Open Palm Desktop.
2. Open the **Tools** menu and select **Users**.
3. Click the **New** button in the dialog that displays. When the New User dialog appears, enter a User name (maximum, 15 characters).
4. Click **OK** to save the name.
5. Run the Intellisync Configure operation and, when prompted, select the User name you added.
6. After you have configured an operation, place the handheld in its cradle and press the **HotSync** button. When prompted, select the new User name and press **OK**. This transfers the User name to the handheld and starts the synchronization.

Notes on Multi-User Support:

- You may be prompted to select a User name the *very first time* you run an Intellisync synchronization.
- The handheld “owner name” is not the same as a User name. User names can only be defined in Palm Desktop.
- If more than one User name is defined in the Palm Desktop User list, you are prompted for a User name each time you run the Intellisync Configure program.
- Intellisync saves configuration information for multiple handhelds in separate directories (based on user names).

Synchronization and History Files

An understanding of history files and how synchronization works is not mandatory. However, you may find this information helpful.

During a synchronization, Intellisync compares records in your *handheld* to records in your PC application, and makes whatever changes are necessary in each system to ensure that they both contain the same information.

If a record has been added to one system and not the other, that record is added to the incomplete system. If a record has been deleted from one system and not the other, Intellisync deletes the record from the other system. If a record has been edited in one system and not the other, Intellisync edits the record in the other system. Intellisync knows how records have changed since the last synchronization because a “**history file**” is used in comparing records.

A separate history file is created for each set of configured applications.

The first time a particular set of data is synchronized, there is no history file. Data from the two locations are simply merged, and conflicts between the two systems are resolved using the Conflict Resolution setting.

However, this initial operation *creates* the history file that will be used for subsequent synchronizations.

How does the history file work? At the end of each synchronization, a history file matching the two synchronized systems is created. When the systems are next synchronized, Intellisync compares the two synchronized systems to each other, and to the history file. If a record in the history file matches one system, but not the other, Intellisync knows that the “conflicting” record has been changed since the last synchronization. It therefore applies the change to the other system and to the history file.

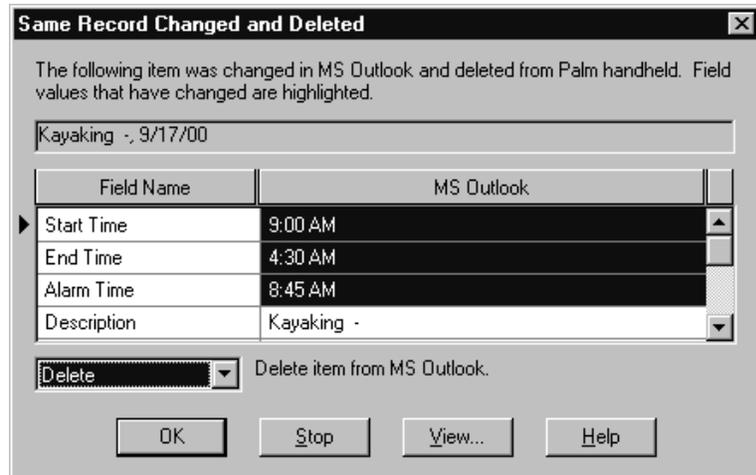
In cases where changes have been applied to both systems, and those changes conflict (for example, if you have added address records for the same name to each system, but the phone numbers don't match), the Conflict Resolution setting is used to resolve the discrepancy.

The Same Record Changed and Deleted Dialog

This dialog appears only when **Notify me when conflicts occur** is the selected Conflict Resolution setting. If any other setting is selected, a **change** always overrides a **delete**—that is, the changed record is added to the system from which the record was deleted.

If you select the **Ignore** option, you will be prompted to resolve the conflict again the next time you run a synchronization.

If, during a synchronization, Intellisync discovers that a previously synchronized record has been **changed** in one system and **deleted** in the other since the last synchronization, a special dialog is displayed.



The Same Record Changed and Deleted dialog alerts you to the deletion of the record in one system, and shows you the record as it has been changed in the other. A list of options allows you to decide between the following actions:

- **Add:** Adds the item back into the system from which it was deleted.
- **Delete:** Deletes the record from the other system.
- **Ignore:** Lets each system remain as it is.

Use the View button at the bottom of this dialog to see the complete value of the highlighted field when it is too long to be displayed in the grid.

Remote Synchronization

Once you have configured a synchronization, Intellisync can synchronize remotely, via modem. This topic outlines what must be done prior to running a remote synchronization, and describes differences between remote and local operations.

Consult your Palm OS® handheld-compatible manuals for instructions on how to set up HotSync, your handheld, and your Palm modem for remote synchronization.

Tip! Synchronize your handheld and PC application before leaving your office. You can not change your Intellisync configuration settings remotely.

To Prepare Your PC

In order to run a remote synchronization, your PC must be turned on.

You must have a modem correctly installed and connected to an outside line.

Your PC should be disconnected from any Online services (e.g., America Online, CompuServe, etc.).

The PC application with which you are synchronizing may have requirements for data transfer. In some cases, for instance, an application must be running or data files must be closed. See the Data Transfer Requirements section of the Supported Systems topic for the PC application you are using.

Remote vs. Local Synchronization

When you run a synchronization locally, you are sometimes prompted for information. For example, if the “Notify” Conflict Resolution setting is selected, you may be prompted to resolve data conflicts.

Since interaction with Intellisync is not possible when you synchronize via modem, remote synchronizations entail a number of limitations. (Under some circumstances, synchronization is not possible.)

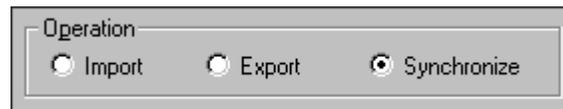
Limitations when synchronizing via modem are as follows:

- If “Notify” is the selected Conflict Resolution setting, the “Add” setting is used in its place.
- PC applications that require a password for access cannot be synchronized remotely.
- Regardless of the “Confirmation” setting, synchronizations take place without confirmation. However, if a synchronization would result in the deletion of all records from a system, the operation cancels.

Importing and Exporting Data

In addition to synchronizing your handheld with PC applications, Intellisync can also perform *imports* and *exports* of data from one system to the other.

The same procedures that are involved in configuring and performing a synchronization are used for importing and exporting. That is, you have to set up the Configuration and Choose Translator dialogs, and, if necessary, adjust settings in the Advanced Settings, Options, and Field Mapping dialogs. Once things are set up, the HotSync button on the handheld cradle starts the operation. The only difference is in the choice of the operation in the Choose Translator dialog.



- To transfer data from a PC application to your handheld, select **Import**.
- To transfer data to a PC application from your handheld, select **Export**.

Notes:

- When you perform an Import or Export, Intellisync doesn't duplicate records that already exist in the target system. However, Conflict Resolution is applied if Intellisync discovers data conflicts between records in your two systems.
- When Conflict Resolution is used during imports or exports, Intellisync may add or change target records, but records are never deleted.
- In a single operation, you can perform different *types* of data transfers. For example, in one operation, you can *import* into the handheld Address Book, *export* Date Book information, and *synchronize* your To Do's. It's simply a matter of which operation you choose for each type of data.

Virtual Fields

Sometimes the handheld does not have fields corresponding to important PC application fields. For example, a PC application's To Do records might have Contact and Company fields which the handheld To Do List records do not.

To solve this problem, Intellisync sometimes creates “virtual” handheld fields. Virtual fields appear in the Field Mapping dialog. When these are mapped, values in corresponding PC application fields are transferred to the handheld as appendages to other fields. For example, virtual fields are appended to the *Note* field of Date Book and To Do List records.

Virtual Fields in the Date Book and To Do List

For the handheld Date Book and To Do List applications, some virtual fields are mapped by default. For example, if you were to configure the handheld To Do List application for synchronization, you might see the following mapping in the Field Mapping dialog:

Handheld		PC Application
Contact Name:	↔	Contact
Contact Company:	↔	Company

This mapping transfers the values in the PC Application Contact and Company fields to the **Note** field of the handheld To Do List record.

The values would appear in the handheld's Note field like this:

Contact Name: Bob Moore
Contact Company: Mid-East Translations

Virtual Phone and Email Fields

Virtual Phone and Email fields can be used to increase the number of phone numbers and email addresses that can be entered into handheld Address records.

Unlike virtual fields in the Date Book and To Do List applications, these virtual fields are *never* mapped by default. To use a virtual field in the Address Book application, you must edit field mapping.

Virtual phone and email fields appear below “normal” fields in the Field Mapping dialog. Map them in the typical manner if you need them.

Work	↔
Alternate	
Assistant	
Home	↔
Alternate	
Home	
Fax	↔
Home Fax	
Alternate Fax	
E-mail	↔
E-mail 2	
E-mail 3	

When virtual phone and email fields are transferred to your handheld, they are displayed in the handheld below the actual field they are associated with, like this:

Work: 603 555-1213
Alternate: 603 555-1214
Assistant: 603 555-2564

Editing and Adding Virtual Fields in the Handheld

You can both *edit* and *add* virtual field values in handheld records. But you must adhere to the following rules:

- When adding virtual field names, use the exact spelling and letter case used in the Field Mapping dialog. For example, when adding a virtual Alternate Home phone field to your handheld, use *Alternate Home*, not *alternate*.
- Place the virtual field on a line separate from any other field text.
- In Note fields, place virtual fields *before* Note text.
- Place a colon and a space between the field name and field value.
- Make sure the virtual field is mapped in the Field Mapping dialog.

An Example

Follow these steps to add a virtual *Assistant* field to the handheld Work (phone) field:

1. With the cursor in the **Work** phone field, and to the right of any existing data, tap **Enter** in the on-screen keyboard.
The cursor is now on a new line in the Work field.
2. Enter **Assistant: xxx xxx-xxxx** (replace the x's with the correct phone number).
3. Tap the **Done** button.
4. Map the **Assistant** field to the appropriate PC field in the Field Mapping dialog.

When you run the next synchronization, the Assistant phone value you added to your handheld will transfer to your PC application.

Chapter 5: Frequently Asked Questions

General

I received the message “Wrong version of Windows,” but I am using a Windows application that is supported by Intellisync.

This message appears if Palm™ Desktop is not already installed on your PC when you attempt to install **Intellisync Lite**.

To stop the error from occurring, install Palm Desktop on your system. Then install Intellisync.

After I ran a synchronization, some of the data in my application was truncated.

When data is transferred between fields in your handheld and your PC application, data may be truncated in the target field if the source data is too lengthy to be accommodated.

If you edit the truncated data, the original data in the other system is truncated during the next synchronization. If you want to edit truncated data, there is a workaround—as follows:

Any time you edit truncated data, you should also go in and edit the corresponding record in the other system. (It can be the same change you made in the shortened record, or a trivial edit of no consequence. The important thing is that a *change* is registered in that record). Make sure the **Notify** Conflict Resolution setting is selected. Then, during the next synchronization, when the Conflict Resolution dialog box is displayed for that record, select **Ignore**. This will prevent the truncated data from overwriting the data in your other system.

Note: If you select **Ignore**, as recommended, you will be prompted to resolve the conflict again the next time you run a synchronization. If this is not acceptable, you can highlight the original (non-truncated) text in the Conflict Resolution dialog and choose **Update**. Note, however, that Update will overwrite the edit that caused the conflict in the first place.

See
“**Synchronization and History Files**” in
Chapter 4 for an
explanation of how
synchronization
works.

During synchronization, I am losing the connection between my handheld and PC.

If your handheld and PC are hooked up correctly, your batteries are not run down, and the COM port setting is accurate, try synchronizing with the Palm Desktop.

If synchronizing with Palm Desktop does work, your problem may be that the baud rate is set too high in Palm Desktop. (This can be an issue especially in cases where you are accessing your PC application over a network.) Try lowering the speed like this:

Go into Palm Desktop (Start/Programs/Palm Desktop/Palm Desktop) and select HotSync® from the Palm Desktop menu. Then select Setup and lower the speed in the Speed box.

Why isn't data being transferred when I run a synchronization?

For information on another way to restore corrupted data, refer to "Full Re-Synchronization" in Chapter 4.

Sometimes a synchronization will fail because data in your PC application is corrupted. One thing you can do to find out if this is the problem is to create a new file in your PC application and run another synchronization using that file. If the operation succeeds, your PC application data is probably corrupted. If this is the case, you might be able to restore the data from a backup file for your application. If not, you may need to contact technical support for that software application.

Why is my handheld timing-out before my synchronization is complete?

Time-outs may occur when you attempt to synchronize large volumes of data.

Follow these steps to run a synchronization using a "Developer's Backdoor" workaround, which places the handheld in "wait-forever" mode:

1. Turn on your handheld.
2. Press the **Applications** button on the left of the handheld.
3. Press the **HotSync** icon.
4. Hold down both the up and down scroll buttons (in the middle of the handheld) while tapping in the upper right corner of the screen (several taps may be necessary).

5. This displays the Developer's Backdoor window. DL Server Wait Forever is ON. Press **OK**.

6. Press the **HotSync** button on the cradle to start a synchronization.

Your handheld will remain in the "wait-forever" mode until the synchronization is completed or canceled. (If a Cancel causes your handheld to hang, execute a soft-reset. Refer to your handheld manual for instructions.)

Note: You may need to use this workaround each time you synchronize your data. However, since first run synchronizations take longer than subsequent synchronizations, it may only be necessary the first time you synchronize your data.

Lotus Organizer

When I try to synchronize my handheld with Lotus Organizer, I get the message “Unable to access data file; verify that the file is closed or not in use.”

When synchronizing with Lotus Organizer, the application can be running, but the file must be closed. If the file you are synchronizing is open (or in the “Open File” box under Organizer Preferences, and Intellisync is starting Lotus during the operation) the synchronization may fail.

To synchronize successfully, either close the file or remove it from the Open File box.

When I synchronize my addresses, some of my handheld addresses are not transferred to the correct location in my Lotus Organizer Address Book.

More than likely, some of the last names in your handheld begin with lower case letters. If you do not use upper case letters when entering a last name into a handheld Address Book record, the record may be transferred to the wrong location in the Lotus Address Book. If you look through your Lotus address records, you will probably find the missing addresses under the wrong letter tabs (they are usually located under the tabs preceding the correct ones).

To successfully transfer the handheld records to Lotus, use the handheld Keyboard function to change the lower case letters to upper case. Delete improperly located records from your Lotus Organizer Address Book, and then re-run the synchronization.

Appendix: Log Files

Log files can be a good source of information if you call for technical assistance.

For each handheld application that is synchronized during an Intellisync operation, a “Log” file is created. Log files contain a detailed accounting of what occurred during the synchronization.

It is not normally necessary to read log files after a synchronization. However, if errors were reported, they may be a useful source of information.

To view a sync log file

To locate and view log files, look in the Available Logs window, located on the View Logs tab of the Intellisync Support Tool. Log files are assigned the following names, based on the handheld application names:

ADDRBOOK.LOG
EXPENSE.LOG
DATEBOOK.LOG
NOTEPAD.LOG
TODOLIST.LOG

Log files identify the records that were transferred from one system to the other, and indicate the exact action that was taken for each record. Field Mapping is also specified in log files.

Reading a Log File

Before any actions are taken during a synchronization, records from each system are read (looked at). You will see the term **READ** used in the log files to indicate this process.

After reading records in each of the systems, Intellisync compares the records in both systems, as indicated in a section labeled **Summary of Data Analysis**. Here you will see phrases like “Unchanged on Both Systems,” “Changed on First System,” “Deleted from Second System,” and so forth.

The next section of the Log file lists the actions that were taken in your “First System” (handheld) and “Second System” (PC application) to achieve synchronization of the two systems.

The following actions may be noted:

ADD: The record was added.

DELETE: The record was deleted.

FAIL RANGE: The item was excluded from the operation.

IGNORE: The record was ignored.

REPLACE: The record was deleted and replaced with a record from the other system.

SKIP: The record was skipped because the data transferred was of a different type.

UPDATE: The record was updated with a value or values from the other system.

To save a particular log file:

Each time you run an operation, sync log files are overwritten. If you want to save a particular log file, rename the file before running another operation.

Log files are located in your user name sub-directory (Intellisync gets this information from the Palm™ Desktop application).

Glossary

Boldfaced text identifies additional terms defined in this glossary.

See “**The Conflict Resolution Tab**” under “**The Advanced Settings Dialog**” in Chapter 3 for more information on Conflict Resolution and data conflicts.

Conflict Resolution

A process (controlled by a setting in the Conflict Resolution tab of the Advanced Settings dialog) that is sometimes used by Intellisync to determine how to resolve **data conflicts** during synchronizations. See *Data Conflict*, below.

Data Conflict

A data conflict occurs when records in both systems have matching key field values but conflicting data in other mapped fields. (For example, if both systems have address records in which the First and Last Name values are identical, but the Address values differ.)

The very first time a set of data is synchronized, (and any time you Import or Export) the **Conflict Resolution** setting is used to resolve all such conflicts. Upon subsequent synchronizations of the same data (after the **history file** has been created), the Conflict Resolution setting is needed only under the following conditions:

- When records with the same key fields have been added to both systems since the last synchronization, but they have conflicts in other mapped fields.
- When mapped fields in previously synchronized records (with matching key fields) have been edited since the last synchronization, but edited differently.

Export

A one-way transfer of data. The Intellisync Export command (selected in the Choose Translator dialog) exports records from a selected handheld application to a selected PC application.

Field

The location of a single data element. Each application is organized into sets of fields (records). For example, handheld Address Book records consist of the fields *Last Name*, *First Name*, *Title*, *Company*, etc.

Field Mapping

The linkage that directs the comparison and transfer of handheld and PC data during synchronizations. Field mapping is contained (and can be edited) in the Intellisync Field Mapping dialog.

To access the Field Mapping dialog, select the Field Mapping button in the Advanced Settings dialog.

History File

A file that is created by a **first run synchronization** and updated after every subsequent synchronization. During a synchronization, this file aids Intellisync in determining which data to use when there are discrepancies between the handheld and PC systems. See “Synchronization and History Files” in Chapter 4 for more complete information.

HotSync® Button

Located on the **HotSync®** cradle, this button initiates a synchronization using settings currently in place in the Intellisync dialogs. Note that in order for this button to work, the **HotSync Manager** application must be loaded in memory, and the **handheld** cradle must be connected to a valid PC COM port. See also, HotSync Manager.

HotSync Manager

An application that is placed in your Windows Startup group when you install Palm™ Desktop. This application, which runs in the background, coordinates communications between your **handheld** and your PC. When you have configured an Intellisync synchronization, pressing the **HotSync button** on the **handheld** cradle directs the HotSync Manager to execute the operation.

Import

A one-way transfer of data. The Intellisync Import command (selected in the Choose Translator dialog) imports records from a selected PC application to a selected handheld application.

Key Field

A field specially defined to detect **data conflicts** during synchronizations. During an operation, Intellisync compares the values of mapped fields in handheld and PC records. When “key” values match, but other mapped values differ, a data conflict exists. For

example, in Address records, if Last Name and First Name (key) values match, but Address values differ, this is a data conflict. See also Data Conflict.

Mapped Fields

Handheld and PC application fields that are linked for synchronization in the Intellisync Field Mapping dialog.

Section

A type, or category, of data contained in a PC application. For example, Addresses, Notepad, and Schedule are sections contained in some of the PC applications supported by Intellisync. In the handheld, sections are referred to as *applications*.

Synchronization

The Intellisync operation that compares the records in a handheld application to the records in a PC application file, and makes whatever changes are necessary in either system to make sure that they both contain the same data.

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