Quick Start Guide

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Introduction to Intellisync

Welcome to the *Intellisync Quick Start Guide*. This guide is designed to help you install Intellisync, as well as complete your first synchronization. It also includes information on accessing online Help and user guides.

What is Intellisync?

Intellisync enables you to synchronize your Palm OS® handheld with a variety of popular Windows applications. This means that if you want to maintain the same data on your handheld as on your PC, there's an easy way to ensure that each system contains the same up-to-date information.

Intellisync transfers data of different formats between your two systems. But it does more than simply transfer the data. Intellisync compares the records in your handheld or device 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."

Additional documentation

The Intellisync software includes additional documentation in the form of electronic copies of manuals (Adobe Acrobat .pdf format), online Help files, and Readme files. The additional documentation consists of:

- *Intellisync User Guide*. This is an Adobe Acrobat file. It provides complete information on using Intellisync with your handheld device.

  View the *Intellisync User Guide* from the Intellisync group on the Start menu by clicking **Intellisync User Guide**.

  Note: Intellisync includes a copy of the Acrobat Reader software used to read and print Adobe Acrobat (.pdf) format documents. Acrobat Reader is available for installation on the

CD. To install it, insert the Intellisync CD into your CD-ROM drive and click **Get Acrobat Reader** on the opening screen.

- *Online Help.* Intellisync includes complete online Help that is accessible through the Help icon in the Intellisync program group or by clicking Help in the program interface dialog boxes.
- *Readme.* The Readme file contains important information that arrived too late to be put into the Help system or the user guide.

  View the Readme file from the Intellisync group on the Start menu by clicking **Intellisync Readme**.

The Intellisync icons

The Intellisync Program Group displays the following icons:

The **Intellisync Favorites Folder** icon contains Web page links to enable easy and timely access to information on Intellisync products, technical issues, and other important topics.

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

The **Intellisync Help** icon accesses the Intellisync online Help system.

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

The **Intellisync Support Tool** icon displays a tabbed dialog box that provides information on various support-related topics and links to Pumatech's Web site.

You can use the **Uninstall Intellisync** icon to remove the Intellisync program from your system.

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

In addition to the Intellisync icons, the install procedure places two shortcut icons (HotSync and Palm Install Tool) in the program group for your convenience.

Getting Started with Intellisync

This section gets you started with your first synchronization by providing configuration information and a synchronization procedure.

Entering configuration settings

How does Intellisync know what to synchronize? You tell Intellisync what to synchronize through the information you enter in a set of configuration dialog boxes. These dialog boxes specify the data you want to synchronize and contain special settings affecting synchronization.

Once you have the options and settings in these dialog boxes configured the way you want them, you need never access them again unless you want to make a change.

> **Note:** For simplicity, this quick start guides you through the process of configuring and running a synchronization. However, these instructions apply to *importing* and *exporting data* 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 box.

Performing the first synchronization

Follow these steps to configure and perform your first synchronization:

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

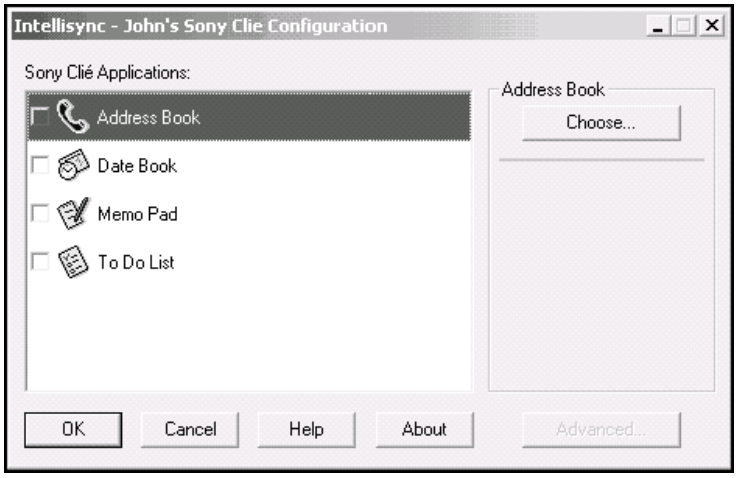

Figure 1. Intellisync Configuration dialog box

2. In the Configuration dialog box, select the handheld application you want to synchronize. Then click **Choose** to open the Choose Translator dialog box:

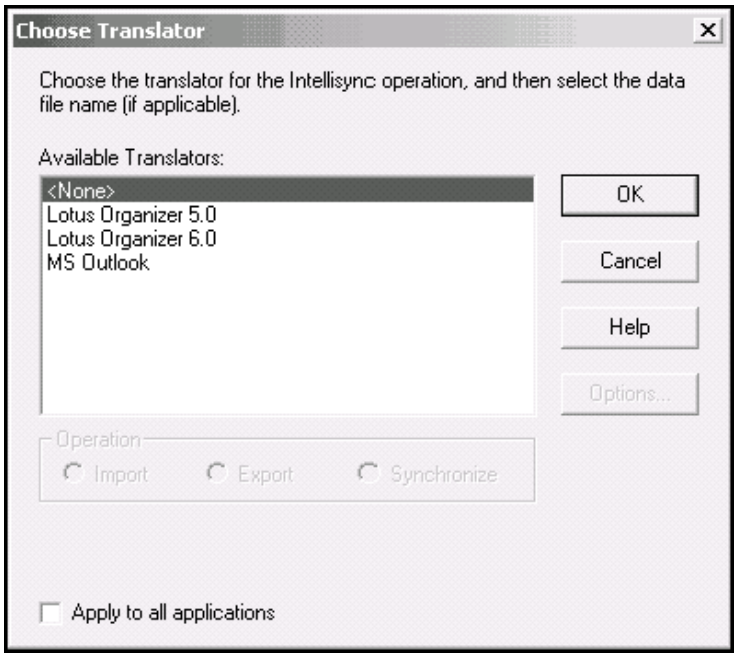

Figure 2. Intellisync Choose Translator dialog box

3. In the Choose Translator dialog box, specify the PC application you want to synchronize. If a File Name or Folder text box is present, use the Browse capability to select the file or folder you want to synchronize.

   Note: Some PC applications do not require you to specify a file name. 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. Checking the Apply to all applications check box (if available) at the bottom of the dialog box assigns the selected PC application for synchronization with all compatible handheld applications.

4. If the Options button is enabled, click it and make sure the system options are set appropriately for the application you have selected. Then click **OK** to return to the Choose Translator dialog box.

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

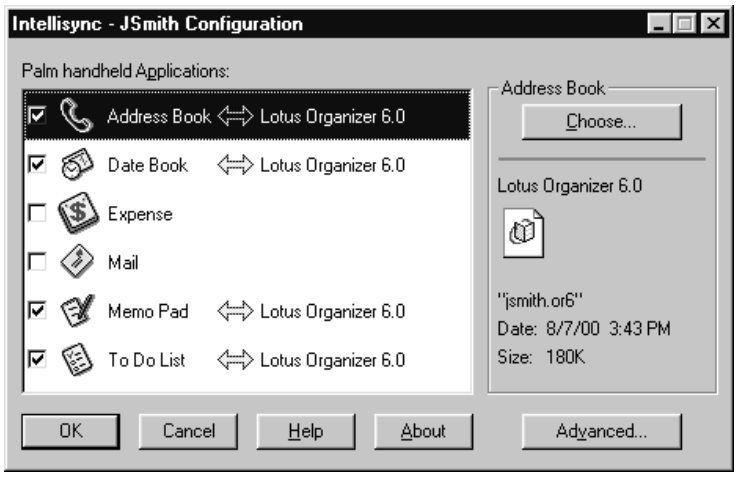

Figure 3. Intellisync Configuration dialog box - selected applications

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 selected, indicating that the data is activated for synchronization. Clearing a check box prevents an application from being included in a synchronization. Clearing a check box does not affect any custom settings.

6. To review or alter settings affecting synchronization, click **Advanced**. This displays the Advanced Settings dialog box. (Intellisync fills in default values for all settings.)

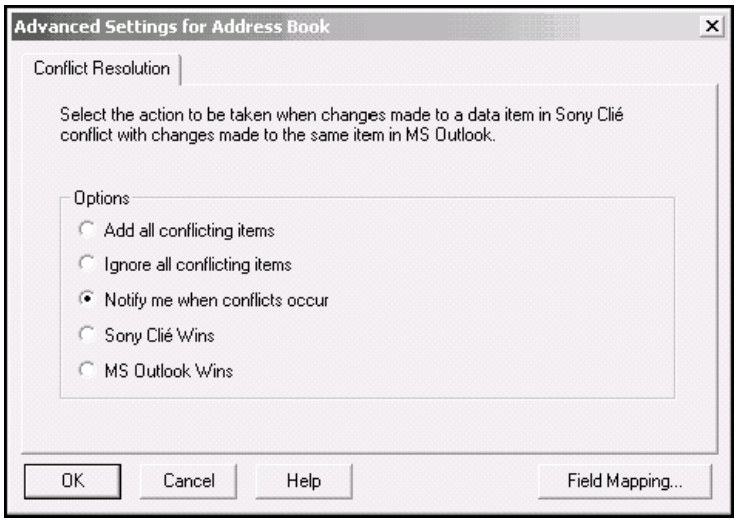

Figure 4. Intellisync Advanced Settings dialog box

7. When settings are configured as you want them, click **OK** to return to the Configuration dialog box.
8. To change any of the fields that will be synchronized, click **Field Mapping** and then **OK**. The Field Mapping dialog box appears. Make changes as needed. If you do not want to keep the changes, click **Reset**. Otherwise, click **OK** and then **OK** again to close the Advanced Settings dialog box.
9. If necessary, repeat the preceding procedure for each of the handheld applications you want to synchronize. Then click **OK** to save specifications and exit the Configuration dialog box.

10. With your handheld in the cradle and the cradle connected to the appropriate COM port on your PC, press the sync button on the cradle. The synchronization process begins, and the Progress dialog box appears.

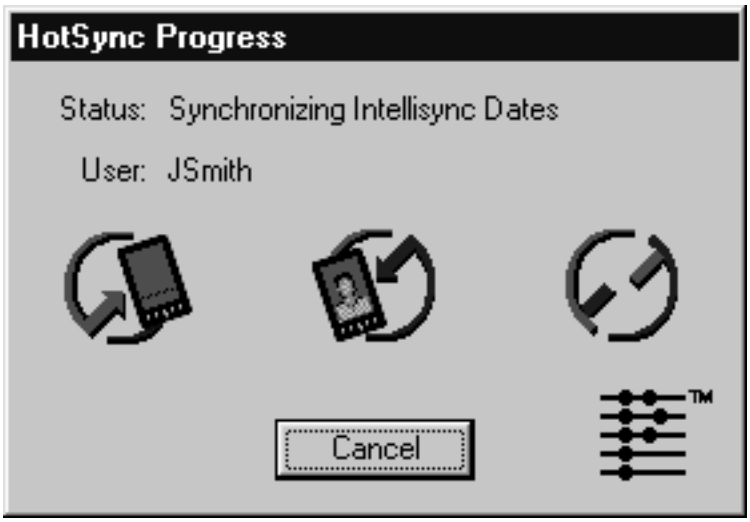

Figure 5. HotSync Progress dialog box

Note: If you click **Cancel** on the Progress dialog box, synchronization will stop when Intellisync finishes synchronizing the current handheld application.

11. If a Conflict Resolution dialog box appears, resolve any "data conflicts."

Note: For each set of data you synchronize, Intellisync uses a history file 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 uses a Conflict Resolution setting to resolve data conflicts.

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