# SHARP

# Intellisync® for Zaurus

**OPERATION MANUAL**

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- Some of the accessories and optional parts described in this manual may be unavailable in some countries.
- Screens and icons in this manual may differ from the actual ones displayed on the PC.
- This manual uses the following substitute expressions:
  "SL-5600" → "device";

*Important:*

- **Please use either Intellisync for Zaurus or Qtopia Desktop for Zaurus on your PC.**
  **Both programs cannot be run at the same time.**
- **If the device has been removed from the Docking Station, make sure to wait for 30 seconds before replacing it on the Docking Station.**
  **If connected immediately after the device is removed, the device may not be properly recognized as a USB device.**
- *Before starting synchronization, close all applications on the device.*
- *The fields that can be synchronized by this application are limited. The default setting preset for field mapping is recommended.*
- *This application does not support synchronizing with multiple devices at the same time. One PC can synchronize with a single device. If a program folder of a PC is shared with multiple users, only users who have installed this application can use it.*
- *Private data settings in Microsoft Outlook and Palm Desktop will not be transferred to the device during synchronization. The device does not have private setting capabilities.*
- *Some characters (symbols, European-language characters, special characters, etc.) may be affected by synchronization and may become garbled.*
- *Only entries with date information from January 1, 1980 (GMT) to December 31, 2037 (GMT) will be supported for synchronization. (birthday and anniversary information excluded)*
- *Before starting synchronization, the initial profile configuration has to be completed and Microsoft Outlook has to be closed.*
- *Updates for Microsoft Outlook are available on the Internet for the purpose of protecting the data, such as contacts or email, from being overwritten, etc. If you use Intellisync for Zaurus with the updated software, the function of Intellisync for Zaurus may be restricted.*
- *Adjust the device and PC times (including Time Zone and Date format) before starting synchronization. If the date and time settings (Date/Time Properties) are changed after Intellisync for Zaurus is installed, it will be necessary to reinstall Intellisync for Zaurus. For PC operations, see PC manuals.*
  *The date format on your device should be set according to that on your PC: "M/d/yyyy" = "M/D/Y", "dd/MM/yyyy" = "D/M/Y", "dd.MM.yyyy" = "D.M.Y".*
- *When performing synchronization with the Palm Desktop, close it before starting synchronization.*
- *Sometimes synchronization may not perform properly with non-English based operating systems.*

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# CHAPTER 1: BEFORE YOU BEGIN

This chapter introduces Intellisync® for Zaurus software and instructs you on how to get started using the software.

## Introduction to Intellisync for Zaurus

Intellisync for Zaurus software enables you to synchronize your SL-5600 (device) with Windows applications. This means that if you want to maintain the same data in your device and on your PC, there is an easy way to ensure that each system contains the same up-to-date information.

- Intellisync can transfer data of different formats between your device and your PC. But it does more than simply translate data and transfer it between your two systems. Intellisync compares the records on your device with the records on your PC. It then makes whatever changes are necessary in each system to keep them both up-to-date and "in sync."

- The main feature of Intellisync:

  - Synchronization with Microsoft Outlook
    The applications Intellisync can manage are Contacts (Address Book), Calendar, Email (Inbox and Outbox), Tasks (Todo List), and Notes (Text Editor: Notes tab)

  ***Note:***

  - *Intellisync can also perform one-way imports and exports of data between your device and supported PC applications.*

  - ***It is possible to transfer data to the device from a machine using Palm OS.*** *First, transfer the data to the PC Palm Desktop software from a machine using the Palm OS. Next, use Intellisync for Zaurus to import data to the device from Palm Desktop. Both "Synchronize" and "Import" are possible between Palm Desktop and the device, but some of the fields will not be properly transferred in some cases on "Synchronize" and "Export" ; therefore, it is recommended that the data be imported to the device from Palm Desktop.*

# Minimum System Requirements

**Minimum System Requirements**

- 100% IBM® Compatible PC
- Microsoft® Windows® 98/98SE/2000 Professional/Me/XP
- Pentium® 200MHz or higher for Microsoft Windows 98/98SE/2000 Professional/Me, Pentium/Celeron® 300MHz or higher for Microsoft Windows XP
- 80MB Available Hard Disk Space for installation
- 64MB RAM (Recommend 128MB RAM) for Microsoft Windows 98/98SE/2000 Professional/Me, 128MB RAM (Recommend 192MB RAM) for Microsoft Windows XP
- CD-ROM Drive
- 1 Available USB Port or Serial Port with Optional Serial Cable CE-170TS
- Mouse or Compatible Pointing Device
- Microsoft Outlook 97/98/2000/2002 must be installed on your PC to perform synchronization between the device and your PC

# Installing the Intellisync Software and the USB Drivers

To use Intellisync for Zaurus, it is necessary to install both Intellisync for Zaurus and the USB driver. Refer to the Start-up Guide provided with the device and the Installation CD-ROM for installation instructions. After that, the explanation assumes that both Intellisync for Zaurus and the USB driver have been installed.

## Notes for Windows XP and Windows 2000 users:

• This application can only be installed and used by the Administrator or person with Administrator level privilege. For examples, if an Administrator logs onto a PC and installs this application, then only that Administrator is able to use it.

• This application does not support use by multiple users. No more than one copy of this application can be installed in one personal computer.

## About the USB port

• If the USB port on your PC or the USB hub connected to the device does not operate properly, perform the following steps.
    • When your PC comes equipped with several USB ports, connect the device to another USB port.
    • When other USB devices are connected to your PC and used simultaneously, disconnect them from your PC.

• Operation on a PC that is upgraded from Windows 95 may not be possible.

• A PC whose USB port is added by the user because the PC is not equipped with a USB port at the time it leaves the factory may not operate properly.

• Activating the power saving mode (suspend, resume, or sleep function etc.) of some PCs may result in the USB port not functioning properly. In this case, disable the power saving mode.

• If the USB driver does not operate properly when you connect the device to your PC via the USB hub, connect it directly to the USB port on your PC. Using the USB extension cable may result in the USB driver not operating properly.

• Do not repeatedly connect/disconnect the USB cable.

## About the Desktop after installation

When Intellisync for Zaurus is installed, the Intellisync for Zaurus shortcut icon will be displayed on the PC desktop and  will be displayed in the Windows system tray (in the bottom-right corner of the task bar).

 When the Intellisync for Zaurus shortcut icon is double clicked, the folder containing the shortcut icons for all functions will be displayed; the following operations are the same as from the Start menu (see page 16).

 This icon indicates that the Zaurus Manager is resident. The Zaurus Manager must be resident to start synchronization when the SYNC button is pressed on the Docking Station (see page 14).

## Uninstalling Intellisync for Zaurus

The uninstall operation below is explained for Windows XP, if you use another OS, uninstall by using Add/Remove Programs from Control Panel.

*1.* Close all software installed from the supplied Installation CD-ROM. Right-click the  icon in the Windows system tray and then click "Exit" from the menu.

*2.* Click **Start**, then click Control Panel. The Control Panel window will open.

*3.* Click Add or Remove Programs.

*4.* Select Sharp Zaurus Software.

*5.* Click the **Change/Remove** button. Check the screen displayed and then click the **OK** button.

*6.* Select **Modify** and then click the **Next** button.

*7.* Select the same communication method used at the time of installation, then click the **Next** button.

*8.* Remove the check mark of Intellisync for Zaurus and then click the **Next** button. Intellisync for Zaurus will be uninstalled. Follow the on-screen instructions.

> *Note:* *If "**Remove**" is selected in step 6 of the above procedure, all applications installed from the Installation CD-ROM will be uninstalled.*

# About the Docking Station SYNC button

Press the Docking Station SYNC button or tap the **Sync Start** button of the device
(displayed by tapping the PC Link icon on the Settings Home screen) to start the
Intellisync for Zaurus synchronization process. (Default setting)
Use the following operation to disable the SYNC button on the Docking Station or
the **Sync Start** button of the device.

1. Click **Start → (All) Programs → Sharp Zaurus 2 → Intellisync for Zaurus →
   Communication Options**.

   The following dialog box will appear.



2. Select "**No**" in the "Start from the Docking Station".

3. Click the **OK** button.

   ### Note:

   - *After the above operation, synchronization can be started from the **PC** by
     clicking **Start → (All) Programs → Sharp Zaurus 2 → Intellisync for Zaurus
     → Synchronize**.*

   - *Use the following procedure to reset the Sync Start from the Docking Station
     SYNC button or from the device (Display (resident) Zaurus Manager in the
     Windows system tray)*

     *1.Click **Start → (All) Programs → Sharp Zaurus 2 → Intellisync for
     Zaurus → Communication Options** and select "**Yes**" in the "Start from
     the Docking Station".*

     *2.Click the **Zaurus Manager** button in the same dialog box.*

     *The Zaurus Manager dialog box will appear.*

     *3.Check on "Display Zaurus Manager icon on the taskbar".*

     *4.Click **OK**, and then click **OK**.*

     *(See page 14 concerning the Zaurus Manager)*

# Zaurus Manager Setting

> **When you have not set (changed) the passcode nor changed the connection method on the device, reading this section is unnecessary. Change this setting, only when necessary.**

The procedure for setting up applications for communication between the device and your PC (Zaurus File Transfer, Backup/Restore, Intellisync for Zaurus, Qtopia Desktop for Zaurus, etc.) must be set up properly for communication.

- When you have set or changed the Security passcode on your device, enter and save the same passcode on this Zaurus Manager screen. Otherwise you will be asked for the passcode every time communication between the device and your PC is initiated.

- If you changed the connection method in the PC Link setting on your device, change the following setting into the same method as on the device. Otherwise communication between the device and your PC cannot be performed.

**Confirm the Zaurus Manager setting contents according to the following instructions and change them as required.**

*1.* Turn off the power on the device, connect it to the PC (see the separate Start-up Guide), then turn the power back on again. Wait for a few moments (approx. 15 seconds).

*2.* On your PC, click the Start menu, then **(All) Programs** → **Sharp Zaurus 2** → **Zaurus Manager**
( Or right-click the Zaurus Manager icon ▣ in the Windows system tray and select "**Zaurus Manager**" from the menu).
The Zaurus Manager screen will appear.
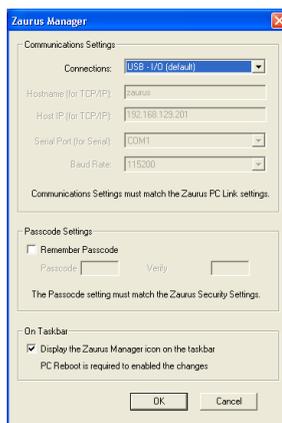


*3.* Confirm the **Communication Settings**.
This will set the method of connection with the device.

| USB - I/O (default) | Select "USB - I/O (default)" to set the communication to the USB connection with the Docking Station. |
|---|---|
| USB - TCP/IP (advanced) | For future function expansion. (The following name and IP Address columns apply when this method has been selected.) |
| Serial | Select "Serial" to set the communication to the serial connection. (Optional Serial Cable CE-170TS is required.) In this case, it is necessary to set the port and baud rate. **Port:** The default setting is "COM1". Select a COM port that does not conflict with others. **Baud Rate:** The default setting is "115200". Lower the baud rate if the number of communication errors is excessive. |

*Note:*

• *On the device, use the following steps to check or change the PC Link Setting. For Details, see the separate Operation Manual.*

   1. *On the Settings Home screen, tap the PC Link icon.*
   *The PC Link screen will appear.*

   2. *Select "USB - I/O (default)" or "Serial" to change the setting to the same method as on the Zaurus Manager screen, when necessary.*

**4.** Confirm the **Passcode Settings**.

When communication between the device and the PC is initiated, verification of both passcodes on the device and the PC will be made. Communication will start when the passcodes match.
Perform the settings on this screen according to the following instructions.

   1. *Check the "Remember Passcode".*

   2. *Enter the same passcode as that on the device to both the input spaces.*
   • *When a passcode has not been set on the Zaurus Manager screen, the screen for passcode input will be displayed every time communication is initiated. When the passcode is entered on that screen, communication will be initiated.*

   • *When a passcode has not been set on the device, do not check the "Remember Passcode" on the Zaurus Manager screen.*

**5.** Confirm the **Resident Setting on the taskbar**.

Set whether or not the Zaurus Manager icon ![icon] is to be displayed (resident) in the Windows system tray. (The default setting is checked.)
This check is required to start synchronization for Intellisync for Zaurus using the Docking Station SYNC button or the Sync Start button of the device.

• *Residence of the ![icon] icon is not required for execution of Zaurus File Transfer or Backup/Restore. To cancel the ![icon] icon residency temporarily, right-click the ![icon] icon and then click "Exit" from the menu. (However, after a reboot, the icon will be displayed again.) To cancel the residency continuously, check off this box and reboot the PC.*

**6.** Confirm the above setting contents and click OK.

# Intellisync for Zaurus folder

After installation, Synchronization start and Synchronization Options can be executed from the Intellisync for Zaurus folder displayed by double clicking the Intellisync for Zaurus shortcut icon.

Double clicking the icons in the Intellisync for Zaurus folder will perform the following operations.

**Synchronize**
Synchronization will be started.

**Communication Options**
The Yes/No setting for Start From Docking Station and the communication setting.

**Sync Options (Synchronization Options)**
The options available for synchronization.

**Help**
Displays the Help items.

**About**
Displays the Intellisync for Zaurus version data.

These have the same functions as the menu items displayed when **Start** → **(All) Programs** → **Sharp Zaurus 2** → **Intellisync for Zaurus** are clicked.

> *Note:* *The shortcut icons of Synchronize and Sync Options will also be created on the PC desktop directly.*

# Using the Help effectively

You can see the **Help** button on the screens displayed inside the Intellisync application. Use Help to view explanations of items and functions not included in the operation manual.

# CHAPTER 2: QUICK START

This chapter is a tutorial that guides you through the process of setting up and performing your first synchronization.

## Using Intellisync: A Tutorial

This "Quick Start" 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 On-line Help.

### Synchronizing Data

How does Intellisync know what to synchronize? That information is stored in a set of Intellisync dialog boxes. These dialog boxes specify the data you want to synchronize, and contain special settings affecting the operation.
Once you have made the desired settings in these dialog boxes, you need never access them again unless you want to change the specifications.

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

**Follow these steps to configure and perform your first synchronization:**

1. Click **Start → (All) Programs → Sharp Zaurus 2 → Intellisync for Zaurus → Synchronization Options**.

   The Intellisync Configuration dialog box will appear.
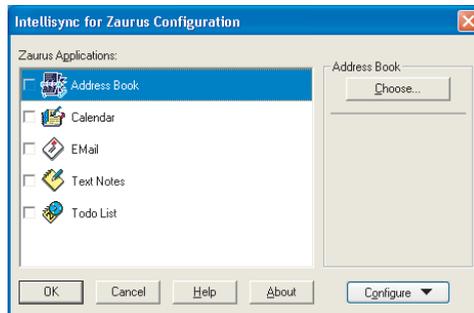


2. In the Configuration dialog box that will appear, click the device application you want to synchronize. Then click the **Choose** button to enter the Choose Translator dialog box.
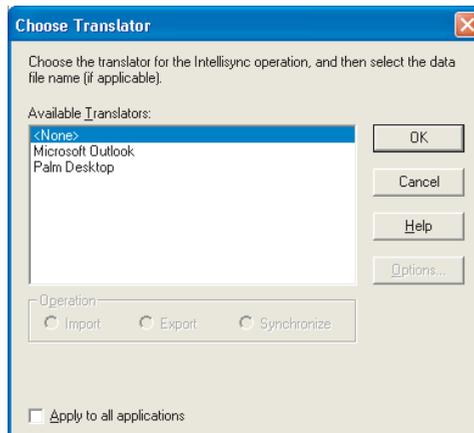


3. In the Choose Translator dialog box that will appear, specify the PC application you want to synchronize. If a File Name or Folder text box is present, use the Browse capability to select the file or folder you want to synchronize.

*Note:*

- *If you can check **Apply to all applications**, the application and file (or folder) you specify will be assigned for synchronization with all applicable device 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.*
- *To execute **Import** or **Export**, select it from **Operation**.*

**4.** If the **Options** button is enabled, click it and make sure the "system options" are set appropriately for the application you've selected. Then click the **OK** button 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 will appear next to the device application name, and a two-sided arrow will appear between the device and PC application names.

Note the check box adjacent to the device 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 will not be synchronized.)

**6.** To review or alter the settings affecting synchronization, click the Configure button and select the **Advanced Settings** from the list to access the Advanced Settings dialog box. (Intellisync will provide default values for all settings.)

For detailed information on Intellisync Advanced Settings, refer to the On-line Help.
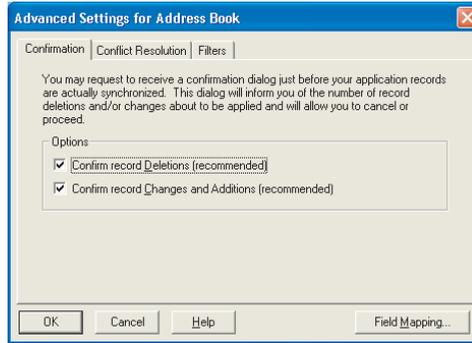


*Note:*

- *For example, the calendar data and To Do List data synchronization range can be set from the Advanced Setting dialogue box.*
- *The Set Password screen will be displayed by selecting "Configuration Password" of the Configure button. Once a password has been set here, it will be necessary to input that password when the Intellisync Configuration dialog box opens; therefore, changes by persons other than yourself can be prevented.*

**7.** When the desired settings are made, click the **OK** button to return to the Configuration dialog box.

**8.** If necessary, repeat the above procedure for each of the device applications you want to synchronize. Then click the **OK** button to save the specifications and exit the Configuration dialog box.

*Notes:*

- *Always see page 23 concerning e-mail synchronization.*
- *Always confirm the following items before carrying out the synchronization.*
  - *Always connect the device to an external power source (AC adapter).*
  - *Never turn off the device power supply while executing synchronization. Also, do not remove the device from the Docking Station.*
  - *Maintain sufficient device Internal Flash memory capacity. If insufficient, synchronization may not be carried out correctly.*
  - *Before starting synchronization, close all applications on the device.*
  - *Do not operate the device during synchronization.*
  - *Do not press the SYNC button on the Docking Station during synchronization.*

**Now the configuration of the Synchronization Option is completed. Perform the following steps to carry out the synchronization.**

**9.** Turn the device power off.

**10.** Connect the AC adapter to the Docking Station and plug the USB connector of the Docking Station into the USB port of your PC. (Before plugging it in, turn your PC on.)

**11.** Place your device on the Docking Station connected to your PC and turn the device on.

**12.** Click **Start** → **(All) Programs** → **Sharp Zaurus 2** → **Intellisync for Zaurus** → **Synchronize**.

**13.** Click the **OK** button.

The synchronization will begin, and the progress dialog box will appear.

*Note:*

- *Synchronization process can also be carried out by pressing the SYNC button on the Docking Station (see page 13).*

- *To stop the synchronization, click the **Cancel** button on the progress dialog box on your PC. Clicking the **Cancel** button on the progress dialog box does not stop the synchronization until the section being synchronized has been completed.*

**14.** If a Conflict Resolution dialog box appears, resolve "data conflicts" (see note below).

*Note:*

- *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. Therefore, a "first run" (first time) synchronization is different from (and may take longer than) subsequent synchronizations.*

- *"First run" synchronization simply merges your device and PC data, and a Conflict Resolution setting is used to resolve data conflicts. For more information, refer to the On-line Help.*

Before the synchronization process starts, one or more confirmation dialog box may be displayed asking you to accept the operation.

**15.** If a confirmation prompt is displayed, click **Accept** to proceed with the operation, or **Cancel** to cancel.

When the operation is complete, the data communication will be automatically terminated.

# Re-running the Operation

You can perform any of the following to carry out the synchronization process.

- Double click the **Synchronize** icon on the Intellisync for Zaurus folder. And then click the **OK** button.
- Click **Start → (All) Programs → Sharp Zaurus 2 → Intellisync for Zaurus → Synchronize**. And then click the **OK** button.
- Press the SYNC button on the Docking Station (see page 13).

You'll only need to access the Intellisync dialog box (Synchronization Options) again if you want to change the nature of the operation.

> ### *Note:*
>
> - *Data can be transferred between records in your device and PC applications because fields in the two systems are "mapped" (linked). Intellisync provides default "field mapping," but you can alter the mapping to re-direct (or prevent) the flow of data during data transfers. For detailed information, see page 25 and  On-line Help.*
>
> - *The communication (the synchronization process, etc.) will not be carried out when the device detects a low battery level or insufficient Internal Flash memory.*
>
> - *The following events will terminate the communication:*
>   - *Turning the device off*
>   - *Disconnecting the communication signal by removing the cable, etc.*
>   - *Shutting down the PC or logging off*
>
> - *When removing the device from the Docking Station connected via a USB cable, follow the instructions for of removing the USB cable according to your PC requirements.*
>
> - *If something such as a communication error during synchronization occurs, the next synchronization may simply merge your device and PC data. You can avoid merging your device and PC, which is caused by performing synchronization after a communication error, by selecting **Import** or **Export** in the Operation box on the Choose Translator dialog box. For example, selecting **Import** allows you to transfer data one-way from your PC to the device.*
>
> - *When synchronization suddenly becomes impossible after previously operating correctly, tap the PC Link icon on the Settings Home screen of the device, then tap **Clear Sync Info** on the screen that will be displayed to clear the device synchronization information.*

# CHAPTER 3: SPECIAL TOPICS

## Email Synchronization

### *Important:*

- *The following table shows the correspondence between the device and Microsoft Outlook application in Email synchronization.*

| Device | | Microsoft Outlook 97/98/2000/2002 |
|---|---|---|
| Synchronization Inbox | ⇔ | Inbox |
| Synchronization Outbox | ⇔ | Outbox |

- *The EMail application synchronization folder of the device will be synchronized. The EMail folders for other accounts will not be synchronized.*

- *The synchronization folder for the card (SD card, etc.) installed in the device can also be synchronized. Before executing synchronization, switch using the Storage Switch button of the EMail application of the device.*

- *By default setting, "Synchronization Sent" and "Synchronization Draft" of the device is not mapped to "Sent Items" and "Drafts" of the Microsoft Outlook application. You can map them on the dialog box (Map Zaurus EMail Folder(s) dialog box). For more information, refer to the note described in step 2 in "Configuring an Email Synchronization".*

- *Subfolders will not be synchronized.*

- *HTML format e-mail messages cannot be synchronized. Only text format e-mail messages can be synchronized.*

- *If you delete the message waiting to be sent on the device and perform Email synchronization, they will not be deleted from Microsoft Outlook application.*

- *For Inbox messages, Email synchronization may not perform correctly depending on the Email software that has sent those messages.*

- *Select Microsoft Outlook (not Outlook Express) for the Email program on the programs tab of "Internet Options" of Internet Explore, or else synchronization will not be performed correctly.*

### *About Email attachment files:*

- *To disable the synchronization of attachment files, click "Zaurus Options" under the Configure button in the Intellisync Configuration dialog box, remove the check mark and then click OK.*
- *To enable the device to handle the attachment files of e-mail message transferred from Microsoft Outlook to the device, set the attachment file size to 500KB or less.*
- *An error will occur and synchronization will be aborted if an attempt is made to execute synchronization when multiple files with the same file name as that attached for one Microsoft Outlook e-mail message. In such cases, either delete that e-mail message or eliminate all attached files with that same file name except for one. Upper case and lower case letters differentiated form the file names of attached files. For example, "abc.jpg" and "Abc.jpg" are both handled as being the same file name.*
- *When only the contents of an attached file have been revised, it will not be possible to synchronize the e-mail data.*

## Configuring an Email Synchronization

### Follow these steps to configure email synchronization:

*1.* In the Configuration dialog box, highlight EMail and click the **Choose** button. This displays the Choose Translator dialog box.

*2.* Highlight the email application you use. Then click **OK** to return to the Configuration dialog box.

> *Note:* *When Microsoft Outlook is highlighted on the Choose Translator dialog box, the* ***Browse*** *button will appear on the lower area of the dialog box. In the dialog box (Map Zaurus EMail Folder(s) dialog box) that appears by clicking this button, you can change the folder mapping.*

*3.* Click the **Configure** button and select the **Advanced Settings** from the list. This will open the Advanced Settings dialog box. Review and, if necessary, change the default settings.

> *Note:* *If e-mail is synchronized with the initial Intellisync for Zaurus settings, and the number of e-mail messages recorded in Microsoft Outlook are large, synchronization will require considerable time. Considerable time is also required to start the EMail application on the device.* ***When executing synchronization for the first time and the number of e-mail messages are large, it is recommended that Filters be used to restrict the number of e-mail messages.***

*4.* When you have finished, click **OK** to return to the Configuration dialog box. You are now ready to synchronize your device mail folders.

# The Field Mapping Dialog

In order for data to be transferred between your device and your PC application file, corresponding fields in each application must be linked to one another, or "**mapped.**" 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 box. This will display the Intellisync Field Mapping dialog box.
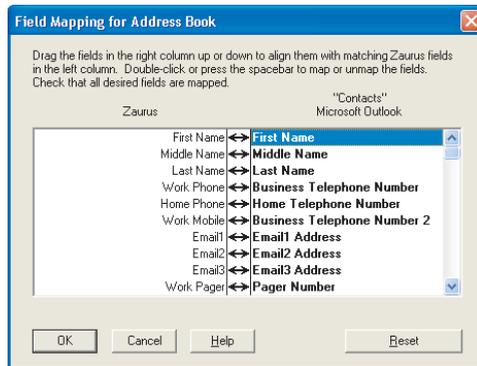


As you can see, the Field Mapping dialog box lists device fields on the left (Sharp SL), and PC fields on the right. Two-way arrows will appear between fields that are "**mapped,**" or linked, for synchronization.

• **To un-map mapped fields:** click 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.

*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 the 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 device and your PC application, data may be shortened in the target field if the source data is too*

lengthy to be accommodated. It is not wise to edit shortened data. If you do, the data in the other system will be shortened after the next synchronization. Refer to APPENDIX, "Frequently Asked Questions," for a workaround that allows you to edit shortened 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 will be displayed.

- Field names marked with asterisks in the Field Mapping dialog box must be mapped. If marked fields are not mapped, an error message will appear when you try to exit the Field Mapping dialog box.

- When the **Field Mapping** button does not appear on the Advanced Settings dialog box, field mapping is fixed.

- **Todo List** field mapping, mapping field, "Very High" and "Very Low" for Priority for the device will be mapped to "High" and "Low" of Microsoft Outlook.

- If "Due date" of the device **Todo List** data has not been set, synchronization will occur and then "Start Date" will be assigned as the "Due Date" of data received by Microsoft Outlook.

- For the **Calendar** application, the settings or data that can be synchronized are limited.

  - The alarm sound setting is not subject to synchronization. "Alarm sound on" is set for all data added to the device from the PC.

  - Schedules with a number of repetition settings cannot be correctly synchronized.

  - The recurrence data on Microsoft Outlook, which is set as "Yearly" for the specified week (for example, the third week of December), will not be synchronized properly.

  - When recurring appointments in Microsoft Outlook are modified or deleted, synchronization will not be performed correctly.

- When a total of three E-mail addresses separated by commas have been registered in the Emails field of the device **Address Book**, synchronization will occur and then "E-mail," "E-mail 2" and "E-mail 3" will be inserted as the E-mail addresses for Contacts in Microsoft Outlook. The reverse is also possible (for up to three E-mail addresses).

- Since the Birthday and Anniversary field data for **Address Book** are handled as character strings, the following restrictions apply.

  - When the Date format is "D/M/Y" (for example, "10/01/1980"), synchronization may not be performed correctly in some cases because this format cannot be distinguished from "M/D/Y" (for example, "1/10/1980").

  - When inputting directly without using the mini-calendar, specify a Date format other than "D/M/Y" (for example, "1/25/1980," "25.1.1980," "1980-01-25," etc.) to ensure correct synchronization.

- *Data received by the device from the PC will be registered using the Date format specified by the PC.*
- *Synchronization may require a considerable amount of time when a large amount of Birthday and Anniversary data has been input into the **Address Book** has been registered in the device.*
- *When the category name has been modified in the category list, the modified category name will be added to the category list after synchronization.*
- *Fields or functions which Microsoft Outlook and the device do not have in common will not be synchronized.*

# Import and Export

Intellisync can also perform one-way imports and exports of data between your device and supported PC applications.

The Intellisync Import command will import records from a selected PC application to a selected device application.

The Intellisync Export command will export records from a selected device application to a selected PC application.

Import and Export can be selected in the Choose Translator dialog box of each application.

### Notes for Import and Export

- *If import/export has been used in the past, then executing import/export after a device format will cause synchronization instead.*

- *If canceled during the writing of data while import or export is executing, in some cases the data will be appended to both at the time of the next import or export operation.*

- *When the same data has been deleted or corrected in the PC and the device, the message "Confirm-Changes" will appear on the screen.*
  *If data deleted from the device exists in the PC during an import operation, the data deleted from the device will be transferred from the PC to the device (except when communicating with the device immediately after deletion).*

- *Operation after the switching of Operation in the Choose Translator dialogue box will be as follows.*
  *If communication is started immediately after switching of the synchronization, import and export operations, a special operation will be performed to ensure the integrity of the data.*

  - *Communication immediately after switching from synchronization to import: Data that does not exist in the device will be transferred to the device from the PC.*

  - *Communication immediately after switching from synchronization to export: Data that does not exist in the PC will be transferred to the PC from the device.*

  - *Communication immediately after switching from import or export to synchronization:*
    *The data of the PC and the device will be collated and data will be transferred where lacking.*

# APPENDIX

## Frequently Asked Questions

**How does the synchronization work?**

During a synchronization, Intellisync compares records in your device 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 will be added to the incomplete system. If a record has been deleted from one system and not the other, Intellisync will delete the record from the other system. If a record has been edited in one system and not the other, Intellisync will edit 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.

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

Sometimes 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. For information about an additional way in which you might be able to restore corrupted data, refer to Re-synchronization in the On-line Help.

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

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

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

Any time you edit shortened 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 shortened 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 synchronization. If this is not acceptable, you can highlight the original (non-shortened) text in the Conflict Resolution dialog box and choose **Update**. Note, however, that Update will overwrite the edit that caused the conflict in the first place._

# Glossary

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

**Data Conflict**
A data conflict will occur 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 synchronization 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 box) will export records from a selected device 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, device Address Book (Contacts) records consist of the fields First Name, Last Name, Company, etc.

**Field Mapping**
The linkage that directs the comparison and transfer of device and PC data during synchronization. Field mapping is contained (and can be edited) in the Intellisync Field Mapping dialog box.
To access the Field Mapping dialog box, select the Field Mapping button in the Advanced Settings dialog box.

**Filter**
A statement that can be applied to a synchronization to restrict the records that are included in the operation.

**First Run Synchronization**
The first synchronization of a particular set of data.
A first run synchronization is different from subsequent synchronization of the same set of data because no **history file** exists. The history file is created during the first run (and the Conflict Resolution setting is used to settle data conflicts between your two systems).

**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 device and PC systems.

**Import**
A one-way transfer of data. The Intellisync Import command (selected in the Choose Translator dialog box) will import records from a selected PC application to a selected device application.

**Key Field**
A field specially defined to detect **data conflicts** during synchronization. During an operation, Intellisync compares the values of mapped fields in device and PC records. When "key" values match, but other mapped values differ, a data conflict exists. For example, in Address Book (Contacts) 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**
Device and PC application fields that are linked for synchronization in the Intellisync Field Mapping dialog box.

**Section**
A type, or category, of data contained in a PC application. For example, Contacts and Tasks are sections contained in some of the PC applications supported by Intellisync. In the device, sections are referred to as applications.

**Synchronization**
The Intellisync operation that compares the records in a device 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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