Intellisync™ for NEC 616

User Guide

Legal Notice

Pumatech, Inc., 2550 North First Street, Suite 500, San Jose, CA 95131

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Preface

This preface provides information about:

- Who should read this guide
- Other Intellisync for NEC 616 (Intellisync) documentation

Who Should Read this Guide

Users who are responsible for installing, configuring, and using Intellisync for NEC 616 should read this guide.

Documentation

For additional information on working with Intellisync for NEC 616 (Intellisync), refer to the *Intellisync for NEC 616 Installation Guide*, Readme, and Online Help; documentation is available as follows:

- *Intellisync for NEC 616 Installation Guide*—system requirements and installation information.
  PDF format available from the Intellisync installation directory.
- **Readme**—Important user issues that did not make it into any of the main product documents.
  Text file available from the Intellisync installation directory.
- **Online Help**—Help available from within the application (WinHelp).

Lite and Full

Intellisync is available in Full and Lite versions. For example, Intellisync Lite does not support the Filters tab feature. If your Intellisync does not have all the features described in this guide or if some features are greyed out, you can upgrade to a "full" version of Intellisync. The Full version includes support for additional PIMs (such as Lotus Notes) and additional synchronisation functionality such as Filtering and Custom Field Mapping. Go to www.pumatech.com, click the shopping cart and visit the Pumatech Web store for more information.

The following table notes Intellisync Lite and Full features.

Feature/Function	**Lite**	**Full**
Conflict Resolution	X	X
Filtering		X
Confirmations		X
Custom field mapping		X
Multiple folder		X
Supported PIMs		
Lotus Notes 4.6, 5/6		X
GroupWise 6.5		X
Outlook 2000/2002	X	X
Outlook Express		X

1 Before you Begin

Read this chapter to learn about:

- Intellisync for NEC 616 (Intellisync)
- Hardware and software system requirements
- Supported systems
- How synchronisation works
- The History file

Introduction

Intellisync enables you to synchronise your data from a variety of systems (Personal Information Manager, PIM, applications and 3 Sync server) to your phone. You can maintain the same set of data and use Intellisync to make whatever changes are necessary to keep all your systems up-to-date and "in sync."

The Intellisync application provides 2-way and 3-way synchronisation of your Contacts, Calendar, and To Do records between:

- Your phone, attached to your PC with a USB cable
- A PIM system (for example, Microsoft Outlook) on your computer
- A 3 Sync server system over the Internet

Intellisync oversees the synchronisation operation, monitors your computer's connection, and listens for a synchronisation command from your phone. All synchronisations with Intellisync are initiated from your phone to your computer through your phone cable.

The following sections list and describe the system requirements for the computer on which Intellisync will be installed.

Notes:

- Your computer must already have the phone software and drivers installed. Your phone must be connected to the USB cable attached to your PC. For more information, refer to your phone documentation.

Hardware Requirements

- **Processor:** 133 Mhz or higher
- **RAM:**
  - 24MB for Windows 98SE
  - 64MB for Windows 2000
  - 128MB for Windows XP
- **Drives:**
  - Hard Disk with 30MB available
  - CD-ROM drive (if installing from CD)
- **Supported Connections:** USB

Software Requirements

- Microsoft Windows 98SE/2000/XP (Professional or Home editions)
- Intellisync for NEC 616 software

Supported PIMs

- Microsoft Outlook 97/98/2000/XP
- Lotus Notes 4.6
- Lotus Notes 5.0/6.0
- Novel GroupWise 5.5.2, 5.5.4, 5.5.4.1, 6.0, 6.0x, and 6.5
- Outlook Express 4.0/5.0/5.5/6.0

Synchronisation Overview

Intellisync handles the translation and transfer of data in varying formats while synchronising the data seamlessly between systems. But it does more than simply translate data and transfer it from one location to another. During the synchronisation, Intellisync compares the records in your main system (your phone) to the records in your other application and then makes whatever changes are necessary to make sure that they contain the same data. When you make changes to your phone or PIM records, they are updated on all platforms after you perform the next synchronisation.

With Intellisync, you define and save your synchronisation settings for use during synchronisation. See "Configuration," for configuration and synchronisation setting information.

Note: In this documentation, your phone is also referred to as the "main" system. Supported PIMs and servers are referred to as "other" systems.

How Synchronisation Works

During a synchronisation, Intellisync compares records in the phone (or main system) to those in your other systems (PIMs or server), and makes whatever changes are necessary to the systems to ensure that they contain the same information.

2-way synchronisation occurs between your main system (phone) and the selected PIM or the server.

3-way synchronisation occurs between your main system, a selected PIM, and the server. 3-way synchronisation prompts you with three confirmation dialogues to confirm whether you want the changes to appear on all three systems. The order in which the dialogues appear is:

1. Main system and server confirmation (confirms that you want the same changes on both systems)
2. Main system and PIM (confirms that you want the changes from the PIM in your main system, and the main system and server changes in the PIM)
3. Main system and server (confirms that you want the PIM changes in the server)

If a record has been added to one system and not to the others, that record is added to the incomplete systems. If a record has been deleted from one system and not the others, Intellisync deletes the record from the other systems. If a record has been edited in one system and not the others, Intellisync edits the record in the other systems. Intellisync maintains a **history** file to keep track of which records have changed.

The first time a particular set of data is synchronised (first-run synchronisation), it begins with no history file. Data from the systems' locations are simply merged, and any data conflicts between the two systems are resolved using the conflict resolution rules you select when configuring your system (See Configuration). This initial operation creates a history file that will be used for subsequent synchronisations.

2-way and 3-way Synchronisation and the History File

At the end of each synchronisation, a history file matching the synchronised systems is created. When the systems are next synchronised, Intellisync compares the synchronised systems to each other, and to the history file.

The following describes 2-way synchronisation after adding one record each to the main system (phone, System A) and another system (System B).

- If the phone (System A) contains an entry that is absent from the other system (System B) and absent from the history file, it must have been added since the last synchronisation, so the entry is added to System B and the history file.
- If System B and the history file contain matching information that is different from System A, System A must have been edited since the last synchronisation, so System B and the history file are updated with data from System A.
- If System A and the history file contain a record that is absent from System B, then the record must have been deleted in System B, so the record is deleted from System A and the history file.

The following describes 3-way synchronisation after adding one record each to the main system (phone, System A), to 3 Sync server (System B), and to a PIM (System C).

System A (main system) adds one record: Last Name = “Jimmy”
System B (3 Sync server) adds one record: Last Name = “Paul”
System C (PIM) adds one record: Last Name = “John”

- The first synchronisation step between the main system and 3 Sync server compares the records, and results in the following:
  System A contains an entry that is missing from system B (“Jimmy”) and System B contains an entry that is not found in System A (“Paul”). As a result, a confirmation dialogue appears, indicating one addition on System A and one addition on System B. After accepting System A, System B will contain the following records: “Jimmy” and “Paul.”
- The second synchronisation step compares records between System A (main system) and System C (PIM).
  System A has two records that are not on System C (“Jimmy” and “Paul”), and System C contains one record not on System A (“John”). As a result, a confirmation dialogue appears, indicating one addition on System A and two additions on System C.
- The third synchronisation step compares records between System A and 3 Sync server (to add the PIM records to the 3 Sync server).
  System A contains one record (“John”) that is added to System B.

3-way synchronisation concludes with each system containing the new records, “Jimmy,” “Paul,” and “John.”

In cases where changes have been applied to all systems, and those changes conflict (for example if you have changed “Jimmy” to “O’Brian” on System A and to “Brien” on System B, so now the records don't match), conflict resolution rules are used to resolve the discrepancies.

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2 Configuration

Read this chapter to learn about:

- Selecting sections to synchronise with other systems
- Synchronising your phone using Intellisync for NEC 616 (Intellisync)
- Configuring your Intellisync application to synchronise data with your phone and other systems

Notes:

- The Intellisync desktop application must be running to perform a synchronisation. When the application is running, the Intellisync icon ( ) appears in your system tray.
- Intellisync is available in Full and Lite versions. For example, Intellisync Lite does not support the Filters tab feature. If your Intellisync does not have all the features described in this guide or if some features are greyed out, you can upgrade to a "full" version of Intellisync. The Full version includes support for additional PIMs (such as Lotus Notes) and additional synchronisation functionality such as Filtering and Custom Field Mapping. Go to www.pumatech.com, click the shopping cart and visit the Pumatech Web store for more information.

The next section describes how to configure and define Intellisync settings for performing a synchronisation between your phone and PIM (Personal Information Manager) system.

Getting Started

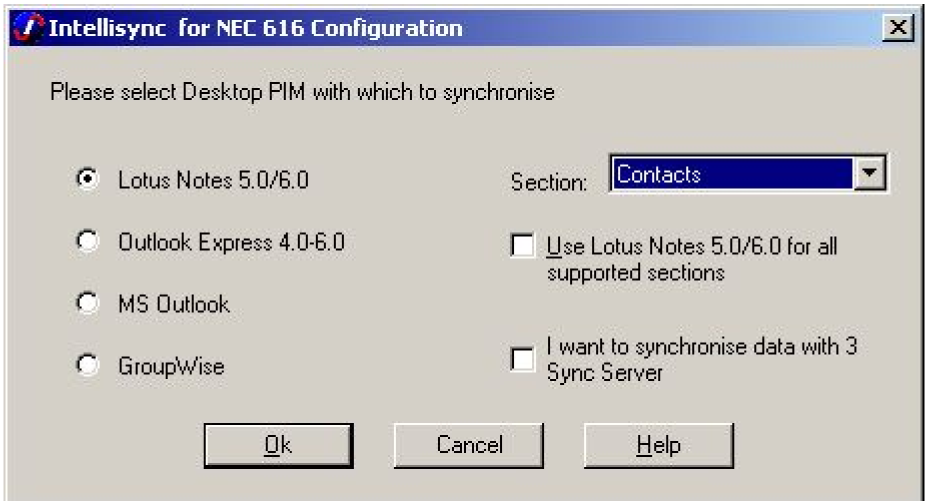
This section describes how to configure Intellisync for 2-way and 3-way synchronisation of your Contacts, Calendar, and To Do records between:

- Your phone, attached to your PC with a USB cable
- A PIM (Personal Information Manager, for example Microsoft Outlook) system on your computer
- A 3 Sync server system over the Internet

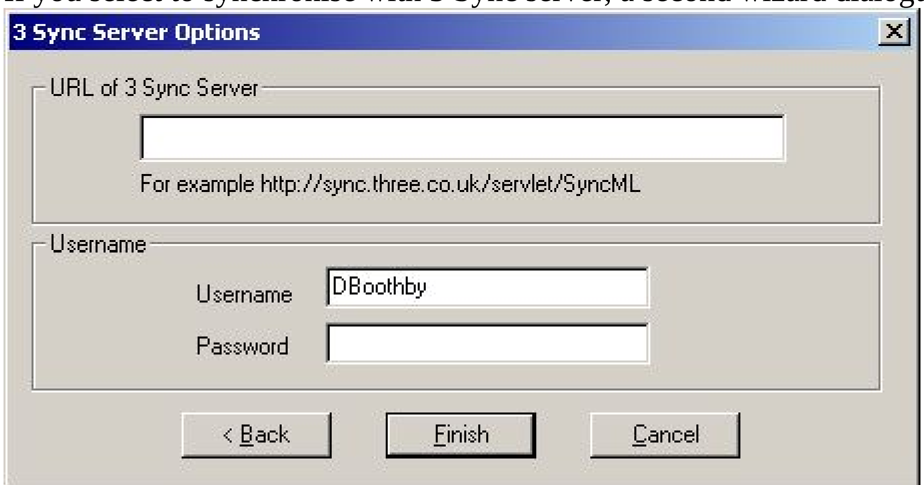
Selecting Sections and Systems for Synchronisation

The quickest way to configure Intellisync is to use the built-in configuration wizard. When you start Intellisync, a dialogue appears that allows you to select:

- The section to synchronise
- A supported system for that section
- Whether to use the same PIM (Personal Information Manager) for all sections
- Whether to synchronise data with 3 Sync server



If you select to synchronise with 3 Sync server, a second wizard dialogue appears.

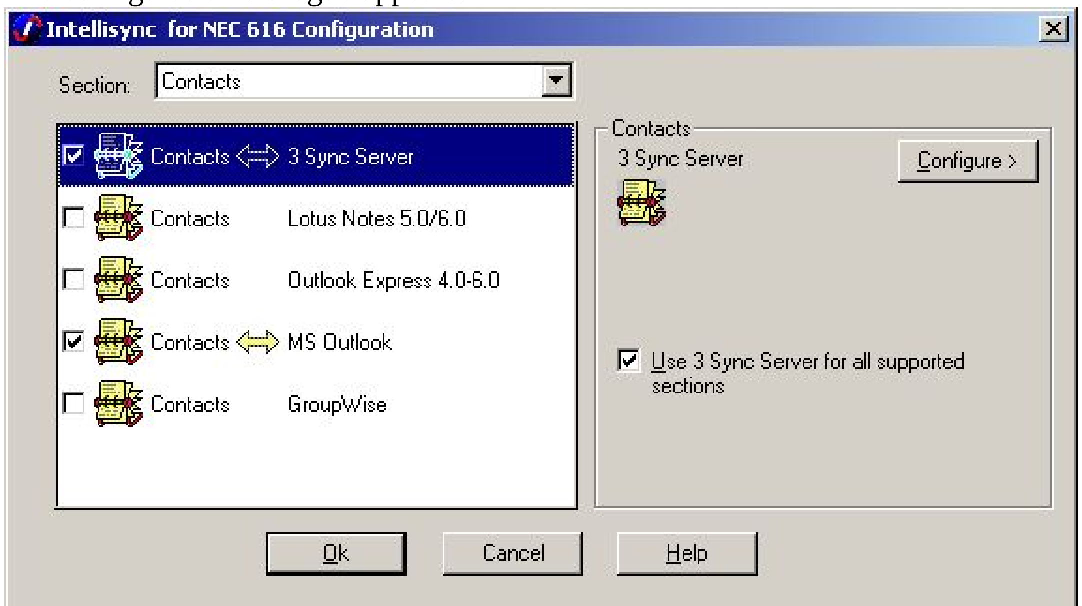


After you enter the server URL and your logon information, the Intellisync dialog closes, leaving only the Intellisync icon on the screen. You are set to begin synchronisation.

To go back at any time and change your options:

1. Click the Intellisync icon ( ) in the system tray of your computer.
2. Choose Configure from the menu.

The configuration dialogue appears.

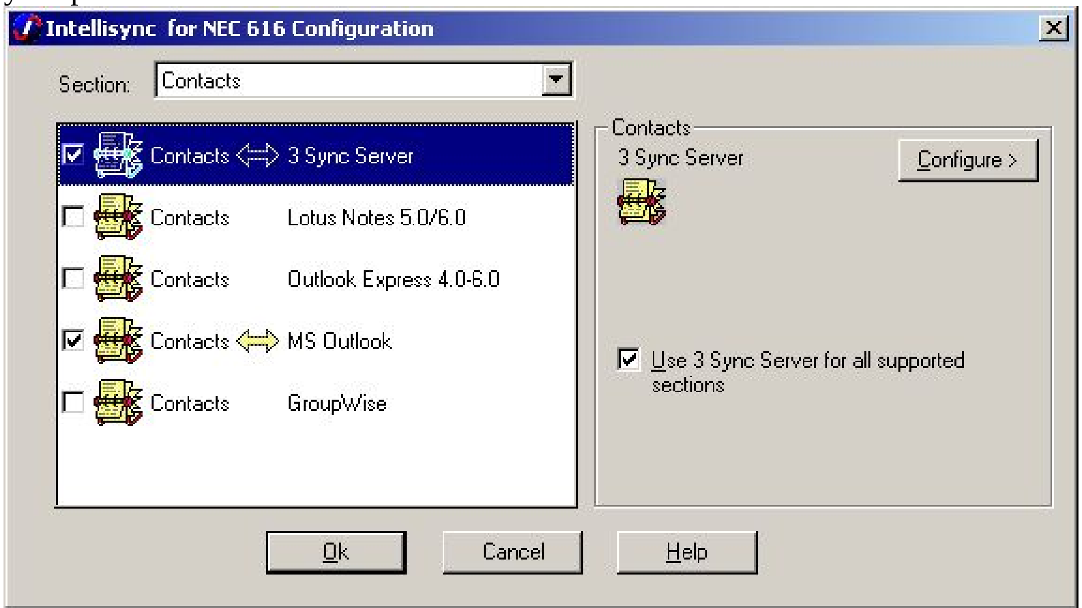


You can go back at any time and change your options. The Configuration dialogue contains a drop-down list of supported **sections** (such as Contacts, Calendar, and To Do) and displays supported **systems**, such as Outlook, Lotus Notes, and 3 Sync Server. You select which data **sections** that you want to synchronise from which **systems** to your phone for 2-way or 3-way synchronisation. After you have associated a section with specific systems, you can go back at any time and change the association later.

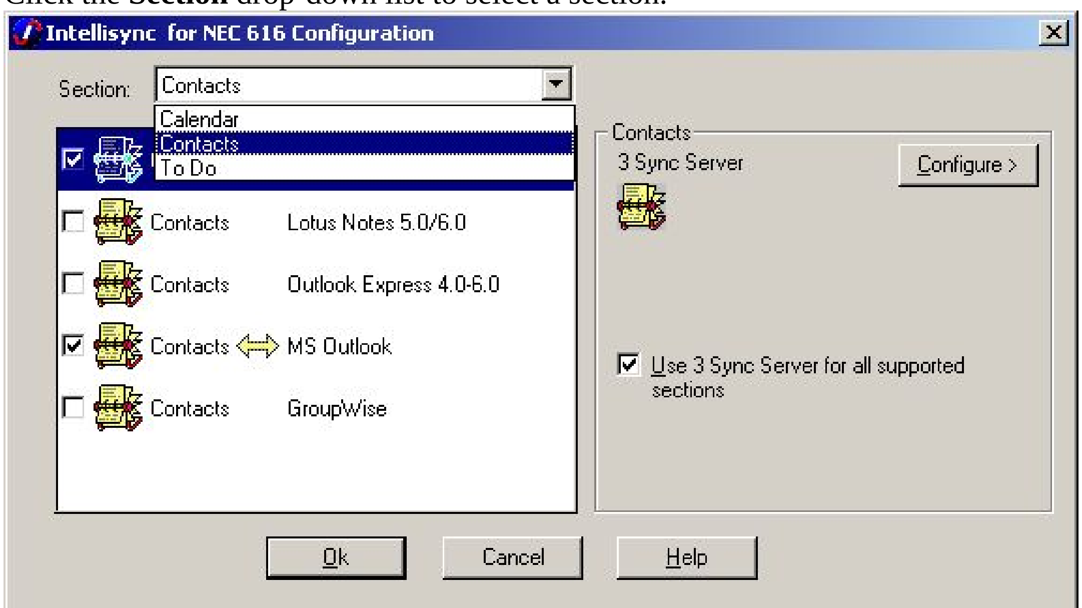
To associate a section with a system:

1. Click the Intellisync icon ( ) in the system tray of your computer.
2. Choose **Configure** from the menu.

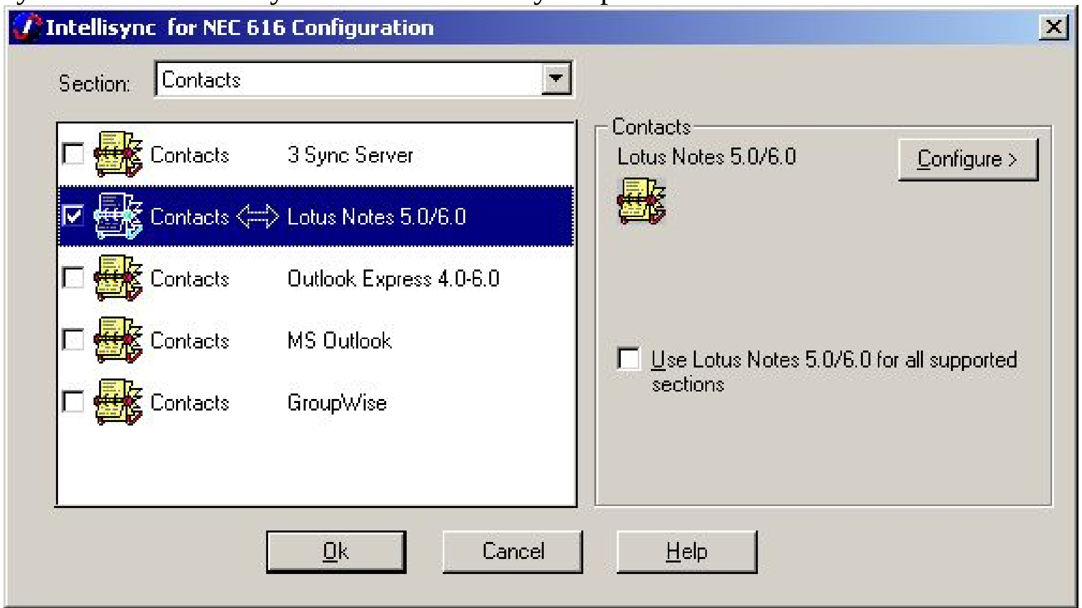
The **Configuration** dialogue opens. At the top left, the **Section** drop-down list will display a list of supported sections, such as Contacts, Calendar, and To Do. Underneath **Section**, select the supported systems you want synchronised with your phone.



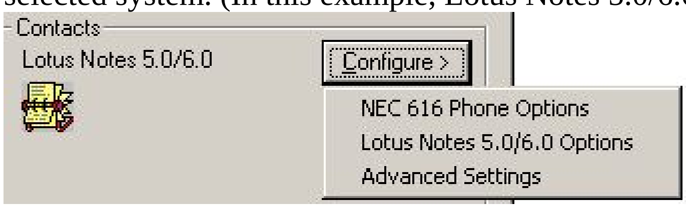
3. Click the **Section** drop-down list to select a section.



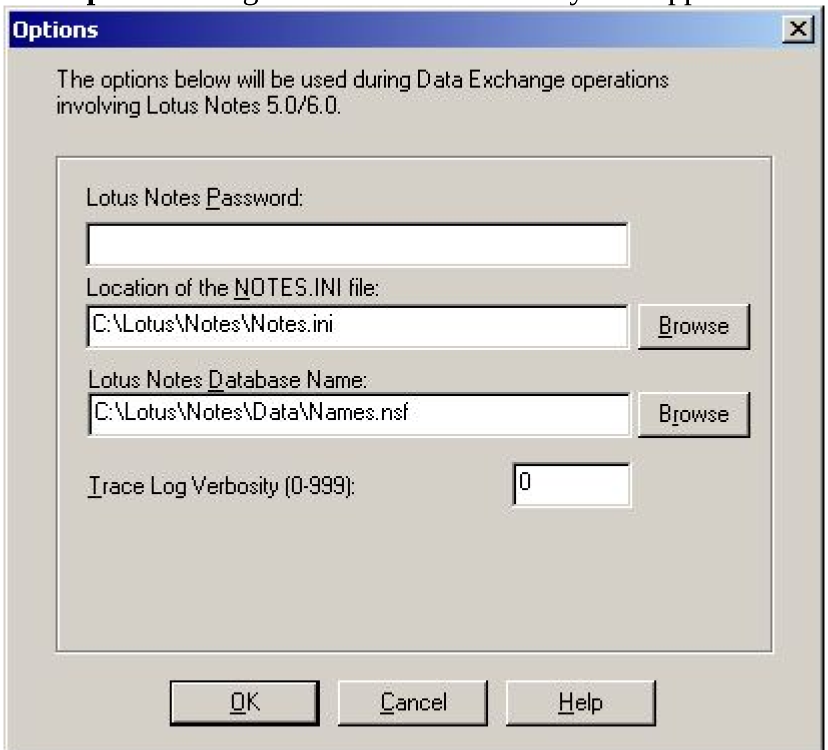
4. Under **Section**, select the supported systems you want synchronised with your phone. The following dialog shows the Contacts section and Lotus Notes 5.0/6.0 system selected for synchronisation with your phone.



5. To configure additional system options, select the application, click the **Configure** button in the Contacts group box, then select the options for the selected system. (In this example, Lotus Notes 5.0/6.0 Options.)



The **Options** dialogue box for the selected system appears.



6. When you are finished, click **OK** to save your options settings and close the **Options** dialogue box, or **Cancel** to clear changes and close the dialogue box.
7. Repeat these steps to associate other sections with systems and to configure systems' options.
8. When you are finished, click **OK.**

You have now associated a section with a system for a 2-way or 3-way synchronisation. The names of the section and systems you chose will appear with an arrow between them. To change the associated section and system or to add other sections and systems, simply repeat the steps above.

Performing the first Synchronisation

After you have associated sections and systems and configured systems options (if necessary), Intellisync is ready to synchronise your data using built-in default settings. In later sections in this guide we will discuss the dialogue boxes from which you can change default synchronisation settings.

Before performing your first synchronisation, verify that the Intellisync application icon appears in your system tray.

Note: Your first synchronisation may take a few minutes; later synchronisations will be shorter.

To perform the first synchronisation:

1. Ensure that your phone is plugged into the USB cable attached to your PC.
2. Follow your phone instructions to perform a synchronisation.
   Note: The first-run synchronisation can take a few minutes.
   The synchronisation completes.
3. Verify that your files have been synchronised properly on your phone and your PIM.

Log Files

Intellisync keeps a log of all synchronisation activity for tracking in case there are any problems with synchronisation. The log file is called **SyncML.log** and can be viewed with any text editor, such as Notepad. If you encounter problems with a synchronisation, viewing the log file may help in determining the cause. If you need to contact Technical Support about a problem, you may be asked to provide a copy of the log file.

To view the log file:

1. Right-click the icon in the system tray of your computer.
2. Choose **View log** from the menu.
   The **SyncML.log** file opens.
3. View, print, or save the log file as desired.

Exiting

Verify that all synchronisation activity is complete before exiting.

To exit:

1. If any dialogue boxes are open, click the Close box in the upper-right hand corner of the dialogue.
2. When no dialogue boxes remain open, right-click the icon in the system tray of your computer.
3. Choose **Exit** from the menu.

The application shuts down and the icon disappears from the system tray.

Configuring Advanced Settings

This section describes the **Advanced Settings** dialogue boxes, where you can customise settings and the synchronisation process for each section.

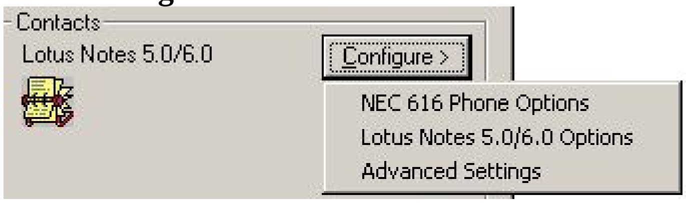
Note: Intellisync is available in Full and Lite versions. For example, Intellisync Lite does not support the Filters tab feature. If your Intellisync does not have all the features described in this guide or if some features are greyed out, you can upgrade to a "full" version of Intellisync. The Full version includes support for additional PIMs (such as Lotus Notes) and additional synchronisation functionality such as Filtering and Custom Field Mapping. Go to www.pumatech.com, click the shopping cart and visit the Pumatech Web store for more information.

Advanced Settings (Contacts Section)

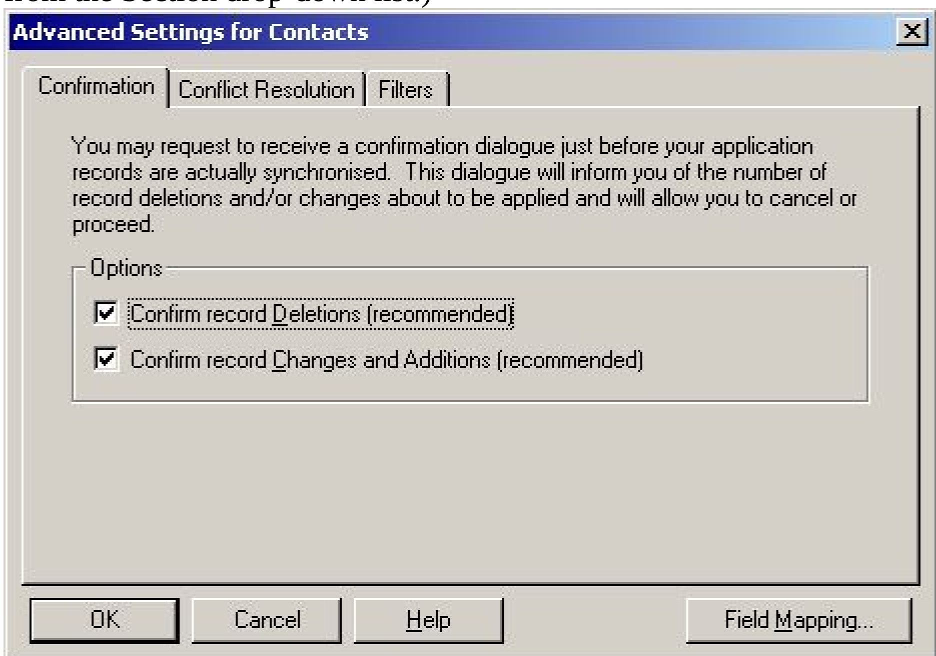
To view or modify advanced settings:

1. Ensure that the section and system application for which you want to configure advanced settings are selected on the Configuration dialogue. In this example, the **Contacts** section and **Lotus Notes 5.0/6.0** system are selected.

2. Click **Configure>**.

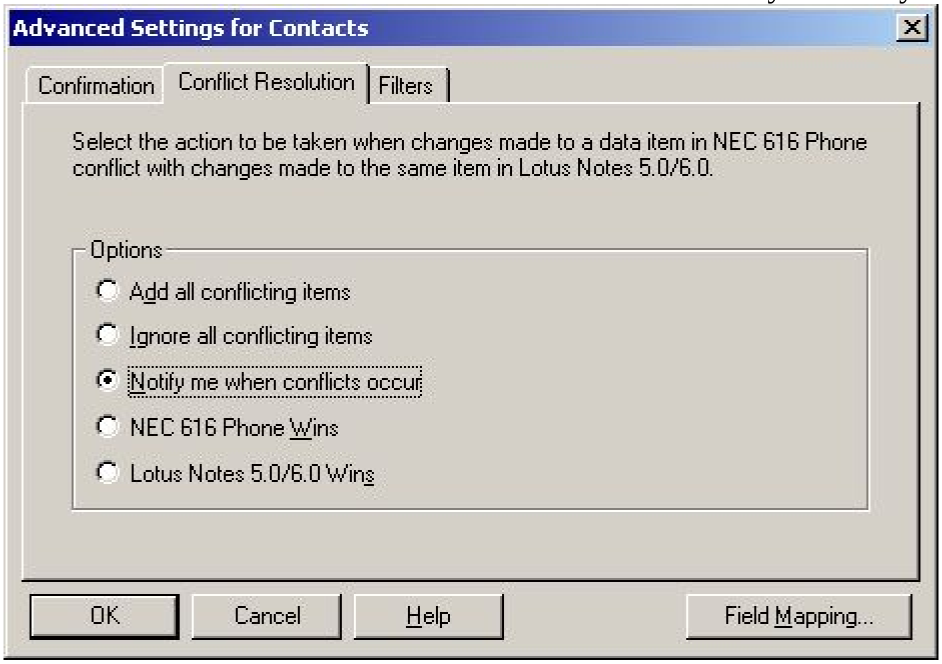


3. Choose **Advanced Settings** from the menu.
   The **Advanced Settings for Contacts** dialogue box opens. (The specific tabs that appear on the Advanced Settings dialogue depend on the section selected from the Section drop-down list.)



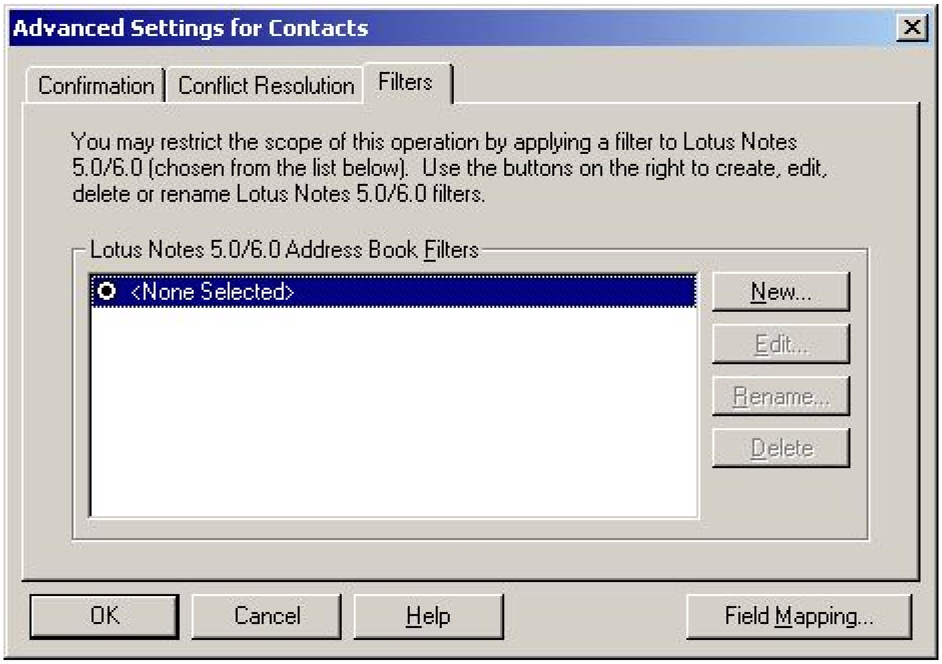
4. On the **Confirmation** tab, select **Confirm record Deletions (recommended)** to receive a confirmation dialogue before your records are deleted.
5. Select **Confirm record Changes and Additions (recommended)** to be notified of individual record changes and additions.
6. Click another tab to change settings or **OK** if you are finished.

7. Use the **Conflict Resolution** tab to specify the actions to take if changes made to an item in a section conflict with the same item in another system or systems.



- **Add all conflicting items**: Add a new record to each system containing mapped values from the record in the other system. The original conflicting records remain intact.
- **Ignore all conflicting items:** Let the conflict stand. No changes are made to either system.
- **Notify me when conflicts occur:** Receive notification when conflicts occur. Intellisync displays a dialogue box with details about each conflict that it detects, and gives you options for resolving the conflict. (This is the default option.)
- **NEC 616 Phone Wins**: Use the data in the main system (your phone). Use this option when you are confident that your main system contains the most current data.
- **Lotus Notes 5.0/6.0 Wins:** Use data from the PIM system. Use this option when you are confident that your other system contains the most current data.

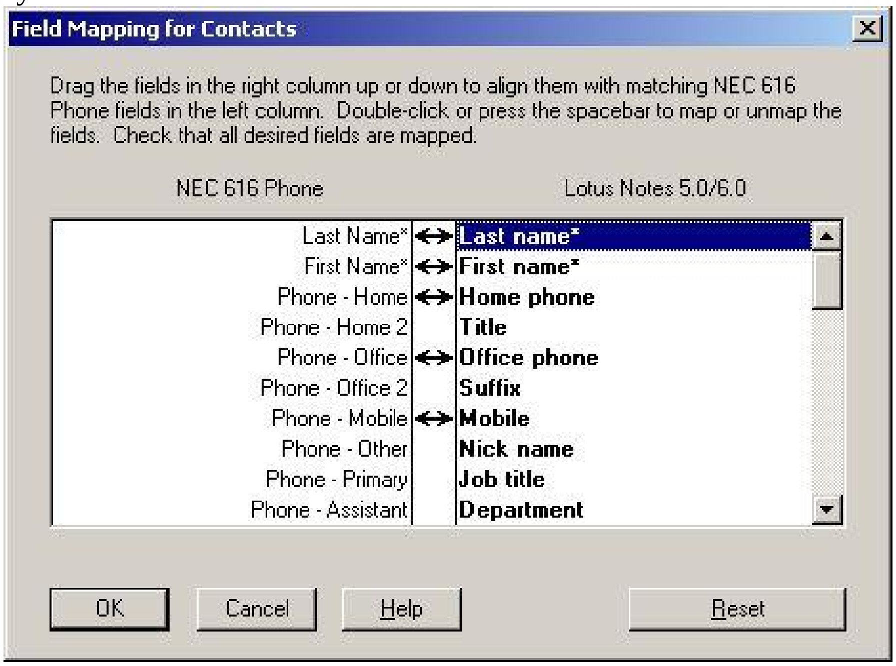
8. The **Filters** tab displays the filters you've created that specify which records to include in a synchronisation. You can use this tab to create new filters to include records based on values in any fields in the records. In this example, no filters have been created.



- To create a new filter, click **New**. A dialogue box will prompt you to name the new filter, and then a second dialogue box will display the controls you need to create the filter. When you've completed the filter, the filter name will appear in this tab.
- To edit an existing filter, select the filter, then click **Edit**.
- To rename an existing filter, select the filter, then click **Rename**.
- To delete an existing filter, select the filter, then click **Delete**.

9. Use the **Field Mapping** option to specify field data retrieval. Click the **Field Mapping** button to open the dialogue.
The Field Mapping dialogue opens. Main system section fields are listed in the left column and other system application fields are listed in the right column. Fields that are mapped have an arrow in the centre column.

Intellisync automatically matches up, or "maps," equivalent fields in your systems so data can be transferred between them. You can view the default field mapping, and, if needed, make changes to redirect the flow of data between your systems.



- To retrieve and refresh field name mapping from your existing data file, click **OK**. This is the default.
- To keep the mapping without refreshing the field list from the data files, click **Cancel.**

10. To change the field mapping, select from the following:
    - To un-map a field, click the arrow.
    - To map adjacent fields, click between them in the centre column. An arrow appears showing that the fields are linked.
    - To map non-adjacent fields, select and drag a field in the right column and drop it next to the field in the left column.
    - To restore default field mapping, click **Reset**.

Notes:

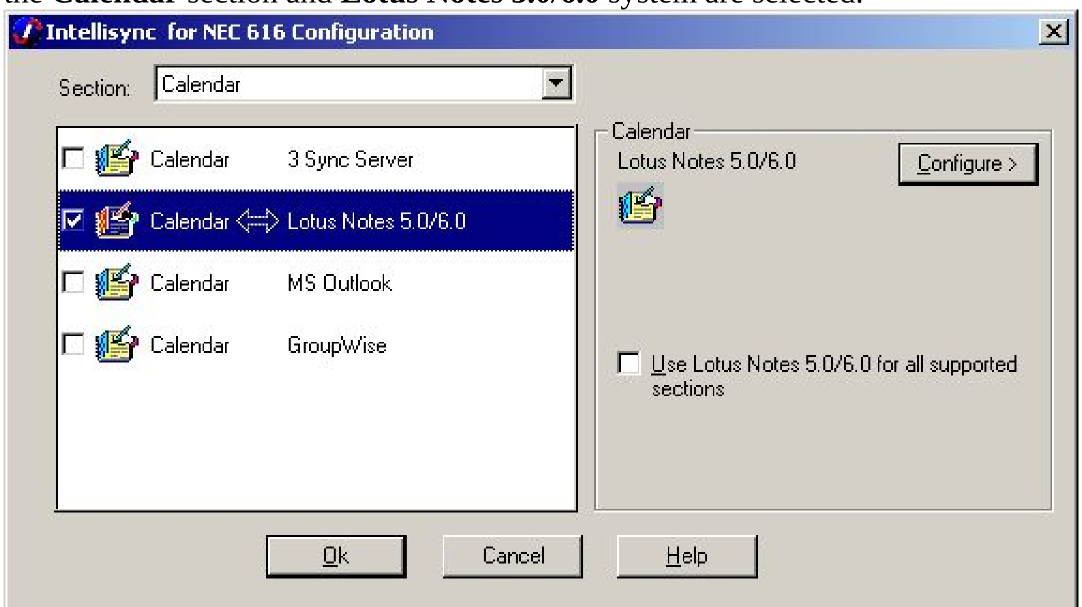
- If you change field mapping for data that has already been synchronised, the next synchronisation that occurs will be, in effect, a first-run synchronisation, which may cause duplicate records to occur in one or both of your systems. If you must change field mapping after data has already been synchronised, you should run a synchronisation before changing the field mapping.
- If you customise field mapping, you should back up your data prior to synchronisation. You should also create test files that you can use to determine the effects of mapping changes on critical data.

11. When you are finished, click **OK** to close the field mapping dialogue.

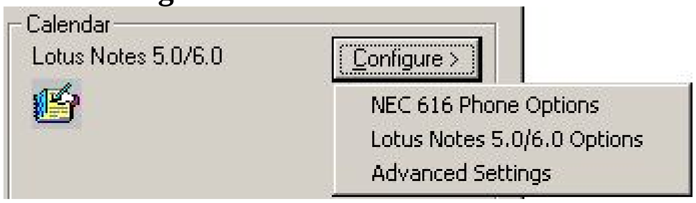
Advanced Settings (Calendar and To Do)

To view or modify section settings:

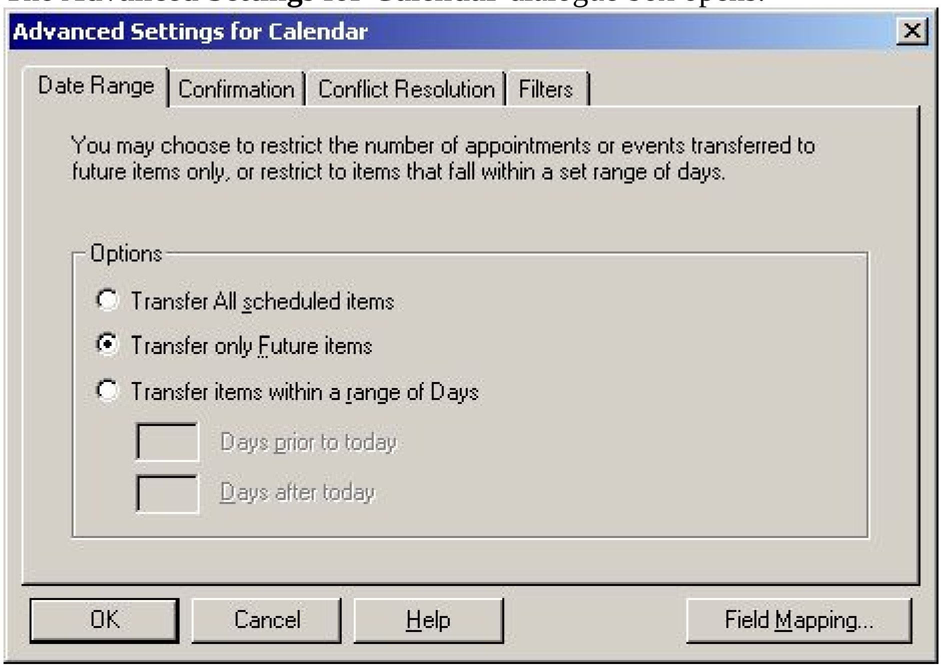
1. Ensure that the section and system application for which you want to configure advanced settings are selected on the Configuration dialogue. In this example, the **Calendar** section and **Lotus Notes 5.0/6.0** system are selected.



2. Click **Configure>**.



3. Choose **Advanced Settings** from the menu.
   The **Advanced Settings for Calendar** dialogue box opens.

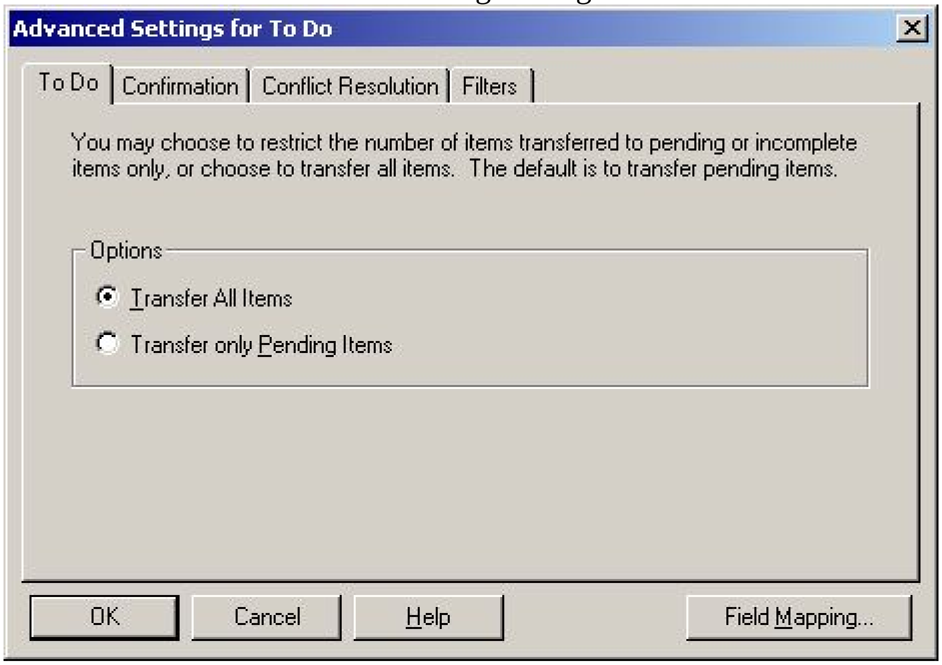


This tab contains the setting that determines which appointments and event items will be included in a synchronisation. You can select one of the following options:

Transfer All Scheduled Items	Include all past and future appointments and event items.
Transfer only Future Items	Include only future appointments and event items. (This is the default option.)
Transfer Items within a Range of Days	Include only appointments and event items within the specified number of days **prior** and **after "today."** This option creates a synchronisation window that adjusts to the current date.

Note: Items that were included in the previous synchronisation and that are currently outside the specified date range, are synchronised, but are not included in the history file. These items will not be included in the next synchronisation. If you transfer a repeating item that doesn't have an end date (or that has an end date that would exceed the maximum fanning limit), and the item has one or more instances that are prior to the current date, Intellisync does not transfer the past instances of the item. This ensures the maximum number of future items is transferred.

The To Do section's Advanced Settings dialogue has one different tab: To Do.



This tab contains the setting that determines which To Do items will be included in an operation. You can select either of the following options:

Transfer All Items	Include all To Do items, including those marked completed. (This is the default option.)
Transfer only Pending Items	Include only pending items - do not transfer completed items.

4. Make your selections and click **OK**.
5. The **Confirmation**, **Conflict Resolution**, and **Filters** tabs' options are similar to the options for the **Advanced Settings for Contacts** in this chapter. In addition, these dialogues are also covered in detail in Chapter 3: Intellisync Dialogue Boxes.
6. Click **OK** to return to the **Configuration** dialogue.

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3 Dialogue Boxes

Read this chapter to learn more about using the Intellisync for NEC 616 (Intellisync) dialogue boxes.

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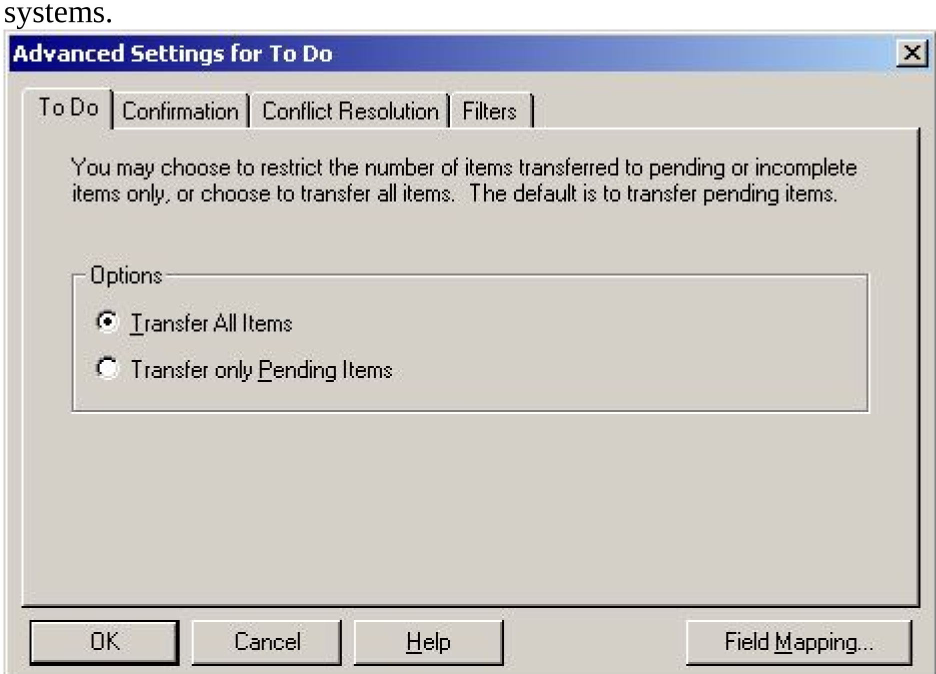
Configuration Dialogue Box

This dialogue box tells Intellisync which sections and systems to synchronise when you initiate a synchronisation from your main system.

The Section drop-down list shows the sections that you can associate with other systems.



The check box that appears to the left of the name of each system indicates whether the system is to be included in synchronisation. A section can be mapped to a system, but will not be included in synchronisation operations unless you check this box to associate them. This feature allows you to easily include or exclude sections or systems in a synchronisation, without removing configuration information.

In the **Configuration** dialogue box, select the section and system names, then click **Configure>** and select to configure phone, selected system, or Advanced Settings options for that system.

The **Operation** box contains the **Import**, **Export** and **Synchronise** buttons. In addition to synchronising your applications, Intellisync can also perform one-way synchronisations (imports and exports) of data between your sections and systems. The same procedures that are involved in configuring and performing a synchronisation are used for importing and exporting. That is, you select a Connector for the other system, and, if necessary, adjust advanced settings and set up proper field mapping. The only difference is the operation you select when you choose the Connector in the Choose Translator dialogue box.

Switching between Import (or Export) and Synchronise

We recommend that you do not switch between importing (or exporting) and synchronising the same data. Due to differences in how Intellisync processes records for these two operations, Intellisync can sometimes duplicate records on the target system. Duplication of records ceases within two consecutive operations of the same type.

Notes:

When you perform an import or export, Intellisync doesn't duplicate records that already exist in the target system. However, conflict resolution rules are applied if Intellisync discovers data conflicts between records in your two systems.

When conflict resolution rules are used during imports or exports, Intellisync may add, change, or delete target records.

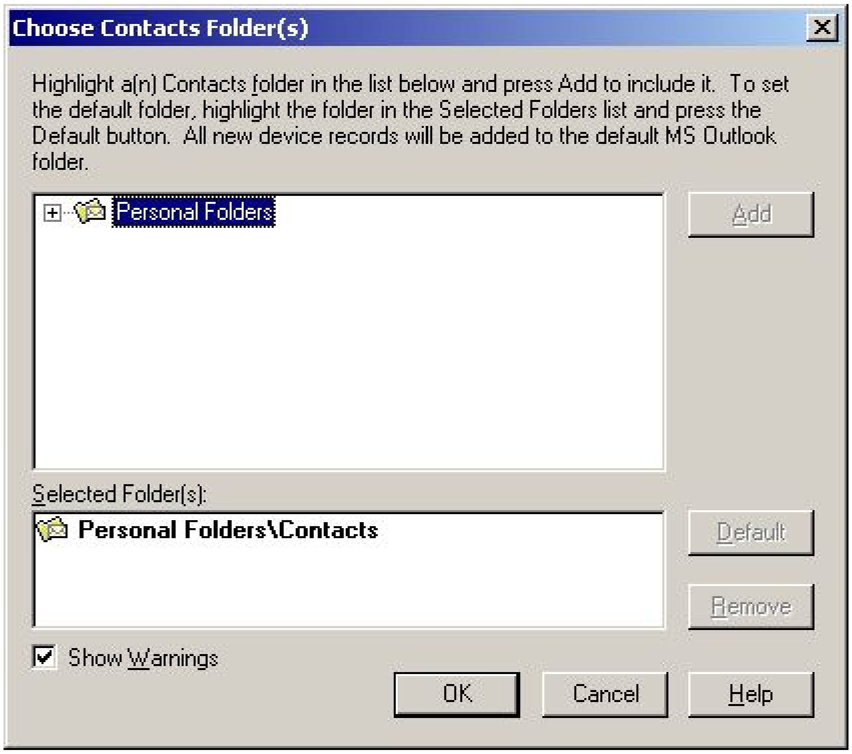
Records modified on the target system will not be updated by the source unless the record is changed or deleted on the source or a re-sync is performed. Similarly, records deleted on the target will not be re-added unless a change is made to the same record on the source system, a re-sync is performed, or the source system does not support fast-sync. If the source system does not support fast-sync, the record will be re-added with the next sync.

The **Use 3 Sync for all supported sections** box allows you to configure synchronisation for all your sections with only the 3 Sync server system with only one click.

Choose Folders Dialogue Box

The Choose Folders dialogue box allows you to select a folder for synchronisation. Some systems allow you to select multiple folders. Some systems allow you to select multiple folders. The Choose Folder(s) dialogue box appears after clicking the Browse button, which appears after a system is selected.

The upper area displays available folders. The **Selected Folder(s)** area displays the folders list that will be synchronised.



Note: The 3 Sync Server component allows the records for a given data section, such as Contacts, to be organised in multiple Folders. The default folder is "Unfiled." Intellisync, when synchronising with the 3 Sync server for a given data section, synchronises phone data with server data found in the "Unfiled" folder. Full folder support is available for PIM systems such as Outlook, but Intellisync makes no connection or correlation between the PIM system folders and 3 Sync Server folders.

About folders

The first folder you select is automatically designated as the default folder and is displayed in **bold**. Records that are created on the main system are transferred to the default folder. Records created in the default folder are also transferred to the main system.

You can select additional folders to synchronise. Records from additional folders transfer to the main system, but main system records are not transferred to that folder. The only time a record transfers from the main system to a non-default folder during a synchronisation is when the record originated in that folder and was later changed in the main system.

If you remove the default folder, the next folder listed in the Selected Folder(s) list automatically becomes the new default folder. Also, if you remove a folder after the folder has been synchronised, the next synchronisation removes from the main system any records that originated in the removed folder.

To add a folder:

1. In the upper area, locate and select the folder you want to add.
2. Click **Add.**

If the folder you selected contains one or more sub-folders of the same data type, a menu containing two commands is displayed.

-Click **Folder** to select only the highlighted folder.

-Click **With Sub-Folders** to select the highlighted folder and compatible sub-folders

The selected folder now appears in the **Selected Folders** list.

To specify the default folder:

Select the folder you want to use as the default folder, and then click **Default**.

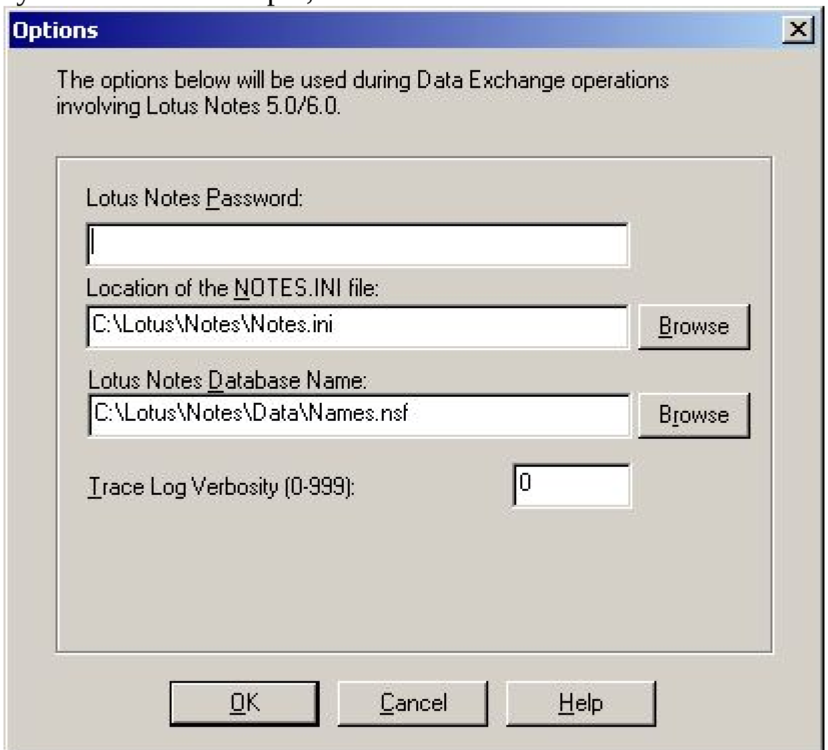
To remove a folder from the Selected Folder(s) list:

Select the folder you want to remove, and then click **Remove**.

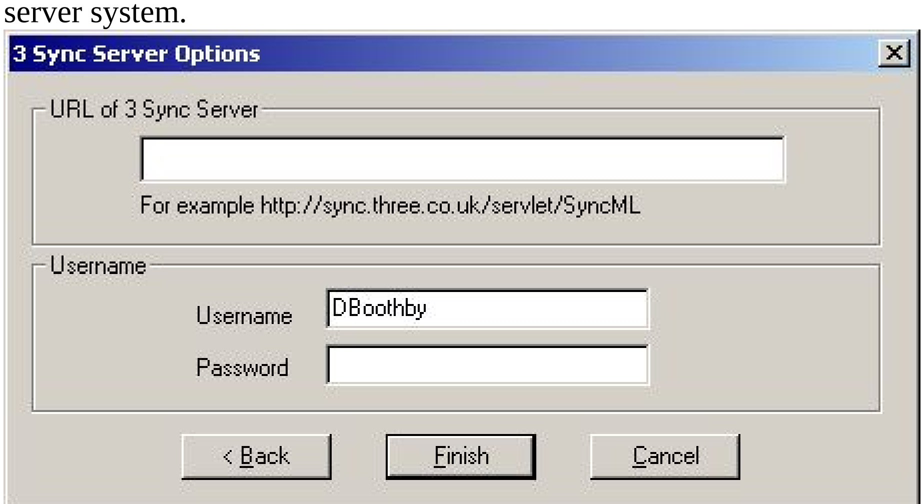
Note: When making changes from this dialogue box, keep the **Show Warnings** option selected to receive notification when changes might yield unexpected results. For example, if you remove a folder from the **Selected Folder(s)** list after it has been synchronised, Intellisync warns you that main system records that originated in the removed folder will be deleted from the main system.

Options Dialogue Box

The **Options** dialogue box allows you to specify options that apply to the selected system. In this example, for Lotus Notes 5.0/6.0.



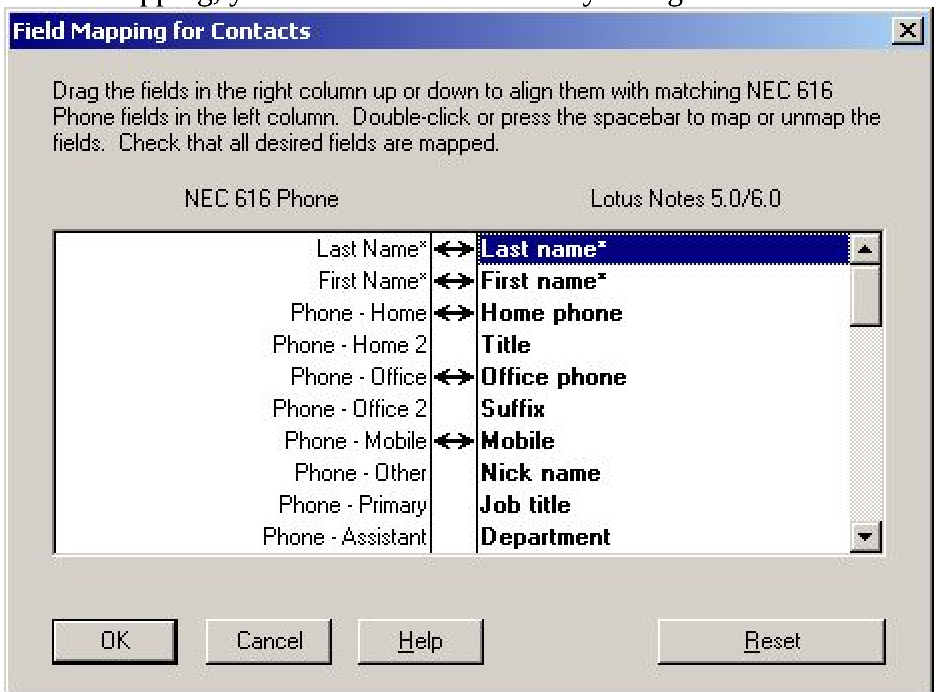
The **Options** dialogue box allows you to specify options that apply to the 3 Sync server system.



The URL of 3 Sync Server field defines where Intellisync will look for the 3 Sync server on the internet. Enter the server's Username and Password, if applicable, in the appropriate fields.

Field Mapping Dialogue Box

Intellisync automatically matches up, or "maps," equivalent fields in your systems so data can be transferred between them. Sometimes you have the option of changing the mapping of a field as one-line or as multiple lines. If you are happy with the default mapping, you do not need to make any changes.



The Field Mapping dialogue box allows you to view and change how equivalent fields in two applications are linked, or mapped. Data will be transferred between the mapped fields during a synchronisation.

Custom field mapping

To adjust the field mapping:

- To un-map mapped fields, click the arrow between the fields.
- To map adjacent fields, click the space between the fields. An arrow appears 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, click **Reset**.

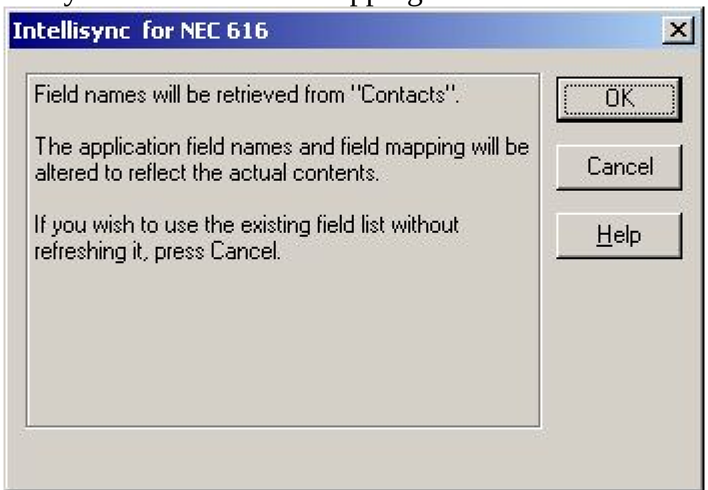
Notes:

- If you change field mapping for data that has already been synchronised, the next synchronisation that occurs will be, in effect, a first-run synchronisation, which may cause duplicate records to occur in one or both of your systems. If you must change field mapping after data has already been synchronised, you should run a synchronisation before changing the field mapping.

- If you customise field mapping, you should back up your data prior to synchronisation. You should also create test files that you can use to determine the effects of mapping changes on critical data.

Field Name Retrieval Dialogue Box

This dialogue box is displayed before Intellisync retrieves field names directly from the system. The default mapping will be reset.



Select one of the following options:

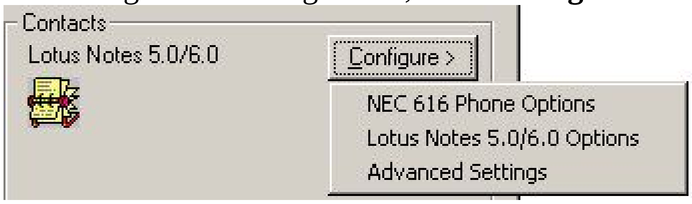
- Click **OK** to proceed.
- Click **Cancel** to open the **Field Mapping** dialogue box without refreshing the field list from the application.

Phone Options Dialogue Box

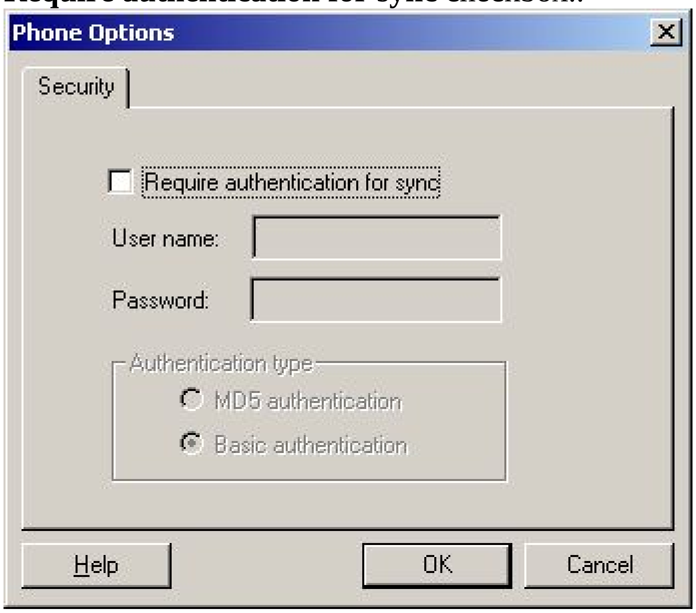
This section describes how to configure phone connection and security settings. The Intellisync application provides settings that can be configured for your specific phone. In most cases, the default settings will not need to be changed. If the default settings do not work for your phone, refer to the directions below to make changes.

To configure phone settings:

1. On the Configuration dialogue box, click **Configure>.**



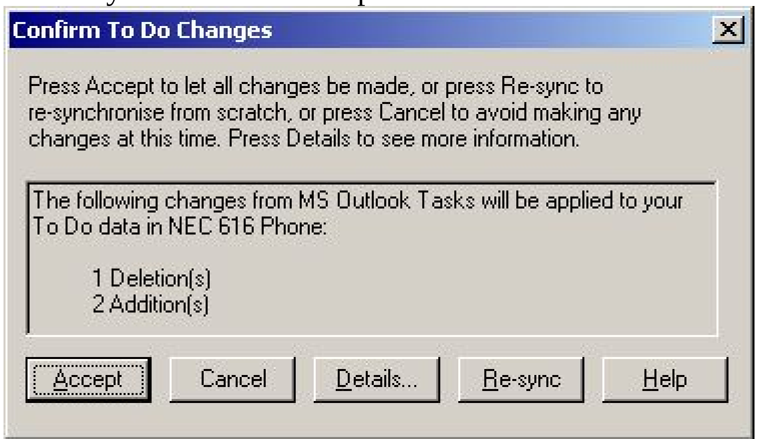
2. Select NEC 616 Phone Options from the menu.
   The **Phone Options** dialogue opens.
3. On the **Security** tab, to set a password before synchronisation, click to select the **Require authentication for sync** checkbox..



4. Enter the **User name** and **Password** you want to use.
5. Select the type of security you want.
   MD5 authentication: Enhanced level of security.
   Basic authentication: Standard level of security
6. When you are finished with configuration, click **Apply** to apply changes and keep the dialogue open, **Cancel** to clear, or **OK** to save changes and close the dialogue.

Confirm Changes Dialogue Box

The Confirm Changes dialogue box displays changes that require confirmation before synchronisation can proceed.

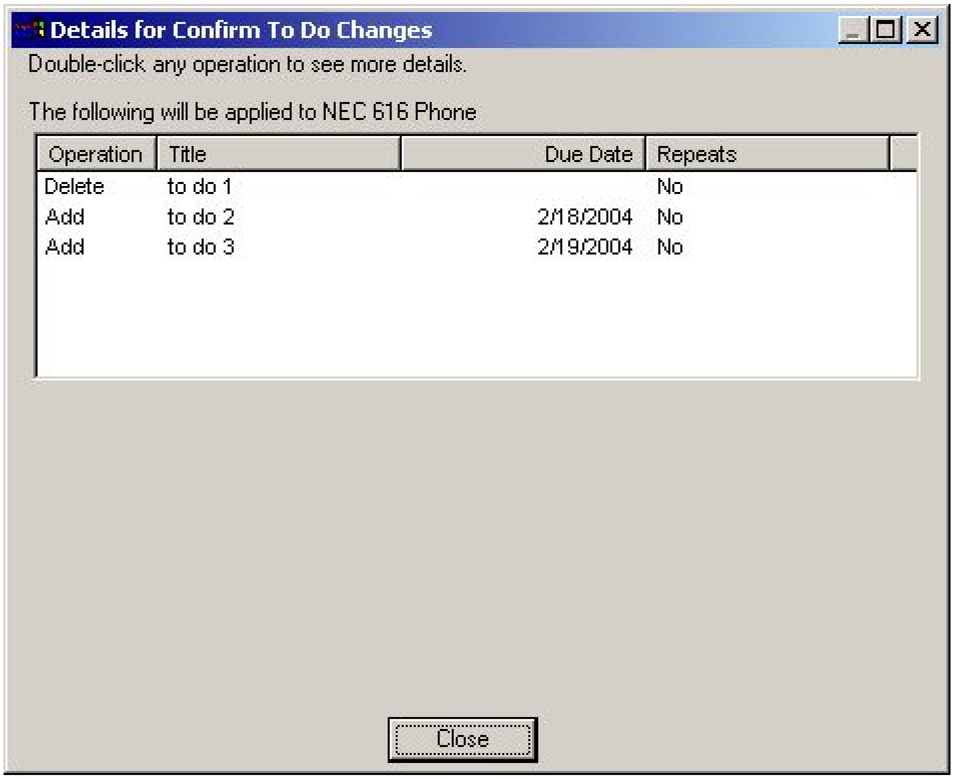


Select one of the following options:

Accept	Accept the proposed changes shown and continue the operation.
Cancel	Reject the changes and stop the synchronisation.
Details	View detailed information about the proposed changes.

Details for Confirm Changes

The Details for Confirm Changes dialogue box shows the operation (Add, Change, or Delete) and the changes that will be made to the records.



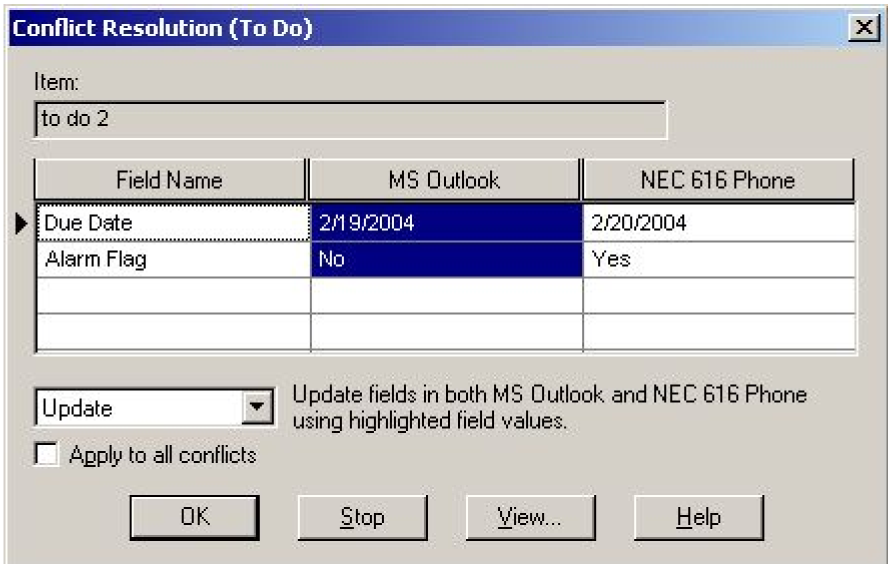
To see more details about any single record, double-click the operation for that record. This displays the **Additional Details** dialogue box.

To sort records in the list, in either ascending or descending order, click the column heading. Click again to sort the column in the opposite order.

Note: You can resize this dialogue box to view more information at once. The new position and size will be used the next time you display the dialogue box.

Conflict Resolution Dialogue Box

The Conflict Resolution dialogue box displays the data from conflicting fields in corresponding records, and provides options for resolving the data conflicts.



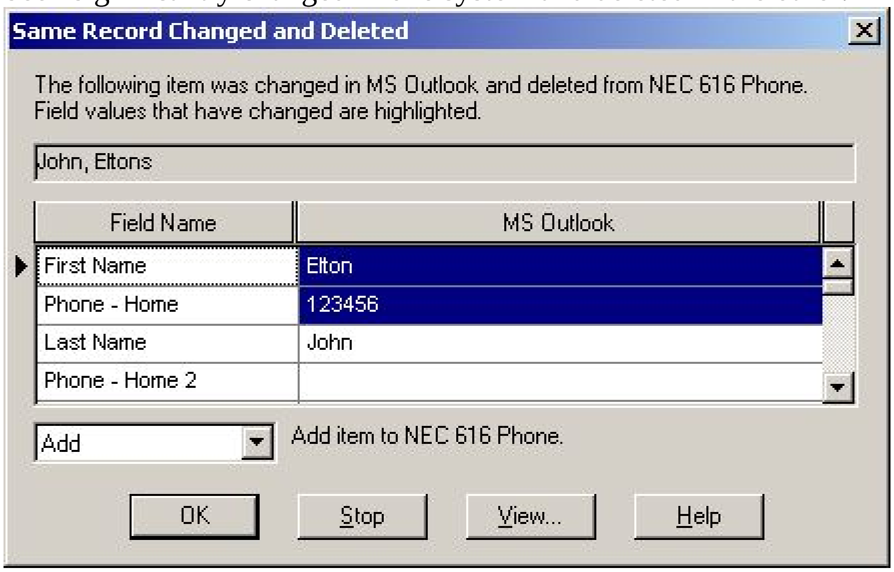
A box labelled **"Item"** contains key field values. This helps identify the conflicting record. If a record in one system conflicts with more than one record in another system, a box to the right of the Item box will say **1 of 2**, or **1 of 3,** etc., and left and right arrow controls will let you switch between conflicts. Select one of the following actions to take to resolve the current conflict(s) from the drop-down list: Update, Add, or Ignore.

Click **View** to see the values of highlighted fields when they are too long to be displayed in the grid.

Click **Stop** to stop the synchronisation.

Same Record Changed and Deleted Dialogue Box

This dialogue box displays the data for a previously synchronised record that has been significantly changed in one system and deleted in the other.



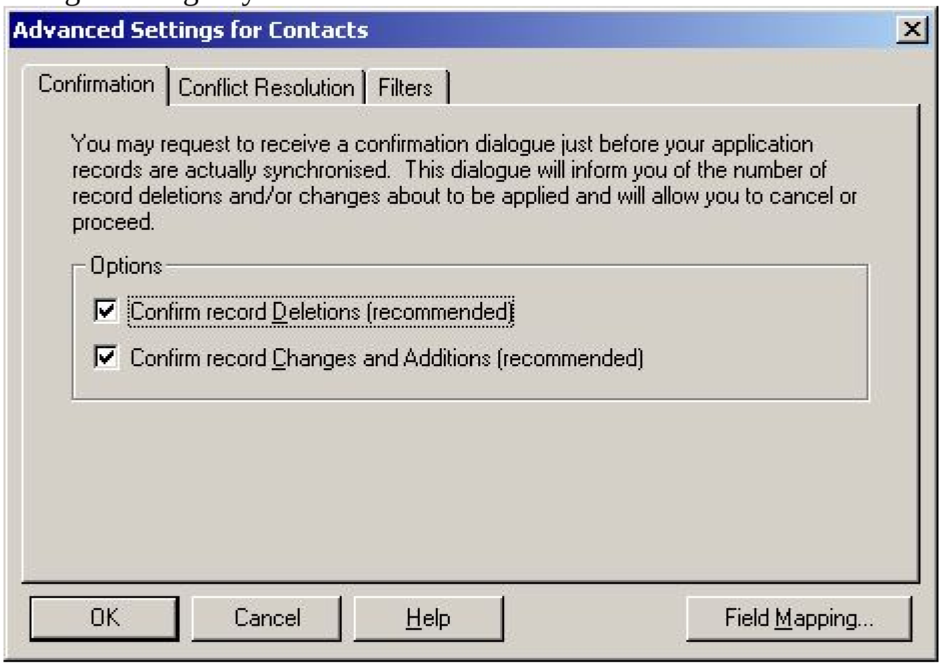
Select one of the following options:

Add	Add the item back into the system from which it was deleted.
Delete	Delete the record from the other system.
Ignore	Let each system remain as it is.

Click **View** to see the values of selected fields in the record that was deleted.
Click **Stop** to stop the synchronisation.

Confirmation Tab

This tab contains settings that determine whether you will be prompted to confirm changes during a synchronisation.

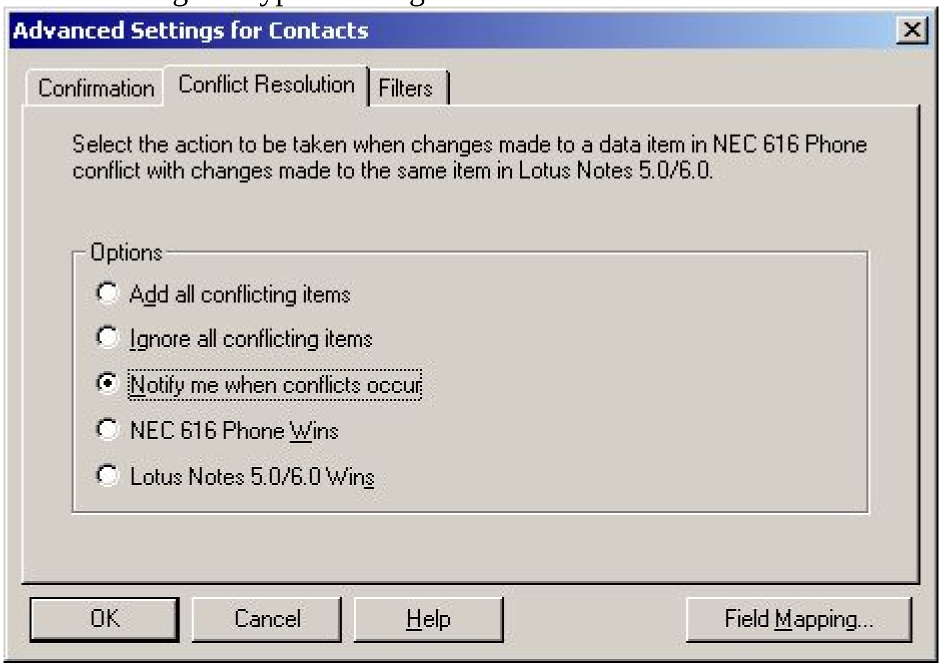


The following options are available:

Confirm record Deletions	Display a confirmation dialogue box before any records are deleted.
Confirm record Changes and Additions	Display a confirmation dialogue box before any records are changed or added.

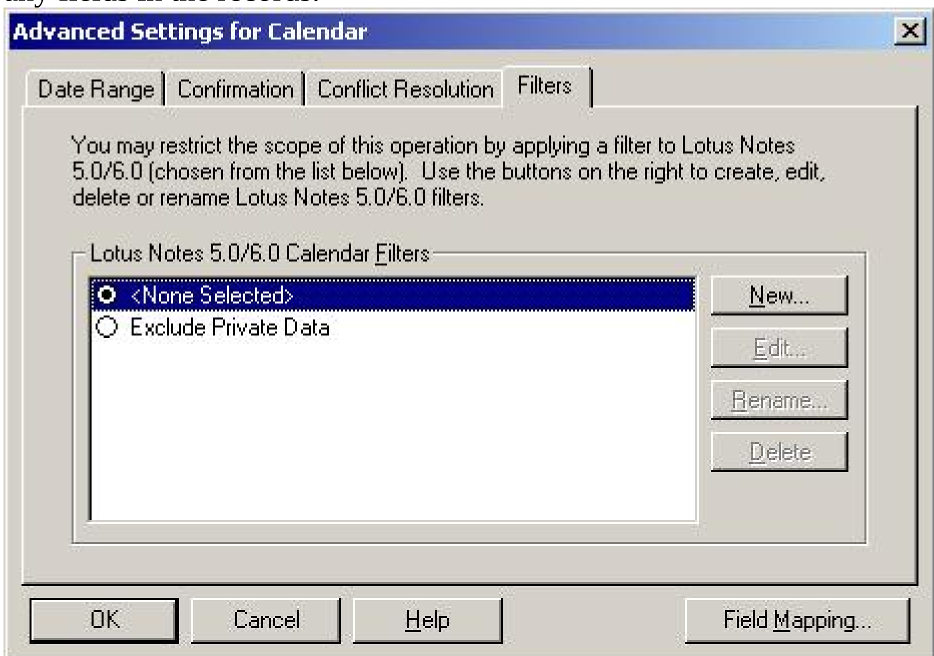
Conflict Resolution Tab

The Intellisync application allows you to configure advanced settings to control conflict resolution between records. Conflict resolution typically involves situations when a specific record has been changed both in the section and the system and the changes do not agree. Intellisync provides the option of setting up rules for dealing with resolving this type of change conflict if needed.



Filters Tab

The Advanced Settings Filters tab displays the filters you can use to specify which records to include in a synchronisation. You can use the provided **Exclude Private Data** filter, or use this tab to create new filters to include records based on values in any fields in the records.



The list in the Lotus Notes 5.0/6.0 Calendar Files list will display any standard or custom filters you have created. The selected filter is highlighted.
The following options are available:

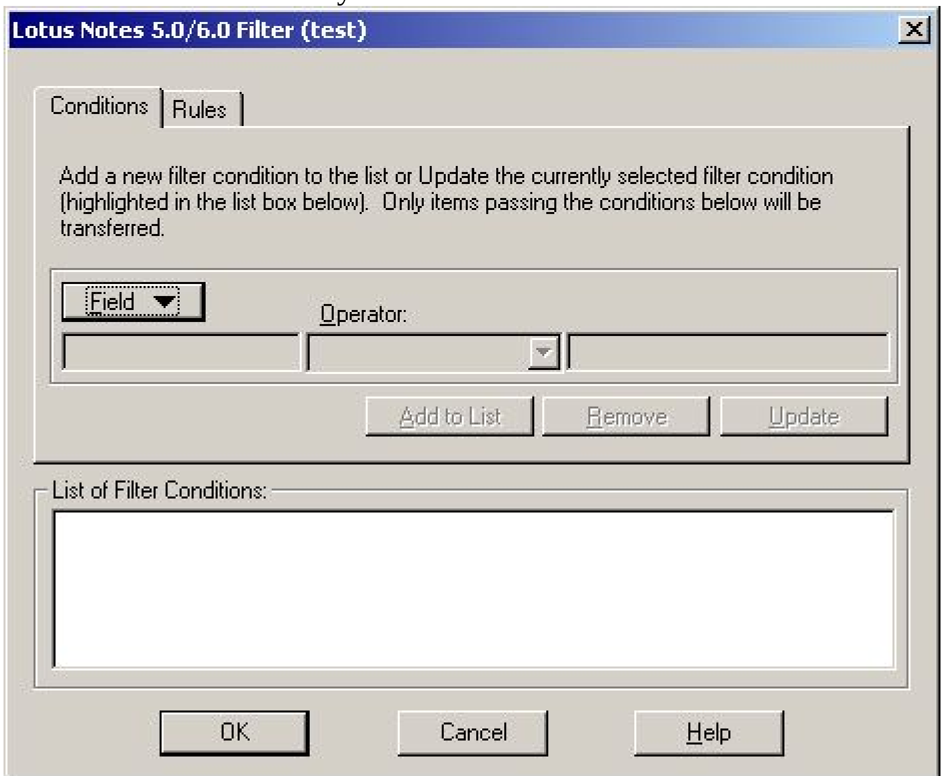
<None Selected>	Do not use any filter. All records are included in a synchronisation. (This is the default option.)
Exclude Private Data	Exclude records marked **Confidential** or **Private**.

To use a filter for the next synchronisation, select the filter name. Only one filter can be used at a time.
To create a new filter, click **New**. A dialogue box will prompt you to name the new filter, and then a second dialogue box will display the controls you need to create the filter. When you've completed the filter, the filter name will appear in this tab.
To edit an existing filter, select the filter, then click **Edit**.
To rename an existing filter, select the filter, then click **Rename**.
To delete an existing filter, select the filter, then click **Delete**.

Conditions Tab

When you create a new filter, a dialogue box appears with the Conditions and Rules tabs. These tabs define the filter.

The Conditions tab allows you to specify the conditions that a record must meet in order to be included in a synchronisation.



You specify a condition using the **Field**, **Operator**, and **Value** fields. For example, here are some conditions that could be applied to various applications:

Field	**Operator**	**Value**
Last Name	is between	A and G
County/Province/State	equals	Beds.
Completed	is true	
Category	does not equal	Ideas
Date	is between	01/01/2000 and 07/01/2000
Start Date	on or after	05/15/2000

To create a condition, select or enter data for the **Field**, **Operator**, and **Value** text boxes, then click **Add to List**.

To delete a condition, select the condition, then click **Remove**.

To modify an existing condition, select the condition, make your changes to the **Field**, **Operator**, or **Value** text boxes, then click **Update**.

Operators

There are operators for four different types of data: **String, Date, Time** and **Boolean.**

Choices available for each type are as follows:

String	**Date**	**Time**	**Boolean**
starts with	equals	equals	is true
contains	does not equal	does not equal	is false
does not contain	after	after	

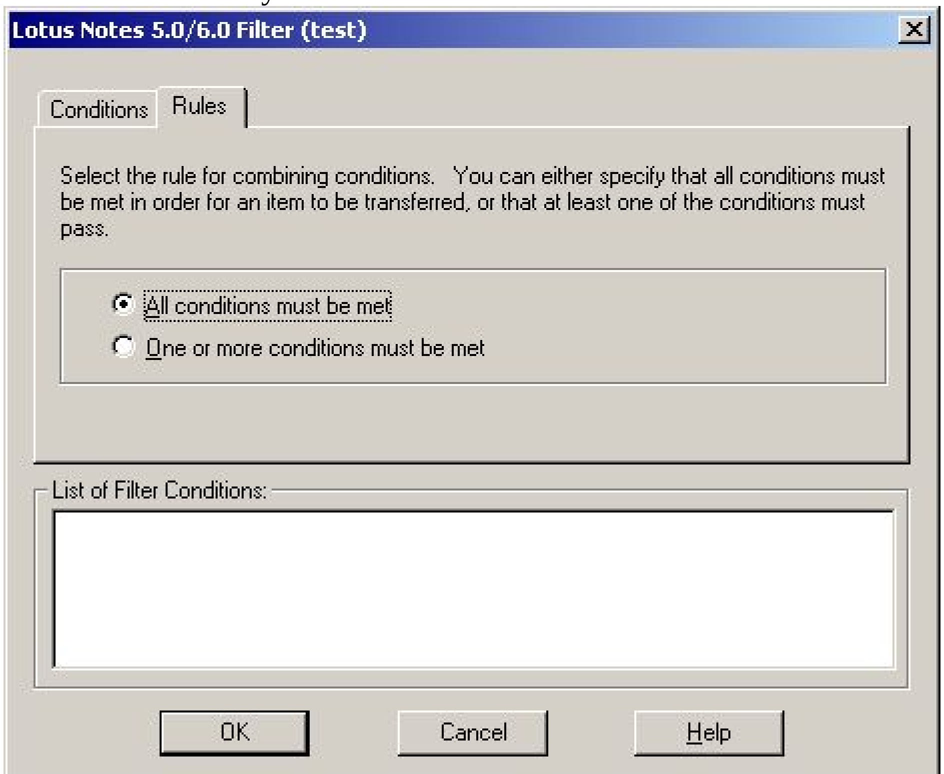
equals	before	before
does not equal	on or after	on or after
is empty	on or before	on or before
is not empty	is between	is between
is between		

Notes:

- You can use Boolean operators for option fields like **Completed** and **Confidential**, which are either selected (is true) or cleared (is false).
- To use a fixed Date value, enter a date directly into the text box using the mm/dd/yy format.
- To use a fixed Time value, enter a time directly into the text box using 24-hour time format (for example, enter 2:00 pm as 14:00).
- If you select a Field value of **Date** or **Time**, or of **Postmark-Date** or **Postmark-Time**, a **Value** button appears above the value field. Click this button to insert **today** (for date fields) or **now** (for time fields) to always use the current date or time in the filter.
- If you use a filter that specifies an un-mapped field, Intellisync will not filter records from the main system, but will filter records from the other application.
- If you use a filter that specifies a field that is contained in only one of your systems, the filter excludes records only from that system.

Rules Tab

When you create a new filter, a dialogue box appears with the Conditions and Rules tabs. These tabs define the filter.
The Rules tab allows you to specify specific options that a record must meet in order to be included in a synchronisation.



You can select either of the following options:

All conditions must be met	Join conditions with the logical operator **AND.** (This is the default option.)
One or more conditions must be met	Join conditions with the logical operator **OR.**

For example, you can create filters like these:

```
Title equals Marketing Strategy AND
Category does not equal Ideas

Company equals Pumatech OR
Company equals Microsoft OR
Company equals Palm

Date after 12/15/99 AND
Time after 14:00
```

Notes:

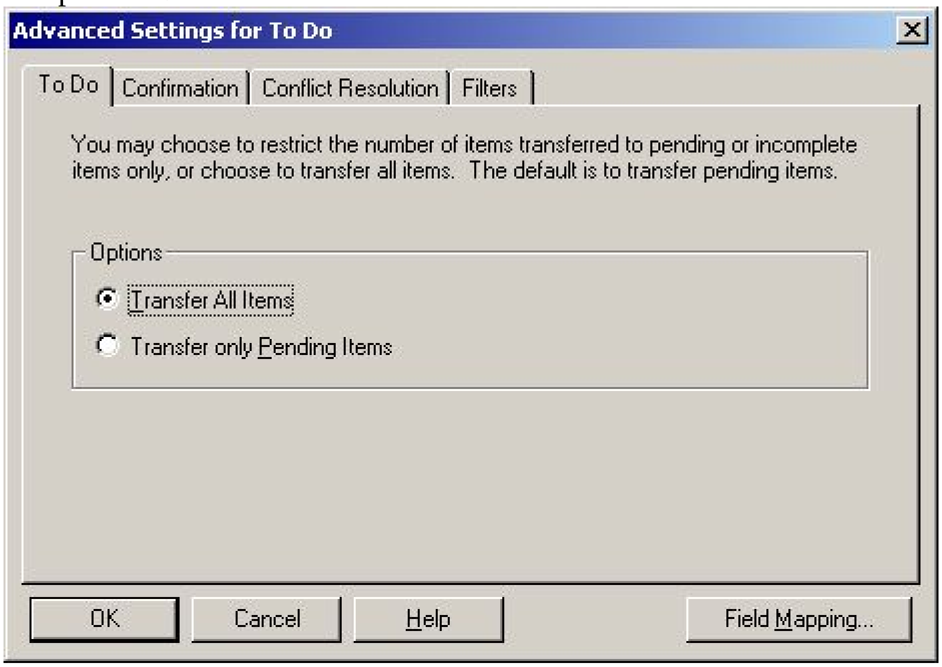
- You cannot use both logical operators (AND/OR) in a single filter. However, you can use the conditional operator **is between** to create conditions like **Last Name is between A and C**. This, in effect, says, "If Last Name starts with A, or Last Name starts with B, or Last Name starts with C."

- You can then use the AND operator to create a filter like the following which, in reality, does utilise both logical operators.

```
Last Name is between A and C AND
County/Province/State equals Beds.
```

To Do Tab

This tab contains the setting that determines which To Do items will be included in an operation.



You can select either of the following options:

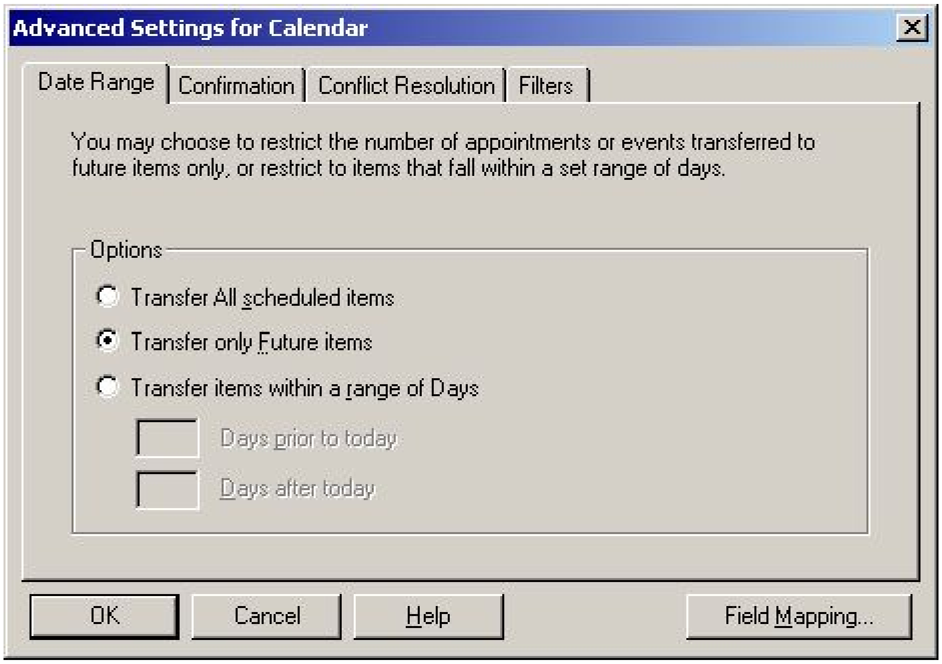
Transfer All Items	Include all To Do items, including those marked completed.
Transfer only Pending Items	Include only pending items - do not transfer completed items. (This is the default option.)

When **Transfer Only Pending Items** is the selected option, changing the status of an item to "completed," and then synchronising, and then changing the status back to "pending," and then synchronising again, can result in duplicate items with different statuses.

To correct, delete a completed item on one side and then synchronise.

Date Range Tab

The **Date Range** tab contains the setting that determines which appointments will be included in a synchronisation.



You can select one of the following options:

Transfer All Scheduled Items	Include all past and future appointments and event items.
Transfer only Future Items	Include only future appointments and event items. (This is the default option.)
Transfer Items within a Range of Days	Include only appointments and event items within the specified number of days **prior** and **after** **"today."** This option creates a synchronisation window that adjusts to the current date.

Notes:

- Items that were included in the previous synchronisation, and which are currently outside the specified date range, are synchronised but are not included in the history file. These items will not be included in the next synchronisation.
- If you transfer a repeating item that doesn't have an end date (or that has an end date that would exceed the maximum fanning limit), and the item has one or more instances that are prior to the current date, Intellisync does not transfer the past instances of the item. This ensures the maximum number of future items is transferred.

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