

# **CorporateSync 3.0 for Pocket PC**

## **User's Guide**

---

## **CorporateSync 3.0 for Pocket PC *User's Guide***

June 2002

### **Copyright 2002 Steltor Inc. All rights reserved**

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means without the express written permission of Steltor.

### **Software License Notice**

Your license agreement with Steltor Inc., which is included with the product, specifies the permitted and prohibited use of the product. Any unauthorized duplication or use of the software, in whole or in part, in print, or any other storage and retrieval system, is forbidden.

### **Trademarks**

All product or brand names are trademarks or registered trademarks of their respective holders.

### **Notice**

Steltor makes no expressed or implied warranty with regard to the programs and materials offered or their salability or their fitness for any particular purpose.

The program, materials, and documentation are made available solely on an “as is” basis, and the entire risk as to their quality, reliability, and performance is with the user. Should the program material or documentation prove defective, the user (not Steltor, or any other party) shall bear the entire cost of all necessary correction and all incidental or consequential damages. Steltor shall not be liable for any incidental or consequential damages in connection with or arising out of the furnishing, use, or performance of the supplied material.

Steltor  
2000 Peel Street, 4th floor  
Montreal, QC CANADA H3A 2W5

tel: (514) 733-8500  
fax: (514) 733-8878  
e-mail: [info@steltor.com](mailto:info@steltor.com)

---

# Contents

---

|   |    |
|---|----|
| Customizing your ActiveSync Options .....                     | 1  |
| Sync Options .....  | 1  |
| Sync Mode.....  | 1  |
| Rules.....  | 1  |
| Setting sign-in preferences.....                              | 2  |
| User information .....  | 2  |
| Server information .....                                      | 2  |
| Setting synchronization preferences for Calendar Events ..... | 3  |
| Synchronizing Refused Events .....                            | 3  |
| Adding attendee names to the Notes section of an Event .....  | 3  |
| Checking attendance status .....                              | 3  |
| Limiting details.....   | 4  |
| Setting a date range for Calendar Events.....                 | 5  |
| Setting synchronization preferences for Tasks .....           | 6  |
| Setting a date range for Tasks .....                          | 7  |
| Synchronizing your Contacts.....                              | 8  |
| Setting synchronization rules.....                            | 9  |
| Performing a Full Synchronization for a plug-in .....         | 10 |
| What is a Full Synchronization? .....                         | 10 |
| When should you perform a Full Synchronization? .....         | 10 |
| Troubleshooting   Connection problems.....                    | 12 |
| Troubleshooting   Entry problems.....                         | 13 |



# Customizing your ActiveSync Options

(Microsoft ActiveSync | Options)

## Sync Options

Control the default synchronization action of your ActiveSync plug-ins. The list displays plug-ins in use for your current partnership and each one's current default synchronization action. If you have correctly installed CorporateSync, the Calendar, Contact and Task plug-ins should display CorporateTime as the application to be synchronized with your mobile device.

Choose a plug-in and click **Settings** to modify your synchronization settings for Events, Tasks and Contacts.

## Sync Mode

Choose when you want to synchronize information between your mobile device and the calendar server. Although CorporateSync supports all three sync modes, it is recommended that you perform a manual synchronization, since your calendar environment on the server can change frequently (other users booking you for Entries, etc.).

## Rules

CorporateSync does not follow the rules you set on this tab. Please consult Setting synchronization rules for more information.

# Setting sign-in preferences

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC Settings | Sign In)

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

## User information

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

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

## Server information

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

# Setting synchronization preferences for Calendar Events

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC Settings | Calendar)

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

## Synchronizing Refused Events

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

## Adding attendee names to the Notes section of an Event

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

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

## Checking attendance status

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

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

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

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

For example:

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

## Limiting details

Control the size of details included with Events when you synchronize your Calendar. The maximum size is 20k. If you do not specify a size, CorporateSync will use the default value provided by your mobile device.

# Setting a date range for Calendar Events

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC | Calendar | Date Range)

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

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

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

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

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

# Setting synchronization preferences for Tasks

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC Settings | Tasks)

**Limit Details:** Control the size of details included with Tasks when you synchronize your Calendar. The maximum size is 60k. If you do not specify a size, CorporateSync will use the default provided by the mobile device.

# Setting a date range for Tasks

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC Settings | Tasks | Date Range)

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

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

CorporateSync will synchronize all active Tasks within your date range. A Task is active if any of the following are valid:

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

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

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

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

# Synchronizing your Contacts

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC Settings | Contact)

**Limit Details:** Control the size of details included with Contacts when you synchronize with the calendar server. The maximum size is 60k. If you do not specify a size, CorporateSync will use the default value provided by your mobile device.

# Setting synchronization rules

(Start | Programs | CorporateSync for Pocket PC | CorporateSync 3.0 for Pocket PC Settings | Rules)

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

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

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

# Performing a Full Synchronization for a plug-in

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

## What is a Full Synchronization?

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

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

## When should you perform a Full Synchronization?

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

### To perform a Full Synchronization for a plug-in:

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

### Important

- If the title, start time or end time of an Event have changed, CorporateSync will treat it as a different Entry.

- If the mapping tables are ever deleted or corrupted, CorporateSync will perform a Full Synchronization.

# Troubleshooting | Connection problems

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

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

**It is taking too long to synchronize.**

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

# Troubleshooting | Entry problems

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

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

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

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

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

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

**I want to view a full report on my synchronization.**

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

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

**A**

- ActiveSync Partnership 1
- Attendance 3
  - attendance status 3
  - attendee list 3
  - changed reply status 9
- Authentication 2

**C**

- Calendar 3, 5
  - date range 5
- COM port 12
- Conflict 9
  - item modified on device and calendar server 9
- Contact
  - limit detail size 8

**D**

- Data 10
  - purge from device 10

**E**

- Events 3, 5
  - adding attendee names to Notes 3
  - date range 5
  - duplication 10
  - events you do not own 3
  - limit detail size 4
  - refused 3
  - repeating 5

**M**

- Mapping 10
  - corrupt mapping tables 10
  - mapping tables 10

**S**

- Server 2, 12, 13
  - master node 2
  - node ID 2
- Synchronization 1, 9, 10, 13
  - Event 3, 5
    - attendee added or removed 9
  - Event duplication 10
  - no connection to calendar server 12
  - rules 9
  - settings 1
  - status report 13
  - Tasks 7

- taking too long 7
- Synchronization, Full 10
- Synchronization, Quick 10
- Synchronizing
  - Events 3, 5
    - taking too long 5
  - missing items on calendar server after sync 13
  - missing items on mobile device after sync 13
  - taking too long 12
- Tasks 6, 7
  - taking too long 7

**T**

- Tasks 6, 7
  - active 7
  - date range 7
  - limit detail size 6

**U**

- Users, multiple 2