

# **User's Guide**

*Sun™ ONE Synchronization*

**Version 1.1**

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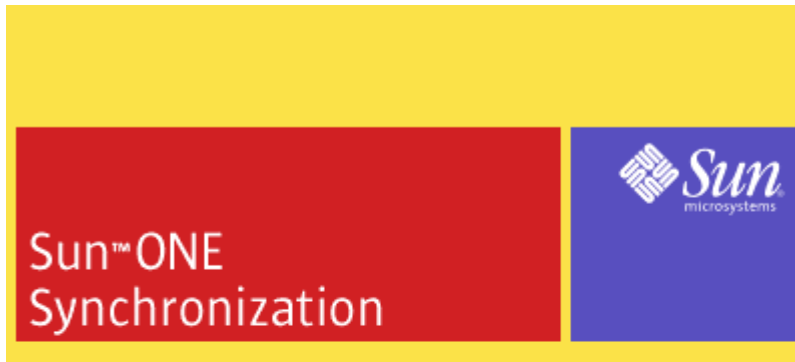
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## Welcome



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**Sun ONE**  
Open Net Environment

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Welcome to Sun™ ONE Synchronization 1.1, software for synchronizing your Sun ONE Calendar Server data with mobile devices and personal information managers (PIMs).

For the applications and mobile devices supported by Sun ONE Synchronization 1.1, see:

[Supported Applications and Mobile Devices](#)

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## What is Sun ONE Synchronization?

Sun ONE Synchronization is a software product that runs on a Windows personal computer to synchronize data between Sun ONE Calendar Server and another data source such as a personal information manager (PIM) or mobile device.

Sun ONE Synchronization includes a synchronization engine and various translators, which are used to integrate the data sources features and data.

### Data Types

Sun ONE Synchronization synchronizes data types for the following items between Sun ONE Calendar Server and a PIM or mobile device:

- Events such as meetings, phone conferences, or appointments entered into the calendar database that can be viewed for a given date or time.
- Tasks (or todos) that you need to perform such as updating a status report or calling a friend.

### Translators

Sun ONE Synchronization uses a translator to integrate your PIM or mobile device to the synchronization engine. The translator interprets the data, converts it into a common readable form, and sends it to the sync engine. Two translators are required to synchronize data. When they both communicate to the sync engine, the engine determines what items have changed on either side, determines what updates need to be made, and then communicates those changes to each of the translators.

### Profiles

A profile defines the relationship between two translators. Sun ONE Synchronization creates a unique profile for the translators of supported applications and devices. For example, Sun ONE and Outlook use one profile, while Sun ONE and a Palm Desktop device require a different profile.

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**Note:** If you right click on the left pane in Sun ONE Synchronization Profiles, you have the option to create a New Profile. However, Sun ONE Synchronization 1.1 supports only specific profiles, and you might create a profile that is not supported. For example, you might create a profile for Outlook and a Palm Desktop device, but this profile is not supported by Sun ONE Synchronization 1.1.

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For the applications and mobile devices supported by Sun ONE Synchronization 1.1, see:

[Supported Applications and Mobile Devices](#)

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**Note:** Sun ONE Synchronization allows you to sync as many different devices or applications to Sun ONE Calendar Server as you have translators installed. But, you cannot sync more than one of each type from the same personal computer.

For example, you can sync from Outlook and a Palm device on the same personal computer to the same or different Sun ONE Calendar Server accounts. But, you cannot sync two different Palm devices from a personal computer to the same or different Calendar Server accounts.

You can also use Sun ONE Synchronization to sync two of the same device types to the same or different Calendar Server accounts as long as you sync them from different personal computers and always sync the devices from the same personal computer each time.

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## Installation Requirements

To install and run Sun ONE Synchronization, you need the following:

- A Windows personal computer with a Pentium processor or later.
- Microsoft Windows 98, Windows NT 4.0, or Windows 2000 operating system
- 16 MB RAM (32 MB recommended).
- 20 MB free hard disk space.
- Supported data sources. See [Supported Applications and Mobile Devices](#) for more information.
- Web Browser - Internet Explorer 4.0 or higher or Netscape 4.5 or higher.
- If you are using a mobile device, you also need the linking device (for example, a cable or infrared) and the software that came with the mobile device.
- For Palm devices: HotSync Manager.
- For Windows CE devices: Active Sync

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**Note:** Before you install Sun ONE Synchronization 1.1, you must first:

- Uninstall iPlanet Synchronization 1.0, if it is installed on your computer.
  - Install each PIM or mobile device you plan to use.
-

## Installing Sun ONE Synchronization

Before you begin, it is strongly recommended that you:

- Backup your data just as a precaution. Refer to the PIM or device sections to back up your data. For more information, see [Supported Applications and Mobile Devices](#).
- Close all open programs.

---

**Note** If you are upgrading from iPlanet Synchronization 1.0 to Sun ONE Synchronization 1.1, you must first uninstall iPlanet Synchronization 1.0.

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### To install Sun ONE Synchronization:

1. Close all open programs, if you have not already done so.
2. Start the Sun ONE Synchronization installation program.
3. Follow the instructions in the series of installation screens:
  - *Welcome* screen
  - *License Agreement* screen
  - *Get Registration Information* screen
  - *Choose Destination Location* screen
  - *Select Components* screen
  - *Start Installation* screen
4. When the installation is complete, click **Finish**.

Depending on the platform your are installing on, a reboot might be required. The installation program will prompt you if a reboot is needed.



## Upgrading Sun ONE Synchronization

Upgrading (or reinstalling) Sun ONE Synchronization allows you to:

- Upgrade your current version of the synchronization software, or
- Add support for an additional PIM or mobile device

Before you begin, it is strongly recommended that you close all open programs.

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**Note** If you are upgrading from iPlanet Synchronization 1.0 to Sun ONE Synchronization 1.1, you must first uninstall iPlanet Synchronization 1.0.

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### To upgrade Sun ONE Synchronization:

1. Perform one last synchronization to ensure that all data is the same. Then backup your data.
2. Close all open programs, if you have not already done so.
3. Start the Sun ONE Synchronization installation program.
4. Follow the instructions in the series of installation screens:
  - Welcome screen
  - License Agreement screen
  - Get Registration Information screen
  - Choose Destination Location screen
  - Select Components screen – This screen shows any translators already installed. From this dialog you can select to install or uninstall specific translators.
  - Start Installation screen
5. When the installation is complete, click **Finish**.

## What is Synchronization?

A common problem for mobile computer users is the need to maintain two different copies of important data. You might have one copy of your events and tasks on the Sun ONE Calendar Server in your office and another copy on a mobile device such as a PDA.

What happens when you make updates to both the Calendar Server and your PDA? For example, you might add an event in Calendar Server and later add a new task on your PDA.

When synchronization is executed, Sun ONE Synchronization syncs your Calendar Server data at your office with the data in your PDA. Then, you have the same events and tasks on both. For more information, see [How to Synchronize](#).

Sun ONE Synchronization allows you to select only the data you wish to synchronize. You can also specify the fields in the Calendar Server that correspond to the fields on your PDA, since they do not necessarily have the same fields.

## First Time Synchronization

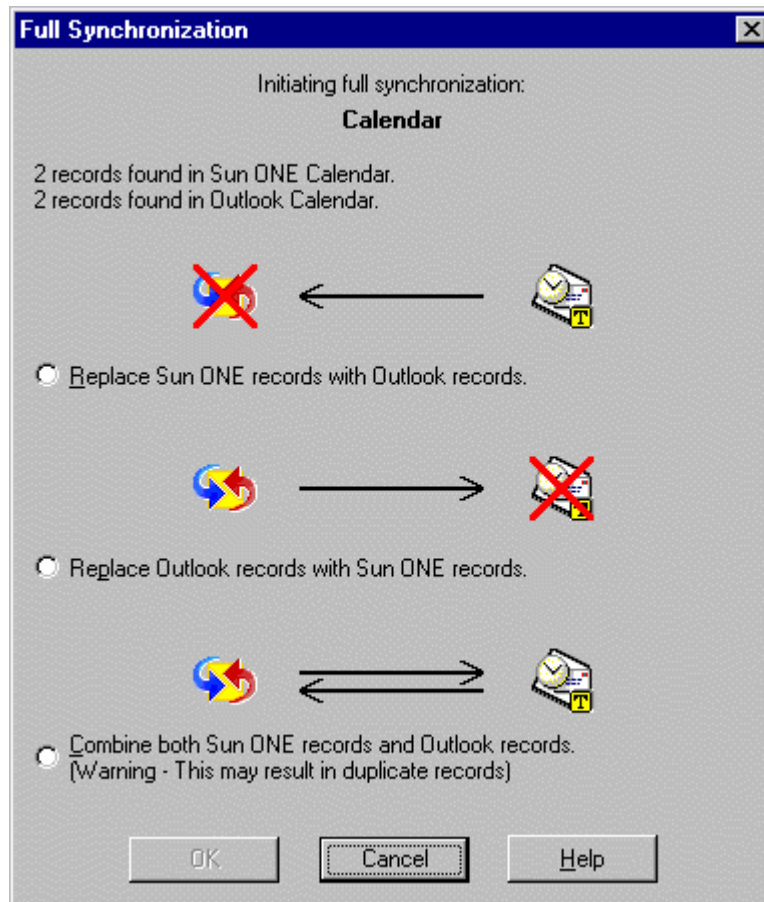
Before attempting to synchronize your Sun ONE Calendar Server data with a PIM or mobile device, you must first configure your Calendar Server account settings. Please see the [Sun ONE Calendar](#) section for instructions to configure your Calendar Server account.

When synchronization is executed for the first time, Sun ONE Synchronization executes a Full Synchronization. With Full Synchronization, Sun ONE Synchronization tries to match each entry in Sun ONE Calendar Server to each entry in the PIM or mobile device. When an exact match is found, those two entries are identified as the same. To make an exact match, the two entries must be identical down to the punctuation in the description fields.

When you select to synchronize for the first time you are given three options for each data source you've selected to synchronize:

- Replace the PIM or mobile device records with Sun ONE records.
- Replace Sun ONE records with the PIM or mobile device records.
- Combine both PIM or mobile device and Sun ONE records

For example, the following screen shows the choices for a full synchronization for Sun ONE Calendar and Outlook:



**Full Synchronization screen**

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**Caution:** Using the Combine option can cause duplicate records. It is highly recommended that you do not use this option.

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If you consider your PIM or mobile device to contain all the information you need, we recommend that you reset (or clear) all the data on the other side so that all the records are moved over.

However, if you have incomplete data in both your PIM or mobile device and Sun ONE Calendar, you should choose to copy data in both directions. Since full synchronization looks for exact matches, if the mobile device and Sun ONE both have a similar yet not exact data, you may receive two entries for the same record.

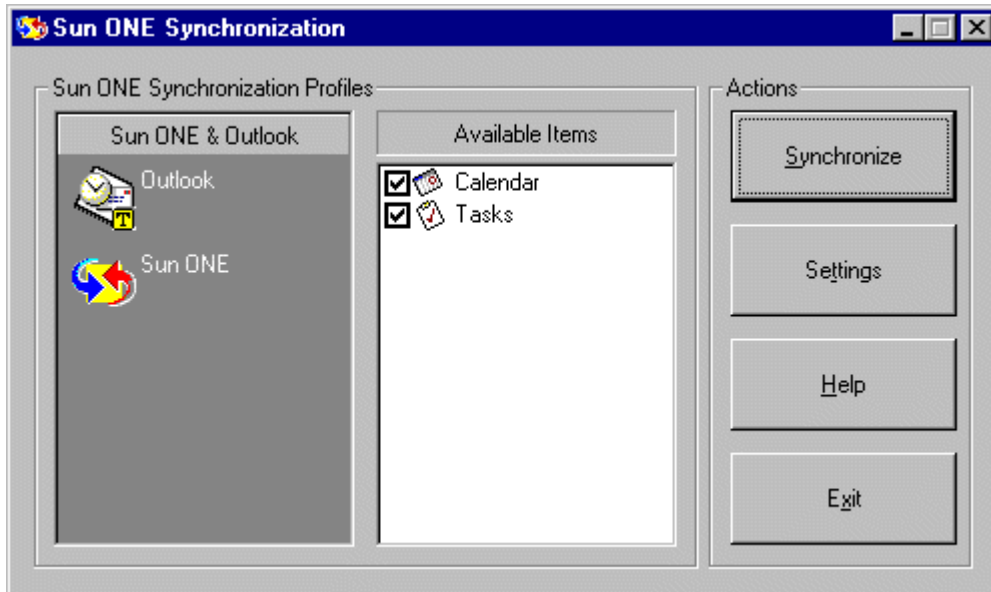
For example, if you have an event in the Calendar Server and the same event with a different name in your device, you will have two entries for the same event when synchronization completes. You can prevent these duplicate entries if you choose to replace records from one side or the other. For example, you want Microsoft Outlook to take precedence over your Sun ONE data because Microsoft Outlook contains your most up-to-date records. In this case, you would simply select to replace the Sun ONE records. Selecting this option will delete all Sun ONE records and send all your Microsoft Outlook records to Sun ONE, making both Microsoft Outlook and Sun ONE in sync.

## How to Synchronize

For the data types you select to synchronize, Sun ONE Synchronization copies the data from one source to the other. Once you are synchronized, Sun ONE Synchronization tracks the changes to the individual entries and merges only those changes in following synchronization sessions.

### To start synchronization:

From the Windows **Start** menu, click **Programs, Sun ONE Synchronization** and then the PIM or mobile device you want to synchronize.



**Sun ONE Synchronization screen**

## Advanced Settings

You can customize Sun ONE Synchronization settings to more closely match your preferences. From the main screen, click **Settings**:

[General](#)

[Auto Synchronize](#)

[Conflicts](#)

[Translators](#)

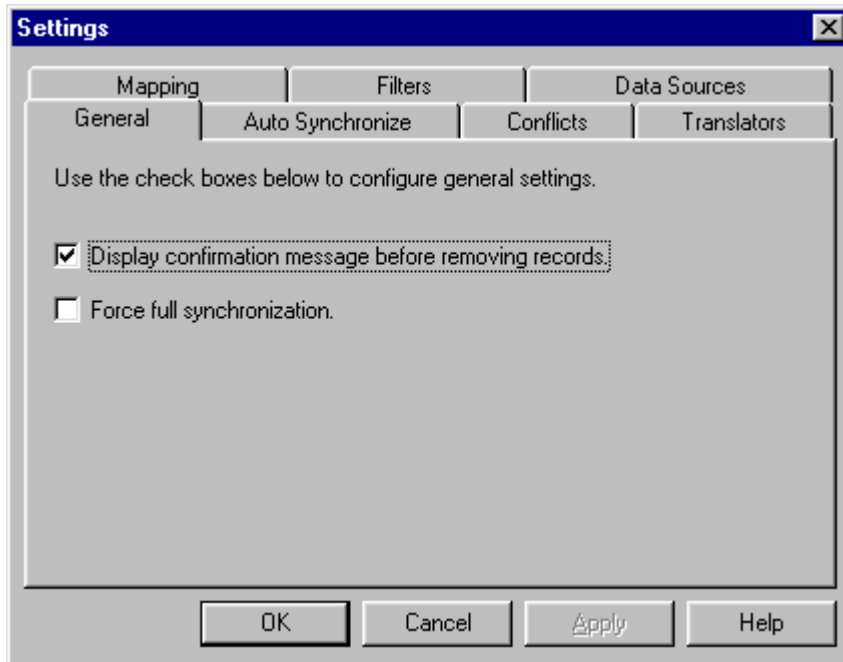
[Mapping](#)

[Filters](#)

[Data Sources](#)

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## General



**General Settings screen**

### General Settings

Select the appropriate check boxes to configure general synchronization settings.

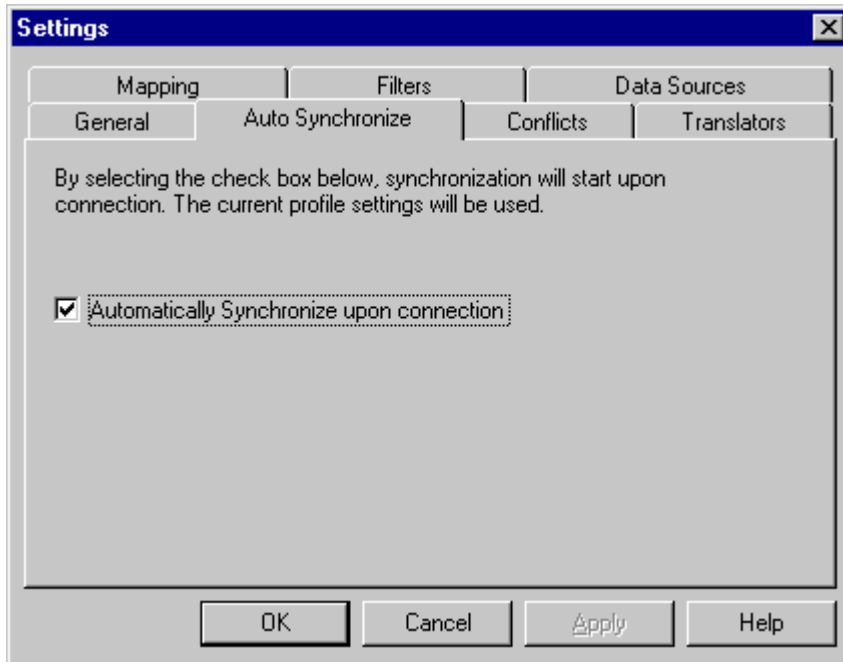
#### Delete Confirmation

Select this check box to display the delete confirmation message. During synchronization, if an entry is deleted on either Sun ONE or in the PIM or mobile device, a message will be displayed before deleting the corresponding record on the other source. This provides the opportunity to keep the entry on the other source. To allow deletion to occur without further prompting, clear this check box.

#### Force Full Synchronization

Full Synchronization can be forced by selecting the check box **Force Full Synchronization**. When you select this, full synchronization occurs the next time you synchronize. If you should exit Sun ONE Synchronization, the setting is cleared regardless of the last setting. For more information about Full Synchronization, see [First Time Synchronization](#).

## Auto Synchronize



**Auto Synchronize Settings screen**

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**Note:** This option is only available if you install a translator that supports auto synchronization.

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### **Auto Synchronize Settings**

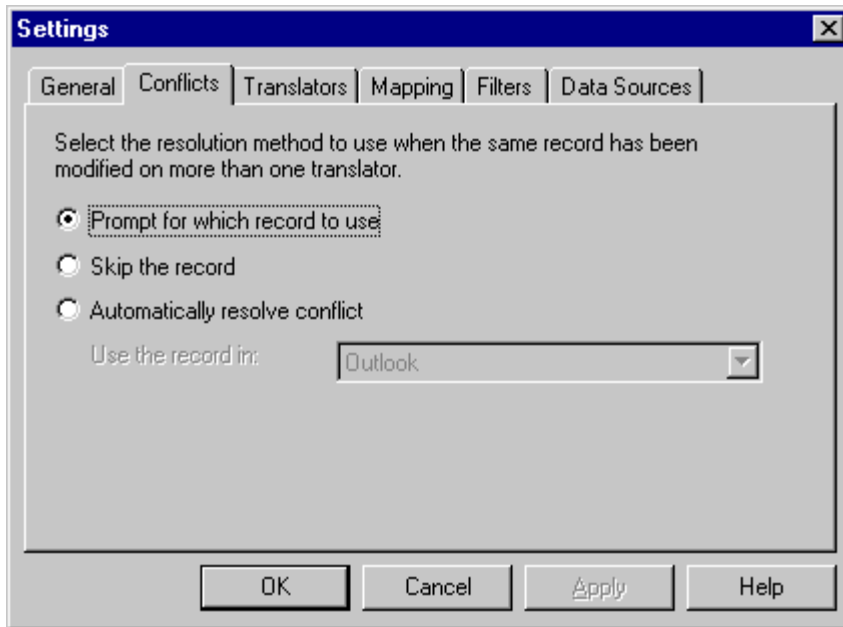
If the **Automatically Synchronize upon connection** is checked, synchronization starts automatically each time the mobile device is connected to the personal computer (which must be turned on).

If you enable auto synchronization, simply connect the mobile device to the personal computer and synchronization will begin automatically. You do not need to make any other menu selections for synchronization to occur.

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## Conflicts



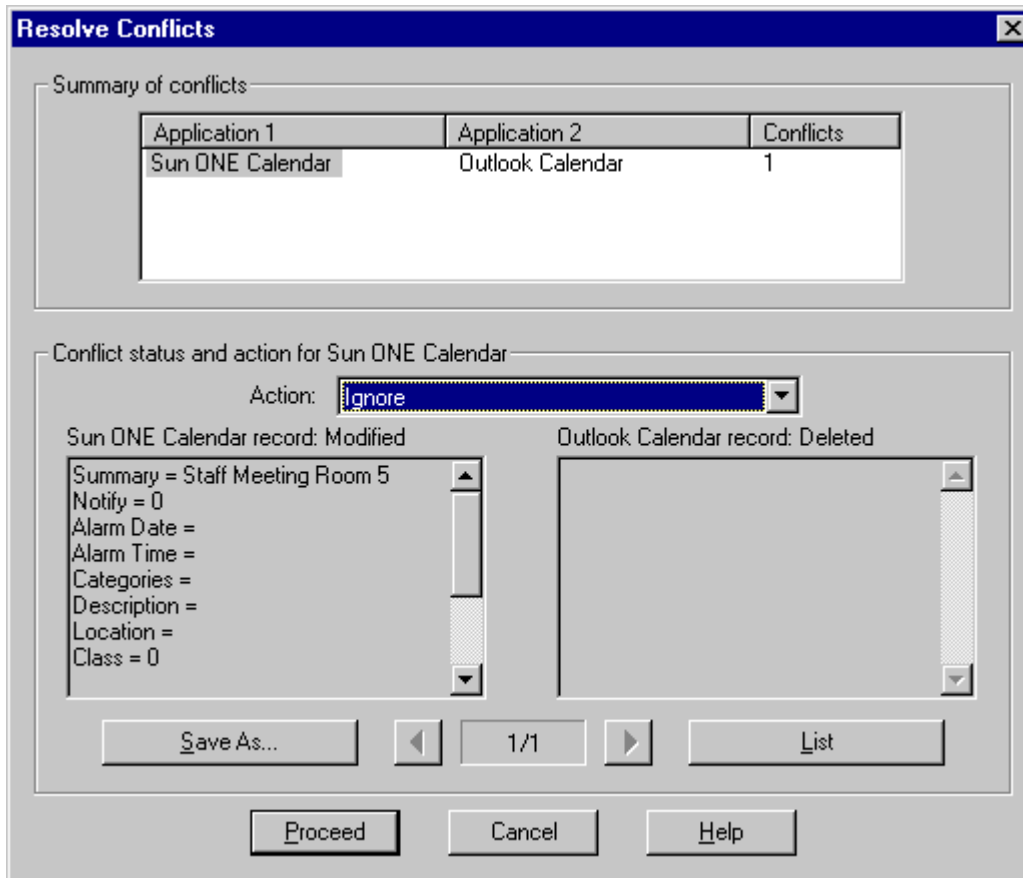
**Conflicts Settings screen**

### Conflict Settings

A conflict occurs when the same data entry is changed in Sun ONE and in the PIM or mobile device between synchronizations. For example, you delete an event on your mobile device and then a colleague edits the same event in your Sun ONE calendar. Sun ONE Synchronization needs to know how to handle this type of conflict.

#### Prompt for Which Record to Use

If you choose to resolve conflicts manually, Sun ONE Synchronization displays the Resolve Conflicts window, which allows you to select which record to use. For example, the following example shows the choices for resolving conflicts when syncing Sun ONE calendar with Outlook.



### Resolve Conflicts screen

To display the details of the event or task and your options to resolve the conflict, click Details.

The Action pull-down list then displays the options you can select. For example, the options might be Ignore, Delete Sun ONE Calendar record, or Add to Outlook Calendar. These options will vary depending on the conflicting event or task and the PIM or mobile device you are using.

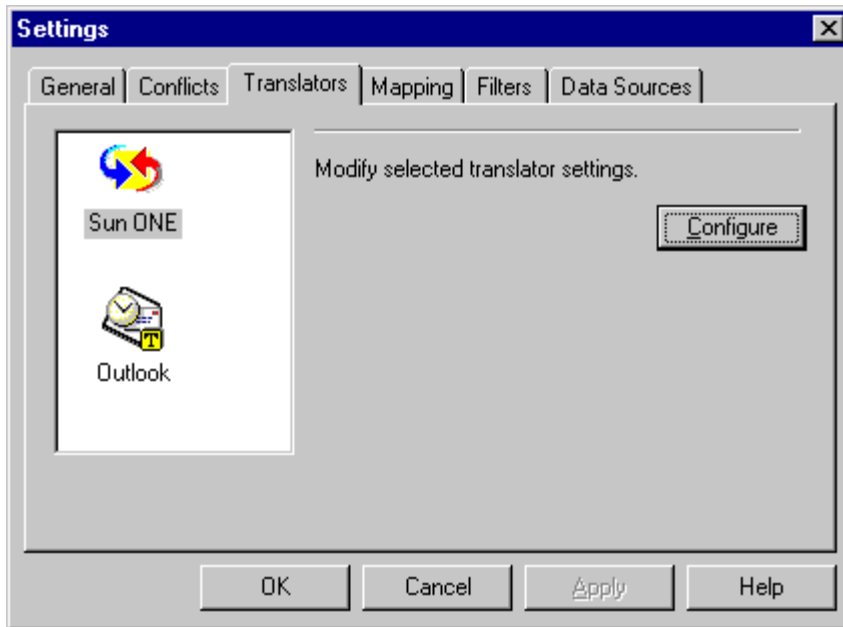
### Skip Records Automatically

If the **Skip the record** option is used, when a conflict occurs, it will never be resolved. Conflicts will always be skipped or ignored, causing it to appear that Sun ONE Synchronization is not synchronizing the data.

### Resolve Conflicts Automatically

If you choose to have conflicts resolved automatically, no screen will prompt you for a decision. Sun ONE Synchronization will perform the correct action according to the specified setting.

## Translators



### Translators Settings screen

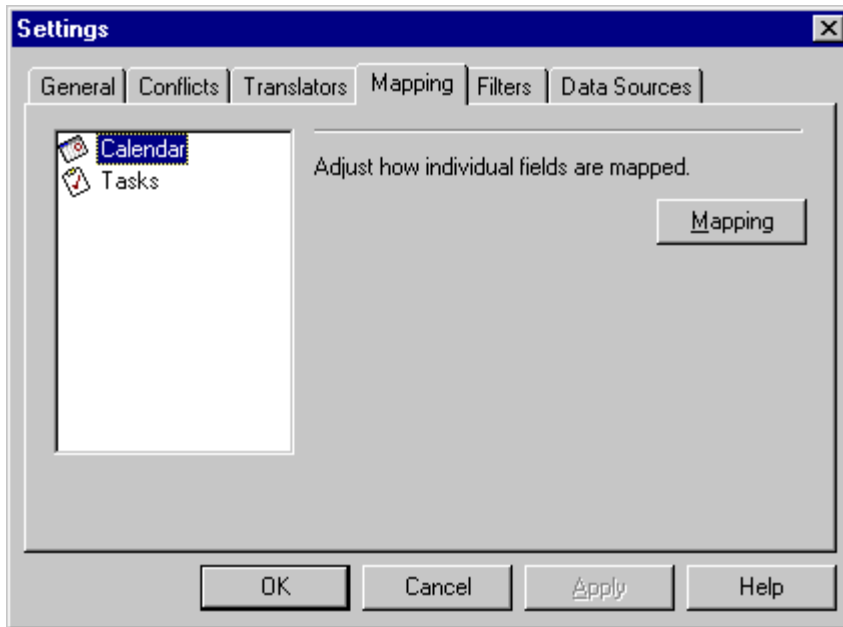
#### Translator Settings

You can modify the settings of the available translators. Highlight the appropriate application or device. The settings that are available for the specified translator can then be changed.

#### Modify Selected Translator Settings

After highlighting either Sun ONE or the PIM or mobile device, you can configure the settings.

## Mapping

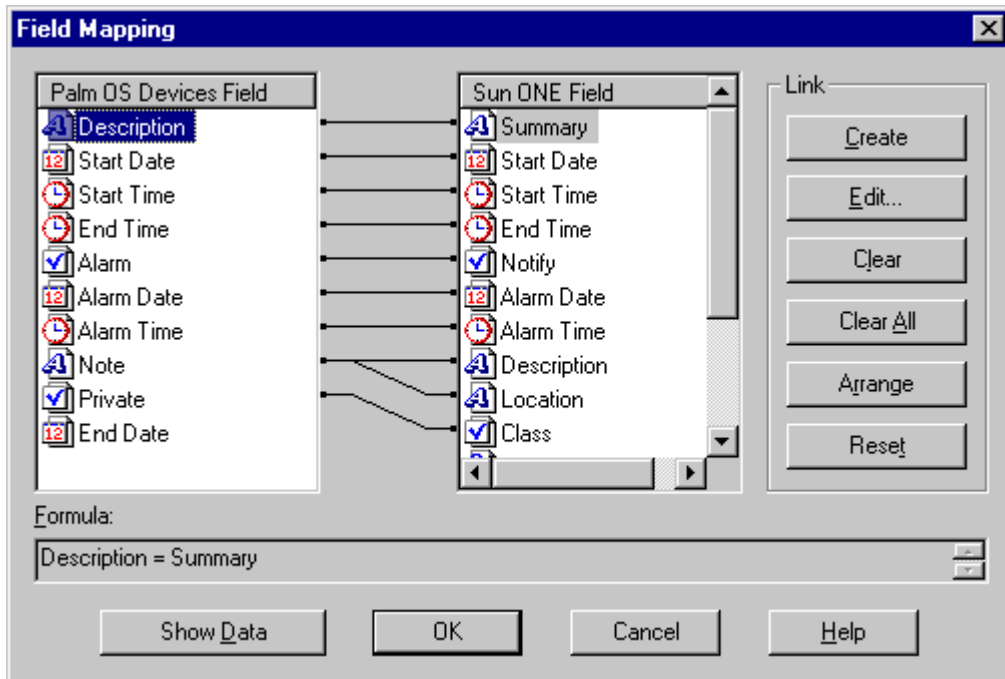


**Mapping Settings screen**

### Field Mapping

In order to have data transfer between Sun ONE and the PIM or mobile device, a link must exist between the individual fields that will have data transferred between them. For instance, the *Appointment Start Date* field in Sun ONE must be linked to the *Appointment Start Date* field in the PIM or mobile device. The collection of links which tell Sun ONE Synchronization what to do with the data is called *Field Mapping*.

Click **Mapping** to view and edit the existing mapping of the individual fields. This screen will appear:



### Field Mapping screen

The Field Mapping screen allows you to customize the transfer of data between Sun ONE and the PIM or mobile device. Since the fields in the PIM or mobile device are not the same as the fields in Sun ONE, you can indicate which fields should be aligned one to the other with a link.






**Note:** When you first install Sun ONE Synchronization, default links are created for you.

### Fields with the same data type to each other

A date field in the PIM or mobile device can be mapped to a date field in Sun ONE and so forth. You can also map any data type to a text field; however, this can lead to problems if during a data transfer, the destination is a non-text field such as a date and the source is a text field.

For example, if you sync a date field on Calendar Server to a text field on Outlook, the sync is successful. However, problems can occur if you later sync the text field on Outlook back to the Calendar Server date field. Therefore, when you are mapping fields, make sure to match fields with similar data types.

Icons next to each field indicates the data type as follows:

Date	
Time	
Text	
Number	
Flag	

### Create Links

Create a link by identifying a field in the PIM or mobile device list and a field in the Sun ONE calendar list. There are two methods for creating links between fields:

#### Drag and Drop

Simply click on one of the fields and, while holding down the left mouse button, drag that field on top of the field to which you wish to link. If the mapping is not allowed, a circle with a line through it will be displayed.

#### Create Link Button

Select the fields to be linked in the PIM or mobile device list and then in the Sun ONE Calendar list. Click the **Create** button. If you select two fields which cannot be linked, the **Create** button will not be available (grayed out).

#### Edit Links

When two or more fields are mapped to a single field, the order the fields should appear and the separator must be identified.

For example, if you want to map the PIM or mobile device *Notes*, *Customer ID* and *Billing Information* fields for an entry to the Sun ONE field *Notes*, you must specify the separator(s). You might map the PIM or mobile device *Notes* field plus a comma and space and carriage return plus the *Customer ID* field plus a comma and space and carriage return plus the *Billing Information* field plus a comma and space and carriage return to the Sun ONE *Notes* field as illustrated in the screenshot below.

Field Name	Separator
Notes	. [SP] [CR]
Customer Id Number	. [SP] [CR]
Billing Information	. [SP] [CR]

Move Up

Move Down

Edit Separator

. [SP] [CR]

Separator buttons: . [SP] [CR] / ; : + -

Formula:

Notes + ". [SP] [CR]" + Customer Id Number + ". [SP] [CR]" + Billing Information

OK Cancel Help

#### Edit Link screen

##### Change Order

Change the order of the fields as they should be communicated. Select a field, then select either **Move Up** or **Move Down**.

## Edit Separators

You can specify the following separators by clicking the buttons, or you can type your own separators into the Formula box:

,	Comma
[SP]	Space
[CR]	Carriage Return (blank line)
/	Forward Slash
;	Semicolon
:	Colon
+	Plus
-	Hyphen

You can also create separators such as "[SP][CR]Location:", "[SP]Description:", or "[CR]Attendees:", and so on.

## Formula

The *Formula* window shows the full formula for the fields that are mapped. This can be very helpful in determining the overall effect of the mapping.

For example, consider the formula **Location + ",[SP]" + Description** for the PIM or mobile device field. *Description* indicates that the PIM or mobile device *Description* field will receive the Sun ONE *Location* field, then a comma, then a space, then the *Description* field. Data entered into the PIM or mobile device in this fashion will be sent to the Sun ONE fields *Location* and *Description*.

## Clear Links

To delete a link between fields, select the field in the PIM or mobile device list and the field in the Sun ONE list and then click on the **Clear** button.

## Clear All Links

To remove all links and start over, click on the **Clear All** button. A confirmation dialog will confirm your desire to clear all of the links.

**Note:** The **Clear All** function cannot be undone. Links can be reset to the Sun ONE Synchronization defaults. If changes have been made to the default links, they will no longer be reflected.

## Arrange Links

The **Arrange** button arranges the fields in the PIM or mobile device list and the Sun ONE list to make the links between fields more visible, but *does not change the function of the mapping*.

## Reset Links

Clicking on the **Reset** button returns all field links to the Sun ONE Synchronization default set. This will remove any changes made to the field links.

**Note:** The **Reset** function cannot be undone. If changes have been made to the links, they will no longer be reflected.

## Formula Bar

For your convenience, the field mapping information on the currently selected field is displayed in the **Formula Bar**. This provides information about the fields linked on both sides.

## Show Data

The **Show Data** button allows the user to see more detail related to the field mapping assignments. The first five records of data will be displayed when this button is selected.

### **Mapping Sun ONE Meeting Attendees**

Meeting attendees are not supported by most translators. If you want this information synched to and from Sun ONE, you will need to map the attendees to another text field. Follow the instructions in the *Edit Links* section above. When you establish this mapping, it will be possible to add new attendees from the device or application you are synching to Sun ONE by entering Sun ONE user names in the mapped field. When you have a list of attendees, be sure that each attendee is separated by a semi-colon.

For example, if you have mapped your Palm *Note* field to Sun ONE *Required Attendees* field and want to add attendees user1 and user2, from the Palm event you would enter them into your *Note* field on the Palm as "user1;user2".

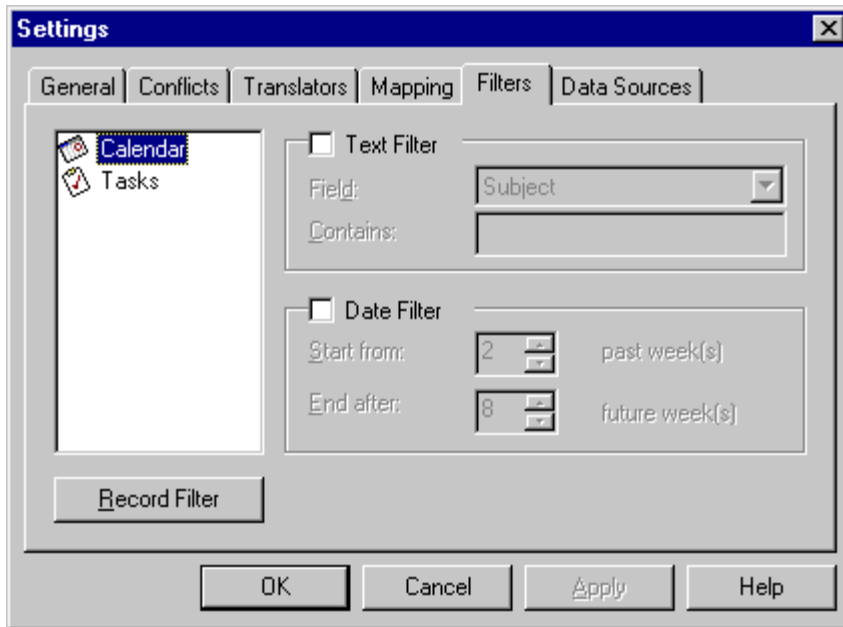
**Note:** If you decide to cancel a mapping by answering "No" to the question about the full sync, you need to reset the mapping by going back to the Mapping dialog and clicking the **Reset** button.

### **Default Sun ONE/Palm Field Mapping**

By default, the Sun ONE Description and Location fields are mapped to the Palm *Note* field. For full details on how this is done, please see "Default Palm OS to Sun ONE Field Mapping" in the [Palm OS Mobile Devices](#) section.



## Filters



**Filters Settings screen**

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**Note:** Changing the filter settings will result in a full synchronization. Be sure to make a copy or backup your data before changing the filter settings.

For more information, see [First Time Synchronization](#).

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### Filter Settings

Filters are used to select only the data you need. The rules you establish in the Filters settings will allow you to eliminate unnecessary data. With these settings, you can speed up the transfer as well as use less disk space or mobile device memory.

Tabs will be displayed only for the data source that you have selected. The selection criterion is different based on each data source. Filters are applied one-way from the translator shown first in the "Sun ONE Synchronization Profiles" list to the translator listed below. This means you can filter records from Outlook to Sun ONE. You can also filter records from Sun ONE to Palm mobile devices.

#### Text Filter

Based on the indicated text, data can be selected based on meeting the indicated **Field** and **Contains** criterion. The available fields are displayed in the drop-down list and are adjusted according to the data you wish to transfer. You then need to type the text that an entry must contain to be included in the data transfer.

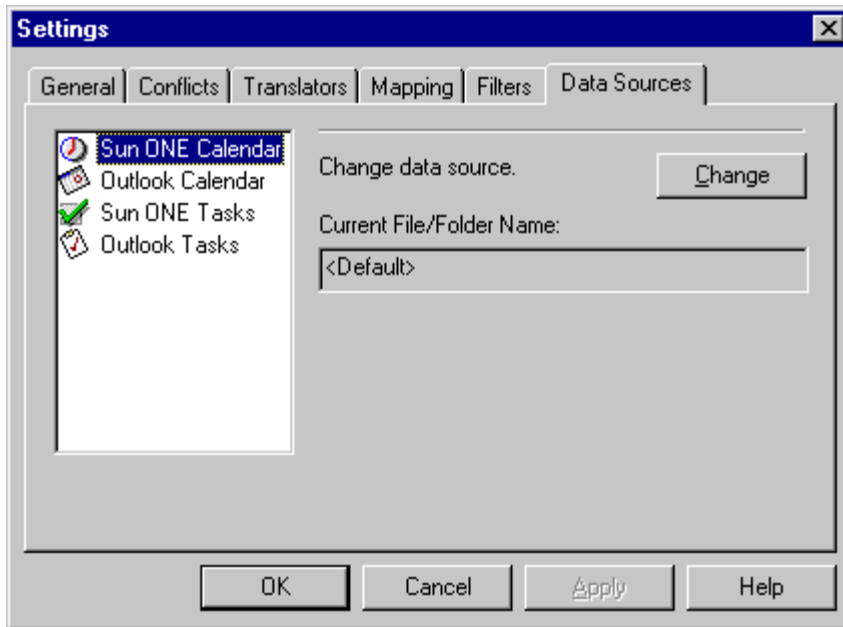
For example, you might want to transfer only the meetings (events) that are held in a conference room named "Auditorium". In the field list, you select "Location". In the **Contains** box, you type "Auditorium". The next time you synchronize, only events in the Auditorium are transferred. Other events are not synchronized.

**Date Filter**

The date filter is available for data that is associated with time. The filter uses the start date as the time reference. To filter the data based on a date, select the number of weeks in the past and the number of weeks in the future which contain the data you wish to transfer.

For example, say you only want to view appointments from the past week and for the next two weeks. You select **Date Filter**. Then, you would enter "1" for the **Start from date** and enter "2" for the **End after date**. If the start date of the appointment is within this period, it will be included in the synchronization.

## Data Sources



**Data Sources Settings screen**

### Data Sources Settings

To change the data source, select the item you want to change from the list and then click on the **Change** button. If the translator does not support a change of data source, the **Change** button will not be available (grayed out).

### Change Button

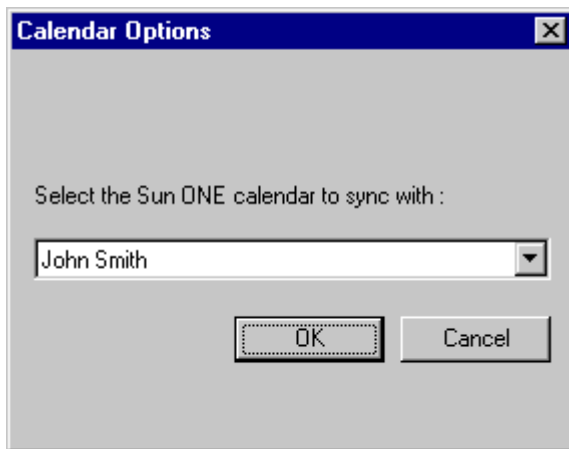
When available for the specified translator, this allows you to select a data source if there are several potential data sources available. For example, if you have two folders in your PIM or mobile device, you can specify which folder is to be used as the source of data for the translator.

### Current File/Folder Name

This displays the actual data source for the selected translator. This field is for display only.

### **Sun ONE Calendar Selection**

Sun ONE Synchronization displays the Calendar Options screen to allow you to select the Sun ONE calendar you want to sync with your PIM or mobile device:



### **Calendar Options screen**

In Calendar Options, select a Sun ONE calendar from the pull-down list and click OK. You can sync data from and to (read and write operations) only one Sun ONE calendar at a time.

## Supported Applications and Mobile Devices

The applications and mobile devices currently supported by Sun ONE Synchronization 1.1 are:

[Microsoft Outlook](#) 98/2000

[Palm Desktop](#) 3.x/4.0

[Palm OS Mobile Devices](#)

[Windows CE Mobile Devices](#) versions 2.0/3.x

[Sun ONE Calendar](#)

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## Microsoft Outlook

Sun ONE Synchronization supports the basic Microsoft Outlook application features as described here:



Calendar

Tasks

**Note:** Mail and the Notes folders are not supported.

### How to Synchronize Microsoft Outlook

For the data types you select to synchronize, Sun ONE Synchronization copies the data from one source to the other. Once you are synchronized, Sun ONE Synchronization tracks the changes to the individual entries and merges only those changes in following synchronization sessions.

From the **Start** menu, click **Programs, Sun ONE Synchronization**, then **Synchronize with Outlook**.

### Backup Microsoft Outlook Data

You can backup your Microsoft Outlook data by creating a backup copy of a folder. To do this, you must first add a personal folder service to your user profile. Open the folder with items you want to back up, and then copy the items to a folder within the personal folder file.

### Tips and Tricks

#### Custom Forms and Fields Support

Custom forms and fields synchronization is supported for Microsoft Outlook. You can select a specific form in Microsoft Outlook to be synchronized. There are three types of forms that are supported:

- Application Forms
- Personal Forms
- Folder Forms

#### Application Forms

Application Forms, which are the default forms, can be selected by changing the form type. Click on **Application Forms** and the default form is automatically entered in the Message Class (for example, IPM.Event or IPM.Task).

#### Personal Forms

Personal Forms can be selected by changing the form type. Click on **Personal Forms** in the Choose Folder screen and then **Custom Forms**. The New Form screen will open and all available Personal Forms will be located here. Highlight your selection and click on **OK**.

For more information, see [Data Sources](#).

#### Folder Forms

Folder Forms can be selected by changing the form type. Click on **Folder Forms** in the Choose Folder screen and then **Custom Forms**. The New Form screen will open and all available Folder Forms will be located here. Highlight your selection and click on **OK**.

When you've created a custom form and used this custom form to create records in Microsoft Outlook, you can then synchronize those records using Sun ONE Synchronization. To synchronize custom forms you need to select the **Settings** button to change to the form you want to synchronize with.

Then you must setup the field mapping. Select the **Settings** button and then click on the *Mapping* tab to map the custom fields in the selected form to a field in the mobile device. When you select to synchronize, it will be a full synchronization because the field mapping has changed.

For more information, see [First Time Synchronization](#).

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**Note:** The following field types are not supported for custom fields: Keywords. Combination, and Formula.

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### Microsoft Outlook Folder Setup

Microsoft Outlook allows you to create multiple folders for one type of data source. For example, you can have two calendars: one for business events and one for personal events. In order to synchronize properly, Sun ONE Synchronization must know which folder to use.

If you use customized folder names, the data source for Microsoft Outlook folders can be changed to select the correct folder. The folders that can be used are shown in **bold**. You will be unable to select folders that do not contain information of the same data type.

For more information, see [Data Sources](#).

### Default Recurring Appointment Window

By default, your recurring Microsoft Outlook appointments will be synchronized to the Sun ONE Calendar Server in a window beginning two weeks in the past and extending 26 weeks into the future. If you would like to change the size of this window, set a [Date Filter](#).

### Microsoft Outlook Limitations

- There is a maximum field length or number of characters allowed in any particular field equal to 255 characters. If the length of the data entered in any field is more than 255 characters, after being transferred to Microsoft Outlook, the data won't be displayed properly. It might not even be displayed at all.
- If you have a brand new .pst or no records in any of the data folders in Microsoft Outlook, you will be prompted with the message "**Create at least one record in all applications in Microsoft Outlook before using Sun ONE Synchronization.**" This is a temporary workaround until this issue has been resolved.
- Microsoft Outlook must either be closed or logged into the profile being used by Sun ONE Synchronization for a sync to complete successfully. If not, the sync program may report trouble connecting to Outlook or appear to hang as it waits for a connection. If you experience this problem when Outlook is not running, make sure an Outlook process is not still active even though Outlook appears to be gone.
- Any dates entered into Microsoft Outlook that are before the year 1970 or past the year 2037 will be clipped to those years in the Sun ONE records synchronized from Microsoft Outlook.

## Palm Desktop

Sun ONE Synchronization supports the basic Palm Desktop application features as described here:



Date Book

To Do List

### Backup Palm Desktop Data

You can export information to various supported file formats. Supported Import and Export File Formats. The Desktop application can import and export information in various formats. Many other Microsoft Windows applications can import or export comma delimited, tab delimited values, or text files. When you export records from Address Book, To Do List, or Memo Pad, you can specify whether to export all the records or only selected records. Hidden private records are not exported.

#### To export information:

1. Open the Desktop application from which to export information. To export only selected records, select the records to export.
2. Choose **Export** from the File menu.
3. In the **Export to File** dialog box, type a name for the file in the File Name box. Be sure to include the file type extension, such as .txt or .csv.
4. Click the **Export As** box and select a file format for the file.
5. Use the Folders and Drives boxes to select a location to create the file.
6. If you are connected to a network, you can use the **Network** button to access locations on your network.
7. Select All or Currently Selected in the Range area.
8. Click the **Export** button.
9. If you are exporting to a file format other than archive, you can change the order in which fields are exported by dragging a field up or down in the Specify Fields dialog box. Export only selected fields by selecting or clearing checks in the Field Name check boxes. All selected field name check boxes will be exported.
10. Click **OK**.

#### Tips and Tricks

- The recommended way of keeping your Palm Desktop, Sun ONE and your Palm device in sync would be to use Sun ONE Synchronization to synchronize your Palm Desktop and Sun ONE, and then use HotSync to synchronize the Palm Desktop and your Palm device.
- It is strongly recommended that you HotSync your Palm Desktop before you synchronize the Palm Desktop with Sun ONE.
- Where there is no priority set for a task, Sun ONE Synchronization sets the priority to low.

#### Limitations

- Address Book, Planner, and Notepad type sections are not supported.
- All the text fields have a maximum length of 255 characters. The note field takes about 4 KB of text. A warning will be issued during synchronization if the Note field exceeds 4 KB and it will be truncated. No warning will be issued for other fields. They will be silently truncated to 255 characters.



## Palm OS Mobile Devices

Sun ONE Synchronization supports the basic Palm OS Mobile Device application features as described here:

- Date Book
- To Do List

### Connecting and Using your Palm OS Mobile Device

Sun ONE Synchronization requires HotSync Manager to be installed and running on your personal computer. HotSync Manager is provided with your Palm OS mobile device. When **Synchronize** is selected, Sun ONE Synchronization automatically starts HotSync Manager to connect to the mobile device. The mobile device will connect and synchronization will begin.

**Note:** Auto Synchronization is enabled by default for Palm OS mobile devices only. If you would like to disable this feature, click the **Settings** button, then the *Auto Synchronize* tab and clear the check box.

### To Synchronize the Palm OS Mobile Device:

1. Connect the Palm device to the personal computer using the cradle or infrared.
2. From the personal computer, select Start, then Sun ONE Synchronization, then Synchronize Palm with Sun ONE.
3. Click the **Synchronize** button on the Sun ONE Synchronization main screen.
4. Press the **HotSync** button on the cradle.

### Starting a Sync from the Palm OS Mobile Device

After an initial full synchronization, you can initiate synchronization from the Palm device by pressing the HotSync button on the Palm cradle. Sun ONE Synchronization will automatically start and the synchronization will occur. This feature occurs because Auto Synchronization is enabled by default. If you would like to disable this feature, click the **Settings** button on the *Synchronization Settings* screen and clear the check box to Automatically synchronize on connection.

For more information, see [First Time Synchronization](#).

## Supported Palm OS Features

### Allows for Field Mapping

Field Mapping is provided with Sun ONE Synchronization to give you flexibility with synchronizing your data with your Sun ONE calendar. You can customize your field mapping so that the Palm OS mobile device data is copied to the correct location in your Sun ONE calendar.

### Limitations

- Palm only supports dates up to 12/31/2031. Attempts to sync records from Sun ONE with dates beyond 12/31/2031 will result in errors from the Palm.
- Palm does not support modified exceptions to recurring appointments. Therefore, if you have a recurring appointment, and an instance to that appointment is modified on your Sun ONE calendar, the appointment might not be synchronized back to the Palm as expected.
- If you have configured your Palm device to hide Private Records from the Security tab, records synchronized from Sun ONE to Palm will not be displayed to you. To see your synchronized records, you must select the Show option under Private Records.

### Default Palm OS to Sun ONE Field Mapping

Sun ONE Synchronization makes it easy for you to synchronize the description and location of your Sun ONE Events and Tasks with your Palm OS device. When you synchronize your Palm

OS device, the description and location are separated by the string ":: location = " in the Palm *Note* field.

You can also use this convention to create To Do List and Date Book entries on your Palm OS device with description and location information that will synchronize with Sun ONE. For instance, if you wanted to create a Date Book entry for a meeting in which you were making a presentation in the Auditorium, you could create the entry with the Note field as "Making presentation:: location = Auditorium". When you synchronize your Palm OS device with Sun ONE, the location field in the Sun ONE Event would be filled in with "Auditorium".

**Note:** If you want to clear either the Location or Description field on the Palm and have that change reflected back to Sun ONE on the next synchronization, replace the field you want to clear with a space.

If you like, you can change this mapping or the separator string by using the [Field Mapping](#) dialog.

## Windows CE Mobile Devices

Sun ONE Synchronization supports Windows CE 2.0/3.x mobile device application features as described here:

- Calendar
- Tasks

### To Synchronize a Windows CE Mobile Device:

1. Connect the mobile device to the personal computer.
2. From the **Start** menu, click **Programs, Sun ONE Synchronize**, and then **Synchronize with Windows CE**.

### ActiveSync

Sun ONE Synchronization requires ActiveSync (former versions include Windows CE Services and Handheld PC Explorer) to be installed and running on your personal computer. ActiveSync is provided with your Windows CE mobile device. Once installed, ActiveSync is loaded at boot time.



ActiveSync (the Windows CE synchronization software) must be disabled for all applications to be synchronized. If you intend to synchronize Calendar and Tasks using Sun ONE Synchronization, you must go into the ActiveSync Options and clear these specific applications.

### Recurring Record Handling

For monthly and yearly recurring patterns, if the first instance lies after the recurring patterns start date, it is transferred correctly. Otherwise, it is not transferred correctly to the Windows CE device.

## Sun ONE Calendar

Sun ONE Synchronization supports the following Sun ONE Calendar Server 5.1.1 features:

-  Calendar
-  Tasks

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**Note:** Sun ONE Synchronization 1.1 has been tested with and is supported only with Sun ONE Calendar Server version 5.1.1.

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### Sun ONE Calendar Translator Settings

Before you synchronize your Sun ONE calendar data with your PIM or mobile device, you must first configure your account settings using the Sun ONE Translator Settings dialog.

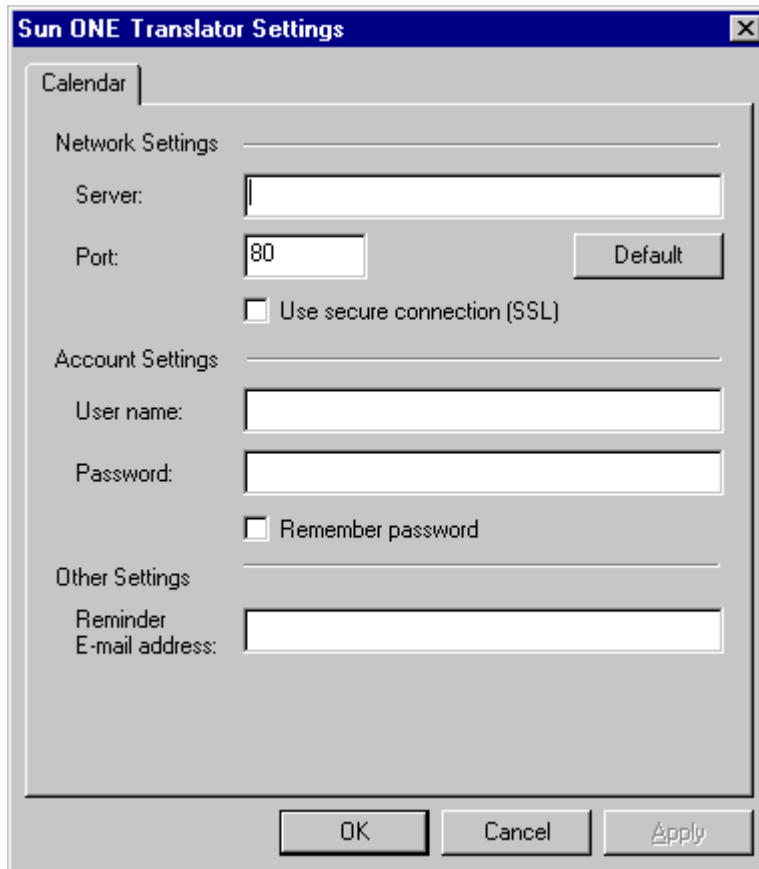
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**Note:** Before changing the settings on this dialog, check with your Sun ONE Calendar Server administrator to see if your settings have already been set for you and should not be modified.

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You can the Sun ONE Translator Settings screen in two different ways:

- Right-click the Sun ONE translator icon displayed on the Synchronize screen. This displays the **Configure** button under your cursor. Click the **Configure** button, or
- Click the **Settings** button on the Synchronize screen. Click the Translators tab. Click the Sun ONE translator icon. Click the **Configure** button.



The image shows the 'Sun ONE Translator Settings' dialog box. It has a title bar with the text 'Sun ONE Translator Settings' and a close button. The dialog is divided into three sections: 'Calendar', 'Network Settings', 'Account Settings', and 'Other Settings'. The 'Calendar' section is currently selected. The 'Network Settings' section contains fields for 'Server:' and 'Port:' (with '80' entered), a 'Default' button, and a checkbox for 'Use secure connection (SSL)'. The 'Account Settings' section contains fields for 'User name:' and 'Password:', and a checkbox for 'Remember password'. The 'Other Settings' section contains a field for 'Reminder E-mail address:'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

## Sun ONE Translator Settings screen

### The Calendar Tab

The Calendar tab allows you to configure the following settings needed to synchronize your account with the Sun ONE Calendar Server.

**Note:** If you have already synchronized a Calendar Server account and wish to change the server or account you are synchronizing, refer to the Changing Sun ONE Calendar Server Accounts topic in the [General Troubleshooting](#) section.

### Network Settings

*Server:* The name of your Sun ONE Calendar server. Check with your Calendar Server administrator if you don't know this name.

*Port:* The server port number on the server used to send and receive Sun ONE Synchronization commands and data. Check with your Calendar Server administrator if you don't know the port number.

*Default:* Click on this button to use the default port number (80).

*Use secure connection (SSL):* Check this box if you want your data sent across a secure connection to the Calendar Server.

### Account Settings

*User name:* The user name for your Calendar Server account.

*Password:* The password for your Calendar Server account.

*Remember password:* Click this box if you want Sun ONE Synchronization to remember your user name and password in subsequent synchs.

### Other Settings

*Reminder E-mail address:* The address you want Calendar Server reminders sent to. Reminders are not synced if you do not enter an email address.

**Note:** Users who use Outlook as their master calendar and have Outlook send email reminders might want to omit this email address to prevent Calendar Server from sending duplicate reminders.

### How to Synchronize Sun ONE Calendar

For the data types you select to synchronize, Sun ONE Synchronization copies the data from one source to the other. Once you are synchronized, Sun ONE Synchronization tracks the changes to the individual entries and merges only those changes in following synchronization sessions.

From the **Start** menu, click **Programs, Sun ONE Synchronization**, and then the PIM or mobile device you are synchronizing with.

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**Caution:** If you are not the organizer of an event on your Sun ONE Calendar Server, do not edit the event on your PIM or mobile device and then sync this data back to the Sun ONE Calendar Server.

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### Recurring Events

Recurring Calendar Server events are converted to individual events when synchronized to a PIM or mobile device. If you modify a single event that is part of a Calendar Server recurring event, the results may not be as expected. If you are synchronizing Sun ONE with a PIM or mobile device that supports recurring appointments, duplicate records on the PIM or mobile device might result. To avoid this problem, delete the recurring event in Calendar Server and add a new event reflecting any modifications to the event.

If you are using Microsoft Outlook, you cannot edit recurring events in Calendar Server if these recurring events were created in Outlook and then synced to the Calendar Server. Changes will not be reflected in Outlook when you sync back to Outlook.

If you are using Palm devices, exceptions made in Calendar Server to recurring events created in the Palm device can cause duplicate events when synced from Calendar Server back to the Palm device.

### **Data Fields**

When synchronizing data to Calendar Server, Sun ONE Synchronization issues a warning advising that your fields are too long and will be truncated. The Sun ONE fields are limited, so any text in your PIM or mobile device that is too long will be truncated. The data on your PIM or mobile device will not be altered initially. However, if you edit the field on Calendar Server and then synchronize again, the note will be replaced on the PIM or mobile device with the truncated version.

### **Read-Only Events**

Read-only events from Calendar Server are handled as follows:

- New read-only events in Calendar Server are transferred to the PC or mobile device.
- Deleted read-only events in Calendar Server are deleted in the PC or mobile device.
- Modified read-only events in Calendar Server are modified in the PC or mobile device.
- Modified read-only events in the PC will display a warning to the user and will not update Calendar Server.
- Deleted read-only events in the PC will not issue a warning and the deleted events will be ignored.
- When synchronization completes, you must refresh your web browser to see any changes that were made.

## Troubleshooting

[General Troubleshooting](#)

[Palm Specific Troubleshooting](#)

[Errors and Warnings](#)

[Troubleshooting Tools](#)

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## General Troubleshooting

Depending on the environment, problems can occur as a result of installation errors, data errors, or system errors. We encourage you to review the [Errors and Warnings](#) to determine what problem you are encountering. See below for general troubleshooting issues which can occur:

**"Unable to run Sun ONE Synchronization."** If you are unable to run Sun ONE Synchronization, most likely the installation did not complete normally. Please install Sun ONE Synchronization again.

**"Unable to synchronize."** If you are able to run Sun ONE Synchronization, but unable to synchronize, verify the current profile, those icons displayed on the main Sun ONE Synchronization screen, are the two data sources you wish to synchronize. Next, check the Settings for your synchronization profile to confirm the translators are configured properly (such as COM port connections). Finally, if synchronizing with a mobile device, verify the device is connected to the PC properly via the serial cable or infrared connection.

**"Unable to login to server. Please verify settings and try again."** received during synchronization. This means you have not entered one or more of the following correctly on the Sun ONE Translator Settings dialog box: Server, Port, Username, or Password. After click **OK** on the error dialog, it will automatically display the Sun ONE Translator Settings dialog for you to make the necessary changes.

**Changing Sun ONE Calendar Accounts.** If you change the Sun ONE Calendar Server or the Calendar Server account you are synchronizing from, you must perform the following two steps:

1. Change the Sun ONE Calendar Server account information on the [Sun ONE Calendar Translator Settings](#) dialog.
2. Use the [Data Sources](#) tab to change the Sun ONE events and Sun ONE tasks and calendar(s) you will synchronize from the new account.

**"Synchronization completed (with one or more errors)."** Something happened during synchronization, and one or more errors were encountered. This message generally follows a different or additional message. Select to synchronize again, forcing a full synchronization using the check box in General Settings, which is available by selecting Settings from the Synchronization Settings screen. If you continue to get this message, contact Technical Support.

**"MAPI Error" or "Unknown Error" when synchronizing with Outlook.** The Outlook translator assumes several things about the setup of the Outlook application:

- Outlook 98 or 2000 only.
- Outlook must be installed in either "Internet Only" mode or "Corporate or Workgroup" mode and not in "no-email" mode.
- Outlook must be selected as the default email client.
- The CDO library DLL must be installed and registered and must be version 1.21 or higher. If you need to install it, run the install program for the Microsoft Office Suite or Outlook application and select to install Collaboration Data Objects. If it is already installed but not registered, make sure it is in the Windows system folder and then register it by typing in the command: regsvr32 CDO.dll.

**"Unknown error"** received during synchronization. If you receive an "Unknown error" during synchronization, please create a log file to send to Technical Support for resolution.



**System Crashes or Page Faults** Duplicate applications for every translator or some other indication of data corruption are displayed after a synchronization page fault. In very rare instances of system crashes or page faults during synchronization, the Sun ONE Synchronization databases can be left in unrecoverable, corrupt condition. If this occurs, make sure your data is backed up, uninstall Sun ONE Synchronization and reinstall.

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**Note:** Reinstallation will result in full synchronization. For more information, see [Upgrading Sun ONE Synchronization](#) and [First Time Synchronization](#).

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**"Unable to add event"** error received during synchronization. This error will only be received when you change the servers you're synchronizing with. Whenever you change the server you're synchronizing with, you need to force a full synchronization to avoid this error.

## **Palm Specific Troubleshooting**

- Palm restricts alarms to be less than 100 days in advance of an event. Thus, alarms set on Sun ONE more than 99 days in advance will be set to 99 days on your Palm. Be aware that synching this back to Sun ONE will result in resetting your Sun ONE alarm to 99 days before your event.
  - Palm will not allow reminders set in the past. Such reminders synched from Sun ONE will be ignored by your Palm.
  - If you have a reminder set in the past in Sun ONE and sync it to your Palm, Palm will set it to 0. Remember that if you sync that record back to Sun ONE, your reminder in the past will be overwritten by the 0 value set in the Palm.
-

## Errors and Warnings

Because of the difference in features between the PIM or mobile device and Sun ONE Calendar Server, some validation of data occurs. When data that is entered on one source is invalid in the other, an error or a warning will be issued during the synchronization, import or export process. An error is a condition that will cause the offending record not to be communicated; a warning is a condition which you should be aware of but which does not inhibit the communication of the record.

**Errors and Warnings**

Summary of errors and warnings

Application	Error Records	Warning Records
Calendar	0	1

Errors and warnings for Calendar

Data

- Start Date = 05/27/1999
- Start Time = 4:00 AM
- End Date = 05/27/1999
- End Time = 9:00 AM
- Subject = Past recurring appointment in Outlook
- Reminder = 1
- Reminder Date = 05/27/1999
- Reminder Time = 7:45 AM

Warning Message(s):

- Reminder time is after Start time. Use Start time as Reminder time

Save As    1/1    List

Proceed    Cancel    Help

### Errors and Warnings screen

The Errors and Warnings screen shows specific information about the entries that are causing the errors and/or warnings.

Examples of data that can cause errors would include entering information in one source's field that is too long in the other or mapping a text field to a date field and entering an invalid date format in the text field.

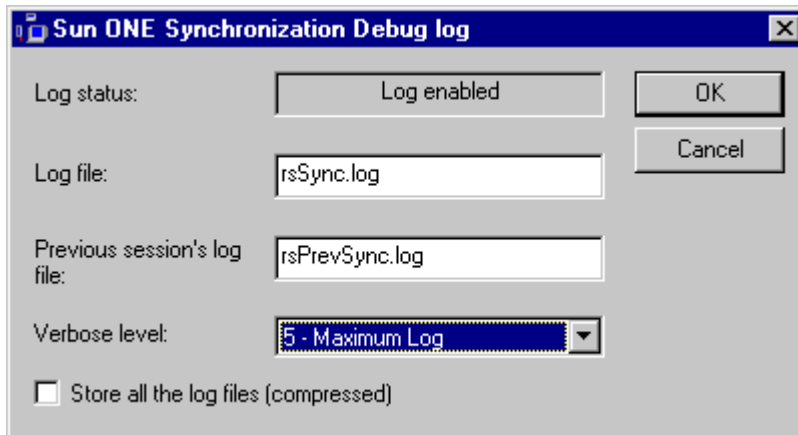
- Click **Save As** to save all the errors and warnings information to an ASCII text file.
- Click **Details** to see the detail of each record that is causing either the error or warning.

## Troubleshooting Tools

### Creating a Debug Log File

It is possible to encounter errors or warnings that are not well defined. In this case, a log file can be created to capture the path of data through the code. This log file can then be sent to trained technical support representatives for interpretation.

To enable the log file feature, select **Start, Programs, Sun ONE Synchronization**, then **Sun ONE Synchronization Debug Log**. You will be prompted with the following screen:



### Debug Log File Settings screen

You will be provided with several options for how to build the log file:

---

0 – No Log	This indicates no log will be created. This is the default setting.
1 – Errors	This log file will capture the errors found during a synchronization session.
2 – Sync Status	This produces a log file with error information and the status of the synchronization.
3 – Data Conversion	This log file will provide information about data being converted during the synchronization.
4 – Data	With this option, the actual data exchanged between the devices will be saved into the log file. This is valuable to determine which record the synchronization may be failing on.
5 – Maximum Log	This log file contains all sources of information about the synchronization. It includes errors, data and other exchanged information. Choosing this option can result in a very large file, depending on how much data you are transferring.

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**Store all the log files (compressed)** - This check box can be selected to compress the data of the log file. Typically, a log file is not very large and this option is not usually needed. However, if you do capture a lot of information, you may choose to compress the files in order to save disk

space. This is also an option if you have a very large file you need to attach to an email to send to Technical Support.

#### **Sending the Log Files to Technical Support**

After you have created the appropriate log file, attach it to an email and send to Technical Support. Log file names are **rsSync.log** for the most recent log file and **rsPrevSync.log** for the previous synchronization. If you have both log files, include both files with your email to Technical Support. If your log files are large, please compress them up using an appropriate utility before attaching them to your email.

## Contacting Technical Support

When contacting your company's Technical Support help desk or the help desk of your ISP (Internet Service Provider), please have the following information available:

- Sun ONE Synchronization version including the Product ID and Build numbers from the Additional Information box in the About Sun ONE Synchronization screen. For example: Version 1.1 [EN], Product Id 209-101, Build 200.
  - PIM or mobile device you are using. For example: Palm III or Microsoft Outlook 98.
  - Browser and version. For example: Internet Explorer 5.5.
  - Specific error and problem description. Include the data type you are trying to synchronize. For example: Calendar data.
  - Zipped debug log file, if applicable.
-