

Mapping non-repeating Organizer entries to Palm Pilot entries

Organizer and Palm Pilot have different ways of presenting similar information and handle repeating entries differently. For example, an Anniversary in Organizer becomes a Date Book event in Palm Pilot when you synchronize your files.

<u>Non-repeating Organizer entry</u>	<u>Pilot entry</u>
Calendar	Timed, non-repeating Date Book event
Planner event (with an end time)	Untimed, daily, repeating Date Book event
Anniversary (without an end time, i.e. a birthday)	Untimed, yearly, repeating Date Book event
Anniversary (not yearly)	Untimed Date Book event
Calls	Timed, non-repeating Date Book event

Mapping Organizer Address records to Palm Pilot Address records

Organizer uses a prioritized mapping scheme when mapping Address records between your Organizer file and your Palm Pilot file. The information that appears in your Palm Pilot Address record is determined by what information is in your Organizer Address record.

In the table below, the fields are listed in order of priority when you synchronize. If there's no information in a field, then the field with the next lowest priority that contains information appears next in your Palm Pilot Address record. For example, if "Business Fax" in your Organizer Address record doesn't contain information and "Business E-mail" does contain information, then when you synchronize, the second field in your Palm Pilot Address record after you synchronize will contain information from "Business Email" in your Organizer file. **Is this too abstract? And is it correct? This seems to be how it works when I test it - although my Organizer Address record was blown away after I edited it and synched again...**

<u>Organizer Address record field</u>	<u>Pilot Address record field</u>
1.Business Tel 1	Work
2.Business Fax	Fax
3. Business E-mail	E-mail
4. Home Tel 1	Home
5. Home [Unused 1]	Pager
6. Home [Unused 2]	Mobile
7. Business E-mail 2	Work
8.Home E-Mail	E-mail
9. Home Fax	Fax
10. Home Tel 2	Home

Mapping Palm Pilot entries to Organizer entries

Organizer and Palm Pilot have different ways of presenting similar information. For example, a Memo Pad memo in Palm Pilot becomes a Notepad page in Organizer when you synchronize your files.

<u>Palm Pilot section</u>	<u>Organizer section</u>
Date Book	Calendar
To Do	To Do
Address	Address
Memo Pad	Notepad

Mapping repeating Organizer entries to Palm Pilot entries

Organizer and Palm Pilot have different ways of presenting similar information and handle repeating entries differently. For example, an Anniversary in Organizer becomes a Date Book event in Palm Pilot when you synchronize your files.

<u>Repeating Organizer entry</u>	<u>Pilot entry</u>
Calendar	Multiple timed, non-repeating Date Book events
Planner	Multiple, untimed, daily, non-repeating Date Book events with an end time
Anniversary	Multiple, untimed, non-repeating, Date Book events without an end time
Calls	Multiple, timed, non-repeating Date Book events

Mapping repeating Palm Pilot entries to Organizer entries

Organizer and Palm Pilot have different ways of presenting similar information and handle repeating entries differently. For example, a Memo Pad memo in Palm Pilot becomes a Notepad page in Organizer when you synchronize your files.

<u>Repeating Pilot entry</u>	<u>Organizer entry</u>
Untimed, yearly, with an end time	Anniversary (occurs every year)
Untimed, yearly, without an end time	Anniversary (repeating)
Daily, with an end date	Planner
Weekly or monthly untimed entries	Anniversary (repeating)
Timed	Calendar (repeating)

Overview: Mapping entries between Organizer and Palm Pilot

Because Organizer and Palm Pilot are different applications, they handle similar information differently.

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[Mapping repeating Palm Pilot entries to Organizer entries](#)

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Overview: Using your Palm Pilot with Organizer

You can share information between your US Robotics Palm Pilot and your Organizer 97 GS PIM (.OR4) file. For example, you can use your Palm Pilot when you're away from your office to keep track of your schedule, and then synchronize your updated entries with your Organizer file when you return.

You can:

- Create or edit entries in your Calendar, To Do, Notepad, and Address sections in your Organizer file and then synchronize the updated entries with the Date Book, To Do, Memo Pad, and Address sections in your Palm Pilot. You can also create or edit entries in these sections in your Palm Pilot and synchronize them with your Organizer file.
- Synchronize entries in your Organizer Calls, Planner, and Anniversary sections with your Palm Pilot file. Entries in these sections become Date Book events in your Palm Pilot file, where you can edit them as you would any other Date Book event. For example, if you synchronized your Organizer and Palm Pilot files, a Planner event would become a Date Book event, which you could modify as you would any other Date Book event. When you synchronize these updated entries from your Palm Pilot back to your Organizer file, they map back to the Organizer section where they originated with the updated information.
- Track your synchronizations, to remember the details of a particular synchronization.
- Determine how fields in your Organizer and Palm Pilot Address records map between applications.
- Resolve conflicts between your Organizer and Palm Pilot files if you've modified the same record in both applications.
- Map entries between your Organizer and Palm Pilot files, including entries in sections that don't correspond directly to a section in the other application. For example, a Planner event in Organizer becomes a Date Book event in Palm Pilot when you synchronize your files, then becomes a Planner event in Organizer when you synchronize the files again. The Planner event will contain any changes you made to the related Date Book event in your Palm Pilot file.

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Mapping Palm Pilot Address record fields to Organizer Address record fields

<u>Palm Pilot Address record field</u>	<u>Organizer Address record field</u>
Work	Business Tel 1, Business Tel 2
Home	Home Tel 1, Home Tel 2
Fax	Work Fax, Home Fax
Other	Work Tel 2, Home Tel 2
E-mail	Work E-mail, Home E-mail
Main	Business Tel 1, Home Tel 1
Pager	Home [Unused1], Home [Unused 2]
Mobile	Home [Unused 2], Home [Unused 1]

Resolving conflicting entries after you synchronize

After you synchronize your Organizer and Palm Pilot files, you may find that there are conflicting entries between Organizer and Palm Pilot. If you modify the same record in both your Palm Pilot and your Organizer file, you'll create a replica in both your Palm Pilot and your Organizer file when you synchronize the files. You resolve the conflict by checking the conflicting records and making the necessary changes to update the correct record.

1. **Haven't seen this working yet.**
2. Select the conflict you want to resolve.
3. More steps.

Note In Palm Pilot, you can purge Date Book events and To Do tasks and save the the purged records to a Pilot Desktop archive file. When you archive a record in your Palm Pilot file, the Palm Pilot entry isn't affected by any changes you make to the Organizer entry that the Palm Pilot entry maps to.

Resolving conflicts between Organizer and Palm Pilot after synchronizing

<u>Action to Palm Pilot record</u>	<u>Action to Organizer record</u>	<u>Resolution</u>
Add	None	Adds record to Organizer
None	Add	Adds record to Palm Pilot
Modify	None	Adds record to Organizer
None	Modify	Adds record to Organizer
Delete	None	Deletes record from Organizer
None	Delete	Deletes record from Palm Pilot
Delete	Delete	Deletes record from both Palm Pilot and Organizer
Delete	Modify	Adds record back to Palm Pilot
Modify	Delete	Adds record back to Organizer
Modify	Modify	Creates replica of record in both Organizer and Palm Pilot
Archive	Modify	Modifies record in Organizer, no change to record in Palm Pilot
Archive modified	Delete	Adds record back to Organizer

Selecting Address synchronization options

Option	Result
Contact Fields	Selects the fields in your Organizer Address record that you want to use when synchronizing.
Map Fields	Selects the fields in your Palm Pilot Address record that you want to map to your Organizer Address record.
Address	Selects the fields in your Organizer Address record that you want to map to your Palm Pilot Address record.

Selecting Anniversary synchronization options

<u>Option</u>	<u>Result</u>
Past	Selects the number of past anniversaries you want to transfer when you synchronize.
Future	Selects the number of future anniversaries you want to transfer when you synchronize.
Additional Description Lines	Selects where additional text from "Description" in your anniversary (if any) maps when you synchronize. True?
Attendees	Not sure yet... will this be dimmed for anniversaries, calls, and Planner events?

Selecting appointment synchronization options

<u>Option</u>	<u>Result</u>
Past	Selects the number of past appointments you want to transfer when you synchronize.
Future	Selects the number of future appointments you want to transfer when you synchronize.
Additional Description Lines	Selects where additional text from "Description" in your appointments (if any) maps when you synchronize. True?
Attendees	Not sure yet...

Selecting Calls synchronization options

<u>Option</u>	<u>Result</u>
Past	Selects the number of past Calls entries you want to transfer when you synchronize.
Future	Selects the number of future Calls entries you want to transfer when you synchronize.
Additional Description Lines	Selects where additional text from "Notes" in your Calls entry (if any) maps when you synchronize.
Attendees	Not sure yet... will this be dimmed for anniversaries, calls, and Planner events?

Selecting Notepad synchronization options

No UI yet; info to follow.

No UI yet; info to follow.

Selecting Planner synchronization options

<u>Option</u>	<u>Result</u>
Past	Selects the number of past Planner events you want to transfer when you synchronize.
Future	Selects the number of future Planner events you want to transfer when you synchronize.
Additional Description Lines	Selects where additional text from "Notes" in your Planner event (if any) maps when you synchronize.
Attendees	Not sure yet... will this be dimmed for anniversaries, calls, and Planner events?

Selecting To Do synchronization options

Option	Result
Completed	Synchronizes Completed To Do items.
Future	Synchronizes Future To Do items.
Overdue	Synchronizes Overdue To Do items.

Synchronizing your Address records

You can synchronize your Address records with your address records in your Palm Pilot. You can choose which Address records you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.

2. Click the Address tab.

3. Click "Synchronize this section."

4. Select the Address records you want to transfer to your Palm Pilot when you synchronize.

Note If there's information in "Company" in your Palm Pilot Address record when you synchronize your Organizer and Palm Pilot files, then any information in "Note" maps to "Notes" on the Business tab in the corresponding Organizer Address record. If there's no information in "Company" in your Palm Pilot Address record when you synchronize your Organizer and Palm Pilot files, then any information in "Note" maps to "Notes" on the Home tab in the corresponding Organizer Address record.

5. Click Options to select your synchronization options.

Note There are differences in the names of fields between Address records in Organizer and Palm Pilot which affect how the information in your Address records will appear. The information that appears in your Address record in Organizer is prioritized to determine the information that appears in the address record in Palm Pilot. Address record fields from your Palm Pilot map to specific fields in your Organizer Address records as well.

6. (Optional) Click Custom to do something or other. [Follow up - can't see this yet...](#)

7. Click OK.

8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Synchronizing your Anniversary entries

You can synchronize your Anniversary entries as Date Book events in your Palm Pilot. You can choose which Anniversary entries you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.
2. Click the Anniversary tab.
3. Click "Synchronize this section."
4. Select the Anniversary records you want to transfer to your Palm Pilot when you synchronize.
5. Click Options to select your synchronization options.
6. (Optional) Click Custom to do something or other. [Follow up - can't see this yet...](#)
7. Click OK.
8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Synchronizing your appointments

You can synchronize your appointments with your Date Book events in your Palm Pilot. You can choose which appointments you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.
2. Click the Calendar tab.
3. Click "Synchronize this section."
4. Select the appointments you want to transfer to your Palm Pilot when you synchronize.
5. Click Options to select your synchronization options.
6. (Optional) Click Custom to do something or other. [Follow up - can't see this yet...](#)
7. Click OK.
8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Synchronizing your Calls entries

You can synchronize your Calls entries as Date Book events in your Palm Pilot. You can choose which Calls entries you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.
2. Click the Calls tab.
3. Click "Synchronize this section."
4. Select the Calls entries you want to transfer to your Palm Pilot when you synchronize.
5. Click Options to select your synchronization options.
6. (Optional) Click Custom to do something or other. **Follow up - can't see this yet...**
7. Click OK.
8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Synchronizing your Notepad pages

You can synchronize your Notepad pages as Memo Pad memos in your Palm Pilot. You can choose which Notepad pages you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.
2. Click the Notepad tab.
3. Click "Synchronize this section."
4. Select the Notepad pages you want to transfer to your Palm Pilot when you synchronize.
5. Click Options to select your synchronization options.
6. (Optional) Click Custom to do something or other. **Follow up - can't see this yet...**
7. Click OK.
8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Synchronizing your Planner events

You can synchronize your Planner events as Date Book events in your Palm Pilot. You can choose which Planner events you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.
2. Click the Planner tab.
3. Click "Synchronize this section."
4. Select the Planner events you want to transfer to your Palm Pilot when you synchronize.
5. Click Options to select your synchronization options.

Note If the Planner event has information under "Note," then the information under "Key" appears as the last line in the Note of the Date Book event the Planner event maps to, after the information under "Note." If the Planner event doesn't have any information under "Note," then the information under "Key" appears as the Note of the Date Book event the Planner event maps to.

6. (Optional) Click Custom to do something or other. [Follow up - can't see this yet...](#)
7. Click OK.
8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Synchronizing your To Do tasks

You can synchronize your To Do tasks with your To Do items in your Palm Pilot. You can choose which To Do tasks and To Do items you want to transfer to your Palm Pilot when you synchronize your Organizer file with your Palm Pilot file.

1. Choose File - Extension - US Robotics Palm Pilot.
2. Click the To Do tab.
3. Click "Synchronize this section."
4. Select the To Do tasks you want to transfer to your Palm Pilot when you synchronize.
5. Click Options to select your synchronization options.
6. (Optional) Click Custom to do something or other. [Follow up - can't see this yet...](#)
7. Click OK.
8. Click OK.

Note You can either synchronize one section at a time, more than one section at a time, or synchronize all of your sections at once. If you want to synchronize more than one section at a time or synchronize all of your sections at once, click the section tabs of the other sections you want to synchronize, select the entries you want to synchronize, and click OK.

9. When you're ready to synchronize your files, press the Hotsync button on your Palm Pilot cradle.

Using the Synchronization Log

You use the synchronization log to track when and what information you transferred between your Organizer file and your Palm Pilot file.

1. Choose File - Extension - Synchronization Log.
2. Select the synchronization record you want to look at.
3. (Optional) Click Details.

The Synchronization Log Details dialog box appears with a description of the synchronization. For example, it may indicate that a synchronization of a section began, that a record was or wasn't successfully updated, or that a synchronization was or wasn't successfully completed.

4. (Optional) Click Close.
5. (Optional) Click Delete to remove a synchronization record (or records) you want to delete.
6. Click Close.

