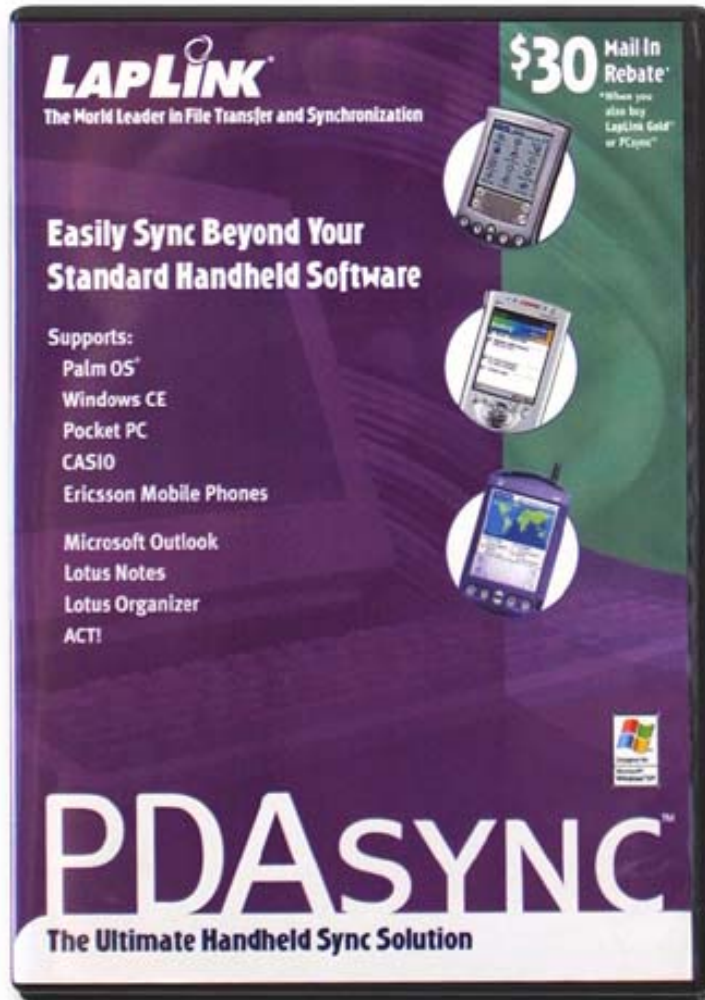


# PDASYNC EVALUATION GUIDE



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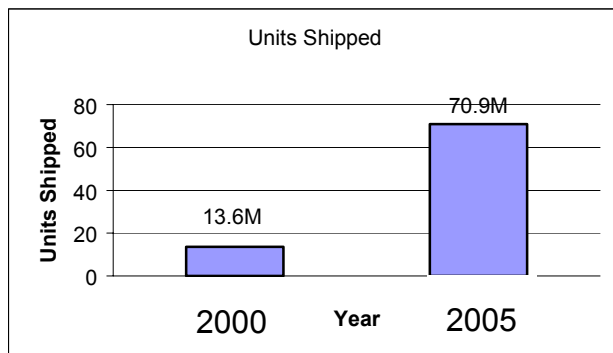
# PDA SYNC

## The Ultimate Handheld Sync Solution

Mobile professionals are finding that they have the same information on multiple handheld devices and need a solution that enables them to keep all devices updated with the current information. PDAsync is the premier software application that allows users to synchronize their calendar, contacts, tasks and email between their mobile devices and applications on their PC. PDAsync goes beyond proprietary PDA software because it works with all major personal organizer software applications on the market.

PDAsync is the one solution that works with major handheld devices and PC applications. Users now need only one synchronization application to support Windows CE, Pocket PC, Palm Computing and CASIO Personal Organizer computing devices and Ericsson mobile phones. PDAsync allows the user to synchronize their devices with Microsoft Outlook, Lotus Notes, Lotus Organizer, ACT! and other popular PC applications.

IDC estimates worldwide handheld device shipments will increase at a compound annual growth rate of 39 percent from 13.6 million in 2000 to 70.9 million by 2005.



According to recently completed research from Strategy Analytics, a planning support provider, global PDA retail revenues will increase five-fold by the year 2006.

Other results from 'The PDA Market: Overview and Analysis' report from the company claimed that in 2006 unit shipments of PDAs will pass 85m units. In addition, a total of 50% of global cellular data revenues will come from messaging services and applications.

The expected cause of this increase is a rapid uptake of the third generation PDAs with improved functionality and greater consumer market appeal.

## ABOUT PDA SYNC

PDAsync software runs on a Windows PC to synchronize data between two data sources, such as a PIM (Personal Information Manager) and a mobile device. PDAsync consists of a synchronization engine and translators, which seamlessly integrate with your data source's features and data. PDAsync makes it easy to synchronize the following data types:

**Contacts** - Contacts keep track of key information such as names, addresses and phone numbers.

## PDAsync Evaluation Guide

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**Calendar** - A Calendar keeps track of appointments. You can enter any meeting, phone conference or reminder into the Calendar and instantly view your appointments for any date or time.

**Tasks** - Tasks are items that need to be done. These To Do lists are handy to keep track of items that you need to complete.

**E-mail** - E-mail is used to send and receive messages. PDAsync supports synchronization of incoming messages, outgoing messages and sent items.

### System Requirements

- Microsoft Windows 95/98/2000/NT 4.0/Me/XP
- IBM PC compatible 486
- 32MB RAM
- 20MB Free Hard Disk Space
- Two supported data sources
- Supported handheld operating system installed
- Handheld cradle or synchronization cable

### Handheld Operating Systems Supported:

- Palm v. 3.0, 4.0
- Windows CE 1.0, 2.x
- Pocket PC 3.0
- Casio Pocket Viewer

### Languages Supported:

- English
- Francais
- Espanol
- Deutsch
- Italiano

### PDAs supported:

- HandSpring Visors
- Palm series
- Compaq iPaq series
- HP Jornada series
- Kyocera Smartphone series
- Ericsson R520, T39, T60 and R300d mobile phones
- Samsung I300 phone
- Toshiba GENIO e Pocket PC series
- Casio Pocket Viewer series
- Cassiopeia Pocket PC series
- Sony Clie
- IBM WorkPad
- SymbolSPT series
- NEC Mobile Pro series
- Sharp Mobilon
- Vadem Clio
- HandEra 330 and TRG Pro

### INSTALLING PDASYNC:

1. Install the handheld operating system, which came with the handheld device, on your computer. (For example HotSync, ActiveSync, Casio.)
2. Close all open programs.
3. Start the PDAsync installation program.
4. Follow the installation instructions that appear on your screen.
5. When installation is complete, click **Finish**.
6. If prompted to reboot, click **OK**.

### STARTING A SYNCHRONIZATION

The first time you synchronize, PDAsync runs a Full Synchronization. That is, PDAsync tries to match each entry on the mobile device with an entry on the PIM. You have 3 options for each data source you've selected to synchronize:

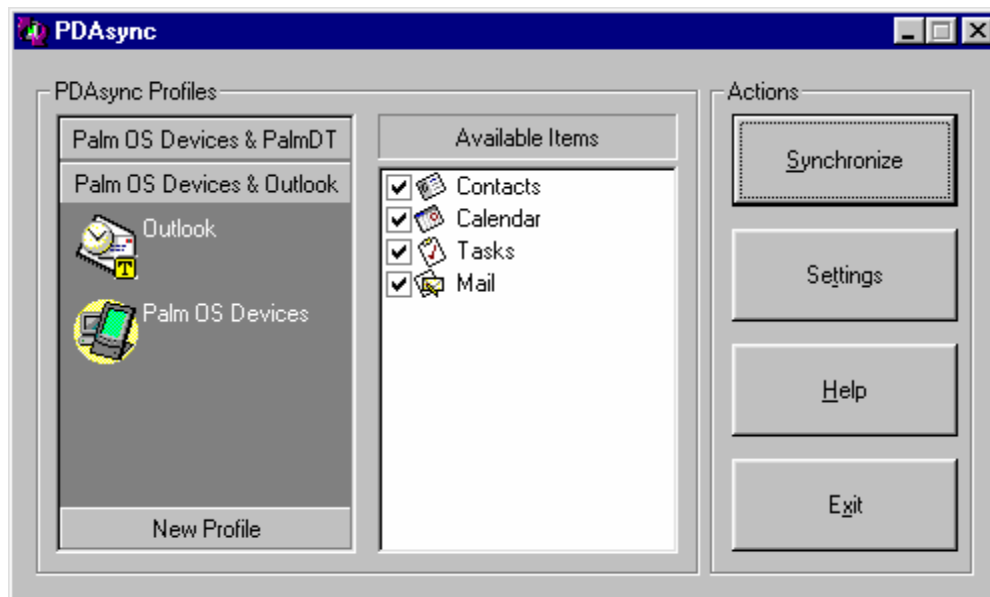
- Replace mobile device records with PIM application records
- Replace PIM application records with mobile device records
- Combine mobile device records and PIM application records

PDAsync copies the data types you've selected from one source to the other. PDAsync tracks changes to individual entries and only merges changes in subsequent synchronizations.

#### Try it

1. From the PDAsync Program group, click Synchronize.
- or
2. Right-click the PDAsync icon in your computer's system tray and click Synchronize.
- or
3. From the PIM's menu bar, click Synchronize.

The following screen appears with the profiles you defined during installation. Click Synchronize and follow the instructions that appear on your screen.



### SETTING FILTERS

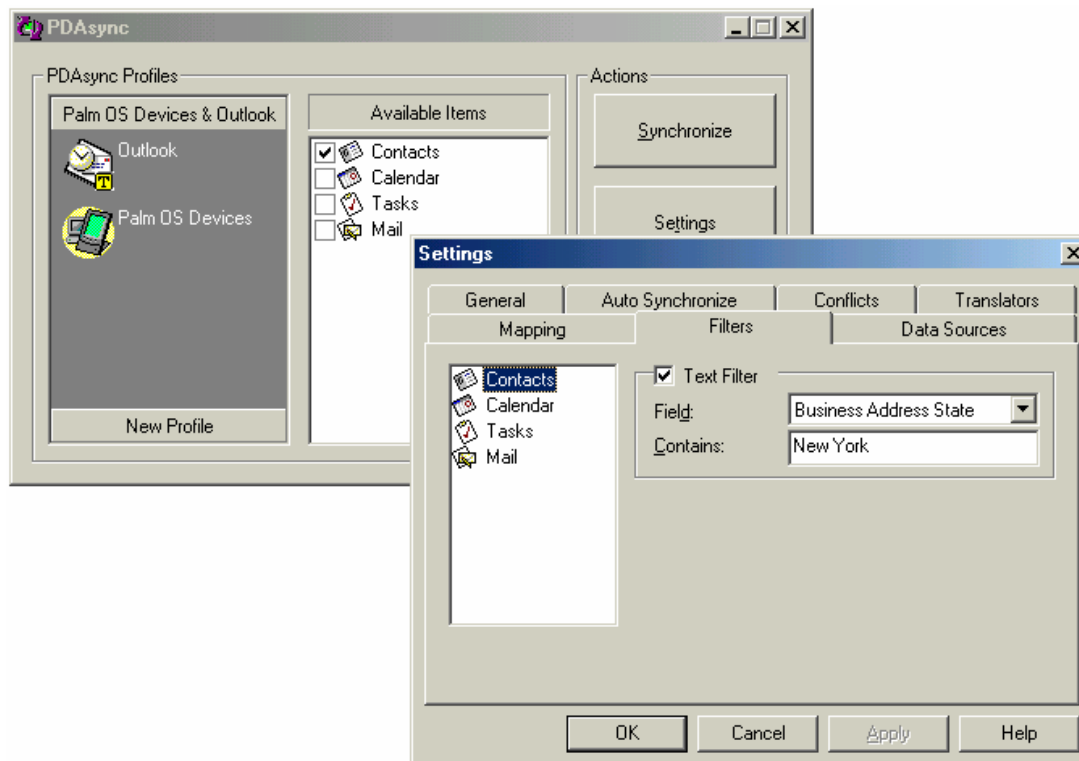
Use filters to select only the data you want to synchronize. The rules you establish in the Filters settings allow you to eliminate unnecessary data. With these settings, you can speed up the transfer and use less mobile device memory.

The types of filters available depend on the data source that you select. The selection criteria are different for each data source.

Filtering data works only in one direction and does not delete data from your PIM. Filtering simply limits the amount of data being synchronized to your mobile device.

### CONTACTS FILTERS:

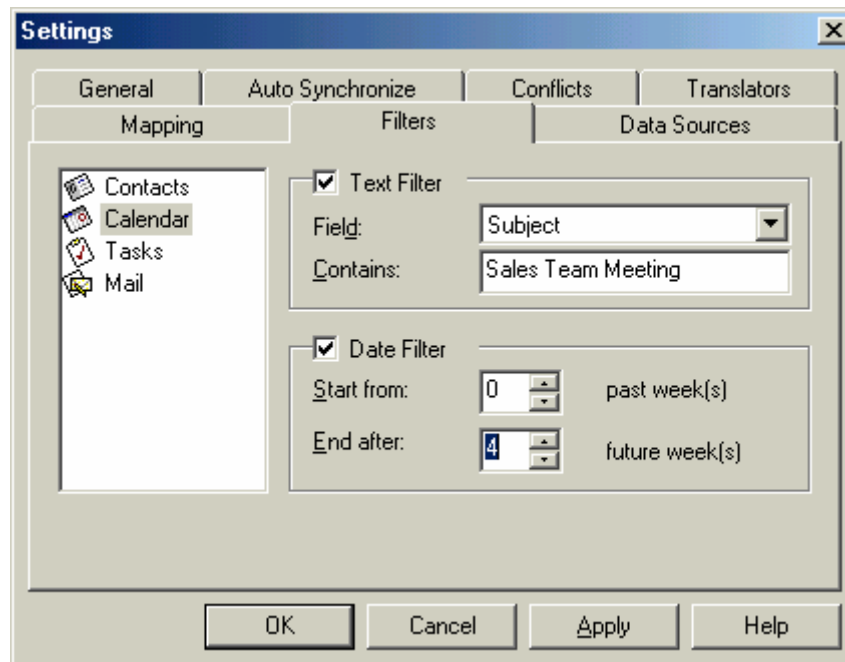
PDAsync allows you to synchronize your contact lists. You can selectively synchronize based on more than 70 categories.



**Text Filter** You can synchronize based on specific category, such as company name, state, zip code or a customized field.

For example, say you want to transfer only those contacts that reside in New York. In the field list, you select "Business Address State". In the Contains box, type "New York". The next time you synchronize, only those Contact in New York are transferred. All other Contacts are not synchronized.

### CALENDAR FILTERS:



**Text Filter** You indicate the criteria that PDAsync uses to select data for synchronization. The available fields that appear in the drop-down list depend on the data you want to transfer. Select the field you want, then type the text that this field must contain to be included in the data transfer. For example, you want to transfer only those contacts that reside in New York. In the Field list, you select "Location." In the Contains box, you type "New York." The next time you synchronize, only those Contacts in New York are transferred. All other Contacts are not synchronized.

**Date Filter** You can use the date filter for data associated with time. The filter uses the current date as the time reference. To filter data based on a range of dates, select the number of weeks in the past and the number of weeks in the future that contain the data you want to transfer. For example, you want to transfer only appointments from the past week and for the next two weeks. Using the Date Filter, enter "1" in the Start from field and enter "2" in the End after field. If the date of the appointment is within this period, it is included in the synchronization.

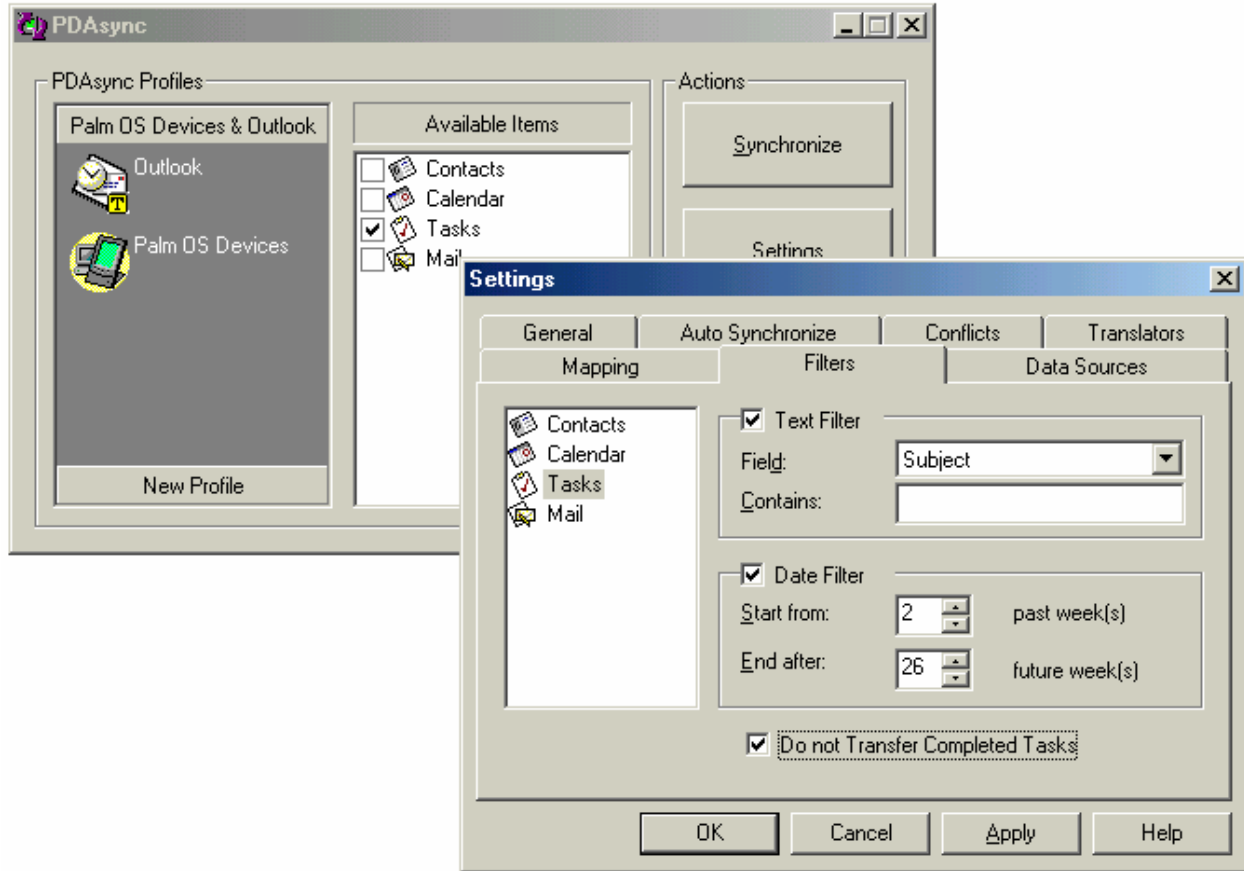
**Record Filter** The Record Filter allows you to select the individual records you want to synchronize. This feature is important because it lets you specify the specific records to synchronize. For example, you have personal contacts and business contacts in your Contacts list. You want to synchronize only the business contacts. With the Record Filter, you can select only the business contacts.

### Try it

1. From the PDAsync main window, select the profile you want to use to define a filter and click Settings.
2. Click the Filters tab.
3. Select the type of data you want to filter. For example, calendar or contact information.
4. Select the type of filter you want to create.
5. Click OK and then click Synchronize.

### TASKS FILTERS:

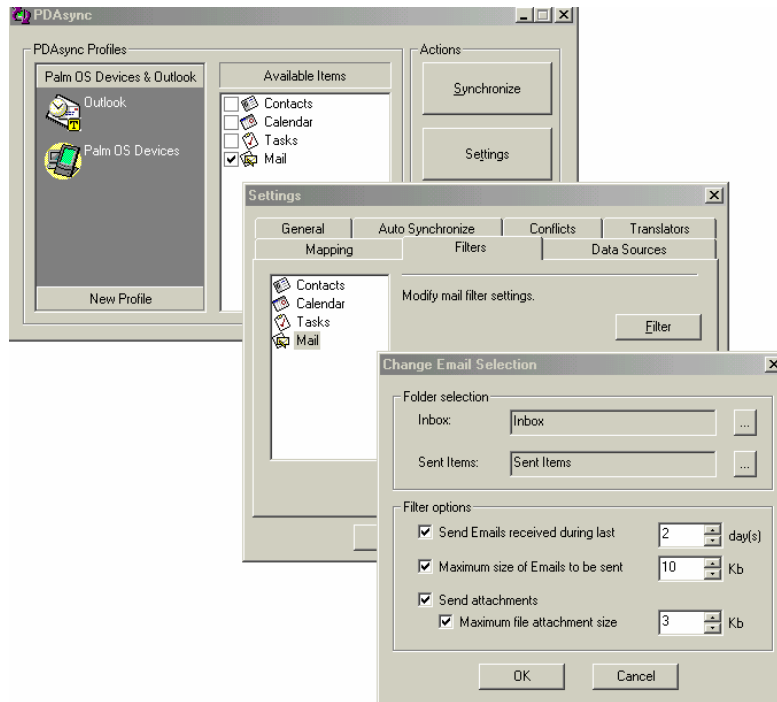
PDAsync allows you to synchronize your tasks. You can select tasks to synchronize based on more than 70 categories.



**Text Filter** You can synchronize based on a particular field, such as subject, category or notes.

**Date Filter** You can select exactly which tasks you want to synchronize. Simply select the start date and end date. You can even specify whether you want to transfer completed tasks.

### MAIL FILTERS:



When PDAsync observes a new item in the PIM Inbox, it transfers it to the mobile device and marks it as transferred. So, if you now read it on the mobile device and then delete it and synchronize again, PDAsync will remember that it has already been transferred to the mobile device once and will not transfer it again. So, you won't be annoyed by having to review the same e-mails over and over again. You can force all items that match the filter conditions to be transferred by forcing a full synchronization.

All e-mail that matches the e-mail filter conditions is transferred to the mobile device. Filter conditions can be set through the Change e-mail selection screen.

**Time Period Filter** You can synchronize emails received any time within the last day to the last year.

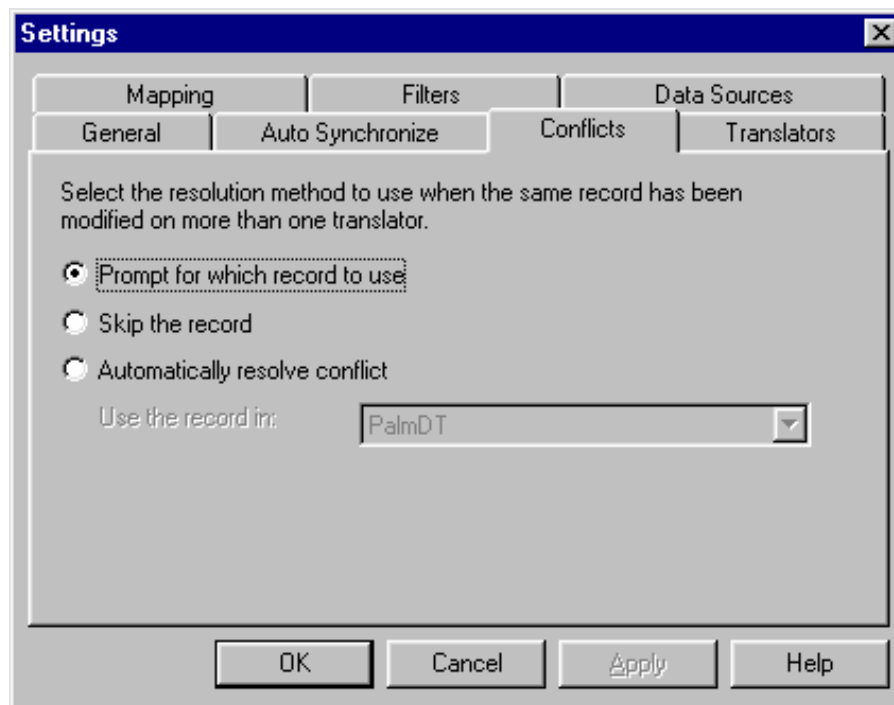
**Maximum Size of Emails Filter** This filter allows you to conserve memory. You specify the maximum email file size that you want to synchronize.

**Attachment Filter** This filter lets you synchronize your attachments. You can also specify the maximum file attachment size that is synchronized.

### RESOLVING CONFLICTS

A conflict occurs when the same data entry is changed in both the mobile device and the PIM between synchronizations. For example, you delete a contact on the mobile device and a colleague edits the same contact in the PIM. PDAsync needs to know how to handle this type of conflict.

When PDAsync encounters a conflicting record, a dialog box prompts you to select which copy to overwrite. The merge option does not exist because the overwrite applies strictly on a record basis. The fields within a single record cannot be merged.



**Prompt for Which Record to Use** If you choose to resolve conflicts manually, a screen appears at the end of the synchronization. For each conflict, you can select which record to use. In the previous example, you could choose either to delete the contact from the PIM or update the contact on the mobile device.

**Skip Records Automatically** If you use this option, conflicts are not resolved. Conflicts are always skipped or ignored, which may make it appear that PDAsync is not synchronizing the data.

**Resolve Conflicts Automatically** If you choose resolve conflicts automatically, no screen prompts you for a decision. PDAsync performs the correct action according to the specified setting.

#### Try it

1. On your hand held device, delete an appointment from the calendar.
2. Open the calendar in your PIM and make some kind of change to the same appointment you deleted from your hand held device.
3. On the PDAsync main window, click Synchronize.
4. When prompted, select whether to use the information found on your hand held device or in your PIM.