Oracle® CorporateSync for Palm

User's Guide

Release 2.1.4 for Macintosh

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Oracle CorporateSync for Palm User's Guide, Release 2.1.4 for Macintosh

Part No. B10105-01

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1

Introduction to Oracle CorporateSync

Oracle CorporateSync allows you to transfer data between your calendar application and your Palm compatible platform device. With CorporateSync 2.1.4, you can synchronize with Oracle CorporateTime 5.0 or greater.

If you cannot find the installer file, contact your System Administrator. For information on HotSync setup, consult your Palm organizer handbook.

A word about terms

Calendar server refers to the server where all Entries (Meetings, Day Events, Daily Notes, Tasks and Holidays) exist. Calendar application refers to the application you use to create, edit or delete these Entries (CorporateTime, OpenTime, Netscape Calendar or Lexacom Calendar). In cases where Entries are discussed, calendar server and calendar application are used interchangeably. Where Address Books are discussed, only calendar application is used, as CorporateSync can only synchronize Address Books that exist locally on a user's machine and not on the server.

System Requirements

- CorporateTime Server 2.53, 2.57, 2.60, 3.5x, 4.0 or greater, or Netscape Calendar Server 3.5 or greater
- Macintosh OS System 7.1.2 or greater
- 8 MB RAM minimum (64 MB recommended)
- Palm MacPac version 2 or greater
- Palm platform compatible device (e.g. Palm III, V, VII, or WorkPad)

Installing Oracle CorporateSync

- **1.** If you already have data in your Palm Desktop, you should perform a HotSync before installing CorporateSync.
- **2.** If you have a previous version installed on your computer, the installer will automatically locate it and overwrite it.
- **3.** This installation replaces the Palm Desktop with your calendar application Entry information. If you have data in the Palm Desktop, the installer will move it to a folder entitled Disabled Conduits. Turn on the Palm organizer and place it in its cradle.
- **4.** Press the HotSync button on the front of the Palm organizer cradle. The CS Setup application will be installed on your Palm organizer.

Note: You may get error messages in the HotSync log saying that CS Setup cannot be located. Ignore these messages.

- **5.** If the HotSync Manager is running, the installer will ask if you wish to close it. Click Yes to exit the HotSync Manager.
- 6. Click the HotSync icon in your HotSync folder and select HotSync Manager.
- **7.** From the HotSync menu, choose Conduit Settings. A list of synchronizable items appears. Choose how you want CorporateTime Events, Tasks and Addresses to be synchronized by double-clicking on each item. A dialog box appears.
 - Synchronize the files: Synchronize all information that exists on both your Palm organizer and in CorporateTime.
 - Macintosh overwrites hand-held: Information in your CorporateTime Agenda overwrites Events, Tasks or Addresses on your Palm organizer.

- Hand-held overwrites Macintosh: Information on your Palm organizer overwrites Entries, Tasks or Addresses on your Macintosh.
- Do Nothing: The specified Entry type is not synchronized.
- 8. Select a user name from the top of the Conduit Settings dialog box. If there is only one user name, it will be selected automatically. For more information on the Conduit Settings dialog box, consult your Palm organizer Handbook.

CorporateSync is now installed but no Entry information has been synchronized.

Note: CorporateSync does not require that a calendar application be installed on your machine. However, CorporateTime/OpenTime 4.0 or greater is required to synchronize an off-line Agenda or Address Book.

Limitations

- Upgrading your Palm device to OS 3.3 may result in loss of data if you have a previous version of CorporateSync installed. To avoid this error, please install CorporateSync 2.1.2 before you upgrade to OS 3.3. If you have already encountered this error, upgrade to CorporateSync 2.1.2 to resolve the problem.
- The Palm organizer does not recognize different time zones. Make sure your calendar application's time zone corresponds to the Palm organizer's.
- You cannot synchronize the Palm organizer's repeating Events. You can, however, synchronize your calendar application's repeating Entries.
- If you change a timed Event to an untimed Event, or vice versa, on your Palm organizer, the change will not appear in your calendar application.
- It is recommended that you only synchronize the Palm organizer with your on-line Agenda. Synchronizing with the off-line Agenda can (and usually does) cause duplicate Entries. See Appendix A for details.
- You cannot HotSync Address Book Entries when your calendar application is open on your Macintosh.
- CorporateSync is unable to present a list of possible matches for duplicated names. To avoid this problem, enter as much unique user information as possible (e.g. organization unit, etc.).

Avoiding Problems

There are a few steps you can take to minimize potential problems:

- After you upgrade to CorporateSync 2.1.2, HotSync immediately before performing other operations
- When possible, create and modify your Entries using the calendar application. This is especially recommended when dealing with repeating Entries.
- Set the Private Records option in the Palm organizer's Security application to "Show".
- Choose Refresh all from the calendar application View menu after performing a HotSync.
- Select "Set as Default" in the Change HotSync Action menu to preserve the settings you entered.

Using Oracle CorporateSync

Synchronizing Your Palm Organizer for the First Time

- 1. Turn on your Palm organizer.
- **2.** Tap the CS Setup icon to open CorporateSync Setup.
- **3.** Enter your calendar application user name and/or organization units in the user field. Enter enough characters to distinguish yourself from all other users on your server.
- 4. Enter the server name and node number or alias in the server field.
- **5.** Synchronize with an off-line database by selecting Off-line instead of a server name. If you select Off-line, the server and node fields will disappear.
- 6. Enter your calendar server password.
- **7.** Choose Dates from the pick list at the top of your Palm organizer. Define the Synchronization period. Enter the range by entering From and To values or by entering start and end dates (or a combination of both).
- **8.** Choose Events from the pick list at the top of your Palm organizer and select Event options
- **9.** Select "HotSync Refused Entries" to transfer Meetings, Daily Notes and Day Events that you have chosen not to attend or keep in your Agenda
- **10.** Select "Show Location" to transfer Meeting Locations (the default Location is the first invited Resource)
- **11.** Select "Show Attendees" to transfer the names of invited people and Resources (maximum of 12)

- **12.** Select "Limit Event Details" to limit the size of Meeting Descriptions that will be transferred. When selected, enter the maximum size to be transferred (maximum of 64k).
- **13.** Choose Tasks from the pick list at the top of your Palm organizer and select Task options.
- 14. Select "HotSync Completed Tasks" to transfer Tasks marked as completed.
- **15.** Select "Limit Task Details" to limit the size of Task Comments that will be transferred. When selected, enter the maximum size to be transferred (maximum of 64k).
- **16.** Choose Addresses from the pick list at the top of your Palm organizer and enter the calendar application Address Book name. Select Address options. In order to HotSync Address Book Entries, your calendar application must be closed on your Macintosh.
- **17.** Place your Palm organizer into its cradle and press the HotSync button. Your Palm organizer is now synchronized with your calendar application.

4

Troubleshooting

This chapter explains how to work around problems users sometimes encounter while working with the Palm organizer. Bulleted lists represent various ways a problem can be fixed. You may need to use one, some or all of the possible solutions.

HotSync Problems

I cannot get my Palm organizer to HotSync with the calendar application.

- Make sure your Macintosh's HotSync Manager is on.
- The calendar application cannot be open in off-line mode when you perform a HotSync with your off-line Agenda. Close the calendar application or switch on-line by choosing Work On-line from the File menu.
- If you are also synchronizing Address Book Entries, the calendar application must be closed. Ensure that the Address Book name is entered correctly in CS Setup.
- Close all HotSync windows on your Macintosh (e.g. HotSync Log, Custom menu).
- Verify the accuracy of the user name, organization units, password, server and node settings in the Palm organizer CS Setup.
- Make sure the user name, organization units and initials you entered distinguish you from everyone else on the system.
- Verify that your Palm organizer is placed properly in its cradle.
- Make sure the HotSync Custom settings for calendar application Addresses, Entries and Tasks are not set to "Do Nothing".
- Make sure the server you are connecting to is running properly.

- Verify the Serial Port settings using the Setup dialog box (opened when you click the HotSync manager icon near your Macintosh's Finder and choose Setup). Make sure no other programs are using the same Com Port as HotSync.
- Close the HotSync Manager and then open it again.

I have trouble connecting to the server.

- Make sure the user name, organization units, server name, password and node number have all been entered properly in the Palm organizer CS Setup.
- Make sure that you are using the right HotSync option in the HotSync application (Local Sync vs. Modem Sync).
- Ensure that the server you are connecting to is running properly.
- Verify that your Palm organizer is sitting properly in its cradle.
- If you are synchronizing calendar application Addresses, your off-line and on-line passwords must be the same.

The HotSync keeps timing out.

Open the Palm organizer's HotSync application. Hold down the Up and Down buttons and tap the top-right corner of the screen. The Developer's Back Door dialog box will open and the message "DLServer Wait Forever is ON" will appear. Tap OK.

The HotSync is taking too long.

Cut down the synchronization time by doing the following:

- Set unused applications to "Do Nothing" in the HotSync Manager Custom menu.
- Narrow the time period you want to HotSync in the Palm organizer CS Setup.

Entry Problems

Some Palm organizer Entries do not appear in the calendar application after synchronizing.

- Choose Refresh all from the View menu in the calendar application.
- Only the first Event of a repeating Event created using the Palm organizer appears in the calendar application.
- The Entries are outside the range defined in the Palm organizer CS Setup.

Some calendar application Entries do not appear in the Palm organizer after synchronizing.

- Set Private Records in the Palm organizer Security application to "Show".
- The Entries are outside the range defined in the Palm organizer CS Setup.
- Check the Entries and/or Tasks HotSync settings in the Palm organizer CS Setup. Select the desired options and HotSync again.

What happens to an Entry that has been modified in both the calendar application and the Palm organizer when I perform a HotSync?

• When a HotSync is done and the Custom menu setting for the calendar application is "Synchronize the files", the Entry is duplicated (for more information about the duplication, open the HotSync Log). Simply delete the unwanted Entry (either on your Palm organizer or in the calendar application) and HotSync again.

I changed a timed Event into an untimed Event (or vice versa) in my Palm organizer but the change was lost when I performed a HotSync.

The calendar application does not support this kind of change. You must delete the Event and then create a new one for the calendar application to recognize it after the next HotSync.

I created an untitled Event using the Palm organizer but I cannot find it.

It was never created. Unless a Note or a Location (entered in the Palm organizer using parentheses on the time line) is included with an untitled Event, the Event will not be created.

I keep getting multiple copies of my Entries.

- If you modified an Entry in both the Palm organizer and the calendar application, Entries will be duplicated when you do a HotSync and the calendar application Events setting in the Custom menu is "Synchronize the files". Simply delete the unwanted Entry (either on your Palm organizer or in the calendar application) and HotSync again.
- This will happen when you synchronize your Palm organizer to your off-line Agenda and then reconcile your off-line Agenda with your on-line Agenda before synchronizing your Palm organizer and the on-line Agenda. See Appendix A for more information.
- If a HotSync stops with an unexpected error, power loss, etc., it is possible that some Entries will be duplicated the next time you HotSync.

Changes I made to an Entry in my Palm organizer were not transferred to the calendar application.

- If it was an instance from a series of repeating Events, it will never be transferred to the calendar application. the calendar application only modifies the original Event.
- Change the calendar application setting in the Custom menu to "Synchronize the files".

When I modify a repeating Event on my organizer that was created in the calendar application, some changes are applied to all instances, while others only to the modified instance.

 The Title, Location, Times and Reminder will only change in the instance you modify. Deleting an Event on the Palm organizer only deletes that one instance. To change these settings for all instances at once, you have to use the calendar application. Notes and Access Levels will be modified for all instances of the Event.

I am having trouble with repeating Events created on my Palm organizer.

The Palm organizer and the calendar application handle repeating Entries differently:

- Currently, the only way to have repeating Events appear in both the calendar application and the Palm organizer is to schedule them in the calendar application and HotSync. If you need to schedule repeating Events using your Palm organizer, you have to create each instance separately for them to appear in the calendar application.
- If you created repeating Events in the Palm organizer and the Custom menu setting for the calendar application is "Synchronize the files", only the first one will appear in the calendar application. All instances will remain in the Palm organizer.
- If you delete the first repeating Event in the Palm organizer, only the original Event will
 remain on your Palm organizer if your HotSync setting for calendar application Entries
 is "Desktop overwrites the Palm organizer".
- If you delete the lone instance that was transferred to the calendar application, all
 instances of that Entry will be deleted if your HotSync setting for the calendar
 application Events is not "Do Nothing".

Events on my Palm organizer get rescheduled after I synchronize.

It is important that the time you enter on your Palm organizer corresponds to the calendar application time zone entered in your calendar application.

I want to delete all Events on my Palm organizer.

- Delete them manually or on an Entry-by-Entry basis.
- Set a time range in your Palm organizer's CS Setup where no Entries exist and synchronize with the calendar application HotSync settings set to "Desktop overwrites handheld"
- Perform a hard reset. *Warning*: Do this only if you want to delete Events from all
 user-installed applications on the Palm organizer, along with all information you have
 entered. Consult the Palm organizer Handbook for more information.

I want to tell my Palm organizer what Address Book Entry address to keep

If you only have either the Business or Personal address entered in your calendar application Address Book, it will choose that one by default. If both addresses are entered, the Default address value selected in the Palm organizer CS Setup is used.

How does my Palm organizer deal with my Address Book Entry phone numbers?

Your Palm organizer tries to recognize phone numbers as best as it can. If it cannot find a valid international phone number combination, everything is entered in the calendar application phone number field. A blank space, dash or period can separate parts of the number. An x or # can be used to identify extensions. The following are examples of valid phone number combinations:

Valid phone number combinations	
555-5555	
555 5555	
(555) 555-5555	
55 (555) 555-5555	
555-555 #555	
55.55.55.55	
55-55-55	
555-55-55	
55 55 55 55x555	

There is an extra x or # beside some phone extension numbers on my Palm organizer.

You probably entered the extra character in your calendar application Address Book. Open the Address Book and delete the extra character manually from the Extension edit box. The next time you HotSync the extra character will be gone.

Other Problems

There is not enough space to enter my user name and organization units.

It is long enough; the typing simply scrolls off-screen. To view all the characters on screen at once, open the Keyboard (CS Setup > Edit menu > Keyboard) and type the information there.

My Palm organizer keeps freezing up.

Do a soft reset by gently pressing the reset button with the tip of a paper clip.

Every time I try to HotSync, I get an insufficient disk space error.

You must free up more space on your Macintosh's hard drive. It is recommended that users have at least 5MB of hard disk space available.

How do I delete CS Setup from my Palm organizer?

- 1. Select Memory from the Palm organizer menu.
- 2. Choose Delete apps.
- **3.** Select CS Setup and tap Delete.
- 4. Tap Yes to delete.

Synchronization

Synchronizing Your Palm Organizer With Your Offline Agenda

- 1. Synchronize the Palm organizer with your off-line Agenda. Agenda Entries are titled "A" on both.
- 2. Upload your offline Agenda information to the calendar server.
- **3.** Synchronize your Palm organizer with your off-line Agenda. Set the Ctime Custom Action to Desktop Overwrites Palmtop. The Entry titled "A" now exists on both and has a Ctime Event ID.

Why you might end up with duplicate Entries

- 1. When you synchronize the Palm organizer with your offline Agenda, Agenda Entries are titled "A" on both.
- 2. When you upload the data to the server, the server assigns Event ID "X" to "A".
- **3.** The next time you synchronize your on-line Agenda with the Palm organizer, you will end up with two Entries called "A". This is because the server does not recognize that the Entry with ID "X" is actually the same as the Palm organizer Entry titled "A".

Synchronizing your Palm organizer with your online and offline Agenda

- 1. Create your meetings, address book entries or tasks using your Palm.
- 2. Then, synchronize your Palm organizer with your off-line Agenda.
- **3.** Log on to CorporateTime.

- **4.** On the Options menu, select off-line, select Download and click Do not download. Then, click OK.
- 5. When CorporateTime prompts Would you like to update the host Agenda?, click Yes.
- 6. On the File menu, click Download To local file.
- **7.** Then, click OK when you are prompted Your are about to start downloading your agenda, would you like to continue?
- 8. Open HotSync Manager, and select Custom.
- **9.** Click CorporateTime Addresses, select Change and then click Desktop overwrites handheld. Select the Set as default check box. Then, click OK. Now repeat step 8, for your CorporateTime Events and CorporateTime Tasks. Click Done when you are finished.
- 10. Now synchronize your Agenda on-line.
- Then, change your CorporateTime Addresses, CorporateTime Events and CorporateTime Tasks to Synchronize the files. Then select the Set as default check box.

Note: To avoid creating duplicate entries, we recommend synchronizing your Palm with your online and offline Agenda after creating new Meetings, Address Book entries or Tasks on your Palm.

Field Mapping

This section describes the conversions that occur when transferring data between the calendar application and your Palm organizer's Date Book, Address Book and To Do List. Apart from the special conversion rules that apply to specific fields, some general rules apply:

- Text fields are cut to the maximum allowed length on the destination platform
- Dates that are not within the representable range of dates on the destination platform will get changed to the nearest representable date
- Details from the calendar application are truncated to the "maximum note size" before being sent to a Palm organizer note

If the user changes a field on the Palm organizer which he or she does not have the right to change in the calendar application (e.g. changing the time of an Event the user does not own), the change is rejected and the affected field is copied from the calendar application back onto the Palm organizer.

Entries

The following table shows how calendar application Entries are converted to Palm organizer Date Book items and vice versa.

 Table 6–1
 Calendar Application Entries and Palm Organizer Date Book Items

Calendar Server Field	Palm Field	Notes
Title	Description	

Calendar Server Field	Palm Field	Notes
Location	Description	If the "Show Location" flag is set, the calendar server Entry's location is enclosed in parentheses and appended to the Palm Event's description, after its calendar server title. If the flag is not set, the calendar server Entry's location is ignored.
Detail	Note	If the calendar server Entry is a Meeting, then its detail is copied to the Palm Event's note. If it is a Day Event or Daily Note, it is ignored. Also, if the "Show Location" flag is set and there is more than one attendee or its sole attendee is not the login user, then a textual list of attendee names is created and added to the Palm Event's note (which may or may not have been copied from the calendar server Entry's detail, depending on the Event's class).
Start Time	Date/Start Time	The calendar server Entry's start time is split into two parts: the date and the time-of-day on that date. The date is always placed into the Palm Event's date field. If the calendar server Entry is a Meeting, then the time-of-day is placed into the Palm Event's start time. If the calendar server Entry is anything besides a Meeting (e.g. Day Event, Daily Note, Holiday), the Palm Event becomes an untimed Event.
Duration	End Time	If the calendar server Entry is a Meeting, then its duration is added to its start time's time-of-day, and the result placed in the Palm Event's end time. The Palm does not allow Events to cross day boundaries. If that happens, the Event is truncated to end at midnight before being copied to the Palm (this does not affect the calendar server Entry).

Table 6–1 (Cont.) Calendar Application Entries and Palm Organizer Date Book Items

Calendar Server Field	Palm Field	Notes
Reminder	Alarm	If the calendar server Entry does not have a reminder, the Palm Event does not get one either and the calendar server Entry's reminder length is checked. If it is a multiple of 1440 (the number of minutes in a day) or is greater than 7620 (the number of minutes in 127 hours), the Palm Event's alarm unit field is set to "Days". If it is a multiple of 60 or is greater than 127, the Palm Event's alarm unit field is set to "Hours" and the Palm Event's alarm unit field is set to "Minutes". The calendar server Entry's reminder length is then converted into the proper units. If the resulting number is greater than 127, it is changed to 127. This number is used in the Palm Event's alarm amount field.
Access Level	Private Flag	If the calendar server Access level is Personal, the Palm Task's private flag is turned on. If the Access level is anything else, the Palm Task's private flag is turned off.
	Repeat	Repeating Entries on the calendar server are always copied as individual instances, so this field is set to "No Repeat".

Table 6–1 (Cont.) Calendar Application Entries and Palm Organizer Date Book Items

Tasks

The following table shows how calendar application Tasks are converted to To Do items on the Palm organizer and vice versa.

 Table 6–2
 Calendar Server Tasks and Palm Organizer To Do Items

Calendar Server			
Field	Palm Field	Notes	
Description	Description		
Detail	Note		

Calendar Server Field	Palm Field	Notes
Priority	Priority	If the calendar server priority is between 1 and 5, it maps to the same priority on the Palm. If the calendar server priority is anything else, it maps to priority 5 on the Palm.
Completion Level	Completed Flag	A calendar server completion level of 100% level flag maps to the Palm's completed flag being turned on. Any other completion level, the completed flag is turned off.
Access Level	Private Flag	If the calendar server Access level is Personal, the Palm Task's private flag is turned on. If the Access level is anything else, the Palm Task's private flag is turned off.
	Category	The To Do gets the default ("Unfiled") category.

Table 6–2 (Cont.) Calendar Server Tasks and Palm Organizer To Do Items

Address Book Entries

Address book Entries in the calendar application are categorized as business Entries and personal Entries on your Palm organizer. If a the calendar application Entry has a business address only (i.e. no home address), that Entry is considered a business Entry. Conversely, if the Entry has a home address only, it is considered a personal Entry. If an Entry has both addresses, its category is taken from the "Default" value in CS Setup. Finally, if an Entry does not have any addresses, it is considered an "unknown" Entry.

The following table shows how a calendar application Address Book Entry is converted to a Palm organizer address and vice versa.

Calendar Server Field	Palm Field	Notes
	Category	Business Entries in the calendar application are placed in the "Business" category. Personal Entries in the calendar application are placed in the "Personal" category. Unknown Entries are placed in the "Unfiled" category.
Last Name	Last Name	
First Name	First Name	
Assistant Phone	N/A	
Business 1	A Phone field	See below
Business 2	A Phone field	See below
Fax 1	A Phone field	See below
Fax 2	A Phone field	See below
Home 1	A Phone field	See below
Home 2	A Phone field	See below
Mobile 1	A Phone field	See below
Mobile 2	A Phone field	See below
Page	A Phone field	See below
E-mail 1	A Phone field	See below
E-mail 2	A Phone field	See below
Street	Address	Business or home address, depending on Entry category.
City	City	Business or home address, depending on Entry category.
Prov/State	State	Business or home address, depending on Entry category.
Zip Code	Zip Code	Business or home address, depending on Entry category.

Table 6–3Calendar Application Address Book Entries and Palm OrganizerAddresses

Calendar Server Field	Palm Field	Notes
Country	Country	Business or home address, depending on Entry category.
Relationship	N/A	
Title	Title	
Company	Company	
Department	N/A	
Office	N/A	
Assistant	N/A	
Industry Type	N/A	
Account #	N/A	
Birthday	N/A	
Anniversary	N/A	
Custom Date 1	N/A	
Custom Date 2	N/A	
Nickname	N/A	
Spouse	N/A	
Personal Notes	N/A	
User 1	Custom 1	
User 2	Custom 2	
User 3	Custom 3	
User 4	Custom 4	
Notes	Note	
	Private Flag	Ignored. The calendar application currently does not support security on a per-address basis.

 Table 6–3 (Cont.) Calendar Application Address Book Entries and Palm Organizer

 Addresses

Telephone fields on the Palm organizer are allocated according to a fixed order. For each telephone number present in the calendar application Entry, a telephone field on the Palm organizer is allocated (up to a maximum to five) and given a corresponding label.

For business and personal Entries, the order of allocation is as follows:

Calendar Application Telephone #	Palm Label	
Business1	Work	
Home 1	Home	
Fax 1	Fax	
E-mail 1	E-mail	
Mobile 1	Mobile	
Pager	Pager	
Business 2	Work	
Home 2	Home	
Fax 2	Fax	
E-mail 2	E-mail	
Mobile 2	Mobile	

 Table 6–4
 Palm Organizer Business and Personal Entries

Palm organizer telephone numbers are transferred to the calendar application depending on (1) their position and (2) their label. For example, the second telephone with a label of "Mobile" will end up in the "Mobile 2" field in the calendar application. The complete list of possibilities is as follows:

1st Occurrence on Palm	Maps To	
Work	Business 1	
Home	Home 1	
Fax	Fax 1	
Other	N/A	
E-mail	E-mail 1	

Table 6–5How Palm Organizer Telephone Numbers Transfer to the CalendarApplication

1st Occurrence on Palm	Maps To	
Main	N/A	
Pager	Pager	
Mobile	Mobile 1	

 Table 6–5 (Cont.) How Palm Organizer Telephone Numbers Transfer to the Calendar

 Application

Table 6–6	How Palm Organizer	Telephone Numbers	Transfer to the C	Calendar
Application				

2nd Occurrence on Palm	Maps To
Work	Business 2
Home	Home 2
Fax	Fax 2
Other	N/A
E-mail	E-mail 2
Main	N/A
Pager	N/A
Mobile	Mobile 2