PocketMirror Software
User Manual

Chapura®

www.chapura.com

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Chapter 1 – PocketMirror Overview

About PocketMirror

PocketMirror is an application that runs on your personal computer to synchronize data between your handheld and Microsoft Outlook. PocketMirror synchronizes Microsoft Outlook's Contacts, Calendar, Tasks, and Notes folders with your handheld Address Book, Date Book, To Do List, and Memo Pad. The user interface for PocketMirror is called Chapura Settings. With Chapura Settings, you can manage your user accounts including adding, deleting, and renaming handheld users. Chapura Settings also allows you to change the way PocketMirror synchronizes your data.

About Chapura Settings

Chapura Settings is the user interface program for the Chapura conduit products PocketMirror and PocketJournal®. The Chapura Settings program allows you to add, delete, and rename user accounts. Chapura Settings is also used to modify the synchronization settings for each user account. There is one user account per handheld device that synchronizes on a PC. The user account name is identical to the handheld user name. It is not necessarily assigned the same as the Outlook profile name.

To get to the "Chapura Settings" screen, go to "Start/Programs/PocketMirror/PocketMirror Settings" or click on the following PocketMirror icon which is placed on the Outlook toolbar during installation.

The following screen is then displayed and allows you to create a new user name, change synchronization settings, delete a user name, rename a user name, view version information about Chapura Settings, and go to the Chapura Settings Help file.
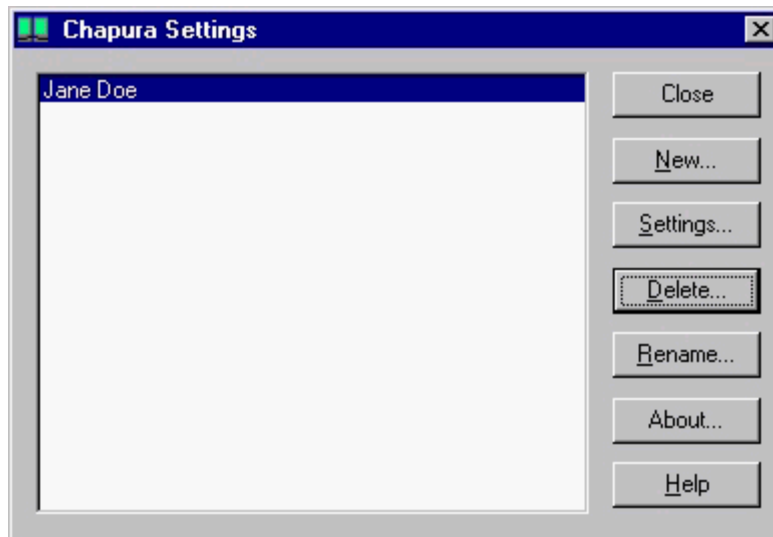
About HotSync Manager

The HotSync Manager is a Palm, Inc. product that controls the communication between your PC and your handheld. The HotSync Manager is provided with your handheld and MUST be installed properly prior to the installation and use of PocketMirror. PocketMirror is compatible with HotSync Manager version 2.x and higher.

To access HotSync Manager, click on the circular blue and red arrow.

The following pop up screen is displayed. The HotSync Manager also has its own help file that can be accessed by opening the HotSync Manager and selecting "Help" from the menu bar.
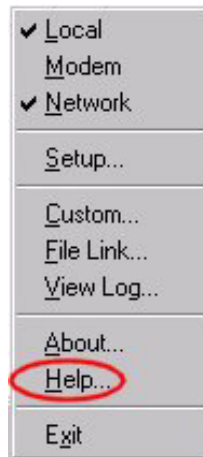
Click on "View Log" in the above pop up screen to view your last synchronization information.

New Features

<u>**PocketMirror 3.1**</u>

- Synchronization with multiple and/or public folders while in "Single Folder" mode (Professional Only)
- Synchronization of calendar categories using the Chapura Calendar (Professional Only)

<u>**PocketMirror 3.0**</u>

- Subfolder category mapping (Professional Only)
- Multiple and/or public folders synchronization (Professional Only)
- Category filtering in subfolder, user-defined field, and mapped modes (Professional Only)
- Category can be kept on the handheld only. (Professional Only)
- The ability to select and change the Outlook root folder (Professional Only)

- ▪ Conflict Resolution can be selected. A conflict occurs when the same item has been modified on both the handheld and in Outlook. (Professional Only)

- ▪ Appointments with attendees (meetings) in Outlook can be flagged on the handheld. (Standard and Professional)

- ▪ Keep Alarms/reminders settings on the handheld only, in Outlook only, or both. (Professional Only)

- ▪ The full e-mail address can be transferred to the handheld instead of the "Display Name". (Standard and Professional)

- ▪ The ability to filter completed tasks (Professional Only)

- ▪ The ability to filter tasks assigned to others (Professional Only)

- ▪ Task priorities can be transferred to Outlook using the Outlook "Priority" field or by using the user-defined field, "Palm Priority". (Professional Only)

- ▪ New Notes created in Outlook by PocketMirror can be identified by selecting a color option. (Professional Only)

- ▪ For a comparison of PocketMirror Standard and PocketMirror Professional features, see the topic, PocketMirror Versions Comparison.

PocketMirror Versions Comparison

FEATURES	PRO	STD	2.0
Supports Subfolder Categories	Yes	No	No
Filter by Outlook Categories	Yes	No	No
Conflicts can be Resolved when the same item has been modified on both the handheld and in Outlook	Yes	No	No
Option to select a different Outlook root folder	Yes	No	No
Alarm/reminder setting can be transferred to and from the handheld and Outlook	Yes	No	No
An Outlook Contact Address can be selected to transfer to the handheld	Yes	No	No
Completed Tasks can be filtered	Yes	No	No
Tasks assigned to others can be filtered	Yes	No	No
Task priorities can be transferred by Outlook "Priority" field or by the user-defined field, "PalmPriority"	Yes	No	No
New Notes can be identified by using a color option	Yes	No	No
Ability to save items in an Archive file in Outlook	Yes	Yes	No
Appointments with attendees in Outlook can be flagged on the handheld (Meetings)	Yes	Yes	No
Full e-mail addresses can be transferred to the handheld instead of the display name	Yes	Yes	No
Correctly synchronizes Multi-day Appointments	Yes	Yes	Yes
Supports synchronization of multiple handhelds to the same Outlook profile	Yes	Yes	Yes
Quick HotSync Setting change for all conduits	Yes	Yes	Yes
Synchronizes all handheld Phone Numbers	Yes	Yes	Yes

FEATURES	PRO	STD	2.0
Option to Backup handheld data to PalmPilot desktop	Yes	Yes	Yes
Option to Restore handheld data to PalmPilot desktop	Yes	Yes	Yes
Ability to synchronize Private Items	Yes	Yes	Yes
Option to enable Journaling for new Contacts	Yes	Yes	Yes
Option to set Task Start Date to handheld Due Date	Yes	Yes	Yes
More than one address can be transferred using Custom Field Mapping	Yes	Yes	Yes

PocketMirror Versions Warning

If you have been synchronizing using PocketMirror Professional and decide to synchronize using PocketMirror Standard, you will lose the PocketMirror Professional features and settings. For example, you will lose your category links, conflict resolution, and outlook root folder settings.

Backing Up Your Outlook Data

Outlook 98 and higher

Determine if you are using Personal Folders or Microsoft Exchange Server for your default folders by displaying the "Folder List" view in Outlook. To display the Folder List view, click "View/Folder List" from the Outlook tool bar. Once in this view, right click on the "Outlook Today" folder, select "Properties", and click on the "Advanced" button. This will bring up a dialog box for either Personal Folders or Microsoft Exchange Server.

If you have Personal Folders, you can simply make a copy of your Personal Folder File (PST). The path to your PST will be displayed in the Properties Dialog Box.

If you have Microsoft Exchange Server, you will need to use the "Export option". To use the Export function of Outlook to export a copy of your Calendar, Contacts, Tasks, and Notes to a backup "Personal Folder" file:

1. Select "File/Import and Export" on the Outlook tool bar menu. The Import and Export Wizard is displayed.

2. Select "Export to a file", click on "Next".

3. Select "Personal Folder File (.pst)".

The wizard will take you through the rest of the procedure. Your Exchange Server Administrator probably makes regular backups of your data.

Outlook 97

Export items to a file or to a personal folder file.

1. On the File menu, click "Import and Export".

2. Click "Export to a file or Export to a personal folder file".

3. Follow the instructions in the Import and Export Wizard.

Backup and Restore to Palm Desktop

The Backup and Restore options are designed to allow for periodic data transfer to and from the Palm Desktop database.

If you choose "Backup to Palm Desktop" as your HotSync Action On Next Synchronization for any or all of the conduits, PocketMirror will read all the data out of the handheld and write it into the Palm Desktop database. (See HotSync Action.) This will not be a synchronization, but a complete copy (backup) of your handheld data into the Palm Desktop. All data in the Palm Desktop database prior to the Backup will be overwritten. This feature can be used periodically as a backup of your handheld data to a location other than Outlook for safe keeping.

If you choose "Restore from Palm Desktop" as your HotSync Action On Next Synchronization for any or all of the conduits, PocketMirror will read all the data out of the Palm Desktop database and write it into your handheld. This will not be a synchronization, but a complete overwrite of the data in your handheld with the data in the handheld Palm Desktop. **This feature should only be used if your handheld and Outlook data has been lost or damaged.** The restore feature will delete any data that was in the handheld prior to the operation. Unless you choose otherwise, a synchronization following a restore will be a Recovery Synchronization and could result in duplication.

E-mail and Expense Conduits

The E-mail and Expense conduits used to synchronize your handheld with Outlook e-mail and Excel are shipped by your handheld provider and are not included in the PocketMirror distribution. In order to use these conduits, you must install the Desktop software that came with your handheld BEFORE installing PocketMirror. If you have difficulty with these conduits, please contact your handheld supplier.

Chapter 2 – Installing Your PocketMirror Software

Installation Notes

If you have an original Pilot (1000, 5000, or 1MB upgrade) and are using Pilot Desktop 1.0, you need to uninstall Pilot Desktop 1.0 and upgrade to the latest Palm Desktop before installing PocketMirror. The Palm Desktop 2.x and 3.x software is available as a free download on Palm's support download page (www.palm.com).

You must install the Palm Desktop 2.0 or higher software BEFORE installing PocketMirror. We recommend synchronizing with the Palm Desktop before installing PocketMirror to insure the HotSync Manager is functioning properly.

System Requirements

In order to install and use PocketMirror software, your computer system and handheld device must meet the following minimum requirements:

- Palm Desktop Software 2.0
- Handheld device using the Palm OS 3.0
- Microsoft Outlook 97
- Windows 95, Windows NT 4.0
- Windows®- compatible personal computer
- 16MB RAM (32 recommended)
- 5MB disk space

Installation instructions

1. Insert the PocketMirror CD-ROM into the computer's CD-ROM drive, or click on the download link.

2. On the Welcome screen, click *Next*.

3. Review the License agreement and click *Yes* to continue.

4. On the Choose Destination Location screen, click *Next*. If you wish to install PocketMirror into a different folder, click the *Browse* button and select the desired folder, and click *Next*.

5. On the Select Program Folder screen, click *Next*. To use a different program folder name, enter the name of your choice into the space provided and click *Next*. The program folder name is the name that appears in Start | Programs.

6. The next screen, Select Handheld User, lets you choose the user name(s) of the handheld device on which you want to add the Chapura Calendar application. If you do not want to add the PocketMirror Calendar application to a handheld device, leave all boxes unchecked. The Chapura Calendar provides you with the ability to view multiple calendars on a single handheld device.

7. Click *Next*.

8. Click *Next* again.

9. The last screen announces the installation of PocketMirror is complete and gives you the option to view the Your First Synchronization Help topic and/or the readme file.

10. Click *Finish*.

NOTE: See "Your First Synchronization" in *Chapter 3 - Getting Started*, for more information.

Chapter 3 – Getting Started

PocketMirror Readme

Please review the readme file before using PocketMirror for current, updated information. The readme file is placed in your PocketMirror default directory (C:\Program Files\Chapura\PocketMirror\Readme.txt) unless you specified a different path during installation.

Your First Synchronization

The first time you synchronize the data between your handheld and Outlook is different from a regular synchronization because there is no history for PocketMirror to use as a guide during the process. You need to select whether PocketMirror should synchronize Outlook and the handheld, have Outlook overwrite the handheld, or have the handheld overwrite Outlook. The default is to synchronize the two. If you choose "synchronize" for your first synchronization, all handheld items will be added to Outlook if no match can be found, and all Outlook items will be added to your handheld if no match can be found. Note: If you have extensive duplicate records between your handheld and Outlook, you might want to consider an option other than synchronize.

If you have a substantial amount of information in Outlook, we recommend that you back up your Outlook information BEFORE your first synchronization.

We recommend leaving the default synchronization setting on "Synchronize". This will keep PocketMirror from deleting data from either Outlook or your handheld. You may have more duplicate items than you want when you are done, but all of your data will be protected. **This is recommended for most users.**

<u>Creating New Items in Your Handheld from Outlook</u>

You can go to your synchronization preferences in Chapura Settings and select "Outlook overwrites Handheld" for each of the four applications. Use this setting only if you want to delete all the items from your handheld and create new items in your handheld from Outlook. To do this:

1. Go to "Start/Programs/PocketMirror".
2. Click on "PocketMirror Settings".
3. In Chapura Settings, click on your user name and select "Settings".
4. Select the applications (one at a time) and click on "Change".
5. Select "HotSync Action" from the Topics.
6. Select "Outlook overwrites Handheld" for each of the four applications.

During synchronization, these settings will erase your handheld items and copy your Outlook items into the handheld. All subsequent synchronizations should be set to "Synchronize".

<u>**Creating New Items in Outlook from Your Handheld**</u>

You can go to your synchronization preferences in Chapura Settings and select "Handheld overwrites Outlook" for each of the four applications. Use this setting only if you want to delete all the items from Outlook and create new items in Outlook from your handheld. To do this:

1. Go to "Start/Programs/PocketMirror".

2. Click on "PocketMirror Settings".

3. In Chapura Settings, click on your user name and select "Settings".

4. Select the applications (one at a time) and click on "Change".

5. Select "HotSync Action" from the Topics.

6. Select "Handheld overwrites Outlook" for each of the four applications.

During synchronization, these settings will erase your Outlook items and copy your handheld items into Outlook. All subsequent synchronizations should be set to "Synchronize".

Chapter 4 – Synchronization Settings

Changing Synchronization Preferences

The synchronization settings in Chapura Settings control the way PocketMirror conducts the synchronization process. Synchronization settings can be controlled separately for each application. The four applications that PocketMirror synchronizes are the handheld's Date Book, Address, To Do List, and Memo Pad categories. To change the synchronization settings for a user:

1. Go to "Start/Programs/PocketMirror".

2. Click on "PocketMirror Settings".

3. Click on your user name and select "Settings".

This will take you to the "Change Synchronization Preferences" screen where you can select separate synchronization settings for each application or a "Quick one-time action setup" for all applications. To change a setting, click on the application you want to change. This will highlight the selected application. Next, click on the "Change" button.
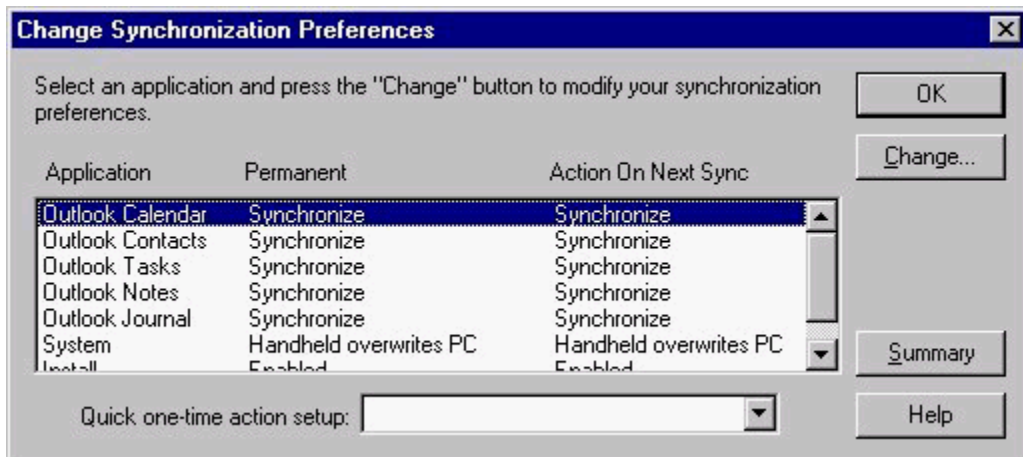
The "Permanent" (or default) synchronization action is how PocketMirror will conduct the synchronization unless you have set the "Action On Next Sync" to override the "Permanent" action. We recommend leaving the "Permanent" action set to "Synchronize".

The "Action on Next Sync" is a one-time synchronization action that will be executed once and then will be reset to your "Permanent" action. You might use "Install Applications Only" located in the "Quick one-time action setup" drop down list if you want to do a quick install of a Palm application and do not want to synchronize the rest of your data one time.

From the "Change Synchronization Preferences" screen, you can also view a summary of your last synchronization settings by clicking on the "Summary" button.

Conduit's Settings Summary

The "Chapura Conduit's Settings Summary" screen displays user information about your last synchronization. This summary screen has been developed as a way to quickly display all the synchronization settings associated with your user account. This information will assist our technical support team in the event you have questions or difficulty with your synchronizations. It also allows you to e-mail your questions and information to our technical support team.

```
Chapura Conduit's Settings Summary

Find: [                                    ] [▼]

User Information                                          [▲]
  Username:                 Jane Doe
  Directory:                C:\Palm\DoeJ\
=============================================================
/* BEGIN HOTSYNC.LOG FILE *************************************
Hotsync.log file could not be opened.
The following error was returned:
File Not Found
NOTE: This is not an error if you have never synchronized before.
** END HOTSYNC.LOG FILE **************************************
=============================================================
Application List
  Title:                    Chapura Settings
    Version:                  1.0.4
  Title:                    Outlook Calendar
    Version:                  3.0 Pro Beta
    Creator ID:               date
    Dll:                      C:\PROGRA~1\Chapura\POCKET~1\DbMirro  [▼]
[◄]                                                        [►]

[  OK  ]                      [ Copy ]          [ E-Mail ]
```

Synchronization Types

There are six synchronization types; Fast, Slow, Handheld Overwrites PC, PC Overwrites Handheld, Recovery, and Update.

A **Fast Synchronization** is the standard transfer of data between your handheld and Outlook.

A **Slow Synchronization** occurs when the handheld has been synchronized at another machine or with the Palm Desktop between synchronizations. A Slow Synchronization also occurs when you have set an application to "Do Nothing", synchronize, and then set it back to "Synchronize":

When a **Handheld Overwrites PC Synchronization** occurs, Outlook items are moved to the Deleted Items folder.

When a **PC Overwrites Handheld Synchronization** occurs, deleted items are saved in an archive folder in the Palm Desktop.

A **Recovery Synchronization** happens if an error occurred during the previous synchronization or if it is the very first synchronization of your handheld with Outlook. Each handheld item is read and compared to all Outlook items to find a match. If a match is found, these items are mapped together. If no match is found, the handheld item is added to Outlook. After all handheld items have been read and compared, any Outlook items left that did not match a handheld item are added to the handheld.

The usual cause of duplication during a recovery synchronization is when you have edited an item on one platform and not synchronized the changes.

An **Update Synchronization** is a new feature in PocketMirror. Updates are made according to the settings that changed.

Categories/Folders

The handheld applications are limited to fifteen different categories each and are also limited to one category for each item. In Outlook you can have an unlimited number of different categories and you can also have several categories for each item.

PocketMirror has three options for managing categories:

- Handheld category = Outlook's 'Categories' field,

- Handheld category = user-defined field 'PalmPilot Category', or

- Handheld category = Outlook subfolder (This Feature Available in Professional Version Only)

1. <u>**Handheld Category = Outlook's 'Categories' Field**</u>

If you choose "Handheld category = Outlook's 'Categories' field", PocketMirror will create the item in Outlook with a single category. PocketMirror transfers categorized handheld items to Outlook and fills in the "Categories" field for each Outlook item. (See the example below).

Set this option by:

1. Go to "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the user name you want to edit, and click the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click the "Change" button.

4. From the "Preferences Settings for Outlook..." screen select the topic "Categories/Folders", and select "Handheld category = Outlook's 'Categories' field".

5. Click on the "Advanced" button to synchronize multiple folders or public folders.

When a new item has been added to the handheld:

If the handheld category does not exist in Outlook, PocketMirror will create the category automatically and assign it to the new item. If the handheld category exists in Outlook, PocketMirror will simply use that category.

When an item's category is modified in the handheld:

PocketMirror will remove all categories assigned to that item in Outlook and replace them with the one from the handheld.
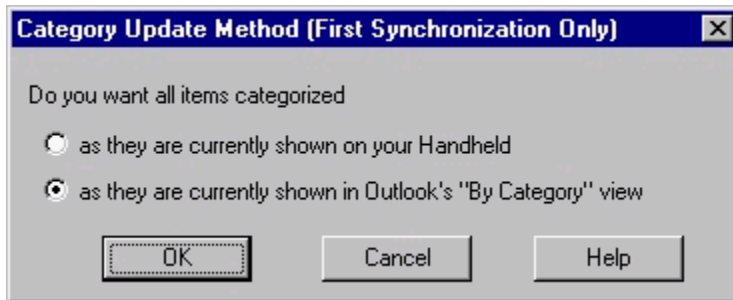
When a new item has been added to Outlook:

PocketMirror will create the item in the handheld with the first category for the new item. If there is only one category assigned to the new item, PocketMirror will determine if that category exists in the handheld. If the category exists, the handheld will assign the category to the new item. If the category does not exist, PocketMirror will create the category and assign it to the new item. If there are already fifteen categories in the handheld, PocketMirror will inform the user that it cannot create additional categories and place the new item in the Unfiled category.

When an item's category is modified in Outlook:

PocketMirror will replace the handheld category with the first category assigned to the Outlook item. The rest of the Outlook item's categories will not be modified.

When you choose "Handheld category = Outlook's 'Categories' field" the following screen will pop up and give you a choice of categorizing your items as they appear on your handheld or as they appear in Outlook's "By Category" view. NOTE: This setting only applies to the first synchronization. Subsequent synchronizations will accept changes made to categories or items within the categories both in Outlook and the handheld.
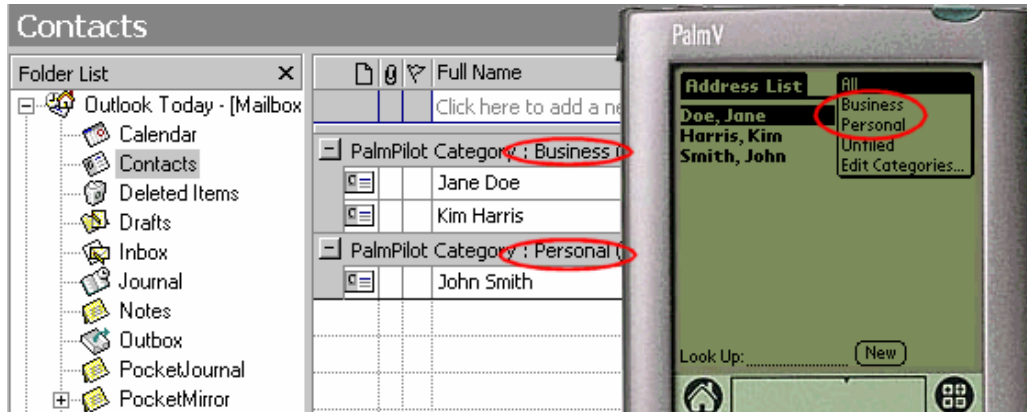

2. Handheld Category = User-defined Field 'PalmPilot Category'

If you choose "Handheld category = user-defined field 'PalmPilot Category'" your Outlook category fields will not be synchronized with the handheld category field. The handheld category will be synchronized with a user-defined field in Outlook called "PalmPilot Category". This will allow you to use the power of Outlook's category features without being limited by the 15 category restriction on the handheld. Set this option by:

1. Go to "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the user name you want to edit, and click the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click the "Change" button.
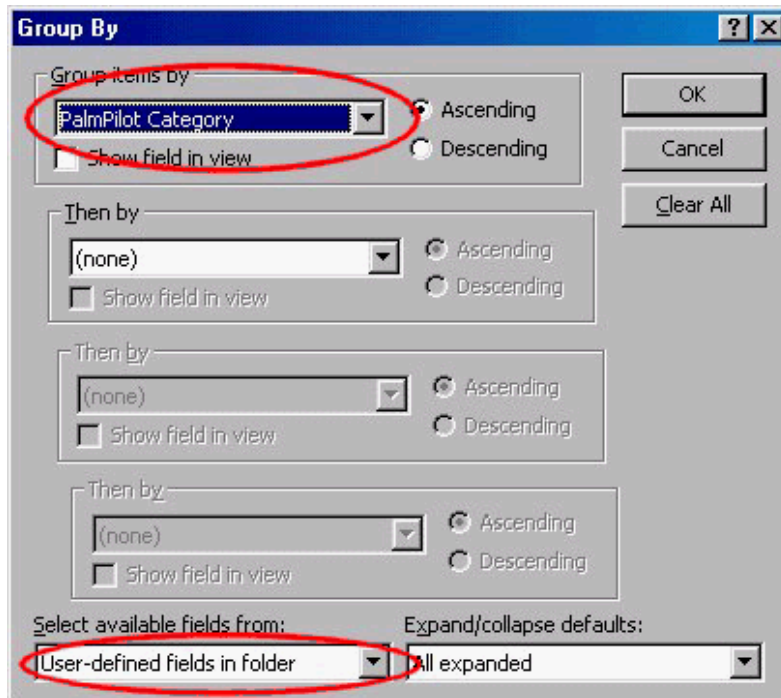
4. From the "Preferences Settings for Outlook..." screen select the topic "Categories/Folders", and select "Handheld category = user-defined field 'PalmPilot Category".

5. Click on the "Advanced" button to synchronize multiple folders or public folders.

To create the "PalmPilot Category" view:

1. Create at least one category on the handheld containing at least one item, and do at least one synchronization.

2. In Outlook, click on the folder where you want to create the view (e.g. Contacts).

3. Select "View/Current View/Define Views..." from the Outlook menu bar.

4. Click "New...". A "Create a New View" screen pops up. Type "PalmPilot Category" for the name of the view, and select "Table" for the "Type of View."

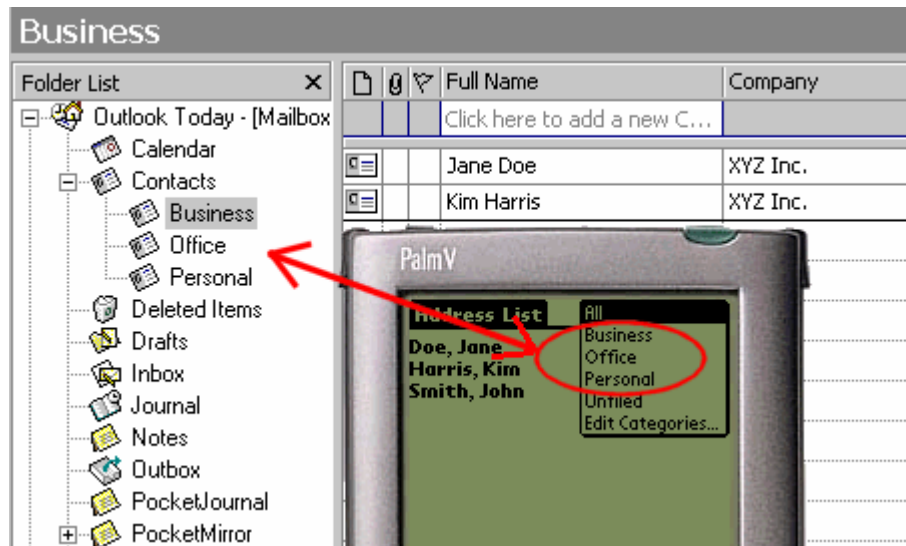5. Click "OK".

6. Click "Group By..."

7. At the bottom of the dialog, pull down the "Select available fields from:" combo box and pick the "User-defined fields in folder" item.

8. Pull down the "Group items by" combo box at the top of the dialog and select "PalmPilot Category".

9. Click "OK", "OK", then "Apply View".

This will allow you to view items grouped by handheld category.

3. Handheld category = Outlook subfolder This Feature Available in Professional Version Only

If you choose "Handheld category = Outlook subfolder", PocketMirror Professional will transfer handheld categories into Outlook subfolders and Outlook subfolders into handheld categories. This applies only to the first level of subfolders as shown in the picture below.   All subfolder names must be 15 characters or less. The total number of Outlook subfolders in addition to the number of handheld categories (that differ from the Outlook subfolder names) must not exceed 15 subfolders/categories.

To set this option:

1. Go to "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the user name you want to edit, and click the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click the "Change" button.

4. From the "Preferences Settings for Outlook..." screen select the topic "Categories/Folders", and select "Handheld category = Outlook subfolder".

When a new item has been added to the handheld with a category assigned to the item:

A new subfolder will be created in Outlook. This new subfolder will contain the items assigned to that handheld category. If the handheld category does not exist in Outlook, PocketMirror will create a subfolder for that category. Items which are Unfiled on the handheld will be transferred to the Outlook root folder.

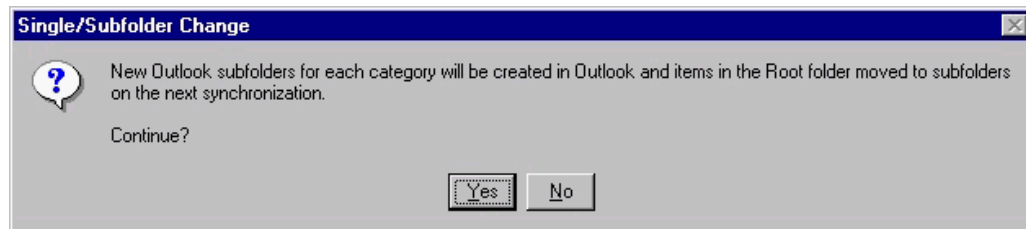**When an item's category is modified in the handheld:**

PocketMirror will move the item to the Outlook subfolder which corresponds to the handheld category.

When a new item has been added to an Outlook subfolder:

PocketMirror will create the item in the handheld with the subfolder from Outlook as the category for the new item. The Outlook subfolder must be 15 characters or less to be synchronized with the handheld. Otherwise, the synchronization will fail, and a message will be placed in the HotSync Log.

If the same item exists in more than one folder in Outlook, it will be transferred to the handheld with each Outlook folder as its category on the handheld.

If you choose Handheld category = Outlook subfolder, during synchronization your handheld categories will be transferred to Outlook as subfolders. The following dialog box appears to ensure you want to do this.

Conflict Resolution

This Feature Available in Professional Version Only

When the same item in Outlook and the handheld has been modified between synchronizations, PocketMirror Professional allows you to resolve the conflict in one of three ways: Duplicate records, Outlook wins, or Handheld wins.

You can choose to duplicate the records so no changes are lost (Duplicate Records), save the changes made in Outlook ONLY (Outlook Wins), or save the changes made on your handheld ONLY (Handheld Wins). This action is set through Chapura Settings and applies through the entire synchronization. This setting does not allow you to choose items individually during the synchronization process. Use the Conflict Resolution screen to set this option.

- Choosing "DUPLICATE records" causes PocketMirror to add a new item to Outlook with the information contained in the modified handheld item AND add a new item in your handheld with the modified Outlook data.

- Choosing "Outlook Wins" causes the modification in your handheld to be deleted and the Outlook modification to be written to your handheld.

- Choosing "Handheld Wins" causes the modification made in Outlook to be deleted and the handheld modification to be written to Outlook.

When you choose for Outlook or the handheld to "win", PocketMirror creates "Conflicts" subfolders for Calendar, Contacts, Tasks, and Notes under the PocketMirror folder in Outlook and places deleted information in these folders.

Exceptions

Only Applies to Outlook 97

Exceptions to recurring appointments occur when instances of a recurring appointment are deleted, moved, or otherwise modified in your Outlook Calendar. Outlook 97 does not readily provide access to the list of exceptions to recurring appointments. The only way for PocketMirror to detect that you have made an exception to one of your recurring appointments in Outlook 97 is to scan all your appointments in Outlook for some period into the future, determine which are exceptions, and write those exceptions into your handheld.

This procedure can slow down your synchronization considerably. You should therefore consider choosing as small a window as possible. Another approach is to set your exception window to zero and enter all exceptions to appointments in your handheld and not Outlook. During synchronization, all handheld exceptions are detected and written to Outlook regardless of the window size.

HotSync Action

There are five different HotSync actions for the "Permanent Action" and eight different actions for the "One-time Action of next HotSync". The different action types are: to "Synchronize", to have "Outlook overwrite Handheld", to have the "Handheld overwrite Outlook", to "Do Nothing", to "Sync once every x days", to "Backup to Palm Desktop", to "Restore from Palm Desktop", to "Backup Private Records", or to "Restore Private Records".

The "**Synchronize**" action is a full two-way process that will detect additions, modifications and deletions in the handheld and in Outlook and update the other side. Changes in your handheld get added to Outlook and changes to Outlook get added to your handheld. **This is the recommended action.**

The "**Outlook overwrites Handheld**" action will delete all items from the handheld. It will then copy all items from Outlook into the handheld.

The "**Handheld overwrites Outlook**" action will delete all items from Outlook. It will then copy all items from the handheld into Outlook. Your Outlook items will be moved to Outlook's Deleted Items folder.

The "**Do Nothing**" action will not perform any synchronization action.

The **"Sync once every x days"** action allows you to synchronize on a schedule. If you select this action as your permanent action, PocketMirror will first determine how long it has been since your last synchronization with this conduit. If it has been less than the number of days selected, PocketMirror will not synchronize this conduit. If it has been the number of days or more since your last synchronization, it will perform a normal synchronization. This action was added as a way to speed up your synchronization by only periodically synchronizing large databases (a lot of contacts for example) that do not change often.

The **"Backup to Palm Desktop"** action allows for a one-time backup of your handheld data into the Palm Desktop database.

The **"Restore from Palm Desktop"** action allows for a one-time restore of the Palm Desktop data into your handheld.

The **"Backup Private Records"** action allows for a one-time backup of private handheld records to the PC. This option will be disabled if you are not filtering private records.

The **"Restore Private Records"** action allows for a one-time restore of private handheld records from the PC. This option will be disabled if you are not filtering private records.

Location Delimiter

Location is a useful Outlook calendar field that does not exist in your handheld. PocketMirror adds the Location field of Outlook appointments to the end of the subject in the handheld, using parenthesis () delimiters by default. For example an appointment titled "Lunch" with a location of "ABC Cafe" would transfer to the handheld as "Lunch (ABC Cafe)". See the example below.

The location delimiter selection box allows you to change the delimiter to: ( ), [ ], { } or < >. This feature is now only cosmetic and no longer affects the Subject field text. In previous versions of PocketMirror, the delimiter you chose impacted the Subject field text.

If you chose < > as your delimiter, the handheld appointment would read "Lunch <ABC Cafe>".
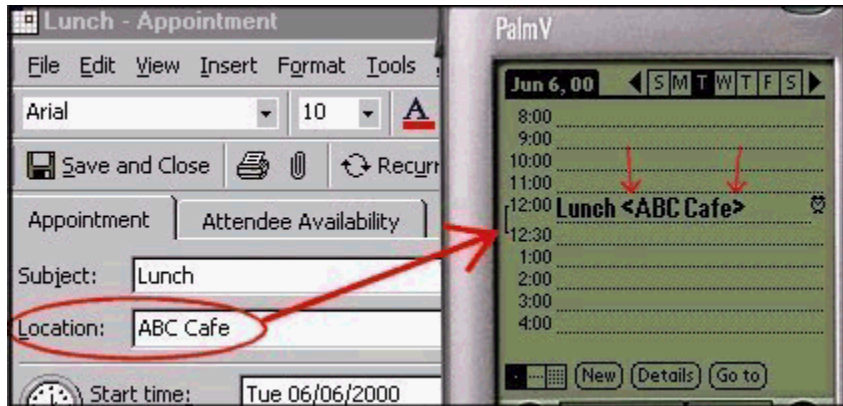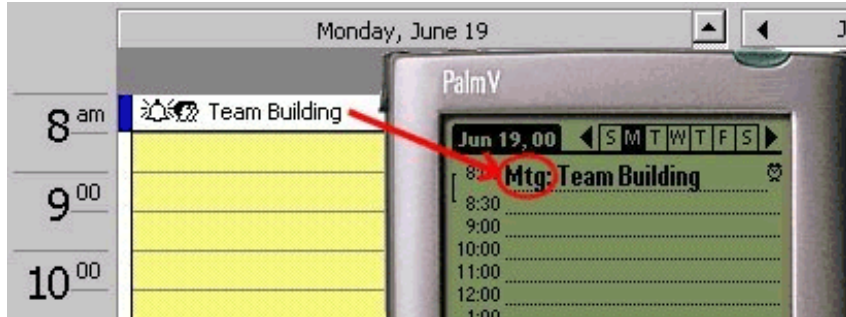

Meetings

PocketMirror can display Outlook meetings (appointments with attendees) with "Mtg:" added to the front of the corresponding handheld appointments. This flags you to make any changes to the recurring appointments in Outlook ONLY, so the attendee list of the meeting is not lost during the synchronization.

To change this PocketMirror option:

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the Calendar application and click on the "Change" button.

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" located on the left, choose the topic "Meetings".

There is no place in the handheld to store meeting attendees. If you make a change to one of these meetings in your handheld, the attendees will not be notified, and the attendee list will be deleted from Outlook. To prevent this from happening, activate the feature and make changes to these appointments in Outlook ONLY.

Multi-day Appointments

The handheld does not support multi-day appointments (appointments that span midnight). If the PocketMirror option is checked to "Split up timed, multi-day appointments" and if the appointment in Outlook is an untimed (all day event), multi-day appointment, PocketMirror will transfer the repeating appointments into your handheld and not change the Outlook record. If this option is unchecked, new timed, multi-day appointments will remain intact in Outlook and be displayed on the first day in the handheld.

To change this PocketMirror option:

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the Calendar application and click on the "Change" button.

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" located on the left, choose the topic "Multi-day Appointments".

If the appointment is timed (starts at 8a.m. on Monday and ends at 5p.m. on Thursday), in order to transfer those appointments to the handheld, PocketMirror can either split the appointment in Outlook into multiple handheld compatible appointments, or leave the appointment intact in Outlook and the appointment will only show on the beginning day on the handheld.

PocketMirror does not split up multi-day REPEATING appointments. These appointments must be manually split up in Outlook.

PocketMirror splits up timed multi-day appointments into individual appointments. For example, if a meeting starts at 8a.m. Monday and goes to 5p.m. Thursday, after the synchronization, you will have four appointments in Outlook and in the handheld (8a.m.-midnight on Monday, all day on Tuesday, all day on Wednesday, and midnight-5p.m. on Thursday).

If you uncheck "Split up timed, multi-day appointments", PocketMirror will leave multi-day appointments intact in Outlook and put a warning message in the HotSync log. The appointment will only appear on the beginning day in your handheld. In this example, there will be no indication in your handheld that you have an appointment on Tuesday, Wednesday, or Thursday. If you uncheck this option, you should put something in the description of the appointment to indicate its duration. Unchecking the box will preserve the banner look in Outlook.
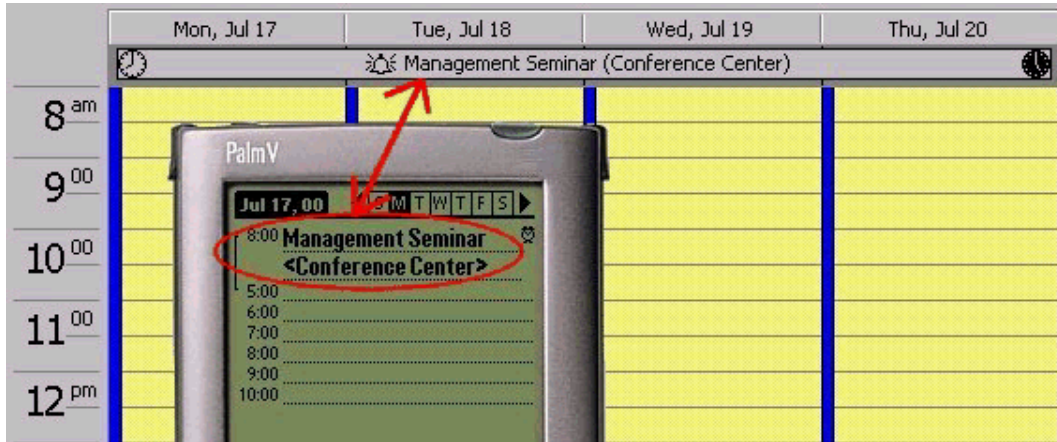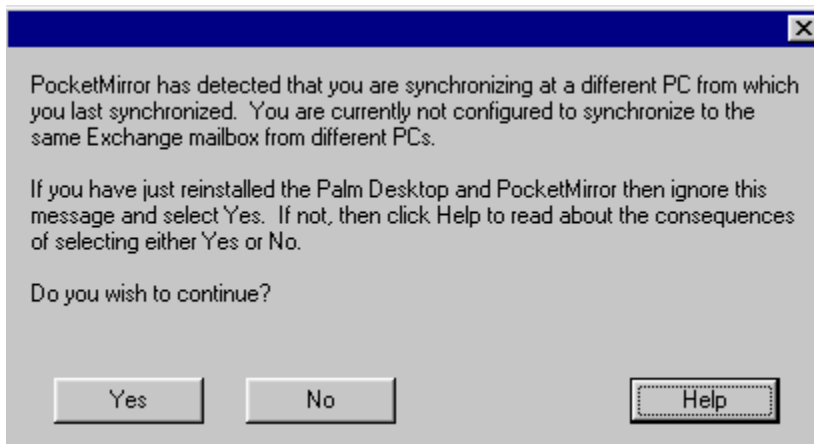

Multiple PCs

If you synchronize at more that one PC to the same Exchange mailbox, your data may be duplicated. Check the "Multiple PCs" option to keep your data from being duplicated. Performance will be slightly slower with this option chosen.

This option is not required if you synchronize at more than one PC that does not use the same Exchange mailbox.

<u>Multiple PC Warning</u>

If you do not synchronize at more than one PC to the same Exchange mailbox but have just reinstalled the Palm desktop and PocketMirror and synchronized, you will receive the following message. If this is the case, it is safe to continue the synchronization by clicking on "Yes".

If you have synchronized at more than one PC to the same Exchange mailbox, you will receive the above message and should perform the following steps:

1. Click the "No" button.

2. Synchronize at the PC you last synchronized with.

3. Go to the Multiple PC screen in "PocketMirror Settings", and check the option that you "Synchronize at more than one PC to the same Exchange mailbox".

4. Re-synchronize.

This will ensure your data is safely adjusted.

Offline Use

If you are using an Exchange Server and have a profile for offline use, you must enable the PocketMirror folder in Outlook for use in the offline profile. If there are any Archive or Conflict subfolders under the PocketMirror folder in Outlook, you will need to enable them for offline use also. You must be online in order to enable folders for offline use.
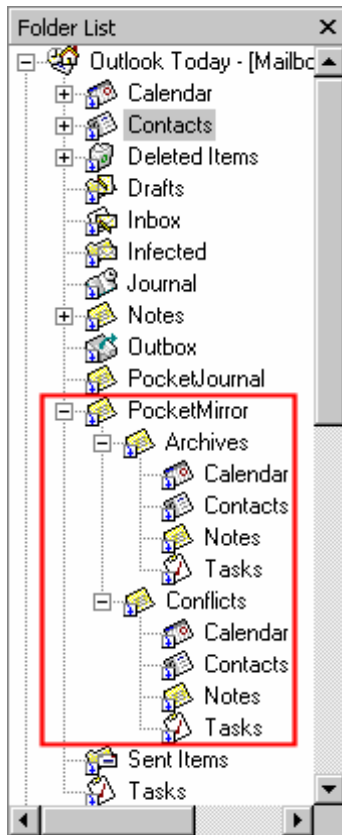
1. Start Outlook and connect to the Exchange Server (connect or online mode).

2. If you have not previously synchronized to this profile, do so now.

3. Display the folder list by selecting "View/Folder" List from the menu.

4. Right click on the "PocketMirror" folder and select "Properties".

5. Click on the "Synchronization" tab and make sure the "When online or offline" radio button is selected.

6. Click on the "OK" button.
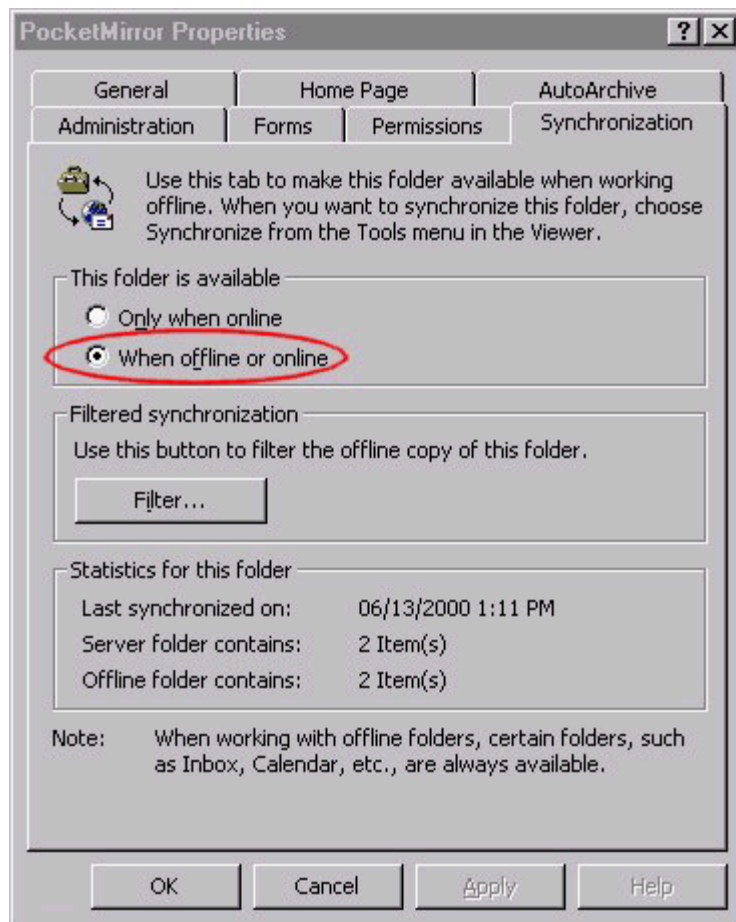
When you synchronize with both online and offline folders, we STRONGLY recommend that you configure Outlook to synchronize all folders when you exit. This will prevent you from synchronizing with an out of date set of offline folders. To set up the automatic synchronization, follow these steps:

Outlook 97 users:

1. Start Outlook and connect to the Exchange Server (connect or online mode).

2. Click "Tools/Options".

3. Click on the "General" tab.

4. Check the "When online, synchronize all folders upon exiting" box. (See the picture below.)

5. Click on the "OK" button.

Outlook 98 and 2000 users:

1. Start Outlook and connect to the Exchange Server (connect or online mode).

2. Click "Tools/Options".

3. Click on the "Mail Services" tab.

4. Check the "When online, synchronize all folders upon exiting" box. (See the picture below.)

5. Click on the "OK" button.
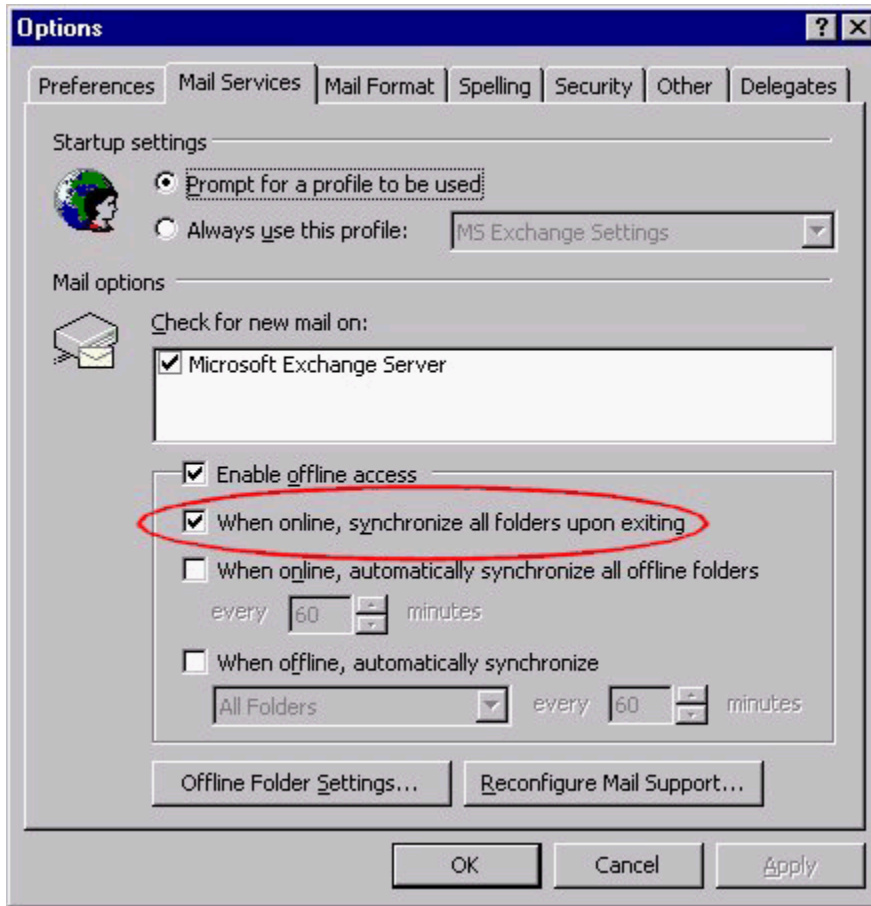
For Outlook 2002, see the Microsoft Outlook Help file for Offline Use information.

Outlook Root Folder

This Feature Available in Professional Version Only

PocketMirror synchronizes to the folder that is set as your root folder. You can view this by opening Chapura Settings, double-clicking on your user name, double-clicking on any Outlook conduit, and clicking on "Outlook Root Folder".

During synchronization, the default Outlook folders are used to store your data. For example, the default Calendar, Contacts, Notes, and Tasks folders for "Jane Doe" would be in:

\Mailbox - Jane Doe\Calendar, \Mailbox - Jane Doe\Contacts, \Mailbox - Jane Doe\Notes, \Mailbox - Jane Doe\Tasks, respectively. The Outlook Root Folder screen allows you to change these folders. PocketMirror Professional lets you set any Outlook folder (new or old) as the root folder. This would be helpful if you wanted to synchronize to a folder that was different than your default Calendar, Contacts, Tasks, or Notes folder.

From the Outlook Root Folder screen:

1. Click on the "Select" button and choose the new Outlook root folder with which you want to synchronize your handheld data.

2. Click on the "Next" button.

3. Click on the "Finish" button.

Jane Doe could create and select a new Outlook folder named "Jane's Notes". During synchronization, the Notes from her handheld would be transferred to the new "Jane's Notes" folder in Outlook.
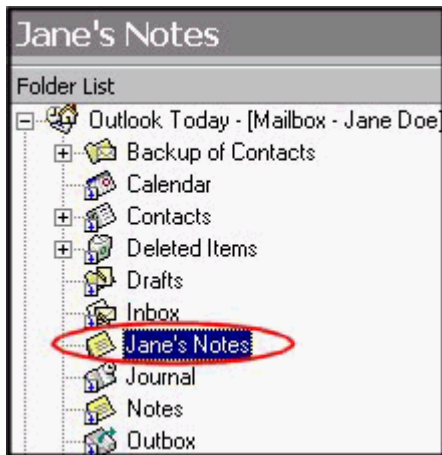
Private Items

PocketMirror allows you to put private items on the handheld, in Outlook, or on both platforms.

Private items in the handheld can be password protected with the Hide feature. PocketMirror will transfer the private field into Outlook, however, private items in Outlook do not have the same level of security as private items in the handheld. Outlook does not have password protection on private items.

Use the Private Items screen to choose whether or not to synchronize private items.

If you select "Synchronize items marked private", PocketMirror will transfer any item marked private on the handheld or in Outlook with the private field marked.

If you do not select "Synchronize items marked private", and you add a new private item to the handheld or Outlook, the item will not be transferred to the other platform during synchronization.

If you do not select "Synchronize items marked private", and you mark an existing item "private" on the handheld or in Outlook, it will be removed from the other platform during synchronization.

If you have been synchronizing Private Items and de-select "Synchronize items marked private", they will remain on both the handheld and in Outlook, but will no longer be linked to each other. This means that if you now change an existing private Outlook or handheld item to not be "private", it will not be removed from the other platform.

We recommend you select a periodic backup of private handheld items by specifying how many days between backups. The default is once a week. Private items will be backed up to a ".prv" file located in "C:\Palm\, followed by your user name and the .prv file. For example, Jane Doe's Contacts marked private would be backed up to "C:\Palm\Jane Doe\address".

You can specify zero to disable the periodic backup feature. If you do not backup private items and your handheld loses your data (possibly due to drained batteries) your private data will not be recoverable.

Transfer Alarms

This Feature Available in Professional Version Only

PocketMirror Professional lets you choose how alarms and reminders on your appointments are handled during synchronization. The options are to synchronize the alarms between Outlook and the handheld, keep alarms in Outlook only, or keep alarms on the handheld only.

If you choose "Synchronize the alarms between Outlook and the handheld", Outlook appointments with reminders will have alarms set in your handheld and handheld appointments with alarms will have reminders set in Outlook.

If you choose "Keep reminders in Outlook only", then all your reminders will be kept in Outlook and will not be transferred to your handheld. Alarms will be deleted from your handheld.

If you choose "Keep alarms on the handheld only", then all your alarms will be in your handheld and not in Outlook. This option will remove the reminders on Outlook appointments. An example is if you add a new appointment in Outlook with a 10 minute reminder, after the synchronization, you will have an appointment in your handheld with a 10 minute alarm and the reminder on the Outlook appointment will be removed.

Address

This Feature Available in Professional Version Only

There are three different address fields in Outlook; Business address, Home address, the Other address. There is also a mailing address check box in Outlook that lets you designate which of the three addresses is your main (or "mailing") address.
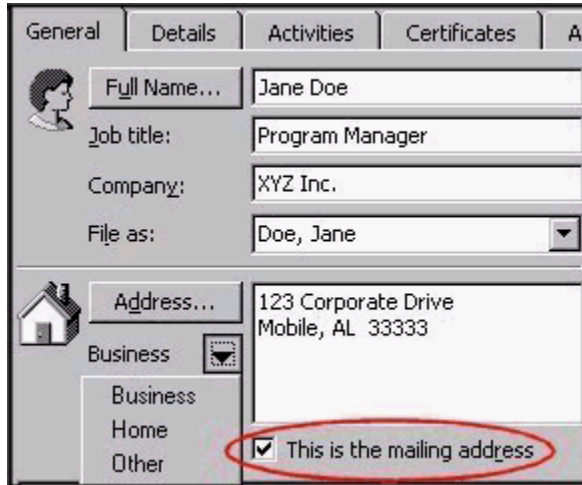
PocketMirror Professional lets you choose which Outlook address to transfer to your handheld.

If you select "Mailing Address", PocketMirror will transfer the Outlook address for a contact that has been designated as the mailing address. This can be, and usually is, different for different Contacts. Personal contacts usually have the "Home Address" set to be the mailing address. Work Contacts usually have the "Business Address" set to be the mailing address. (NOTE: Addresses for new handheld items will be added to Outlook in the "Business Address" field and will be marked as the mailing address. Addresses for new handheld items categorized as "Personal" will be added to "Home Address" and will be marked as the mailing address.)

If you choose the "Business Address", PocketMirror will always transfer the Business Address from Outlook to the handheld and for new handheld items will always put the handheld address into the Outlook "Business Address" field.

If you choose the "Home Address", PocketMirror will always transfer the Home Address from Outlook to the handheld and for new handheld items will always put the handheld address into the Outlook "Home Address" field.

If you choose the "Other Address", PocketMirror will always transfer the Other Address from Outlook to the handheld and for new handheld items will always put the handheld address into the Outlook "Other Address" field.

Carrying More Than One Outlook Address Field in Your Handheld

If you want to transfer more than one address, select "Business", "Home", or "Other" from the PocketMirror "Preference Settings for Outlook Contacts Address" screen and then go to Custom Fields and transfer the other address field to one of the four custom fields.

When transferring the Outlook "Mailing Address" to the handheld "Address", and transferring other Outlook addresses to the handheld "Custom" fields, only the "Mailing Address" will be a two-way synchronization field. Any changes made on the handheld will not show up in Outlook.
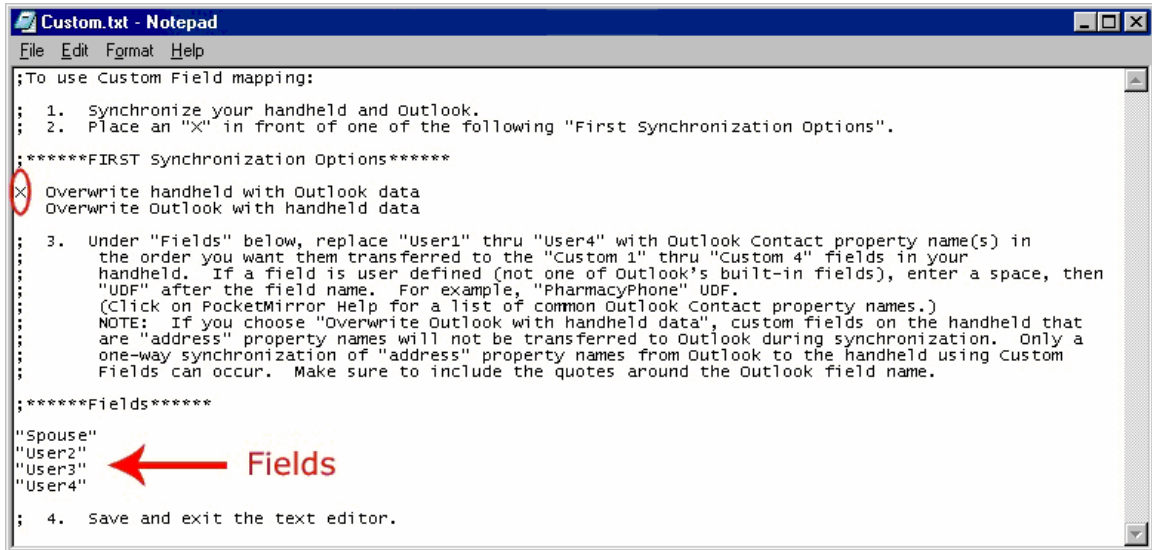
Custom Fields

PocketMirror lets you transfer Outlook Contact data and user-defined fields (UDFs) in Outlook to the four custom fields in the handheld Address application. If you map a field to one of the custom fields, it will take effect for all contacts in the handheld.

To activate custom field mapping follow these steps:

1. Synchronize your handheld and Outlook (otherwise Contacts may be duplicated).

2. Click on the "Edit custom.txt" button located on the "Preferences Settings for Outlook Contacts, Custom Fields" screen.

The following screen is displayed. (The areas marked in red are where you will edit your information.)

3. Select the desired update option for the first synchronization by placing an "X" at the start of the appropriate line. This is for the first synchronization only. Synchronizations performed after the initial synchronization, update according to the preferences specified in Chapura Settings.

4. Edit the four field names as desired. Whether you change "User1" thru "User 4" or not, all four field names must be enclosed in double quotes and you must specify all four fields. **Make sure to include the double quotes around the Outlook field names.** If you are specifying a user-defined field (UDF), place the characters "UDF" outside the double quotes following the field name.

5. Save the file and close the text editor.

6. Synchronize. If any errors are detected in the custom.txt file you will get an error dialog asking if you want to continue the synchronization using your old "map" settings or cancel so you can correct the error. More details about the error will be in your HotSync log.

NOTE: If you choose "Overwrite Outlook with handheld data", custom fields on the handheld that are "address" property names will not be transferred to Outlook during synchronization. Only a one-way synchronization of "address" property names from Outlook to the handheld using Custom Fields can occur.

Below is a partial list of the Outlook Contact property names that can be transferred. For the complete list of available property names, refer to the Outlook Object Model Help located on your Microsoft Office CD.

Account

Anniversary

AssistantName

AssistantTelephoneNumber

BillingInformation

Birthday

BusinessAddress **

                                          ***

BusinessAddressPostOfficeBox

BusinessHomePage

CallbackTelephoneNumber

Categories **

Children

ComputerNetworkName

CustomerID

Department

FileAs**

FTPSite

GovernmentIDNumber

Hobby

HomeAddress **

                                          ***

HomeAddressPostOfficeBox

Initials**

ISDNNumber

Language

ManagerName

MiddleName

Mileage

NickName

OfficeLocation

OrganizationalIDNumber

OtherAddress **

                                          ***

OtherAddressPostOfficeBox

PersonalHomePage

Profession

RadioTelephoneNumber

ReferredBy

Spouse

Suffix

TelexNumber

Title

TTYTDDTelephoneNumber

WebPage

** These fields correspond to a fixed field in the handheld and will only transfer from Outlook to your handheld. (e.g. changes made in the handheld will not update Outlook). This will allow you to carry the information in your handheld, for example Home Address, but you can only edit the information in Outlook.

*** These are mapped one-way only if "Mailing Address" is selected for the "Business", "Home", or "Other" Address that corresponds to the Outlook property name. The custom.txt file is used to select Outlook property names. To access the custom.txt file, go to the "Preferences Settings for Outlook Contacts, Custom Fields" screen, and click on the "Edit custom.txt" button.

E-mail Translation

PocketMirror lets you transfer Outlook Contact full e-mail addresses (SMTP and Exchange) instead of the display name to the handheld during synchronization.

From the "Preference Settings for Outlook Contacts E-mail Translation" screen, check the option to transfer Contact SMTP or Exchange e-mail addresses to the handheld. New and/or modified Outlook Contacts will only be updated on the handheld. PocketMirror first looks for an SMTP address. If the SMTP address does not exist, the Exchange address (if it exists) will be transferred to the handheld.

If the E-mail Translation box is unchecked PocketMirror will transfer the display name to the handheld for new and/or modified Outlook Contacts.

NOTE: If your synchronization action is set to "Handheld overwrites Outlook", the display name for non-exchange e-mail addresses will be overwritten with the SMTP address.

File As

PocketMirror lets you choose how new Outlook Contacts created by PocketMirror will be filed in Outlook. PocketMirror creates a new Outlook Contact when you add a new contact to the handheld and synchronize.

The choices are:

> Last, First
>
> First Last
>
> Company
>
> Last, First (Company)
>
> Company (Last, First)

First is the "First name" field of the contact.

Last is the "Last name" field of the contact.

Company is the "Company" field of the contact.

To change your view of Contacts in the handheld:

1. In the Address Book, tap on "Menu".
2. Select "Options".
3. Tap on "Preferences", and select a "List By" option.
4. Tap "OK".

Journal

PocketMirror lets you turn on Outlook journaling for any new contact that is added to Outlook from the handheld.

The display below will be a familiar Outlook dialog box if you regularly use Outlook's journaling feature. Outlook lets you keep journal events, like meeting requests, associated with your Outlook Contacts.
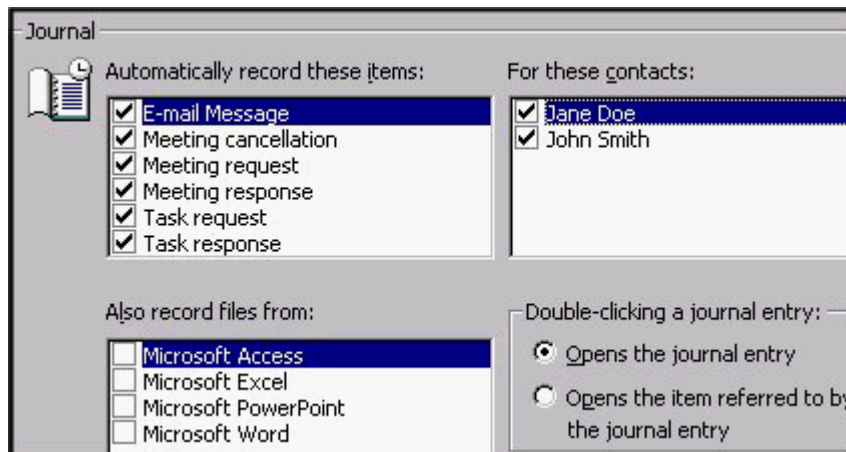
Chapura has software available to better utilize your Outlook Journal with your handheld. Visit our web site at www.chapura.com for more information on PocketJournal.

Phone Number Priorities

PocketMirror lets you change the order of the phone numbers (including e-mails) to be transferred to the handheld. PocketMirror transfers the first five phone numbers it finds in Outlook from this list to your corresponding handheld Address field. PocketMirror starts at the top of this list and adds each non-blank phone number it finds until either all five slots in your handheld are full or all phone numbers from an Outlook Contact have been added.

To change the Phone Number priority list, click on the phone number you want to change. Then click either the up arrow button or the down arrow button to move the phone number you have selected up or down the list. Click the "OK" button and this becomes your new priority list order.

When moving items on the list, some items may not be moved above or below other items. For example, Business Phone 2 cannot be above Business Phone, Car Phone cannot be above Mobile Phone, Mobile Phone 3 cannot be above Car Phone, etc.

Use this feature if you have a certain phone number or e-mail type that is critical and must always be added to your handheld. For example if Mobile Phone is more important than Pager, click Mobile Phone and move it to the top five. That way it will always be one of the numbers to transfer.

NOTE: If you change this feature after you have been synchronizing for some time, it will only affect new Outlook and handheld records. Changing the setting and synchronizing will not change existing records.

NOTE: This feature does not affect the Outlook display.

PocketMirror also allows you to customize the phone numbers in the handheld for each contact in your Address Book with the Update Command.

Handheld Tasks Priority Settings

This Feature Available in Professional Version Only

PocketMirror Professional maintains your Task priority settings that are transferred between Outlook and the handheld.

From the "Preference Settings for Outlook Tasks Handheld Priority", you can choose to prioritize your Tasks by Outlook priority or a user defined field, "Palm Priority".

Outlook Priority Field

If you select "Use Outlook Priority Field", your handheld and Outlook Tasks will be mapped as follows:

To Do List (Tasks) Priority Field Mapping

Handheld	Outlook
Priority (1)	High Importance
Priority (2)	Normal Importance
Priority (3)	Normal Importance
Priority (4)	Normal Importance
Priority (5)	Low Importance

User Defined Field (UDF) "Palm Priority"

If you select "Use the user defined field (UDF) Palm Priority", PocketMirror puts your handheld priorities in the Palm Priority field in Outlook.

If you are unable to view your handheld task priorities in Outlook, you need to add the Palm Priority field to your current Outlook Task view. This will show the numeric priority you have assigned to your handheld tasks. If you are in the Outlook Task Timeline view, you will need to switch to one of the other Task views.

1. In Outlook Tasks, right click on the column heading "Subject".

2. Select "Field Chooser" from the drop down list.

3. Left click on the drop down arrow next to Frequently-used field, and select "User-defined fields in folder".

4. Left click on "Palm Priority", and drag and drop it to the right of the column heading Subject.

OR

1. In the Outlook Folder List, click on Tasks.

2. Go to "View/Current View/Customize Current View", and click on the "Fields" button.

3. Click on the down arrow below "Select available fields from:"

4. Select "User-defined fields in folder".

5. Under Available Fields, select "Palm Priority".

6. Click on "Add".

7. Click "OK".

By following either of the above set of steps, the numeric priority you have assigned to the tasks will be displayed under the heading, Palm Priority. If you have existing tasks in the handheld, you will need to synchronize Outlook with the handheld and then have the handheld overwrite Outlook. This will fill in the Palm Priority for all of the tasks.

Tasks Start Date

The To Do List on the handheld does not have a "Start date" field. PocketMirror lets you copy the handheld "Due Date" to the Outlook Start date.

In the example below, the "Set Task Start date in Outlook to handheld Due Date" has been checked. So, when an Outlook appointment is created from a handheld item with a due date, PocketMirror copies the due date to both the Outlook Start and Due dates. This is helpful in some Outlook views.
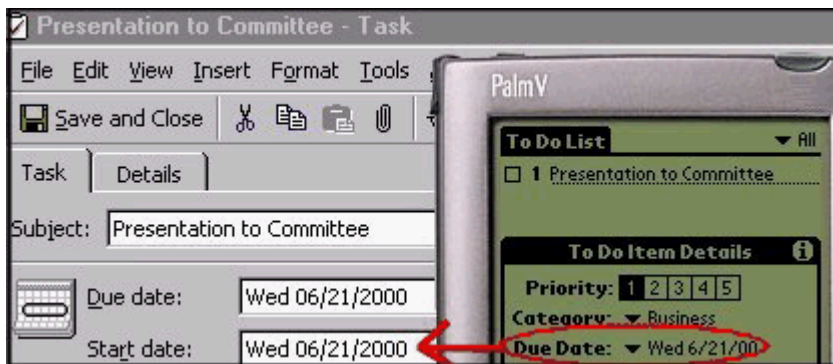
Task Filter

This Feature Available in Professional Version Only

The option "Remove completed tasks from handheld (keeping them in Outlook)" allows you to choose whether or not to leave completed tasks on your handheld. If you choose this option, the completed tasks will remain in Outlook but will be deleted out of your handheld after each synchronization.

The option "Do not put Outlook Tasks assigned to others on the handheld" allows you to exclude Tasks other than yours from the handheld. In the example in the Task Filter screen, Jane is the handheld owner and has chosen not to transfer tasks assigned to others on her handheld. Therefore, the two other tasks in her Outlook, one assigned to Bill and one to Tom, will not be transferred to the handheld.
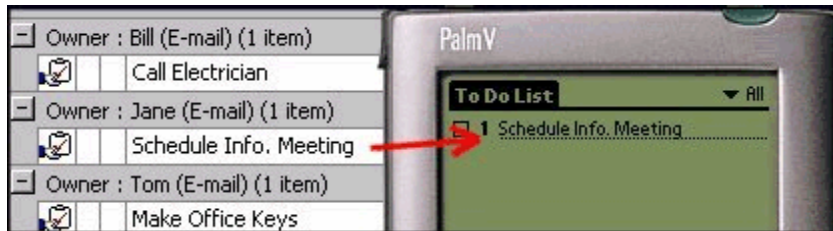
New Note Color

This Feature Available in Professional Version Only

For any new Note created on the handheld, PocketMirror allows you to choose the color for these new Notes in Outlook. The following example shows three new notes on the handheld transferred to Outlook as new yellow notes.
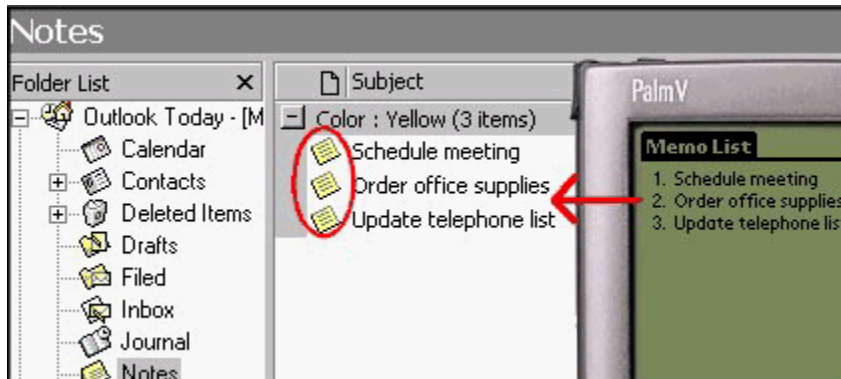
Chapter 5 – Other

About Phone Numbers

Outlook has an extensive number of fields dedicated to a contacts' phone numbers and e-mail addresses. The handheld can store five phone numbers. In addition to the Outlook defined phone numbers, there are user defined fields that PocketMirror takes advantage of to allow more numbers than Outlook defaults.

The handheld labels all business type phone numbers "Work", all home type numbers "Home", and so on. In contrast, Outlook uniquely names each of its phone number fields. PocketMirror maps each of the handheld phone number fields to one (and only one) Outlook field. Since there are not forty predefined phone number fields in Outlook, PocketMirror creates user-defined fields to make up the difference. The exact phone number mapping between Outlook and the handheld is listed below. **This allows user flexibility in the choice of phone numbers as opposed to a straight map that would restrict all contacts to the same five phone numbers.**

For example, if you create a handheld contact in your Address Book on your handheld with three numbers labeled "Work", one labeled "Home" and one labeled "Fax", PocketMirror will copy the 1st Work number to Outlook's Business Phone field, the 2nd Work number to Outlook's Business Phone 2 field, the 3rd Work number to an Outlook user-defined field named Business Phone 3, the Home number to Outlook's Home Phone field and the Fax number to Outlook's Business Fax field.
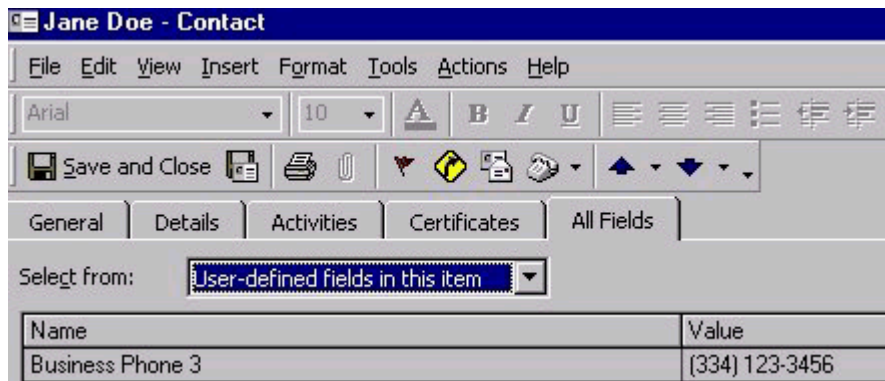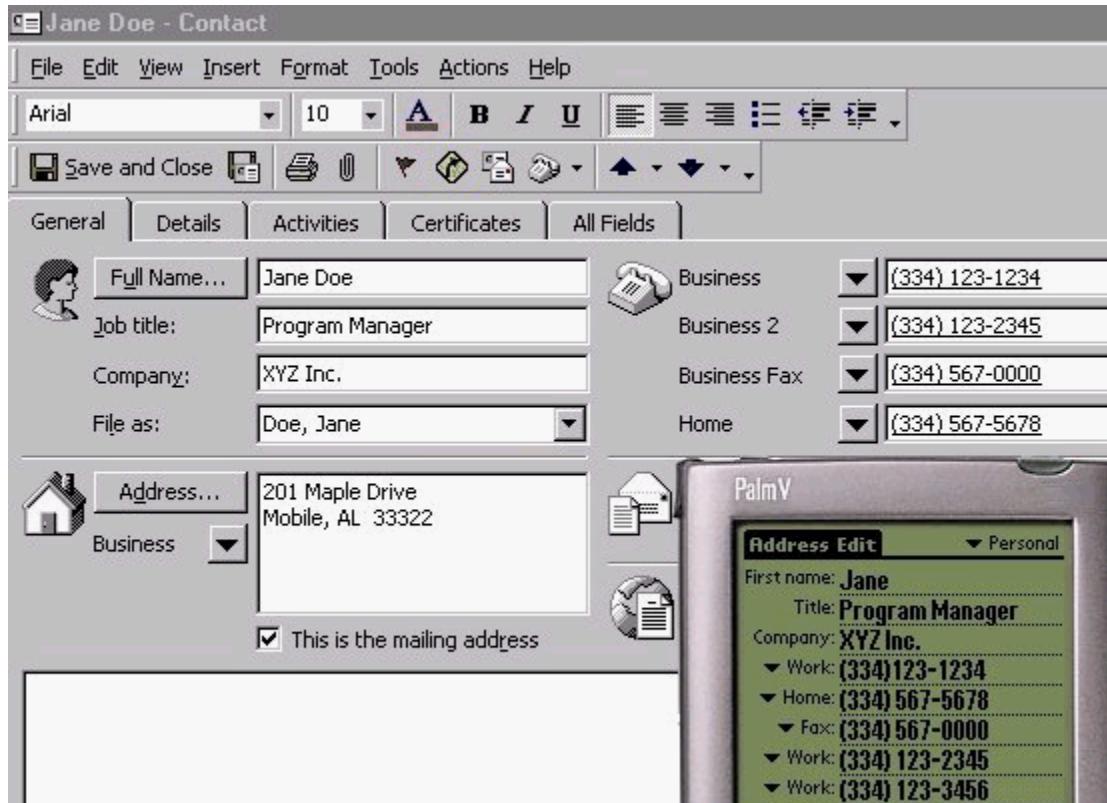
When you create a contact in Outlook and synchronize, PocketMirror will create the contact in your handheld Address Book with up to five handheld phone number fields filled in with the data from Outlook. When PocketMirror is determining which five phone numbers to add to a handheld contact from Outlook, it will start at the top of the phone number priority list and add each non-blank phone number it finds until either all five handheld slots are full or all Outlook phone numbers have been added. If a contact in Outlook has a total of five or less phone numbers and e-mails, all five (or less) will be transferred to the handheld. The phone number priority list order can be changed from the Phone Number Priorities list.

The only time a blank handheld phone number field is required is when you have a higher priority phone number or e-mail address number and the lower priority number is empty in Outlook. For example if e-mail 1 is blank and e-mail 2 has an address in it, there will be a blank e-mail field in the handheld as a place holder. PocketMirror treats the handheld phone fields as WYSIWYG (What You See Is What You Get), therefore, in order to display e-mail 2, e-mail 1 must exist. It is unusual that you will have an e-mail 2 without an e-mail 1. The case that is more likely to happen is if you have a home fax but not a business fax. See the mapping below.

You can also customize which Outlook phone number fields you take in your handheld with the PocketMirror Update Command.

Handheld/Outlook Phone Number Mapping

Handheld	Occurrence	Outlook
Work	Business Phone	1st
Work	Business Phone 2	2nd
Work	[Business Phone 3]*	3rd
Work	[Business Phone 4]	4th
Work	[Business Phone 5]	5th
Home	Home Phone	1st
Home	Home Phone 2	2nd
Home	[Home Phone 3]	3rd
Home	[Home Phone 4]	4th
Home	[Home Phone 5]	5th
Fax	Business Fax	1st
Fax	Home Fax	2nd
Fax	Other Fax	3rd

Fax	[Other Fax 4]	4th
Fax	[Other Fax 5]	5th
Other	Other	1st
Other	[Other 2]	2nd
Other	[Other 3]	3rd
Other	[Other 4]	4th
Other	[Other 5]	5th
E-mail	E-mail	1st
E-mail	E-mail 2	2nd
E-mail	E-mail 3	3rd
E-mail	[E-mail 4]	4th
E-mail	[E-mail 5]	5th
Main	Company Main Phone	1st
Main	Primary Phone	2nd
Main	[Main Phone 3]	3rd
Main	[Main Phone 4]	4th
Main	[Main Phone 5]	5th
Pager	Pager	1st
Pager	[Pager 2]	2nd
Pager	[Pager 3]	3rd
Pager	[Pager 4]	4th

Pager	5th
[Pager 5]	
Mobile	1st
Mobile Phone	
Mobile	2nd
Car Phone	
Mobile	3rd
[Mobile Phone 3]	
Mobile	4th
[Mobile Phone 4]	
Mobile	5th
[Mobile Phone 5]	

* Brackets ([ ]) indicate an Outlook user-defined field.

Archiving Handheld Items

PocketMirror creates a special archive folder in Outlook to store archived handheld items. If you delete a handheld item AND select the "Save archive copy on PC", PocketMirror will move that item out of the Outlook folder it was in (for example, your Contacts folder) and put it into your archive folder. The archive folder will be located in your PocketMirror folder in the Outlook folder list.
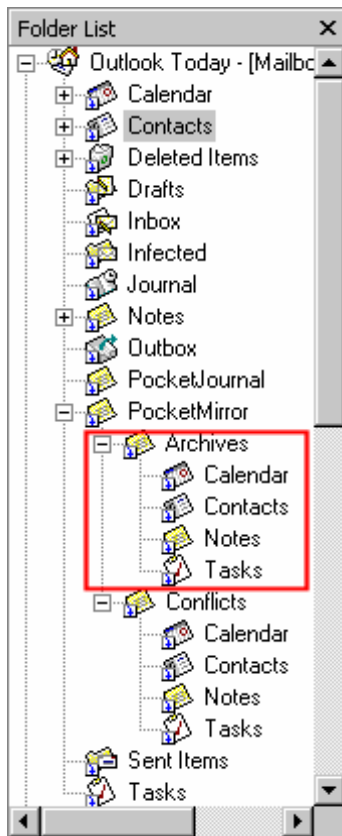
If you delete a handheld item and DO NOT mark "Save archive copy on PC", then PocketMirror will move the Outlook default folder to your Outlook Deleted Items folder. To return items to your Outlook Calendar, Contacts, Tasks, and Notes, locate the items in the PocketMirror Archive folder in Outlook, and move them back to your daily folder(s). The next time you synchronize with your handheld, these items will be added to your handheld.

Private Items:

If you do not select the option to synchronize your private items, and a private item is deleted, the item will not be archived.

Category Links

This Feature Available in Professional Version Only

Category Links allow you to synchronize with multiple Outlook Calendar, Contacts, Tasks and Notes folders. This includes Public Folders.

To set up Category Links:

1. Go to "PocketMirror Settings" by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application to which you want to add category links, and click on the "Change" button.

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" on the left, choose the Categories/Folders topic.

5. From the "Categories/Folders" screen, click on the "Advanced" button.

After clicking on the "Advanced" button, the following Category Links screen is displayed.
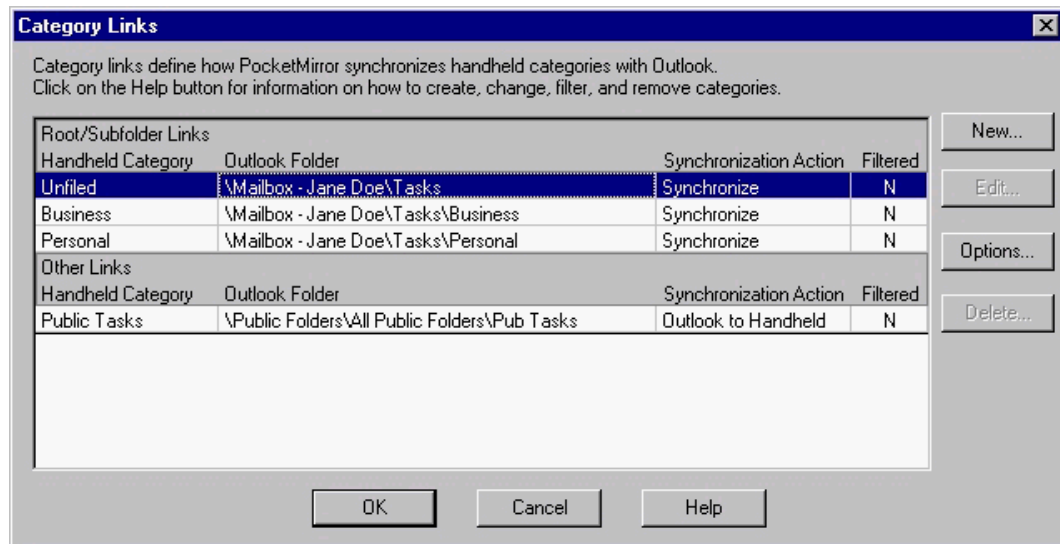
Select **New** from the Category Links screen above to create a new category link.

The following Category Link Wizard will prompt you to enter the new handheld category name, choose the type of synchronization, select the Outlook folder with which to link your new category, and specify an **initial** synchronization type. NOTE: The new category link name cannot be the same as other category link names.
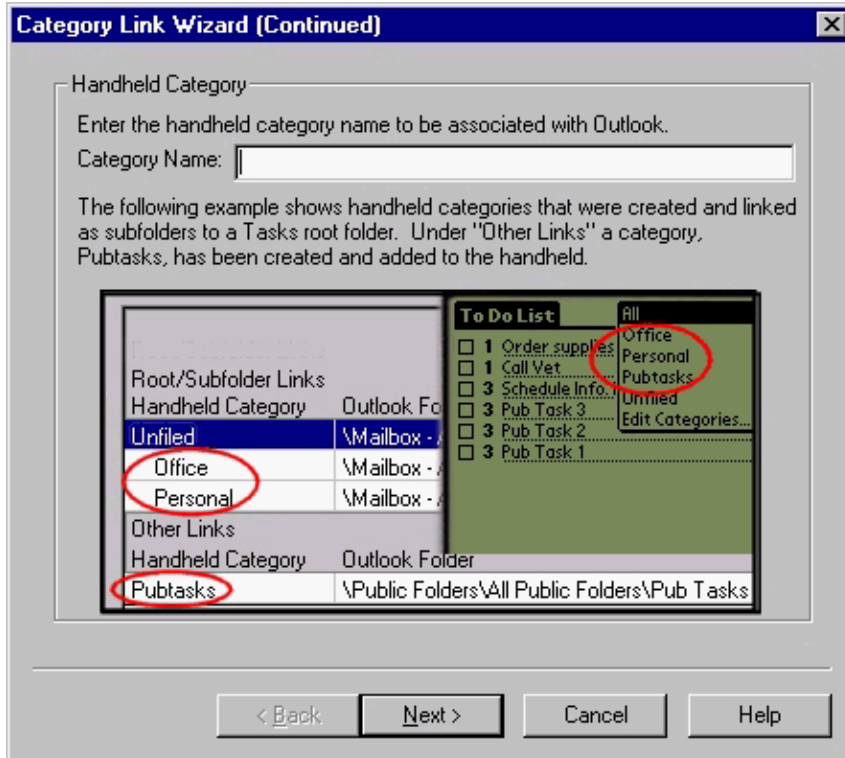
After creating a new category name and clicking on "Next", the following Synchronization Type screen is displayed. On this screen, you select how PocketMirror will synchronize your handheld category with Outlook.
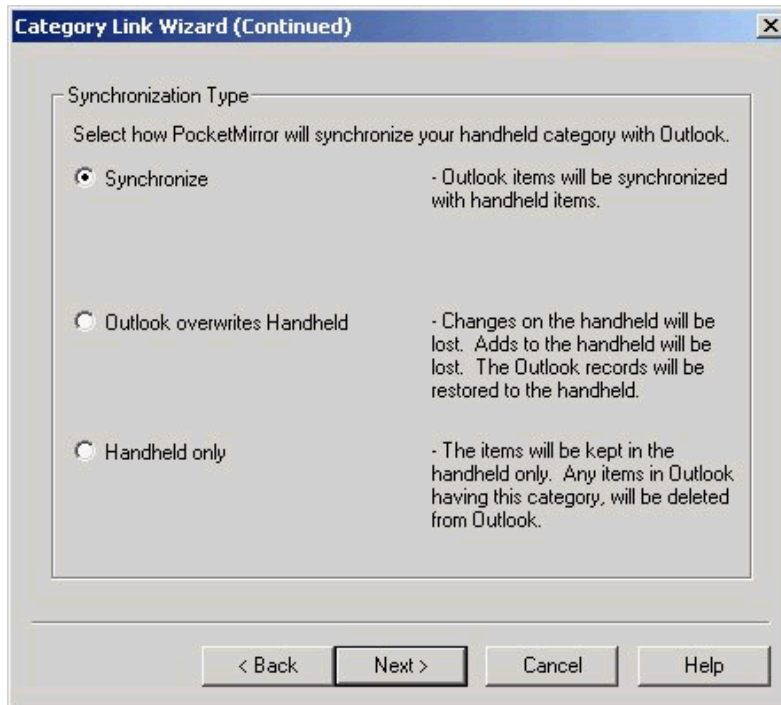
Select **Edit** from the Category Links screen to modify an existing category link. The following Edit Category Link Wizard will prompt you to select an edit option. You can rename a handheld category, change the Outlook folder to synchronize with your handheld category, or change the synchronization action for a category link.
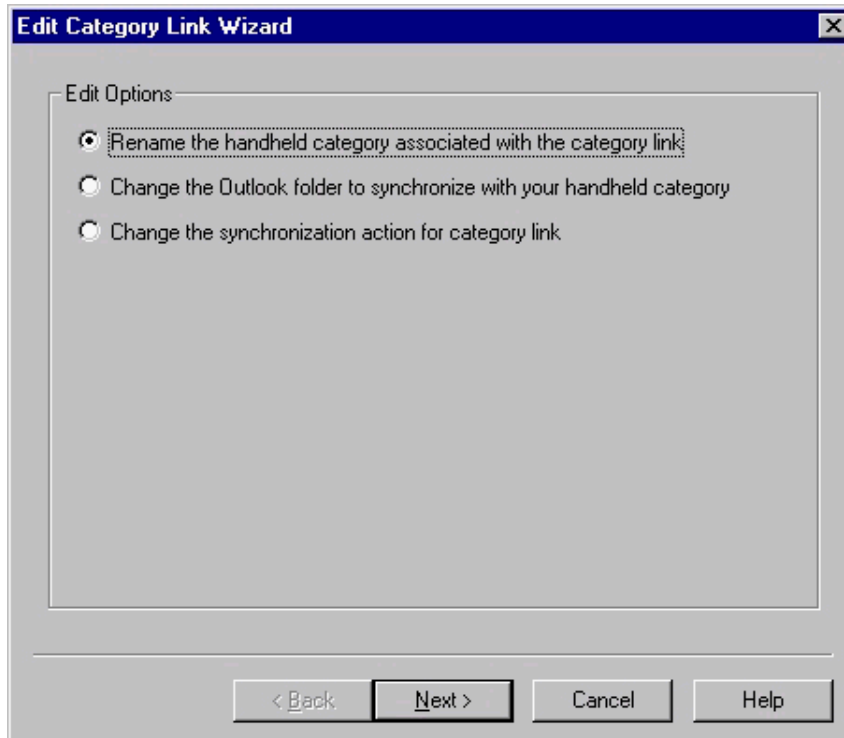
Select **Options** from the Category Links screen to filter items by Outlook category and/or to assign new Outlook items created by PocketMirror to Outlook categories.
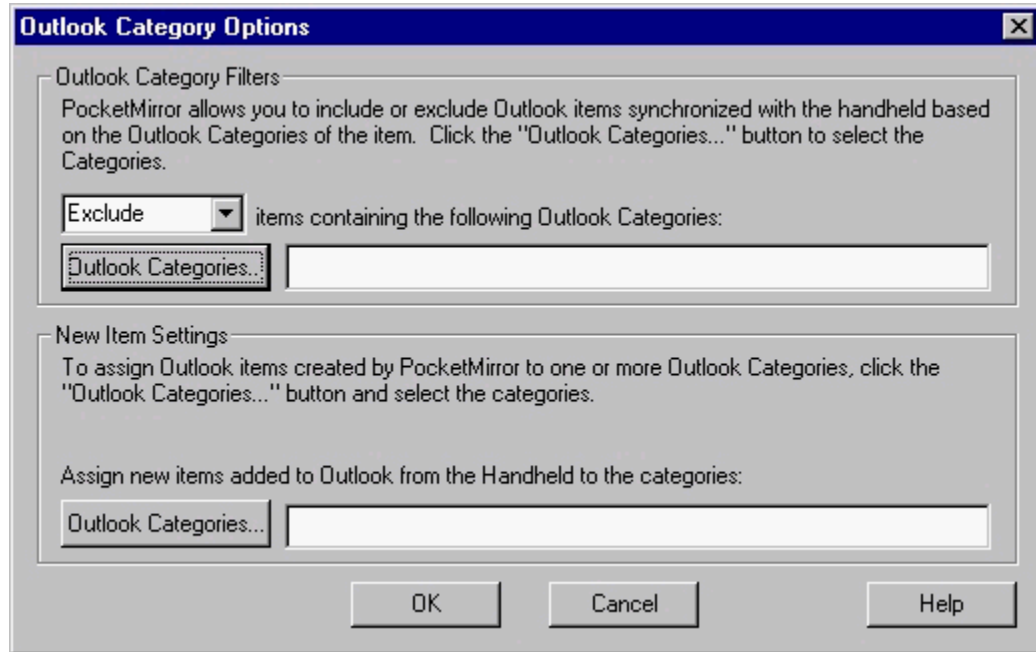
Select **Delete** from the Category Links screen to remove category links.

Synchronization Information:

When an item's category is changed on the handheld and the synchronization action is set to "Outlook to Handheld" for a category/folder specified in the Category Link screen, PocketMirror will duplicate the item on the handheld (the item will be in the original category as well as the new one). The item will only be in the new category in Outlook.

When the synchronization action is set to "Outlook to Handheld" for a folder/category specified in the Category Link screen and you change that item on the handheld, PocketMirror will detect that you have made the change. During the next synchronization, the handheld item will not have the updated change, and the changed item will be placed in the "Conflicts" subfolder located in the PocketMirror folder in Outlook.

Chapura Calendar

The Chapura Calendar is a calendar application that supports categories. With PocketMirror Professional 3.1 or higher, the Chapura Calendar application is placed in your PocketMirror default directory (C:\Program Files\Chapura\PocketMirror\Calendar.prc) unless you specify a different path during installation.

To manually install the Chapura Calendar application for additional users, perform the following steps:

1. Right-click on "Calendar.prc", and select "Open".

2. From the "Install Tool" screen, in the "Username" drop-down, select the new user name, and click on "OK".

3. Close the "Install Tool" screen.

During the next synchronization, the Chapura Calendar application will be added to the new user's handheld.

Conflicts Folders

When you choose how PocketMirror resolves conflicts, the deleted information is copied to the "Conflicts" subfolders for Calendar, Contacts, Tasks, and Notes under the PocketMirror folder.
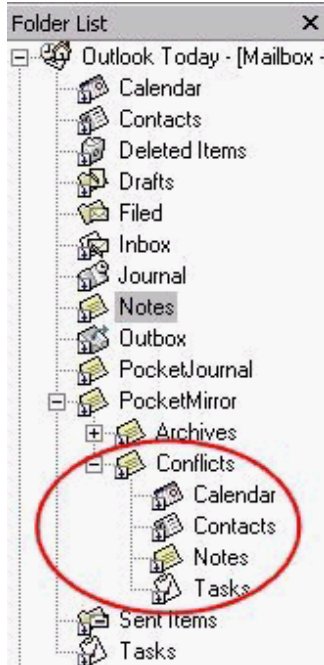
Duplicate Records (PocketMirror Professional)

Choosing "DUPLICATE records" will cause PocketMirror to add a new item to Outlook with the information contained in the modified handheld item AND add a new item in your handheld with the modified Outlook data. An example would be if you had "Joe Smith" in your handheld and in Outlook and added a home number to the item in your handheld and an e-mail address to the item in Outlook, then synchronized. You would have two items in Outlook and in your handheld. One with "Joe Smith" and a home number and one with "Joe Smith" and an e-mail address. This only occurs if you modify both of these items between synchronizations. This option duplicates items in Outlook and on the handheld. No changes are lost.

The following table shows results of modifying, deleting, and archiving records with the "Duplicate Records" option enabled.

ACTIONS	RESULTS
Modifications:	
Change an item on the handheld only.	Outlook is updated with the change.
Change the same item differently on the handheld and in Outlook.	The item is duplicated on the handheld and in Outlook. A message is placed in the HotSync log.
Change an item on the handheld, and delete the same item from Outlook.	The changed item appears on the handheld and in Outlook. A message is placed in the HotSync log.
Change an item on the handheld only, and filter by category the same item in Outlook.	Outlook is updated with the change and the item is removed from the handheld.
Change the same item differently on the handheld and in Outlook, and filter by category the item in Outlook.	The changed handheld item is added to Outlook, and a message is placed in the HotSync log. If the changed handheld item is also filtered, the item is duplicated in Outlook only.
Deletions:	
Delete an item from the handheld only.	The handheld item is deleted from Outlook.
Delete an item from the handheld and change the same item in Outlook.	The changed item in Outlook is added to the handheld. A message is placed in the HotSync log.
Delete the same item from the handheld and Outlook.	The item is removed from the handheld and Outlook.
Delete an item from the handheld only, and filter by category the same item in Outlook.	The handheld item is deleted from Outlook.
Delete an item from the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	The item remains in Outlook. A message is placed in the HotSync log.
Archiving:	
Archive an item on the handheld only.	The item is deleted from Outlook.
Archive an item on the handheld and change the same item in Outlook.	The item is duplicated on the handheld and in Outlook. A message is placed in the HotSync log.
Archive an item on the handheld and delete the same item in Outlook.	The item is removed from the handheld and Outlook.
Archive an item on the handheld only, and filter by category the same item in Outlook.	The handheld item is deleted from Outlook.
Archive an item on the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	The item remains in Outlook. A message is placed in the HotSync log.
Change an archived item on the handheld only.	The item is updated in Outlook and deleted from Outlook.

ACTIONS	RESULTS
Change an archived item on the handheld, and change the same item in Outlook	If the changes are identical, the item in Outlook will be deleted. Otherwise the items are duplicated on the handheld and in Outlook. A message is placed in the HotSync log.
Change an archived item on the handheld and delete the same item from Outlook.	The handheld item is moved to the Outlook Deleted Items folder.
Change an archived item on the handheld only, and filter by category the same item in Outlook.	The item is updated in Outlook and deleted from Outlook.
Change an archived item on the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	If the changes are identical, the item in Outlook will be deleted. Otherwise the items are duplicated on the handheld and in Outlook. A message is placed in the HotSync log.

Outlook Wins (PocketMirror Professional)

Choosing "Outlook wins" causes the modification in your handheld to be deleted and the Outlook modification to be written to your handheld.

An example would be if you had "Joe Smith" in your handheld and in Outlook and added a home number to the item in your handheld and an e-mail address to the item in Outlook, then synchronized. Joe Smith's home number would be lost, his e-mail address would be added to your handheld, and you would only have one occurrence of Joe Smith in Outlook and your handheld.

When you choose for Outlook or the handheld to "win", PocketMirror creates "Conflicts" subfolders for Calendar, Contacts, Tasks, and Notes under the PocketMirror folder in Outlook and places deleted information in these folders.

The following table shows results of modifying, deleting, and archiving records with the "Outlook Wins" option enabled.

ACTIONS	RESULTS
Modifications:	
Change an item on the handheld only.	Outlook is updated with the change.
Change the same item differently on the handheld and in Outlook.	Outlook overwrites the handheld.
Change an item on the handheld and delete the same item from Outlook.	The changed item is deleted from the handheld.
Change an item on the handheld and filter by category the same item in Outlook.	Outlook is updated with the change.
Change the same item differently on the handheld and in Outlook, and filter by category the item in Outlook.	Outlook overwrites the handheld.
Deletions:	
Delete an item from the handheld only.	The handheld item is deleted from Outlook.
Delete an item from the handheld and change the same item in Outlook.	The changed item in Outlook is added to the handheld.
Delete the same item from the handheld and Outlook.	The item is removed from the handheld and Outlook.
Delete an item from the handheld only, and filter by category the same item in Outlook.	The handheld item is deleted from Outlook.
Delete an item from the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	The item is removed from the handheld.
Archiving:	
Archive an item on the handheld only.	The item is deleted from Outlook.
Archive an item on the handheld and change the same item in Outlook.	The Outlook item is restored to the handheld.
Archive an item on the handheld and delete the same item in Outlook.	The item is removed from the handheld and Outlook.
Archive an item on the handheld only, and filter by category the same item in Outlook.	The handheld item is deleted from Outlook.
Archive an item on the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	The item is removed from the handheld, and the filtered item stays in Outlook.

Handheld Wins (PocketMirror Professional)

Choosing "Handheld Wins" causes the modification made in Outlook to be deleted and the handheld modification to be written to Outlook.

An example would be if you had "Joe Smith" in your handheld and in Outlook and added a home number to the item in your handheld and an e-mail address to the item in Outlook, then synchronized. The e-mail address in Outlook would be deleted and the home number would be added to Outlook, leaving you with only one item for Joe Smith in both Outlook and your handheld.

When you choose for Outlook or the handheld to "win", PocketMirror creates "Conflicts" subfolders for Calendar, Contacts, Tasks, and Notes under the PocketMirror folder in Outlook and places deleted information in these folders.

The following table shows results of modifying, deleting, and archiving records with the "Handheld Wins" option enabled.

| ACTIONS	RESULTS
Modifications:	
Change an item on the handheld only.	Outlook is updated with the change.
Change the same item differently on the handheld and in Outlook.	The handheld item overwrites the Outlook item.
Change an item on the handheld and delete the same item from Outlook.	The changed handheld item is added to Outlook.
Change an item on the handheld and filter by category the same item in Outlook.	The Outlook item is updated, and the handheld item is removed.
Change the same item differently on the handheld and in Outlook, and filter by category the item in Outlook.	The handheld item overwrites the Outlook item.
Deletions:	
Delete an item from the handheld only.	The handheld item is deleted from Outlook.
Delete an item from the handheld and change the same item in Outlook.	Delete the item from Outlook.
Delete the same item from the handheld and Outlook.	The item is removed from the handheld and Outlook.
Delete an item from the handheld only, and filter by category the same item in Outlook.	The handheld item is deleted from Outlook.
Delete an item from the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	The handheld item is deleted from Outlook.
Archiving:	
Archive an item on the handheld only.	The item is deleted from Outlook.
Archive an item on the handheld and change the same item in Outlook.	The handheld item is deleted from Outlook.
Archive an item on the handheld and delete the same item in Outlook.	The item is removed from the handheld and Outlook.
Archive an item on the handheld only, and filter by category the same item in Outlook.	The handheld item is deleted from Outlook.
Archive an item on the handheld, and modify the same item in Outlook. Filter by category the item in Outlook.	The handheld item is deleted from Outlook.

Outlook Category Filtering Options

This Feature Available in Professional Version Only

PocketMirror Professional lets you filter items by Outlook categories and/or assign new Outlook items created by PocketMirror to Outlook categories.

NOTE: WHEN USING OUTLOOK CATEGORY FILTERS AND NEW ITEM SETTINGS, ONLY THE **OUTLOOK CATEGORIES** ARE USED IN DETERMINING WHAT IS AND IS NOT SYNCHRONIZED TO THE HANDHELD. HANDHELD CATEGORIES ARE NOT USED IN FILTERING AND NEW ITEM SETTINGS.

The following screen is where you will edit this information.
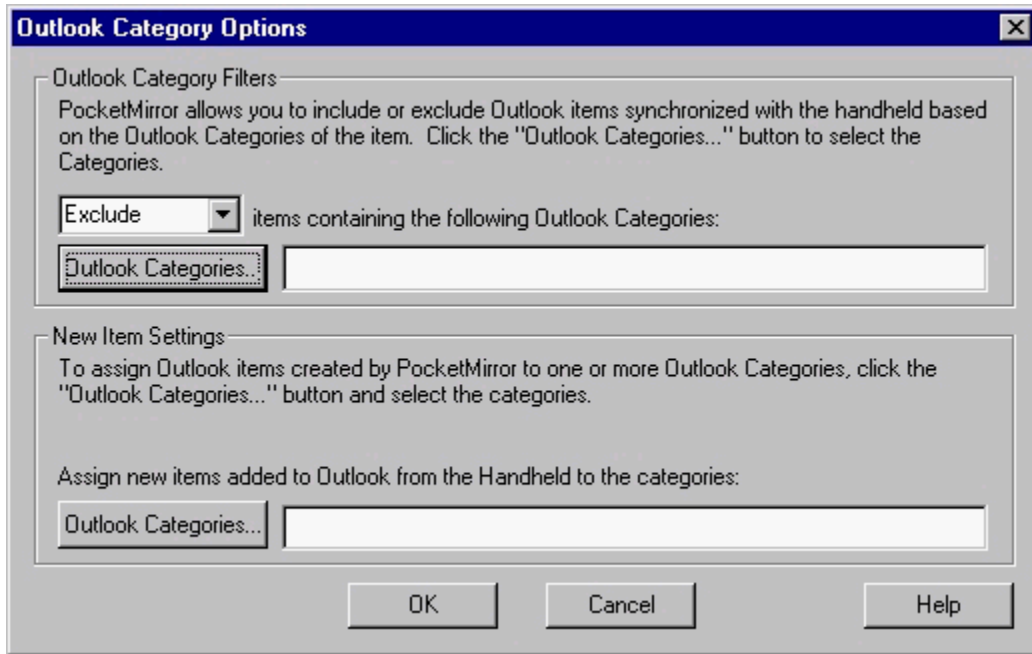
To access the "Outlook Category Options" screen:

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the Outlook application you want to edit, and click on the "Change" button.

4. From the Preference Settings for Outlook…" screen, select the topic Categories/Folders.

5. Click the "Advanced" button located on the Categories/Folders screen.

If you choose to "Exclude" items containing a particular Outlook category, the category will remain intact in Outlook, but items in that category will not be transferred to the handheld.

If you choose to "Include" items containing a particular Outlook category, the category will remain intact in Outlook, and **only** items in that category will be transferred to the handheld.
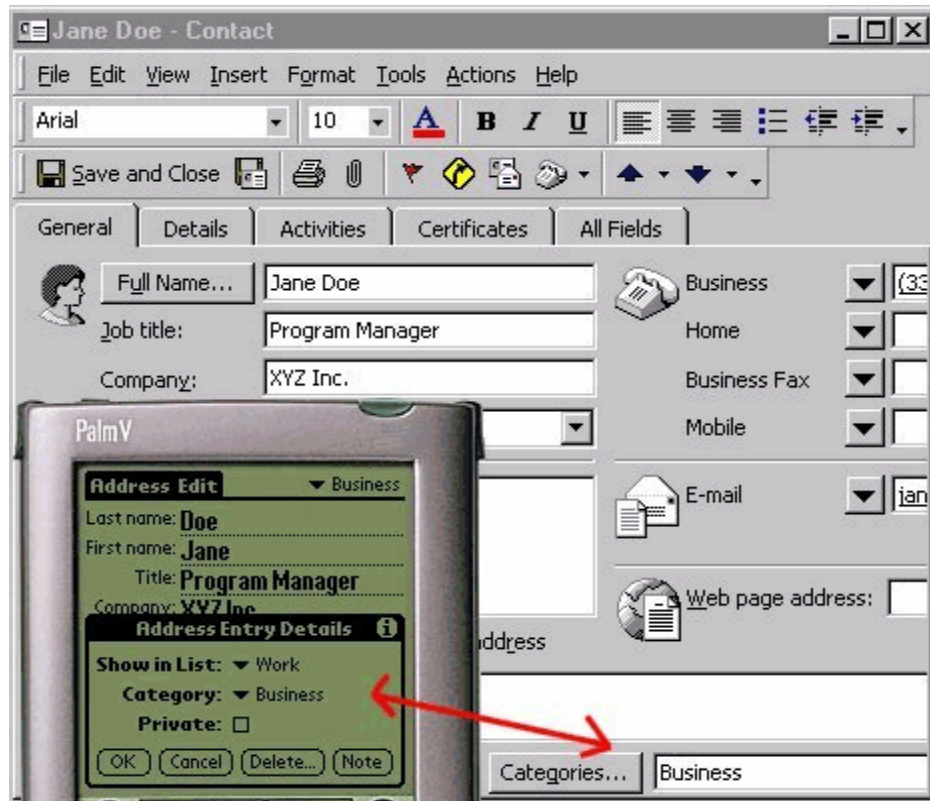
When synchronizing using the "Handheld category = Outlook's Categories" option, the "Assign new items added to Outlook from the Handheld to the categories:" is not available, because new categories are automatically synchronized.

When synchronizing using the "Handheld category = user-defined field PalmPilot Category", or "Handheld category = Outlook subfolder" option, the "Assign new items added to Outlook from the Handheld to the categories:" can be used. Select the Outlook category or categories you want your new handheld items to be copied to during the next synchronization.

Handheld Category = Outlook's 'Categories' Field

If you choose "Handheld category = Outlook's 'Categories' field", PocketMirror will create the item in Outlook with a single category. PocketMirror transfers categorized handheld items to Outlook and fills in the "Categories" field for each Outlook item. (See the example below).

Set this option by:

1. Go to "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the user name you want to edit, and click the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click the "Change" button.

4. From the "Preferences Settings for Outlook..." screen select the topic "Categories/Folders", and select "Handheld category = Outlook's 'Categories' field".

5. Click on the "Advanced" button to synchronize multiple folders or public folders.

When a new item has been added to the handheld:

If the handheld category does not exist in Outlook, PocketMirror will create the category automatically and assign it to the new item. If the handheld category exists in Outlook, PocketMirror will simply use that category.

When an item's category is modified in the handheld:

PocketMirror will remove all categories assigned to that item in Outlook and replace them with the one from the handheld.
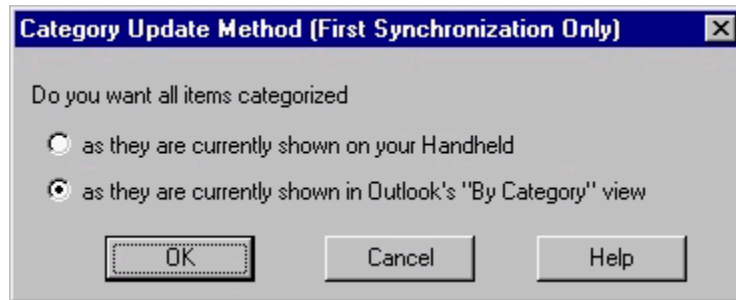
When a new item has been added to Outlook:

PocketMirror will create the item in the handheld with the first category for the new item. If there is only one category assigned to the new item, PocketMirror will determine if that category exists in the handheld. If the category exists, the handheld will assign the category to the new item. If the category does not exist, PocketMirror will create the category and assign it to the new item. If there are already fifteen categories in the handheld, PocketMirror will inform the user that it cannot create additional categories and place the new item in the Unfiled category.

When an item's category is modified in Outlook:

PocketMirror will replace the handheld category with the first category assigned to the Outlook item. The rest of the Outlook item's categories will not be modified.

When you choose "Handheld category = Outlook's 'Categories' field" the following screen will pop up and give you a choice of categorizing your items as they appear on your handheld or as they appear in Outlook's "By Category" view. NOTE: This setting only applies to the first synchronization. Subsequent synchronizations will accept changes made to categories or items within the categories both in Outlook and the handheld.

Handheld Category = User-defined Field 'PalmPilot Category'

If you choose "Handheld category = user-defined field 'PalmPilot Category'" your Outlook category fields will not be synchronized with the handheld category field. The handheld category will be synchronized with a user-defined field in Outlook called "PalmPilot Category". This will allow you to use the power of Outlook's category features without being limited by the 15 category restriction on the handheld. Set this option by:

1. Go to "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the user name you want to edit, and click the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click the "Change" button.

4. From the "Preferences Settings for Outlook..." screen select the topic "Categories/Folders", and select "Handheld category = user-defined field 'PalmPilot Category".

5. Click on the "Advanced" button to synchronize multiple folders or public folders.

To create the "PalmPilot Category" view:

1. Create at least one category on the handheld containing at least one item, and do at least one synchronization.

2. In Outlook, click on the folder where you want to create the view (e.g. Contacts).

3. Select "View/Current View/Define Views..." from the Outlook menu bar.

4. Click "New...". A "Create a New View" screen pops up. Type "PalmPilot Category" for the name of the view, and select "Table" for the Type of View."

5. Click OK.

6. Click "Group By..."

7. At the bottom of the "Group By" screen, pull down the "Select available fields from:" combo box and pick the "User-defined fields in folder" item.

8. Pull down the "Group items by" combo box at the top of the screen and select "PalmPilot Category".

9. Click OK, OK, then "Apply View".

This will allow you to view items grouped by handheld category.

Handheld category = Outlook subfolder

This Feature Available in Professional Version Only

If you choose "Handheld category = Outlook subfolder", PocketMirror Professional will transfer handheld categories into Outlook subfolders and Outlook subfolders into handheld categories. This applies only to the first level of subfolders as shown in the picture below. All subfolder names must be 15 characters or less. The total number of Outlook subfolders in addition to the number of handheld categories (that differ from the Outlook subfolder names) must not exceed 15 subfolders/categories.

To set this option:

1. Go to "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the user name you want to edit, and click the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click the "Change" button.
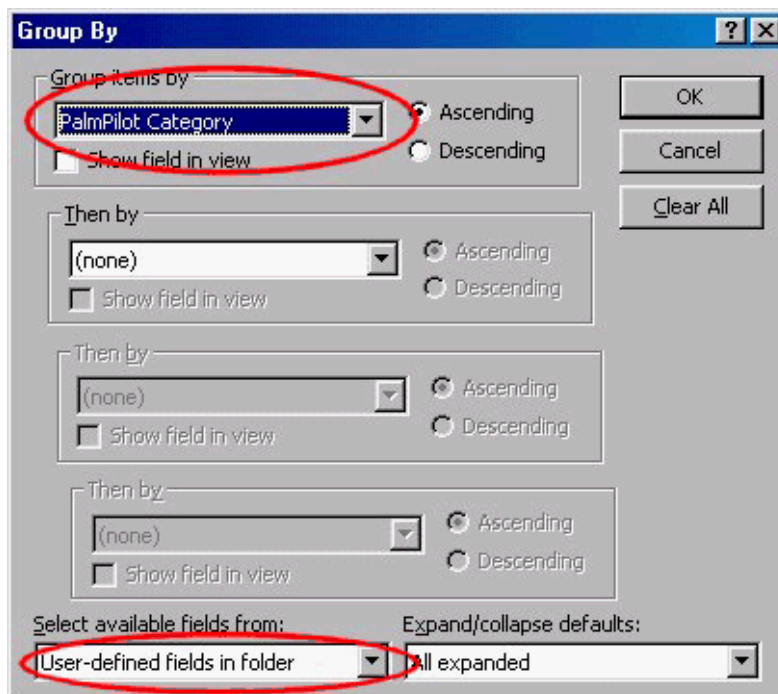
4. From the "Preferences Settings for Outlook..." screen select the topic "Categories/Folders", and select "Handheld category = Outlook subfolder".

When a new item has been added to the handheld with a category assigned to the item:

A new subfolder will be created in Outlook. This new subfolder will contain the items assigned to that handheld category. If the handheld category does not exist in Outlook, PocketMirror will create a subfolder for that category. Items which are Unfiled on the handheld will be transferred to the Outlook root folder.

When an item's category is modified in the handheld:

PocketMirror will move the item to the Outlook subfolder which corresponds to the handheld category.

When a new item has been added to an Outlook subfolder:

PocketMirror will create the item in the handheld with the subfolder from Outlook as the category for the new item. The Outlook subfolder must be 15 characters or less to be synchronized with the handheld. Otherwise, the synchronization will fail, and a message will be placed in the HotSync Log.

If the same item exists in more than one folder in Outlook, it will be transferred to the handheld with each Outlook folder as its category on the handheld.

If you choose Handheld category = Outlook subfolder, during synchronization your handheld categories will be transferred to Outlook as subfolders. The following dialog box appears to ensure you want to do this.

Mapping

This section details the exact mapping between the handheld and Outlook.

Address Book (Contact) Field Mapping

Handheld	Outlook
Last Name	Last Name
First Name	First Name
Title	Job Title
Company	Company
Phone 1	see Phone Mapping
Phone 2	see Phone Mapping
Phone 3	see Phone Mapping
Phone 4	see Phone Mapping
Phone 5	see Phone Mapping
Address	Mailing Address Street
City	Mailing Address City
State	Mailing Address State
Zip Code	Mailing Address Postal Code
Country	Mailing Address Country

Handheld	Outlook
Custom 1	User Field 1 Changing Custom Field Map
Custom 2	User Field 2 Changing Custom Field Map
Custom 3	User Field 3 Changing Custom Field Map
Custom 4	User Field 4 Changing Custom Field Map
Note	Body
Category	Category
Private	Sensitivity - Private
Not Private	Sensitivity - Normal

Phone Number Mapping

Occurrence	Handheld	Outlook
1st	Work	Business Phone
2nd	Work	Business Phone 2
3rd	Work	[Business Phone 3]*
4th	Work	[Business Phone 4]*
5th	Work	[Business Phone 5]*
1st	Home	Home Phone
2nd	Home	Home Phone 2
3rd	Home	[Home Phone 3]*
4th	Home	[Home Phone 4]*
5th	Home	[Home Phone 5]*
1st	Fax	Business Fax
2nd	Fax	Home Fax
3rd	Fax	Other Fax
4th	Fax	[Other Fax 4]*
5th	Fax	[Other Fax 5]*
1st	Other	Other
2nd	Other	[Other 2]*
3rd	Other	[Other 3]*
4th	Other	[Other 4]*
5th	Other	[Other 5]*
1st	E-mail	E-mail
2nd	E-mail	E-mail 2
3rd	E-mail	E-mail 3
4th	E-mail	[E-mail 4]*
5th	E-mail	[E-mail 5]*
1st	Main	Company Main Phone
2nd	Main	Primary Phone
3rd	Main	[Main Phone 3]*

Occurrence	Handheld	Outlook
5th	Main	[Main Phone 5]*
1st	Pager	Pager
2nd	Pager	[Pager 2]*
3rd	Pager	[Pager 3]*
4th	Pager	[Pager 4]*
5th	Pager	[Pager 5]*
1st	Mobile	Mobile Phone
2nd	Mobile	Car Phone
3rd	Mobile	[Mobile Phone 3]*
4th	Mobile	[Mobile Phone 4]*
5th	Mobile	[Mobile Phone 5]*

* Brackets ([ ]) indicate an Outlook user-defined field.

Date Book (Calendar) Field Mapping

Handheld	Outlook
Description	Subject
Appended to Description	Location
Start Time	Start Time
End Time	End Time
Alarm	Reminder
Note	Body
Private	Sensitivity - Private
Not Private	Sensitivity - Normal
Repeat	Recurrence

Memo Pad (Notes) Field Mapping

Handheld	Outlook
Memo	Note
Category	Category

To Do List (Tasks) Field Mapping

Handheld	Outlook
Description	Subject
Category	Category
Due Date	Due Date
Completed	Completed
Priority (1)	High Importance
Priority (2)	Normal Importance
Priority (3)	Normal Importance
Priority (4)	Normal Importance
Priority (5)	Low Importance
Private	Sensitivity - Private
Not Private	Sensitivity - Normal
Note	Body

Update Command

This is a special feature of PocketMirror which allows you to customize the phone numbers in your handheld for each contact in your Address Book. Outlook has many different phone number fields, whereas the handheld has only five. With PocketMirror, if a contact has a total of five or fewer phone numbers and e-mail addresses, all five (or less) will be copied to the handheld. The update command is needed only if you have more than five numbers and e-mail addresses **and** the five you want to carry are different than what is specified in the phone number priority list.

To use the update command feature, simply choose the five labels of the phone numbers you want for the handheld contact and type a "U" in one of the fields next to one of the labels in your handheld. On your next synchronization, PocketMirror will retrieve the five phone numbers (and/or e-mails) from Outlook and place them in your handheld. **The Update Command will update all five phone/e-mail fields in the handheld for a single Contact**. For this command to work, you must already have the contact in Outlook and have not modified it since your last synchronization. Modifying a contact on both the handheld and Outlook will create a warning and duplicate records.

If you create a new contact in Outlook with more than a total of five phone numbers and e-mails and then synchronize, PocketMirror will create the contact in your handheld Address Book with five phone numbers and/or e-mail addresses in the order specified in your Phone Number Priority screen. (If the contact has five or fewer numbers and addresses, all will be in the contact and there will be no need for the Update Command). After this synchronization, if you decide you would rather have different numbers in your handheld for this contact, use the update command feature. First edit the contact on the handheld, change the labels to the numbers you desire (Work, Work, Fax, Home, and Pager for example). In one of the fields next to the label, delete the number and type the letter "u". On the next synchronization, all five numbers will be updated with the numbers from Outlook.

Appendix A – Troubleshooting

Known Limitations

There are a few known limitations in the PocketMirror conduits. Listed below are the limitations and an explanation of how this will effect your synchronization between Outlook and the handheld.

Categories

- Outlook does not support commas in category names or spaces at the end of category names.

- The handheld is limited to fifteen different categories and is limited to one category for each item. In Outlook you can have several categories for each item. The handheld category name is limited to fifteen characters.

- When you add a new category to your handheld it is not added to Outlook's Master Category List. The item shows the correct category, it's just not in the Master List.

- The handheld allows multiple categories with the same spelling, but different cases (for example "Personal" and "personal"). PocketMirror requires a unique spelling for each category.

Multi-day Recurring Appointments

Outlook is capable of generating recurring events and appointments that span days. The handheld does not have this capability. If you have a recurring event or appointment that spans days in Outlook at synchronization time, it will not be put on your handheld. You will get a message stating that the handheld cannot handle this type of event or appointment and a request to change it in Outlook. In order to have a recurring event or appointment that spans days appear in the handheld, you must enter that appointment on each day of the event. PocketMirror works with multi-day appointments and it works with recurring appointments; it does not work with multi-day, recurring appointments.

Weekly Recurring Appointments that include Sunday

There is a problem in Outlook 97 version 8.0 that prevents PocketMirror from setting weekly recurring appointments in the calendar that include Sunday. This problem is fixed in Outlook 97 version 8.01+ and Outlook 98 and higher. To work around this problem, create weekly recurring appointments that include Sunday in Outlook instead of your handheld.

Conflicting Edits

When using offline folders, a conflict will be created by Outlook if an item such as an appointment is edited in the Exchange Server Mailbox (while you were not connected) and in the offline folders. When you connect to Exchange, the conflicting item will have a crossed swords icon.
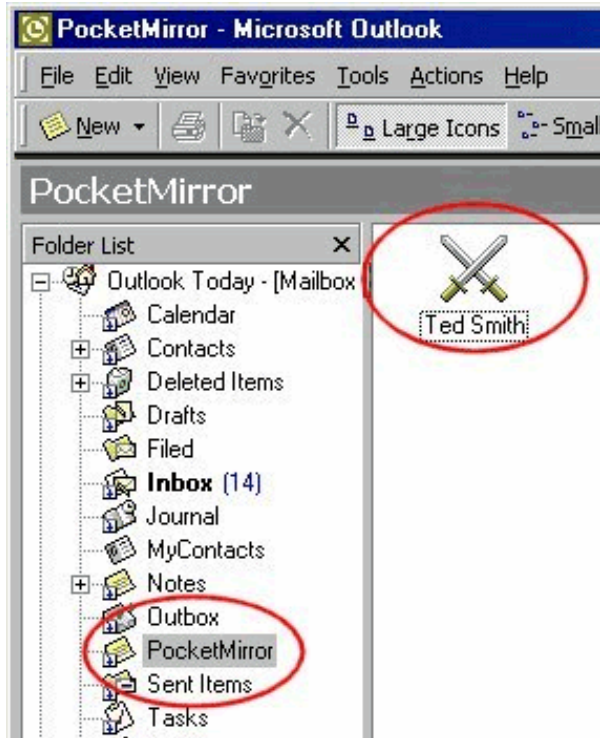
To resolve the conflict, double-click on the item to open a special conflict resolution dialog. A quick way to find all your conflicting items is to switch to a table view in Outlook, such as "By Category". To do this, Click on "View/Current View/By Category". Next, click on the folded page icon in the header to sort the items by icon. This will show all the crossed swords grouped together.

To minimize the creation of conflicts, you should configure Outlook to synchronize all folders when exiting. See Offline Use.

Duplicate Records (PocketMirror Standard)

If PocketMirror detects that a user has modified the same item on the handheld and in Outlook since the last successful synchronization, the modified Outlook item will be copied to a new handheld item. The modified handheld item will also be copied to a new Outlook item. PocketMirror has no way to determine which of the two modified items you intended to keep and will therefore duplicate the item on the handheld and in Outlook. You will receive an error message that will identify the item and advise you to delete the unwanted item. (One way to find duplicated records in Outlook is to change your view to a table that includes the creation date and time. See the Outlook Help file for information on "views".) Any duplicate records will have a creation date and time approximately equal to the synchronization date and time.

PocketMirror 3.0 or higher Professional version allows you to resolve conflicts when the same item has been modified on both the handheld and in Outlook.

Unable To Attach To Outlook's Default Folder

This error usually occurs when one or more Outlook folders have "lost their defaultness". To restore the missing default folders, simply close Outlook and start it once using the /ResetFolders command line switch. If you have Outlook closed, just click here to run Outlook with the switch, and you should be able to synchronize properly.

Another cause of this error is when there is no mail delivery location specified in your Outlook profile. Check this as follows:

1. On the Outlook menu, click "Tools/Services".

2. Click on the "Delivery" tab.

3. Make sure the combo box at the top ("Deliver new mail to...") is either "Personal Folders" or "Mailbox - name" (if using Exchange Server).

4. Click "OK".

5. Close and restart Outlook.

If the delivery location was "none", you should be able to synchronize now.

Synchronizing Multiple Handhelds To The Same Profile

You can configure an Outlook profile to allow multiple handhelds to synchronize by adding an Outlook Note in the Outlook folder named "PocketMirror". PocketMirror creates the Outlook folder and note when the first handheld is synchronized to a profile. This prevents a user from accidentally synchronizing to the wrong Outlook profile.

If you renamed your handheld and you receive a message that your handheld was not previously synchronized with your profile, simply rename the user note in the PocketMirror folder to your new handheld user name and re-synchronize. **NOTE:** User Note names are case sensitive and must match exactly the name on the handheld.

If you would like more than one handheld to synchronize with the same Outlook folders, add a user note for each handheld that will be synchronizing with the profile. To add the notes, turn on Outlook's folder list view by clicking "View/Folder List", locate and click on the Outlook folder named "PocketMirror" and then add a note for each handheld that will synchronize with the profile. For example, if the handheld user "Ted" wants to add Bill and Tom, create two notes (one titled "Bill" and one titled "Tom" where "Bill" and "Tom" are the handheld user names). The content of the note is not significant, only the name.

Once you set up the Outlook profile for multiple users, you should consider the consequences of the first synchronization of each handheld. Using our example above, let's assume that the profile is synchronized with Ted's handheld. When you synchronize Bill's and Tom's handhelds the first time, you will probably want to do an Outlook overwrites handheld synchronization. This will get all three handhelds to an identical starting point. If you just synchronize, then the data in Outlook will be combined with the data in Bill's and Tom's handhelds.

Local Calendar Setting

PocketMirror detects when you are set up to use the local calendar in Outlook. The possibility exists that calendar items may not be completely synchronized when this option is set. It is recommended that you disable the local calendar.

For Outlook 2000 users:

1. In Outlook, click on "Tools/Options".
2. From the "Preferences" tab, select the "Calendar Options" button.
3. Uncheck "Always use local calendar".
4. Close and reopen Outlook.

For Outlook 98 and 2002 users:

1. Go to "Start/Run", type in "regedit", and click "OK".
2. Select "HKEY_CURRENT_USER\Software\Microsoft\Office\8.0\Outlook\OST".
3. Double-click on "NoOST".

The "Edit DWORD Value" screen is displayed.

4. Under "Value Data", if there is a "0", change this number to "3". If there is a "1", change this number to "2".

Expression Service

Outlook uses the Expression Service for finding and filtering items through the OLE Automation interface. When using Microsoft Outlook 97, the Expression Service may not function properly, so PocketMirror cannot correctly handle certain situations (like exceptions to recurring appointments). You can try to fix the Expression Service error by going to Microsoft's knowledge base article Q168146 at http://support.microsoft.com/support/kb/articles/q168/1/46.asp and trying the suggested fix. Also, uninstalling and reinstalling Microsoft Office into a new directory may resolve this problem.

Frequently Asked Questions

How Do I Synchronize Subfolders?

This Feature Available in Professional Version Only

PocketMirror Professional lets you synchronize subfolders. When synchronizing calendars, a calendar application that supports categories (such as Chapura's Calendar application which is available during the install of PocketMirror Professional version 3.1 or higher) is necessary.

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit, and click on the "Change" button. (If you do not have Outlook open, you will be prompted to choose a profile you want to change.)

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" located on the left, choose the topic Categories/Folders.

5. For Category mapping, select "Handheld category = Outlook subfolder", and click on the "OK" button.

6. Exit PocketMirror Settings, and synchronize.

Results:

- New Outlook subfolders for each handheld item with a category will be created in Outlook.

- Items in the Outlook root folder will be moved to subfolders only if categories are assigned to them. Otherwise, they will remain in the root folder.

- Existing or new Outlook subfolders will become categories on the handheld.

How Do I Change My Outlook Root Folder?

This Feature Available in Professional Version Only

To change the Outlook root folder to synchronize with a different folder (i.e. Contacts) instead of your default folder (mailbox Contacts or Personal Folders Contacts) - you will need to change your Outlook Root Folder.

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit (i.e. Contacts), and click on the "Change" button.

4. From the "Preference Settings for Outlook..." screen, under "Select Topic Below" located on the left, choose the topic "Outlook Root Folder".

5. Click on the "Select" button, and select the new folder with which you want to synchronize. Only the folder type specified will be in bold which indicates what folders are available for you to choose.

6. Click on the "Next" button.

7. Click on the "Finish" button located on the "Summary" screen.

8. Exit PocketMirror Settings and synchronize.

How Do I Maintain Multiple Calendars?

This Feature Available in Professional Version Only

PocketMirror Professional lets you maintain multiple calendars. A calendar application that supports multiple calendars or categories (such as Chapura's Calendar application which is available during the install of PocketMirror Professional version 3.1 or higher) is necessary in order to be able to maintain multiple calendars on your handheld.

First, you must add the other user's calendar folder to your Outlook profile. To do this:

1. In Outlook, click on "Tools/Services".

2. From the "Services" screen, click on the "Add" button.

3. From the "Add Service to Profile" screen, select "Personal Folders" which is located under "Available Information Services". Then click on the "OK" button.

4. From the "Create/Open Personal Folders" file, select the .pst file you want to add to your Outlook profile, and click on the "Open" button.

5. From the "Personal Folders" screen, you can view the file you have just selected. Click on the "OK" button.

6. Click on the "OK" button to close the "Services" screen.

To view the Personal folder you have just created in Outlook, click on "View/Folder List".

Next, you must set up PocketMirror. (It is recommended to synchronize your data before performing the following steps):

7. Go to "PocketMirror Settings" by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

8. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

9. From the "Change Synchronization Preferences" screen, select the "Outlook Calendar" application and click on the "Change" button.

10. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" on the left, choose the Categories/Folders topic.

Next, you must set up a category link to your other calendar folder:

11. From the "Categories/Folders" screen, click on the "Advanced" button.

12. From the "Category Links" screen, click on the "New" button.

13. On the "Handheld Category" screen, enter the name of the new category for the calendar you are adding. (i.e. "Wife's Calendar"), and click on the "Next" button.

14. From the "Synchronization Type" screen, select to "Synchronize", have "Outlook overwrite the Handheld", or "Keep the information on the Handheld Only". Then, click on the "Next" button.

15. From the "Outlook Folder Selection" screen, find the "Personal Folders" folder you created, select "Calendar", and click on the "Next" button.

16. From the "First Synchronization Option" screen, choose how PocketMirror will first

synchronize your data. Then click on the "Next" button.

17. From the "Summary" screen you can view your choices. Click on the "Finish" button.

18. Exit PocketMirror Settings, and synchronize.

How Do I Maintain Multiple Contact Lists?

This Feature Available in Professional Version Only

PocketMirror Professional lets you synchronize multiple Contact lists.

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the Outlook Contacts application, and click on the "Change" button.

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" located on the left, choose the topic Categories/Folders.

5. Click on the "Advanced" button. This will open the Category Links Wizard.

6. Select "New" from the "Category Links" screen and on the "Handheld Category" screen, enter the new handheld Contacts category name, and click on the "Next" button.

7. From the "Synchronization Type" screen, select the desired Synchronization Action, and click on the "Next" button.

8. From the "Outlook Folder Selection" screen, select the folder to synchronize with, and click on the "Next" button. The folders available will be in bold text.

9. Click on the "Finish" button, and exit PocketMirror Settings.

10. Synchronize.

How Do I Synchronize Multiple Folders?

This Feature Available in Professional Version Only

PocketMirror Professional lets you synchronize multiple folders. When synchronizing calendars, a calendar application that supports categories (such as Chapura's Calendar application which is available during the install of PocketMirror Professional version 3.1 or higher) is necessary.

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the application you want to edit (i.e. Calendar), and click on the "Change" button.

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" located on the left, choose the topic Categories/Folders.

5. Click on the "Advanced" button. This will open the Category Links Wizard.

6. Select "New" from the "Category Links" screen and on the "Handheld Category" screen, enter the new handheld category name, and click on the "Next" button.

7. From the "Synchronization Type" screen, select the desired Synchronization Action, and

click on the "Next" button.

8. From the "Outlook Folder Selection" screen, select the folder to synchronize with, and click on the "Next" button. The folders available will be in bold text.

9. Click on the "Finish" button, and exit PocketMirror Settings.

10. Synchronize.

How Do I Keep Personal Information Off of the Company Server?

This Feature Available in Professional Version Only

PocketMirror Professional lets you choose which information to keep off of your company server by using Category Links.

1. Go to PocketMirror Settings by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the Outlook application you want to edit, and click on the "Change" button.

4. From the "Preference Settings for Outlook…" screen, under "Select Topic Below" located on the left, choose the topic Categories/Folders.

5. Click on the "Advanced" button. This will open the Category Links Wizard.

6. Select "New" from the "Category Links" screen and on the "Handheld Category" screen, enter the new handheld category name, and click on the "Next" button.

7. From the "Synchronization Type" screen, select "Handheld only" for the desired Synchronization Action, and click on the "Next" button.

8. Click on the "Finish" button, and exit PocketMirror Settings.

9. Synchronize.

How Do I Resolve Conflicts?

This Feature Available in Professional Version Only

When the same item in Outlook and the handheld has been modified between synchronizations, PocketMirror Professional allows you to resolve the conflict (Conflict Resolution) in one of three ways: Duplicate records, Outlook wins, or Handheld wins.

To access this feature:

1. Go to "PocketMirror Settings" by clicking "Start/Programs/PocketMirror/PocketMirror Settings".

2. From the "Chapura Settings" screen, select the handheld user name you want to edit, and click on the "Settings" button.

3. From the "Change Synchronization Preferences" screen, select the Outlook application you want to change, and click on the "Change" button.

4. From the "Preference Settings for Outlook Calendar" screen, under "Select Topic Below" located on the left, choose the "Conflict Resolution" topic.

5. Choose to duplicate the records so no changes are lost (Duplicate Records), save the changes made in Outlook ONLY (Outlook Wins), or save the changes made on your handheld ONLY (Handheld Wins).

6. Exit PocketMirror, and synchronize.

More Frequently Asked Questions

Check our Web site for the latest FAQs **http://www.chapura.com/support.html.** Our technical support team has an extensive collection of solutions to common issues that our users experience. Our on-line knowledge base is searchable and available anytime.

Technical Support

Chapura, Inc. provides free technical support for registered owners of PocketMirror. You can contact our technical support group by e-mailing questions to support@chapura.com or by calling (251) 470-1979 between 8:00 a.m. and 5:00 p.m. Central Standard Time, Tuesday through Friday and 9:00 a.m. to 5:00 p.m. Central Standard Time, Monday.

Appendix B – Glossary

Handheld	The handheld is the connected organizer based on Palm OS computing platforms.
Synchronization	Synchronization is the transfer of data between your handheld and your PC.
Conduit	This is the software program that links the Personal Computer to one of the handheld applications.
Exception Window	This is the period of time in the future PocketMirror will scan Outlook for exceptions to recurring appointments.
PocketJournal	This is the Chapura software for handheld applications used to enter new activities associated with specific "Contacts"