Syncing a Mobile Device with the Gateway Portal (Windows 2000)
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Chapter One: Synchronization and Installation Requirements

Chapter Objectives:

- Understanding the synchronization process
- Meeting installation requirements (system requirements)
- Installing Sun ONE Synchronization

Prerequisites

- A mobile device, such as a Personal Digital Assistant (PDA).

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

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

The Gateway portal utilizes a Sun Microsystems architecture that allows you to synchronize your personal digital assistant (PDA) with the information you store on your Gateway portal account.

When synchronization is executed, Sun ONE Synchronization syncs your Gateway calendar data with the data in your PDA. Then, you have the same events and tasks on both. Sun ONE Synchronization 1.1 allows you to select only the data you wish to sync. You can also specify the fields on the Gateway calendar that correspond to the fields on your PDA since they do not necessarily have the same fields.
Lesson 1-1: Understanding the Synchronization Process

The Sun ONE Synchronization is a software product that runs on a Windows PC to synchronize (sync) data between the Sun ONE Calendar Server (which stores the University’s Gateway information) and another data source, such as your PDA. Currently, software for the MAC is not available.

Data Types

The Sun ONE program can sync data types for the following items between the server and your PDA:
- Events such as meetings
- Tasks

What you CAN do

You can sync as many different devices of applications to the Gateway calendar as you have installed on your computer. For example, you can sync from Outlook and a PDA on the same personal computer to the same or different Gateway accounts. You can also sync two of the same device types to the same or different Gateway accounts as long as you sync them from different personal computers and always sync the devices from the same personal computer each time.

What you CANNOT do

You CANNOT sync more than one of each type of application from the same personal computer. You CANNOT sync two different PDAs from a personal computer to the same or different Gateway accounts.

Figure 1-1

Software that is provided with a PDA that uses a Palm operating system, for example.
Lesson 1-2: Meeting Installation Requirements

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

1. A windows PC with a Pentium processor or later
3. 16 MB RAM minimum (32 MB recommended)
4. 20 MB free hard disk space
5. Supported data source: Microsoft Outlook 98/2000/XP; Palm Desktop 3.x/4.0; Palm OS Mobile Devices; Windows CE Mobile Devices 2.0/3.x
6. Web Browser – IE 4.0 or higher
7. The linking device (for example, a cable or infrared) and the software that came with your mobile device
8. If you are syncing a Palm device, you need the HotSync Manager
9. If you are syncing a Windows CE device, you need Active Sync
10. Be sure your mobile device software is installed on your computer.
Lesson 1-3: Installing Sun ONE Synchronization

Before you begin, it is strongly recommended that you:

♦ Backup your data just as a precaution
♦ Close all open programs

These screen shots are the appropriate ones for installing on a Windows 2000 machine. If you are using Windows XP, you may have additional screen prior to, or after the ones presented here.

1. Download the Sun ONE Synchronization 1.1 Patch 2 software from:  
   http://wwws.sun.com/software/download/products/3f9ee26e.html

   On your visit, register and accept the license agreement and then download. Be sure to note where you save the download! If you are logged in to a SLU computer, you can go to ftp://helpdesk.slu.edu/INCOMING and select the sync1-1 file and download from SLU.

   NOTE: IF YOU ARE OPERATING ON THE ACADEMIC OR ADMIN DOMAINS, YOU WILL NEED TO HAVE ADMINISTRATOR’S RIGHT IN ORDER TO INSTALL THIS SOFTWARE! SEE YOUR LOCAL IT SUPPORT.
2. Double-click the downloaded file to begin the installation process. When the file is fully extracted, the Sun ONE window appears. Click Next:

![Sun ONE Synchronization window]

Welcome to the InstallShield Wizard for Sun ONE Synchronization

Sun ONE Synchronization tool has been tested and is certified with the Sun ONE Calendar Server

3. Read the **License Agreement. Click Yes:**

![License Agreement window]

Press the PAGE DOWN key to see the rest of the agreement.

**Sun ONE Synchronization 1.1 P2 for Sun ONE Calendar Server**

**IMPORTANT - PLEASE READ THIS NOTICE CAREFULLY.**

SUN IS WILLING TO MAKE THE SUN ONE SYNCHRONIZATION 1.1 P2 FOR SUN ONE CALENDAR SERVER (ALONG WITH ALL ACCOMPANYING SOFTWARE AND DOCUMENTATION, "SYNCH") AVAILABLE TO YOU ONLY UPON THE CONDITION THAT YOU ACCEPT ALL OF THESE TERMS CONTAINED IN THIS AGREEMENT.

Do you accept all of the terms of the preceding License Agreement? If you choose No, the setup will close. To install Sun ONE Synchronization, you must accept this agreement.

![License Agreement options]
4. Select the components you want to install. In this instance, we’re going to sync with a Handspring Visor which uses Palm operating system software. We also use Outlook. Click Next:

5. Your choices are confirmed. Click Next:

6. The software extracts:
7. And the installation is complete! Click **Finish**:
Chapter Two: Syncing Your Mobile Device

Before you can attempt to synchronize your Gateway data with your mobile device, you must first configure your Gateway account settings. After you have done that, you are ready to sync for the first time, and set up the special settings you may want in the process.
Lesson 2-1: Identifying Your Account with Gateway

For our example here, assume you are syncing a Palm OS device (the Handspring Visor).

1. Click Start, Programs, Sun ONE Synchronization, Synchronize with Palm OS Devices. The Sun ONE Synchronization window opens:

2. Click the Sun ONE icon on the left side of the window, and the pop-up Configure button (note: if you do not get the pop-up button, click on Settings, Translators):

Figure 2-1
The components installed from Chapter 1 are represented in the last drop-down menu.
3. The **Sun ONE Translator Settings** window opens:

![Sun ONE Translator Settings window](image)

4. Complete the fields as follows:

   - **Server:** lumcalendar.slu.edu
   - **Port:** 6785
   - **User Name:** your SLU user name
   - **Password:** your Gateway password
   - **Reminder Email address:** your SLU email address

5. **Click the OK button. You are returned to the Sun ONE Synchronization window.**
Lesson 2-2: Synchronization Settings

For the sake of simplicity, we will review only those settings that are necessary for syncing. The other settings may be investigated and changed if you so desire.

1. From the Sun ONE Synchronization window, click Settings. The Settings window opens as seen in Figure 2-2.

2. Click the General tab.

   Display confirmation message before removing records – Select this check box to display the delete confirmation message. During synchronization, if an entry is deleted on either Gateway or your mobile device, a message will be displayed before deleting the corresponding record on the other source. This provides the opportunity to keep the entry on the other source if you so desire. To allow deletion to occur without further prompting, clear this check box.

   NOTE: When syncing, if you have elected to decide whether or not to override one source over another, and are NOT at your computer to make the selection, the delay in completing the syncing may cause problems and delete data. If you have elected to decide on conflicts, then please do NOT leave your computer until the process is completed.

   Force Full Synchronization – Full Synchronization can be forced by selecting this check box. When you select this, full synchronization occurs the next time you sync. If you should exit the synchronization, the setting is cleared regardless of the last setting.
3. Click the **Conflicts** tab:

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

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

When the details of this window are displayed, you can then decide what to do. The Action drop-down list displays the options you can select. For example, you might want to Ignore, Delete the Sun ONE record (Gateway), or Add to Outlook Calendar.

**Skip the record** – If this is used, when a conflict occurs, it will never be displayed. Conflicts will always be skipped or ignored, causing it to appear as if the data is not synchronized.

**Automatically resolve conflict** – If you choose this, no screen will prompt you for a decision. Sun ONE will perform the correct action according to the specified setting.
4. **Click the Mapping tab:**

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

5. **Click the Filters tab:**

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

**Text Filter** – you can set up Field Contains criteria here. This will allow only that text that you have in the criteria to be synced.

**Date Filter** – here, you can establish the date frame for what you want to be filtered in the syncing.
6. Click the **Data Sources** tab:

Depending on the Components selected (see page 16) you should see the installed selections here.

**Data Sources Settings** – to change the data source, select the item from the list that you want to change. If it is supported, the Change button will be available.

**Change button** – this allows you to select a data source if there are several potential sources available. For example, if you have two folders on your mobile device, you can specify which folder is to be used as the source of data.

**Sun ONE Calendar Selection** – select the calendar you want from the drop-down list. Remember, you can sync data from and to (read and write operations) only one Gateway calendar at a time.
Lesson 2-3: First Time Synchronization

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

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

- Replace the mobile device records with the Sun ONE records (Gateway)
- Replace the Sun ONE records (Gateway) with the mobile device records
- Combine both mobile device and Sun ONE records (Gateway)

Using the “combine” option can cause duplicate records, and it is highly recommended that you do not use this option.

If you consider your mobile device to have all the information you need, it is recommended that you reset (clear) all the data on the other side so that all records are moved over. However, if you have incomplete data in both your mobile device and Gateway, you should choose to copy data in both directions. Since full synchronization looks for exact matches, if the mobile device and Gateway records have a similar yet not exact data, you may receive two entries for the same record.

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

1. With the Sun ONE Synchronization window open as seen in Figure 2-2, click Synchronize. The Full Synchronization window opens:

Choose the option you want to use for this first time synchronization from the 3 choices listed. Sun ONE will tell you if it sees duplicates to delete. Follow the instructions on your monitor.
Lesson 2-4: Specific Mobile Device Support

For assistance with Microsoft Outlook, visit:

http://www.slu.edu/its/training/sync_outlook.pdf

For assistance with Palm Desktop, visit:

http://www.slu.edu/its/training/sync_palmdesktop.pdf

For assistance with Palm OS devices, visit:

http://www.slu.edu/its/training/sync_palmOS.pdf

For assistance with Windows CE devices, visit:

http://www.slu.edu/its/training/sync_windowsce.pdf