



Starfish

Smart Connected Solutions

TrueSync® Plus Quick Start Guide

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Introducing TrueSync Plus

Welcome to TrueSync Plus.

TrueSync Plus is designed to provide direct synchronization among your applications, handheld devices, and/or online services. One click lets you keep your information current and accessible anytime, anywhere.

Instructions for setting up TrueSync and synchronizing are provided in “Synchronizing” on page 6.

Requirements

Before you install TrueSync Plus, make sure that you have the necessary hardware and software listed here. Some features may require special configurations.

To use TrueSync Plus, you need:

- ◆ A computer running Windows 95, Windows 98, or Windows NT 4.0 workstation
- ◆ A minimum of 15 MB hard disk space for installation of TrueSync Plus (includes 1 MB of temporary space on the same drive as your Windows directory for installation)
- ◆ 256-color VGA video adapter and compatible monitor
- ◆ An MPC 2 Compatible CD-ROM drive
- ◆ A pointing device compatible with Windows 95, Windows 98, or Windows NT 4.0

- ◆ A sound card and speakers, required to play sounds (.WAV files) for appointment alarms
- ◆ Microsoft Internet Explorer 3.01 or greater, or Netscape Navigator 3.0 or greater required to view the *Troubleshooter Guide*.

Synchronization with a device may require an available communications port.

Installing the product

As with any product, Starfish recommends backing up your data files before installation and periodically as you continue to use the product. For help backing up your data, please visit the Starfish Web site:

<http://www.starfish.com/service/backup/>

Installing TrueSync Plus:

Insert the CD-ROM into your CD-ROM drive.

NOTE When you insert the CD-ROM into your CD-ROM drive, the installation should launch automatically. If it does not, follow the steps below.

If the installation does not launch automatically:

- 1 Click Start on the Windows taskbar, then choose Run.
- 2 Click the Browse button.
- 3 Browse to locate the program SETUP.EXE on the CD-ROM.
- 4 To begin the installation, double-click SETUP.EXE.

The Readme file

Any last-minute changes or additions to TrueSync Plus are documented in a Readme file. To see the TrueSync Plus Readme file, click the Windows Start button and choose Programs | TrueSync Plus | Readme.

Registering

Be sure to register TrueSync Plus so that you can receive product information and support.

Uninstalling your product

If you want to remove TrueSync Plus from your computer, use the uninstall program, which permanently removes the product's program components.

To remove the software from your computer

- 1** Click Start on the Windows taskbar. Choose Settings | Control Panel.
 - 2** Double-click Add/Remove Programs.
 - 3** Choose TrueSync Products from the listed applications.
 - 4** Click the Add/Remove button.
 - 5** Choose the components you want to uninstall.
 - 6** Back up any data you want to keep, and then delete the TrueSync folder (usually Program Files\Starfish\TrueSync).
 - 7** Restart Windows.
-

Starting TrueSync Plus

Instructions for using TrueSync Plus are provided in “Synchronizing” on page 6.

About the documentation

This *User's Guide* provides installation instructions and a guide to synchronizing.

The *Troubleshooter Guide* helps you get started and provides access to online resources, including technical support information. To view the *Troubleshooter Guide*, click Start in the Windows Taskbar and choose Programs | TrueSync Plus |

Troubleshooter. The Troubleshooter is an HTML document and starts in your Internet browser.

NOTE The illustrations in this guide are intended as examples. What you see on your screen may differ, depending on factors such as the software version and information that you have entered.

Using online help

TrueSync Plus includes a detailed online help system. To open Help, press **F1**, or choose Help | Topics.

For more information

For technical support and additional information, refer to the Readme file (see “The Readme file” on page 3).

Synchronizing

Use Starfish TrueSync technology to synchronize your contact information, calendar events, tasks, and memos quickly and easily among your PC-based applications, handheld devices, and online services. Because TrueSync Plus is designed to synchronize with the most popular desktop applications, devices, and services, you can customize it to suit your own working style and needs.

Starting TrueSync



TrueSync Plus users:

Right-click the TrueSync icon in the Windows taskbar, and click Configure.

Setting up TrueSync

The first time you start TrueSync, a Setup Wizard assists you in specifying:

- ◆ the clients you will synchronize (a client is any supported handheld device, online service, or application that you have set up for TrueSync synchronization). In some versions, the initial clients are preselected for you.
- ◆ details about each client, such as where to find the data for an application or how you connect your handheld device to your computer.

- ◆ which files, folders or categories you want to synchronize.

NOTE You can modify your selections after completing the Setup Wizard.

Using the TrueSync Setup Wizard

- 1 Click Next in the Welcome screen.
- 2 Select your application, such as Outlook. Depending on your installation, the application may be pre-selected.
- 3 Specify the location of your application's data. Depending on the application, you may have the option of specifying a different folder.
- 4 Select the device that you want to synchronize, if prompted. Depending on your installation, the device may be pre-selected.
- 5 Depending on the device, you may need to specify how you will connect your device to your computer.
- 6 If you use a service, you may be asked whether you want to synchronize with that service.
- 7 Depending on the service, you may need to enter your user ID for the service, password, and connection method.
- 8 You are prompted to connect your device to your computer. After the device is connected, and turned on if required, click Next.
TrueSync reads the data from the clients you have chosen. No data transfers or changes take place during this step.
- 9 If prompted, select your country and city to indicate your time zone.

The next step begins your selections of files, folders and categories to synchronize, starting with Contacts data. To learn how to select items to synchronize, see “Selecting files, folders, or categories” on page 10. You can change your choices at any time after you have completed the Setup Wizard.

- 10** Specify which Contacts fields you want to synchronize. For details, see “Selecting and mapping Contacts fields” on page 11.
- 11** Specify the Calendar files or folders you want to synchronize.
- 12** Specify the Memos files or folders you want to synchronize.
- 13** Specify the To Do list (task) files or folders you want to synchronize.
- 14** When you are satisfied with your selections, click Finish to display the TrueSync window. You can change your setup at any time as described in “Changing the TrueSync setup” on page 9
- 15** When you perform the first synchronization between two clients, it is recommended that you **overwrite** the data in one of the clients to avoid duplicate records. To learn how, see “Changing synchronization options” on page 9.

To synchronize:

- 1** Connect your device to your computer. Some devices may require that you turn them on before synchronizing.
- 2** Click the TrueSync icon in the center of the TrueSync window.
- 3** If you are synchronizing with a client that is password-protected, you may be prompted to enter your password.

NOTE Do not disconnect your device from your computer during a synchronization.

See the TrueSync Log for status and information about the synchronization. See “Using the TrueSync Log” on page 13.

NOTE If you cancel an in-progress synchronization by clicking the Stop Synchronization toolbar button, wait until the synchronization has halted before closing the TrueSync window. The cancellation process may take some time to complete.

Changing the TrueSync setup

At any time after you have completed the TrueSync Setup Wizard, you can:

- ◆ add or remove clients.
- ◆ change the synchronization options for each client.
- ◆ select the data types to synchronize (data types are Calendar, Contacts, Memos, and To Do items).
- ◆ change the files, folders, or categories to synchronize.
- ◆ specify which Contacts fields to synchronize and how those fields map to corresponding fields in other clients.

To add a client to your configuration:

Choose Client | Add, then select the client from the Application, Device, or Service lists. You will be prompted to specify details about the client, such as which folders or categories to synchronize. After you add a client, it is represented in the TrueSync window with an icon, which you can click to change options.

To remove a client:

Choose Client | Remove. Select the client and click the Remove button.

Changing synchronization options

To change how a client will be synchronized:

Choose Client | *<clientname>* options to display the client's Options Page. Use this page to specify how the client's data will be synchronized.

Use these guidelines to select the appropriate choice:

- ◆ Select Do not synchronize to exclude the client from synchronizations.

- ◆ Select Synchronize to synchronize this client’s data with data from one or more other clients. Records may be added, deleted, or modified on this client.
- ◆ Select one of the delete and overwrite options to overwrite this client’s data with data from one or more other clients.

Selecting what to synchronize

All data types (Calendar, Contacts, Memos, To Do items) will be synchronized unless you specifically exclude them.

To exclude a data type from synchronization, choose Data | *<datatype>*, and check the “Do not synchronize *<datatype>*” option. The data type will be excluded from each synchronization until you uncheck the option.

To limit the range of Calendar event dates that will be synchronized to a device, choose Data | Calendar and click the Options tab. Limiting the range of dates speeds up synchronization and saves space on your device.

Selecting files, folders, or categories

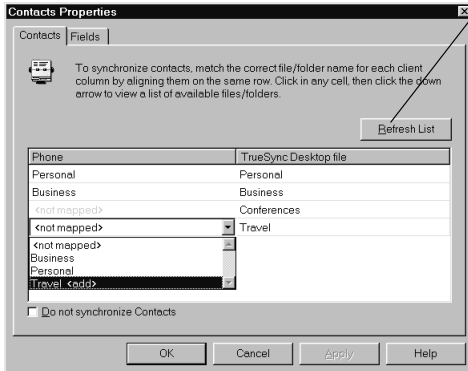
Select a data type by choosing Data | *<datatype>*.

To select items to synchronize between clients:

- 1** Find the row for the item that you want to synchronize.
- 2** Click in the same row under the other client. A down arrow displays at the right of the column.
- 3** Click the down arrow to open a list of item choices on that client.

4 Click on your choice from the list:

Each client's column lists the files, folders, or categories available for synchronization on that client. If you add items and do not see them in the list, click the Refresh List button.



If you align <not mapped> in one column with an item in another column, it means that item will not be synchronized.

If you select an item followed by <add>, it will be created during synchronization.

The number of items you can synchronize to a device is limited by the device.

The number of files, folders, or categories that you can select is limited by devices. For example, suppose you have four Contacts folders set up for synchronization to a device, the limit for that device. You then decide to synchronize another Contacts folder. Before you can do so, you will need to deselect one of your mapped Contacts folders because of the device limit.

Selecting and mapping Contacts fields

The term “mapping fields” refers to matching one client’s field with another client’s field. For example, you might map a field called “Home Phone” on your desktop application with a field called “Personal Phone” on your device.

To map your Contacts fields:

- 1 Select Data | Contacts and click the Fields tab.
- 2 Highlight the files or categories containing the fields that you want to map.

- 3 Specify how to map the fields. You can choose:
- ◆ **SmartMap™** mapping by clicking the SmartMap button. SmartMap automatically maps your Contacts fields. All you have to do is choose one of the SmartMap options; your choice determines which fields to synchronize. For information about each of the SmartMap options, click the Help button.
 - ◆ **Customized** mapping by clicking the Customize Mapping button. This option lets you map each pair of fields. To change mapping, click a field, click the down arrow at the right, and select the new mapping from the drop-down list. To save space on your device, unmap any fields you do not normally use.

Changing your preferences

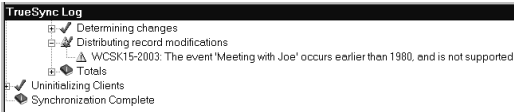
To change the preferences for any client, choose Client | *<clientname>* options or click on the client's icon in the TrueSync window. This displays the client's Options Page described in "Changing synchronization options" on page 9. Depending on the client, there may be additional client preferences; click the additional tab(s), and change the options as desired. For assistance, click the Help button on each page.

Using QuickLists

Depending on the device that you are using, you may have the option to customize your QuickLists. When you are adding or changing data, QuickLists present you with choices, such as event subjects, task names, or short reminders, that reflect the profile you chose in your device's setup wizard. As you enter new items, the QuickLists include your additions. To change your QuickLists, choose Client | *<devicename>* options, and then click the QuickLists tab. If you need assistance, click the Help button.

Using the TrueSync Log

The TrueSync Log displays messages about your recent synchronization sessions. The messages provide details about the progress and results of the synchronizations.



View or hide the TrueSync Log by choosing View / Log.

Select Synchronize | Options to specify how TrueSync displays TrueSync Log entries. Click the Help button for details.

To get help on error messages, highlight an error and click *F1*.

Setting up multiple users

If you use more than one synchronization configuration, or if more than one person uses the same computer to synchronize, set up an additional user to define each configuration.

To create an additional user:

- 1 Select Synchronize | Options, and then click the Users tab.
- 2 Click the New button and use the Setup Wizard to specify the synchronization preferences for the new user.
- 3 Select client preferences for the new user by choosing Client | *<clientname>* options.

To specify the user:

- 1 Choose Synchronize | Set User.
- 2 Select a user name from the list.

The current user name is shown on the TrueSync window title bar.

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