TeamAgenda Synchronization under Mac OS X

This document describes the process of synchronizing TeamAgenda's Address Book, Calendar and To Do List with handheld devices such as Personal Digital Assistants(PDA), cellular phones or any device that may be synchronized using Apple's iSync ®.

iSync

On Apple's Mac OS X®, Apple has provided an infrastructure for the synchronization of data between applications and handheld devices. This infrastructiure is named Sync Services. The iSync application utility provides a mean to initiate synchronizations. iSync also provides ways to fine tune the synchronization process.

As such, Teamsoft has implemented a synchronization module within TeamAgenda that allows TeamAgenda to exchange information with handheld devices through Apple's iSync.

Data Exchange

The synchronization module implemented within TeamAgenda exchanges Address Book, Calendar and To Do List information. In fact, during synchronization, not all the data stored in TeamAgenda gets transferred to the handheld device.

For synchronization to work, Teamsoft needed to define a subset for each type of data that corresponds to what both TeamAgenda, iSync and the handheld devices supported.
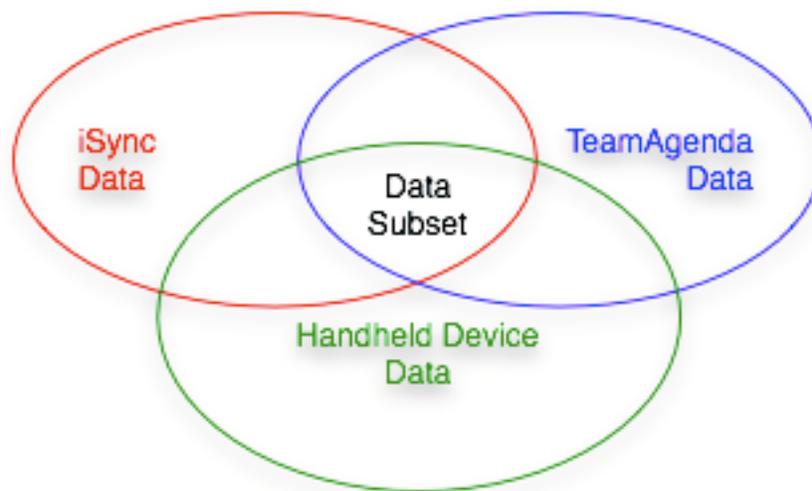
Figure 1 - Data Exchange Subset diagram.

The next three tables describe what data gets transferred to the device for each type of data.

Address Book		
Last Name	Business Street	Business Phone
First Name	Business City	Business Fax
Company	Business State/Province	Business Mobile Phone
Job Title	Business Postal Code/Zip	Business Email
Notes	Business Country	Home Phone

Table 1 - Address Book fields that are exchanged during the synchronization.

Calendar		
Date	Begin Time	End Time
Subject	Comments	Alarm Offset

Table 2 - Calendar fields that are exchanged during the synchronization.

To Do List		
Date	Begin Time	End Time
Subject	Comments	Alarm Offset
Due Date	Completed	Completion Date

Table 3 - To Do List fields that are exchanged during the synchronization.

Synchronization Process

The synchronization process may be launched from TeamAgenda's File menu item labeled "Synchronize using iSync..." as seen on figure 1.
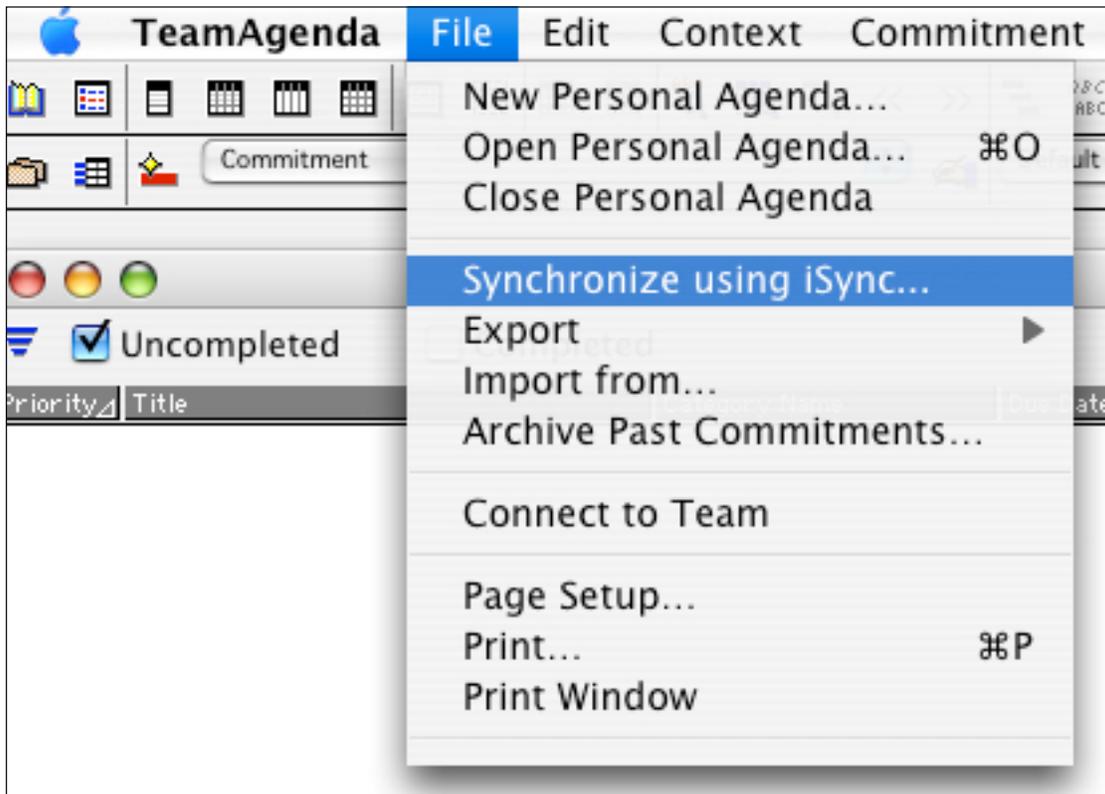
Figure 2 - Synchronize using iSync... File menu item.

By selecting the " Synchronize using iSync..." File menu item you will initiate a three step process that begins with the display of the dialog illustrated by figure 2:
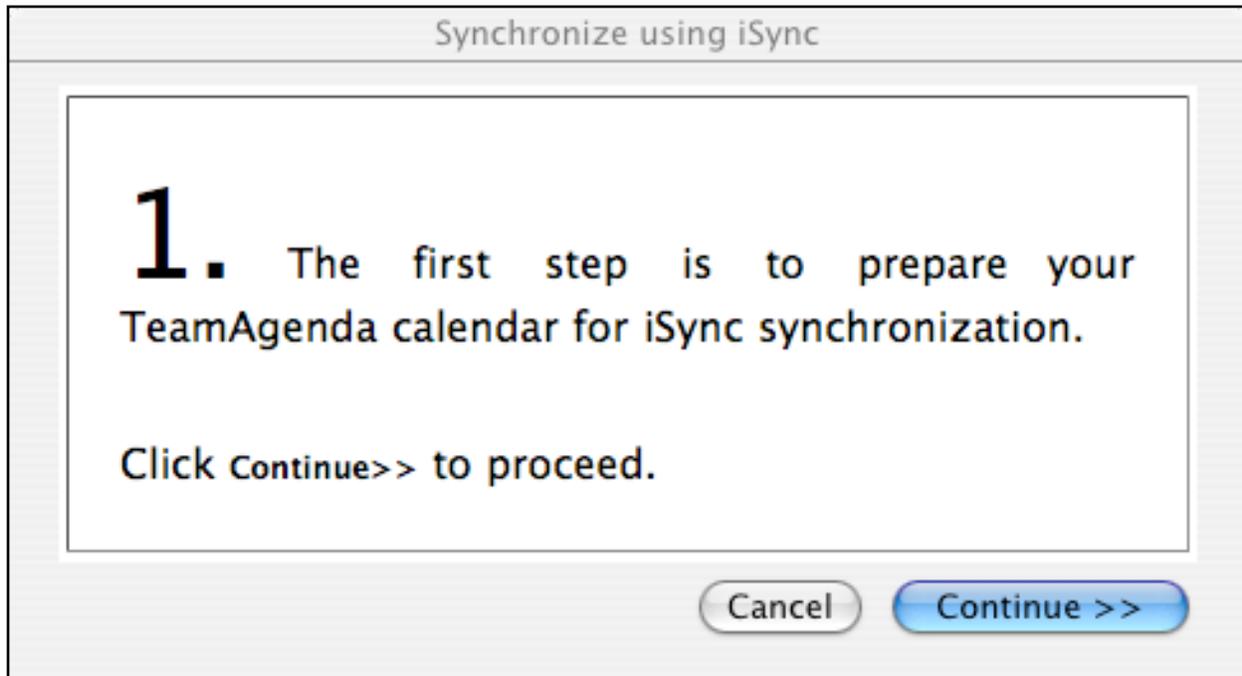
Figure 3 - First step of synchronization process.

During the first step of the process, TeamAgenda prepares the data for synchronization. As mentioned on the dialog, click the "Continue >>" pushbutton to move on to the second step or the "Cancel" pushbutton to abort the process.

The second step consists in launching an external application named *iSync*. iSync will let you define some options that will customize the synchronization process and then, at your command, iSync will deal with the handheld device to exchange information.
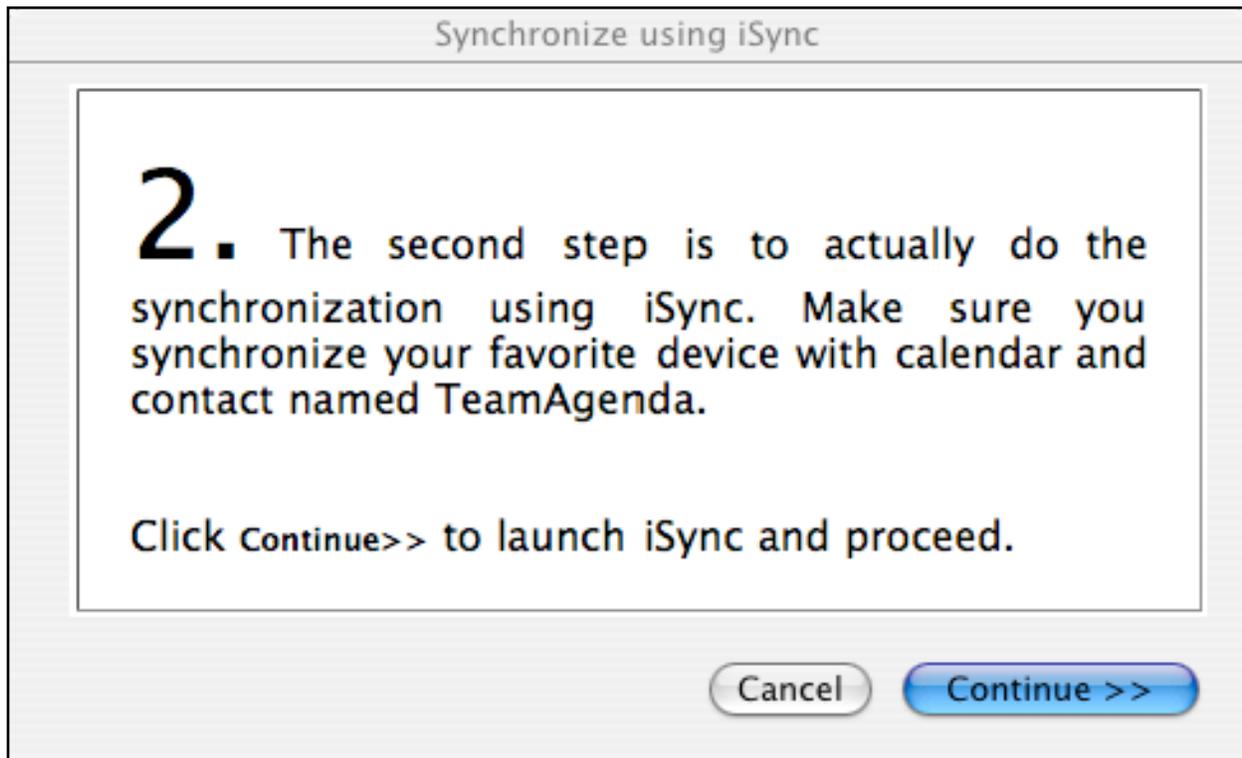
Figure 4 - Launching iSync.

The iSync dialog displays the devices currently hooked physically to your computer. For our example, we use a Palm handheld that is identified with the owner's name, in this case the owner is named *Marc*.

Figure 5 - iSync synchronization application.

By clicking on the icon labeled *Marc,* you will see a range of options that you can use to customize the synchronization process.
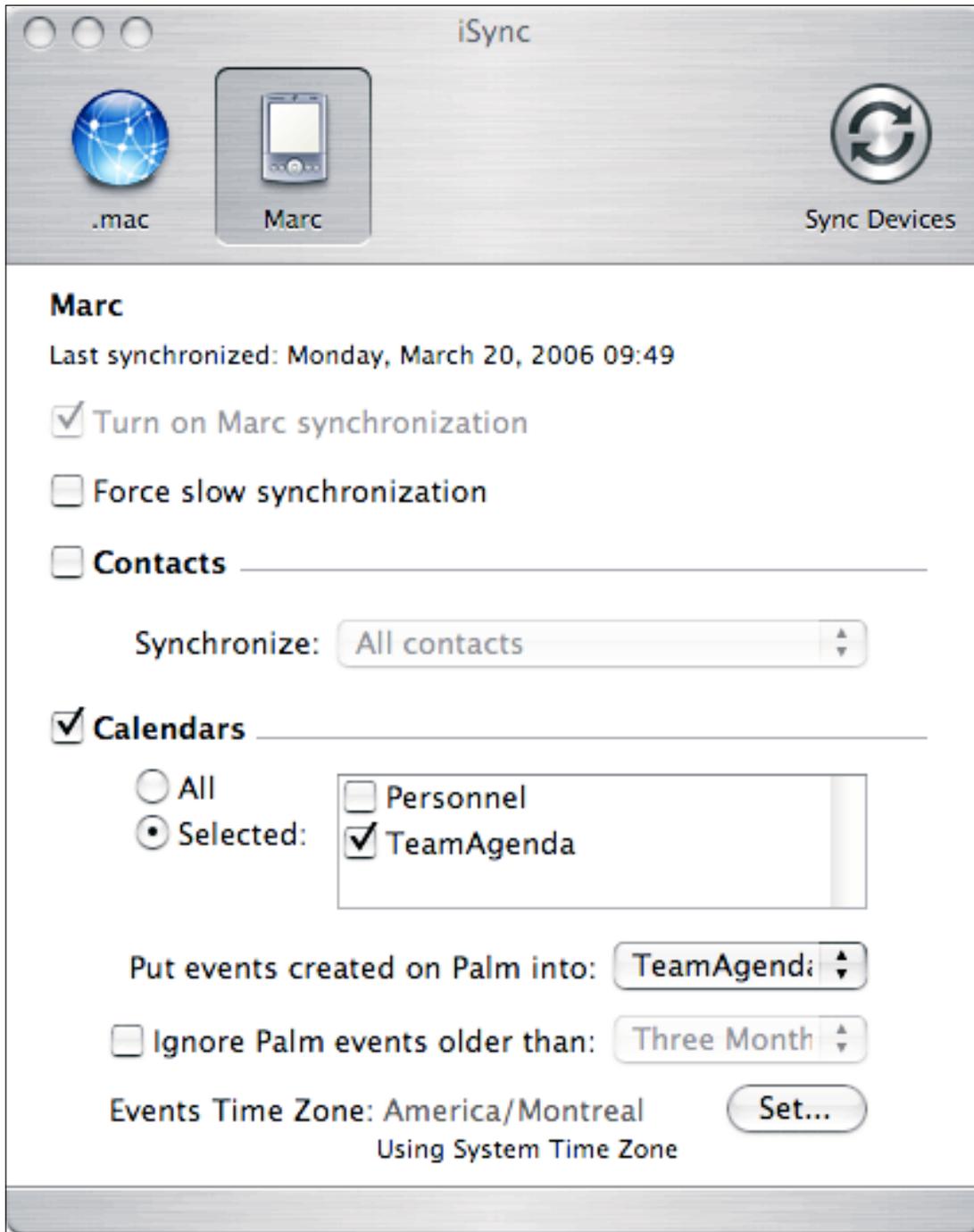
Figure 6 - iSync options.

For the synchronization to work correctly, you have to make sure that the Address Book information, labeled "Contacts" in iSync is setup to be synchronized with TeamAgenda by selecting the "TeamAgenda" option from the "Synchronize:" pulldown menu.

Accordingly, you need to make sure that the calendar information, which also includes the To Do List as well, is configured to be sent to the right calendar. TeamAgenda will create a calendar in iCal named TeamAgenda to be used as a container to support the synchronization process. Therefore, in iSync, you need to select the *TeamAgenda* calendar to be the destination of the data exchanged with the handheld device.

Also, TeamAgenda synchronization using iSync is characterized as being a *Slow Sync*. A slow synchronization means that TeamAgenda and the handheld device will merge the whole content of their respective databases at the time of the synchronization. This is done to ensure accuracy. In contrast, a Fast Sync, would try to restart the synchronization to the point the last synchronization was done. At this point in time, a fast synchronization cannot be implemented reliably with iSync.

Figure 7 below shows a correct iSync options configuration.
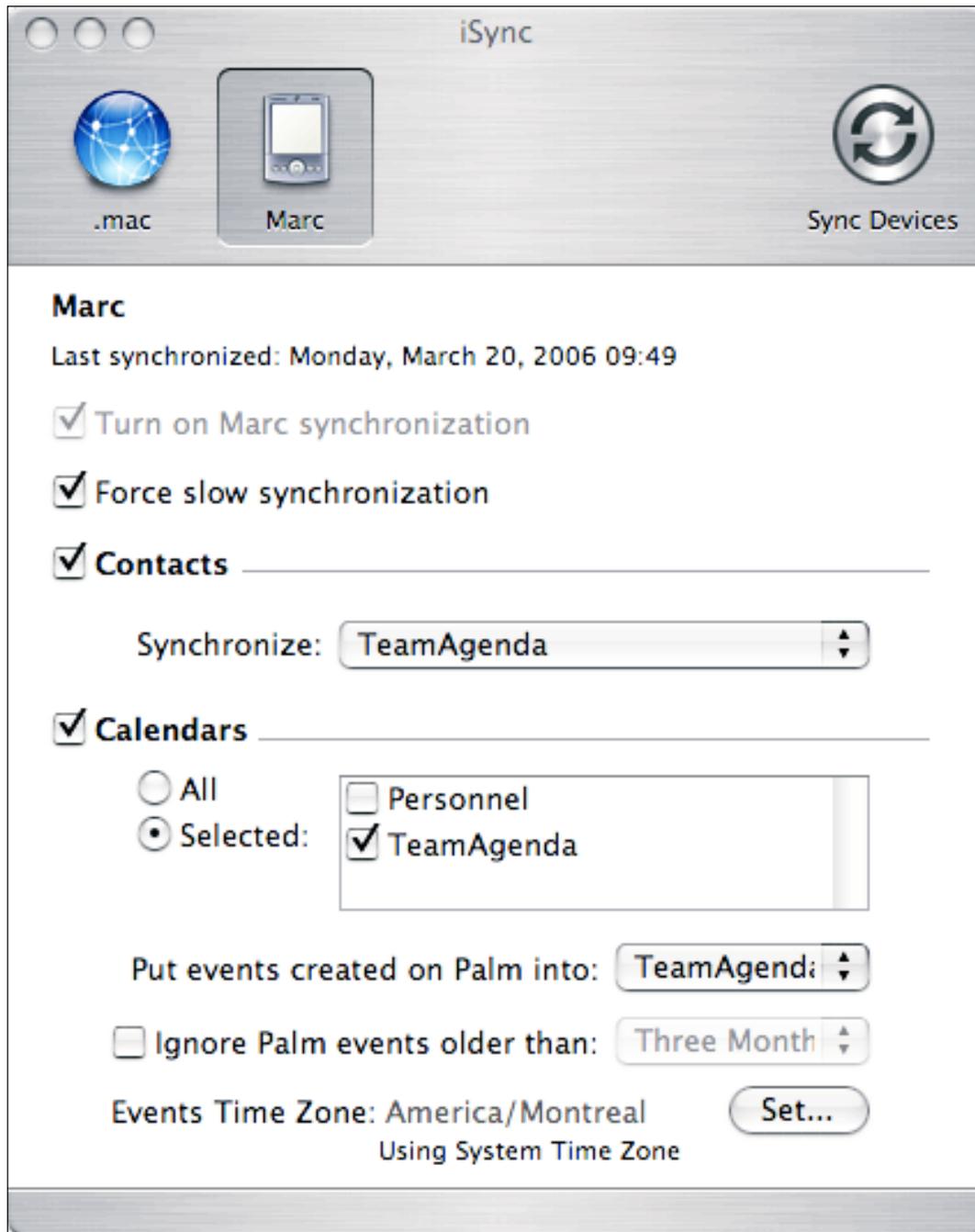
Figure 7 - Example iSync configuration.

The next step is to initiate the synchronization between iSync and the handheld device. Using a Palm device, this is done by launching Palm's HotSync Manager, on another device please check the manufacturer's documentation.

Once the synchronization is started on the handheld device, the handheld device may provide some progress information. On a Palm device, Palm's HotSync Manager provides progress information this way.
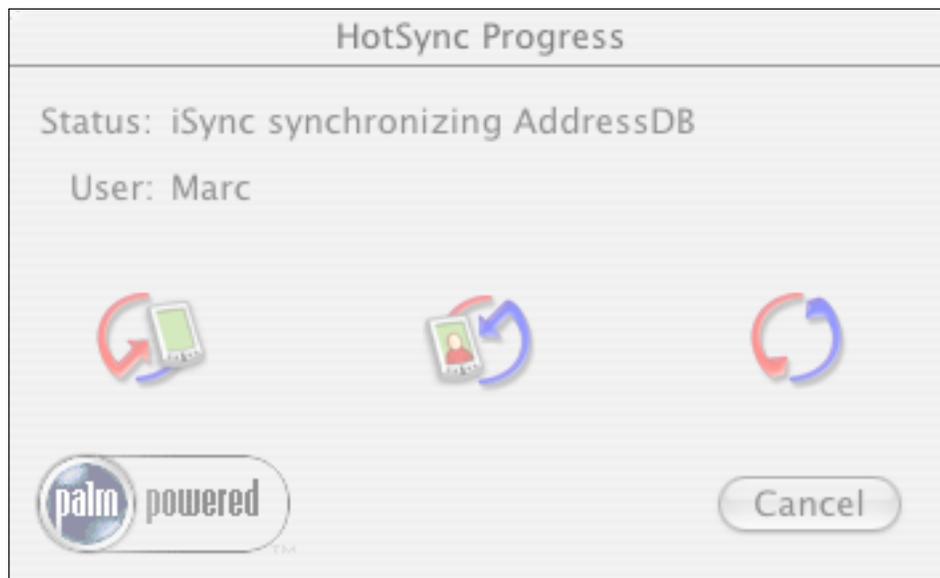
Figure 8 - Palm HotSync Manager providing progress information.

If you initiate the synchronization in iSync before the handheld device is ready to synchronize, you might get a warning dialog such as Figure 9 to remind you to start the synchronization process on the device as well.

Figure 9 - Palm HotSync Maneger issuing a warning urging to initiate the synchronization on the handheld device.

Warning
TeamSoft recommends that your do a hard reset of your PDA before doing your first synchronization.

The third and last step consists at applying the results of the synchronization against TeamAgenda's database. Figure 10 shows a dialog that allows you to apply or cancel the final step of the synchronization.
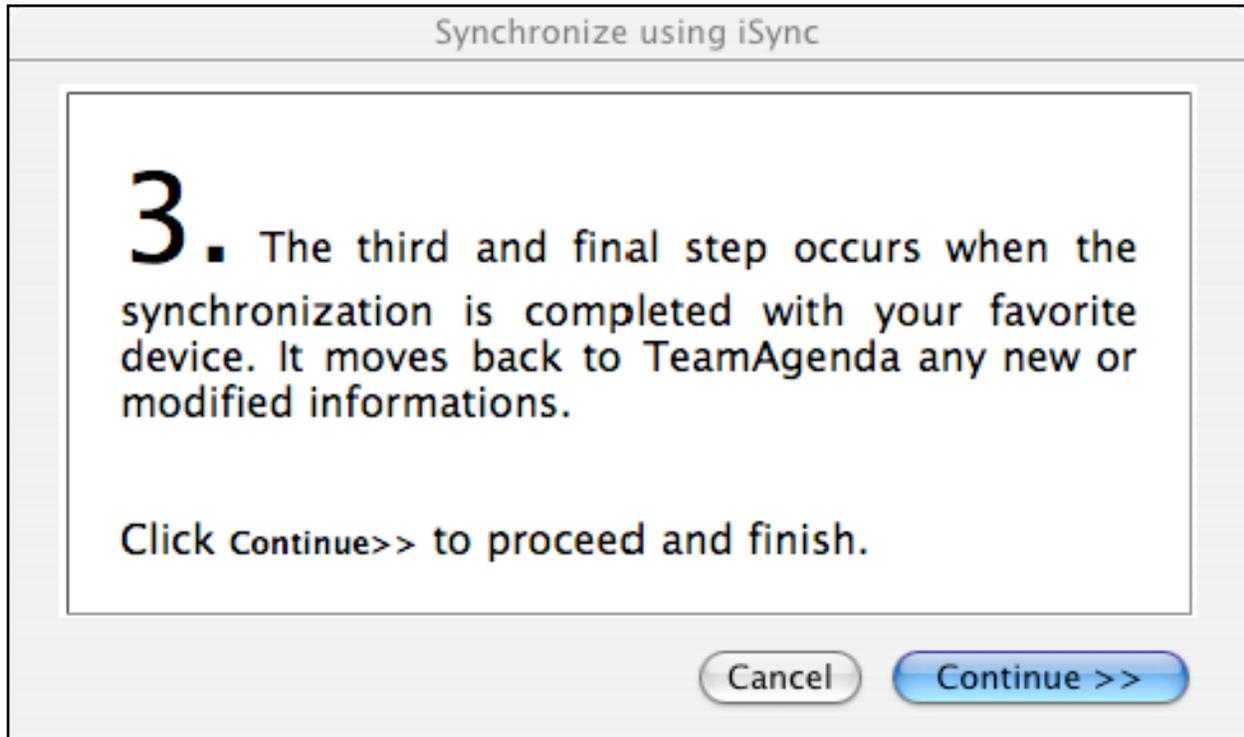
Figure 10 - Last step of the synchronization process.

Minimal Requirements

Any PC computer matching the following specifications:

CPU (PowerPC)	G3, G4 or G5 500 MHz or faster
CPU (Intel)	Any Intel Core CPU (Solo or Duo)
Operating System	Mac OS X 10.3.9, Mac OS X 10.4.5 or newer
Memory (RAM)	256 MB
Hard Drive	100 MB or more