

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.



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.



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

🧯 TeamAgenda	File	Edit	Context	Comm	nitmen	nt
1	Nev Op Clo	w Perso en Perso se Perso	onal Ageno sonal Ager sonal Ager	da Ida Ida	жо) <i>BC</i> ABC
00	Syn	chroni	ize using i	Sync		
▼ ✓ Uncompleted Priority⊿ Title	Exp Imp Arc Cor	oort oort fro hive Pa nnect t	om ast Commi to Team	tments.) Dee C	ate
	Pag Prin Prin	ge Setu nt nt Wind	p dow		ЖP	

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:

Synchronize using iSync
1. The first step is to prepare your TeamAgenda calendar for iSync synchronization. Click Continue>> to proceed.
Cancel Continue >>

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.

 Synchronize using iSync
2. The second step is to actually do the synchronization using iSync. Make sure you synchronize your favorite device with calendar and contact named TeamAgenda.
Click Continue>> to launch iSync and proceed.
Cancel Continue >>

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.

000	iSync	
.mac		Sync Devices
Marc		
Last synchronized: Mo	nday, March 20, 2006 09:49	
☑ Turn on Marc sy	nchronization	
E Force slow sync	hronization	
Contacts		
Synchronize:	All contacts	×
✓ Calendars		
 All Selected: 	Personnel TeamAgenda	
Put events cre	eated on Palm into: TeamA	genda 🛟
Ignore Palm events older than: Three Month 🛊		
Events Time Zo	one: America/Montreal Using System Time Zone	Set

Figure 6 - iSync options.

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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.

TeamAgen	da Pro
OOO iSyn	C
.mac	Sync Device:
Marc	
Last synchronized: Monday, March 20), 2006 09:49
☑ Turn on Marc synchronizatio	n
✓ Force slow synchronization	
Contacts	da 🔺
✓ Calendars	ua v
 All Selected: TeamAge 	enda
Put events created on Palm	n into: 🛛 TeamAgend: 🗘
📃 Ignore Palm events older	than: Three Month 🛊
Events Time Zone: America/	Montreal Set

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.

ŀ	lotSync Progress	5
Status: iSync synch	nronizing Addre	ssDB
oser. mare		
GD	5	\bigcirc
(palm) powered		Cancel

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.

	Sync Now	
	Press HotSync button	
9	Your device list contains a Palm OS compatible device. To include it in the synchronization, you must press the HotSync button located on the device cradle.	
	If HotSync is currently executing from a previous sync operation, please wait for it to complete before pressing the HotSync button again.	
	If you do not respond to this panel before the timeout the sync will proceed without the Palm Device.	
Don't show this dialog again		
్ల్లి Time F	Remaining: 4 minutes 43 seconds Sync without PalmOS device	

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.

Synchronize using iSync
3. The third and final step occurs when the synchronization is completed with your favorite device. It moves back to TeamAgenda any new or modified informations.
Click Continue>> to proceed and finish.
Cancel Continue >>

Figure 10 - Last step of the synchronization process.



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