

# Desktop User Guide

Pylon Conduit and Pylon Pro

Version 5.4.1



iAnywhere grants you permission to use this document for your own informational, educational, and other non-commercial purposes; provided that (1) you include this and all other copyright and proprietary notices in the document in all copies; (2) you do not attempt to "pass-off" the document as your own; and (3) you do not modify the document. You may not publish or distribute the document or any portion thereof without the express prior written consent of iAnywhere. iAnywhere Solutions, Inc. is a subsidiary of Sybase, Inc.

This document is not a commitment on the part of iAnywhere to do or refrain from any activity, and iAnywhere may change the content of this document at its sole discretion without notice. Except as otherwise provided in a written agreement between you and iAnywhere, this document is provided "as is", and iAnywhere assumes no liability for its use or any inaccuracies it may contain.

iAnywhere, iAnywhere Solutions, Sybase, SYBASE (logo), AAOSA, AccelaTrade, Adaptive Agent Oriented Software Architecture, Adaptive Agent Software Architecture Platform, Adaptive Agent Software Architecture Program, Adaptive Server, Adaptive Server Anywhere, Adaptive Server Enterprise, Adaptive Server IQ, Afaria, Answers Anywhere, Anywhere Studio, AvantGo, AvantGo Mobile Marketing Channel, Mobile Pharma, Mobile Sales, Pylon, Pylon Application Server, Pylon Conduit, Pylon PIM Server, Pylon Pro, DataWindow, DirectConnect, Embedded SQL, InfoMaker, jConnect for JDBC, M-Business Anywhere, M-Business Server, Open Client, Open Client/Server, Open Client/Server Interfaces, Open ClientConnect, Open Gateway, Open Server, Open ServerConnect, PhysicalArchitect, Pocket PowerBuilder, PocketBuilder, PowerBuilder, PowerDesigner, QAnywhere, Replication Agent, Replication Server, Replication Server Manager, RFID Anywhere, SQL Anywhere, SQL Anywhere Studio, SQL Remote, SQL Server, Sybase Central, Transact-SQL, UltraLite, UltraLite.NET, Watcom, Watcom SQL, Watcom SQL Server, XcelleNet (and design) are trademarks of Sybase, Inc. or its subsidiaries.

All other trademarks are property of their respective owners.

For a comprehensive list of Sybase trademarks, see <http://www.iAnywhere.com/trademarks>.

Written and designed at iAnywhere Solutions, Inc.  
One Sybase Drive  
Dublin, CA 94568  
<http://www.iAnywhere.com>

# Table of Contents

List of Tables . . . . .	9
List of Figures . . . . .	11

## Before you begin

---

<b>CHAPTER 1. About this guide</b> . . . . .	17
Focus of this guide . . . . .	18
How this guide is organized . . . . .	19
Conventions . . . . .	20
Text conventions . . . . .	20
Graphics conventions . . . . .	20
Related publications . . . . .	21
Contacting iAnywhere Solutions . . . . .	22
Technical support . . . . .	22
Application development — customizing iAnywhere software . . . . .	23
Product information . . . . .	23
Feedback on documentation . . . . .	23

## Getting started

---

<b>CHAPTER 2. Introduction</b> . . . . .	27
About Pylon Conduit and Pylon Pro . . . . .	28
About Pylon Conduit . . . . .	28
About Pylon Pro . . . . .	28
Installation, configuration, and security . . . . .	28
Components of Pylon . . . . .	28
System requirements . . . . .	30
Lotus Notes/Domino Server requirements . . . . .	30
Desktop computer requirements . . . . .	30
Mobile device requirements . . . . .	30
Overview of Lotus Notes applications in Pylon . . . . .	32
Mail overview . . . . .	32

Calendar overview . . . . .	32
Address Book overview . . . . .	33
To Do List overview . . . . .	33
Memo Pad (Palm only) overview . . . . .	34
Expense (Palm only) overview . . . . .	34
<b>CHAPTER 3. Installing . . . . .</b>	<b>35</b>
Overview . . . . .	36
Installation checklist . . . . .	36
Before you install . . . . .	37
Tasks for existing Pylon users . . . . .	37
Uninstall or disable other PIM conduits . . . . .	38
Make sure Domino Server is not running on the same machine . . . . .	38
Establish a partnership with ActiveSync (Pocket PC only) . . . . .	38
Installing Pylon . . . . .	39
Configuring Pylon . . . . .	48
Modifying your Pylon installation . . . . .	49
Repairing your Pylon installation . . . . .	51
Uninstalling Pylon . . . . .	52
Uninstalling Pylon from your desktop computer . . . . .	52
Uninstalling from your mobile device . . . . .	54

## Syncing Lotus Notes PIM applications

---

<b>CHAPTER 4. Configuring basic PIM sync settings. . . . .</b>	<b>57</b>
Overview of configuration tasks and documentation . . . . .	58
PIM configuration task checklist . . . . .	58
Roadmap to Pylon configuration instructions . . . . .	58
Accessing Pylon on your desktop computer . . . . .	60
Opening the Pylon Configuration Database . . . . .	60
Opening your Pylon Configuration document . . . . .	61
Disabling or enabling a PIM application . . . . .	64
Setting the sync Action . . . . .	65
Choosing a sync filter . . . . .	67
<b>CHAPTER 5. Customizing Pylon . . . . .</b>	<b>71</b>
Making a copy of a sync filter . . . . .	72
Customizing a sync filter . . . . .	74
Displaying the list of Pylon filters — Filters view of Pylon Configuration Database . . . . .	74
Making changes to Custom Field Mapping . . . . .	75
Making generic changes to a sync filter . . . . .	76
Making Mail-specific changes to a sync filter . . . . .	81
Making Calendar-specific changes to a sync filter . . . . .	83
Making Address Book-specific changes to a sync filter . . . . .	85

Making To Do List-specific changes to a sync filter . . . . .	86
Making Memo Pad-specific changes to a sync filter . . . . .	88
Making changes to the My Journal filter (Palm only) . . . . .	88
Making Expense-specific changes to a sync filter (Palm only) . . . . .	89
Syncing additional application databases or views . . . . .	91
Making sure the first database or view has a unique Category Sync name in its filter . . . . .	92
Creating a new filter for the additional database or view . . . . .	93
Enabling the additional database or view with initial sync Action of “Desktop overwrites handheld” . . . . .	94
Syncing your device . . . . .	95
Changing the sync Action on the additional database or view . . . . .	95
<b>CHAPTER 6. Accessing PIM applications on your device . . . . .</b>	<b>97</b>
Accessing Pylon on your Pocket PC OS device . . . . .	98
Syncing your Windows Mobile 5 device. . . . .	98
Syncing other Pocket PC OS devices not running Windows Mobile 5 . . . . .	98
Using Mail on Pocket PC OS . . . . .	100
Using Calendar on Pocket PC OS . . . . .	101
Using Address Book on Pocket PC OS . . . . .	107
Using To Do List on Pocket PC OS . . . . .	108
Accessing Pylon on your Palm OS device . . . . .	112
Syncing your Palm OS device . . . . .	112
Using Mail on Palm OS . . . . .	112
Using Calendar on Palm OS. . . . .	114
Using Address Book on Palm OS . . . . .	125
Using To Do List on Palm OS. . . . .	126
Using Memo Pad on Palm OS . . . . .	129
Using Expense on Palm OS . . . . .	130

## Syncing custom databases (Pylon Pro only)

---

<b>CHAPTER 7. Syncing custom databases . . . . .</b>	<b>133</b>
Overview . . . . .	134
Custom database configuration task checklist . . . . .	134
Creating a Pylon Pro filter to sync a custom database . . . . .	135
Enabling or disabling Pylon Pro . . . . .	139
Selecting a Pylon Pro sync filter . . . . .	140
Setting sync action . . . . .	141
Making changes to a Pylon Pro sync filter . . . . .	142
Enabling additional databases. . . . .	144
De-activating and re-activating a custom database . . . . .	145
De-activating a custom database . . . . .	145
Re-activating a custom database . . . . .	145

**CHAPTER 8. Working with custom databases on a Pocket PC OS device** . . . . . 147

Overview . . . . . 148

Installing custom databases on a Pocket PC OS device . . . . . 149

Navigating custom databases on a Pocket PC OS Device . . . . . 150

    Viewing custom databases on a Pocket PC OS device . . . . . 150

    Changing column attributes. . . . . 153

    Resizing columns . . . . . 154

Making changes to custom databases on a Pocket PC OS device . . . . . 155

    Creating a new record . . . . . 155

    Editing a record. . . . . 155

    Deleting a record . . . . . 155

    Attaching and editing an image . . . . . 155

    Working with text . . . . . 156

    Deleting a database . . . . . 158

**CHAPTER 9. Working with custom databases on a Palm OS device** . . . . . 159

Overview . . . . . 160

Installing custom databases on a Palm OS device . . . . . 161

Navigating custom databases on a Palm OS Device. . . . . 162

    Opening Pylon Pro on a Palm OS device . . . . . 162

    Navigating custom databases in the Pylon Pro Workspace. . . . . 163

    Navigating custom databases in List View . . . . . 164

    Navigating the Pylon Pro Read View . . . . . 166

    Navigating the Pylon Pro Edit View. . . . . 167

Making changes to custom databases on a Palm OS device . . . . . 169

    Creating a new record . . . . . 169

    Deleting a record . . . . . 169

    Editing a record. . . . . 170

    Working with notes . . . . . 170

    Working with images . . . . . 171

    Editing record fields . . . . . 172

    Setting global preferences. . . . . 174

    Using the Palm Find function with Pylon Pro . . . . . 175

    Deleting a database . . . . . 175

## Appendices

---

**APPENDIX A. Troubleshooting** . . . . . 179

Troubleshooting: Installing . . . . . 180

Troubleshooting: Upgrading . . . . . 181

Troubleshooting: Using the Pylon Log database . . . . . 182

    Viewing log messages . . . . . 182

    Changing the Log Level. . . . . 182

Troubleshooting: Syncing . . . . . 184

---

Problems with first sync . . . . .	184
Other problems with syncing . . . . .	186
Troubleshooting: Accessing Pylon Configuration document . . . . .	189
Troubleshooting: Using Pylon with M-Business Anywhere client . . . . .	190
<b>APPENDIX B. Setting up Pylon for multiple users. . . . .</b>	<b>191</b>
Setting up Pylon for multiple Pocket PC OS users . . . . .	192
Requirements. . . . .	192
Setup Instructions . . . . .	192
Setting up Pylon for multiple Palm OS users . . . . .	194
Requirements. . . . .	194
Setup Instructions . . . . .	194
<b>APPENDIX C. Syncing from multiple desktop computers (Palm OS only) . . . . .</b>	<b>197</b>
About Multi PC Support (Palm OS only). . . . .	198
Enabling Multi PC Support . . . . .	198
Copying your Pylon configuration . . . . .	198
Replicating your Lotus Notes databases and syncing . . . . .	199
<b>APPENDIX D. Creating device-friendly Notes databases . . . . .</b>	<b>201</b>
About SmartDesigner . . . . .	202
General design guidelines. . . . .	203
Forms . . . . .	204
Views . . . . .	205
Icons . . . . .	206
Unsupported design objects . . . . .	207
Synchronization issues. . . . .	208
<b>APPENDIX E. Implementing on-device database lookups . . . . .</b>	<b>209</b>
About on-device database lookups. . . . .	210
Creating a lookup field in a Lotus Notes database . . . . .	211
Creating a lookup field mapping . . . . .	211
Retrieving additional fields . . . . .	212
Synchronization issues . . . . .	212
Designing a bar code lookup database . . . . .	213
Triggering a bar code scan for lookups. . . . .	213
Triggering a bar code scan for text/numeric values . . . . .	213
<b>APPENDIX F. Custom field mapping on Palm . . . . .</b>	<b>215</b>
Overview . . . . .	216
Default field mappings. . . . .	217



# List of Tables

Table 1-1	Formatting conventions . . . . .	20
Table 4-1	Application names on different device platforms . . . . .	63
Table 4-3	Pre-defined sync filter options . . . . .	67
Table 5-1	Total number of databases/views supported for each application 91	
Table 6-1	Calendar events in Lotus Notes and on Pocket PC OS device	101
Table 6-2	To Do events in Lotus Notes and on Pocket PC OS device. .	108
Table 6-3	Calendar events in Lotus Notes and on Palm OS device . . .	114
Table 6-4	To Do events in Lotus Notes and on Palm OS device . . . . .	126
Table 6-5	Repeating To Do events in Lotus Notes and on newer Palm OS devices*127	
Table A-1	Problems with installation . . . . .	180
Table A-2	Problems with upgrading . . . . .	181
Table A-3	Problems with your first sync . . . . .	184
Table A-4	Other problems with syncing. . . . .	186
Table A-5	Problems accessing your configuration document. . . . .	189
Table A-6	Problems using Pylon with M-Business Anywhere client. . .	190



# List of Figures

Figure 3-1	Pylon installer Welcome panel . . . . .	40
Figure 3-2	Pylon installer License Agreement panel . . . . .	41
Figure 3-3	Pylon installer Select Lotus Notes Installation panel . . . . .	41
Figure 3-4	Pylon installer Select Internet Security Option panel . . . . .	43
Figure 3-5	Pylon installer Custom Pylon Setup panel . . . . .	44
Figure 3-6	Pylon installer Select Palm Users panel . . . . .	45
Figure 3-7	Pylon installer Select Additional CE Devices panel . . . . .	46
Figure 3-8	Pylon installer Welcome panel for maintenance install . . . . .	50
Figure 4-1	Open Database dialog box . . . . .	60
Figure 4-2	Pylon Configuration Database . . . . .	61
Figure 4-3	Your Pylon configuration document . . . . .	62
Figure 4-4	Select Keywords panel . . . . .	66
Figure 5-1	All available pre-defined filters . . . . .	72
Figure 5-2	All available filters . . . . .	75
Figure 5-3	Generic filter settings, shown on My Inbox Mail filter . . . . .	77
Figure 5-4	Mail-specific filter settings . . . . .	81
Figure 5-5	Calendar-specific filter settings . . . . .	84
Figure 5-6	Address Book-specific filter settings. . . . .	85
Figure 5-7	To Do List-specific filter settings . . . . .	86

Figure 5-8	Memo Pad-specific filter settings . . . . .	88
Figure 5-9	Expense-specific filter settings . . . . .	89
Figure 6-1	ActiveSync Options dialog box . . . . .	99
Figure 6-2	Confirmation of a successful Pylon sync . . . . .	99
Figure 6-3	Pylon Select Icon on the Applications Screen . . . . .	123
Figure 6-4	Pylon Select on a Palm Device . . . . .	123
Figure 7-1	All available filters . . . . .	135
Figure 7-2	Filter configuration document. . . . .	136
Figure 7-3	Pylon Pro Filter Custom Mapping Options . . . . .	138
Figure 7-4	Select Keywords panel for Pylon Pro Filter . . . . .	140
Figure 7-5	Select Keywords panel for Pylon Pro Action. . . . .	141
Figure 7-6	All available filters . . . . .	142
Figure 7-7	Pylon Pro Sample 1 filter, default settings . . . . .	143
Figure 8-1	Pylon Pro Workspace on a Pocket PC OS device . . . . .	150
Figure 8-2	Pylon Pro database List View on Pocket PC OS. . . . .	151
Figure 8-3	Custom database open in record List View . . . . .	151
Figure 8-4	Read View on a Pocket PC OS device . . . . .	152
Figure 8-5	Edit View on a Pocket PC OS device . . . . .	152
Figure 8-6	Pylon Pro Column attributes page . . . . .	153
Figure 8-7	Date field calendar on a Pocket PC OS device . . . . .	157
Figure 8-8	Delete database popup on a Pocket PC OS device. . . . .	158
Figure 9-1	Pylon Pro icon on Palm OS applications screen . . . . .	162
Figure 9-2	Pylon Pro Workspace on a Palm OS device. . . . .	162
Figure 9-3	Sample Pylon Pro Workspace. . . . .	163
Figure 9-4	Sample Database in Pylon Pro List View . . . . .	164
Figure 9-5	Pylon Pro Columns dialog box. . . . .	165

---

Figure 9-6	Sample Database Record item in Read View . . . . .	167
Figure 9-7	Viewing help for the User List field . . . . .	168
Figure 9-8	Full help in the Tips dialog box . . . . .	168
Figure 9-9	Delete Item dialog box. . . . .	169
Figure 9-10	Pylon Pro Note View . . . . .	170
Figure 9-11	Sample signature in Pylon Pro Image View . . . . .	171
Figure 9-12	Pylon Pro Entry Details dialog box . . . . .	173
Figure 9-13	Pylon Pro Preferences dialog box . . . . .	174
Figure D-1	Database icon in Lotus Notes . . . . .	206
Figure D-2	Database icon in Pylon Pro on device . . . . .	206
Figure E-1	Creating a lookup field . . . . .	211



# Before you begin

“About this guide” (page 17)



Before you begin



# CHAPTER 1. **About this guide**

---

- “Focus of this guide” (page 18)
- “How this guide is organized” (page 19)
- “Conventions” (page 20)
- “Related publications” (page 21)
- “Contacting iAnywhere Solutions” (page 22)

## Focus of this guide

This guide provides the information you need to install and use Pylon Conduit and Pylon Pro from iAnywhere Solutions software.

Some people reading this guide are new to Pylon software. These users may or may not be new to Pocket PC or Palm OS devices. Other people reading this guide have used Pylon for Pocket PC or Palm OS software. However, these Pylon power users may be unfamiliar with Pylon Pro, Pocket PC OS devices, or Palm OS devices.

In this guide we address the concerns and needs of all users. Both new and existing Pylon users can use this guide for an overview of this version of the software — how to install it and how to use it. For users familiar with Pylon, or with Pocket PC OS or Palm OS devices, some information may be redundant. Where applicable, we note if power users can skip the information we present; or, in some cases we advise you to review the documentation that came with Lotus Notes, Microsoft ActiveSync, Palm Desktop, or your mobile device.

If time is a constraining factor, we encourage all users at least to scan the guide, but to focus on Chapter 3, “Installing” (page 35). The chapter on installing contains important information necessary to get Pylon software running successfully on both your desktop computer and your mobile device.

You can access this guide from the web or, after installing Pylon, from your desktop:

- **Web** — in your browser, navigate to [http://www.ianywhere.com/developer/product\\_manuals/pylon\\_conduit\\_pro/index.html](http://www.ianywhere.com/developer/product_manuals/pylon_conduit_pro/index.html)
- **Desktop** (after installation) — on the Windows desktop, select **Start|Programs|Pylon|Help|Desktop User Guide**

## How this guide is organized

Pylon is available in two different product versions, Pylon Conduit and Pylon Pro. Both of these product versions are available for both Palm and Pocket PC OS devices. This guide is set up to provide easy access to the specific information that is relevant to users of either product, and either operating system.

The chapter, “Installing” (page 35), is the single most important chapter in this guide and provides the information necessary for you to install and begin using Pylon, regardless of the product version you purchased or the device operating system you use. We strongly encourage all users to read this chapter.

Information that is relevant only to one product version, either Pylon Pro or Pylon Conduit, is clearly separated by section within the guide. The chapters in the section “Syncing Lotus Notes PIM applications” (page 55) address users of both Pylon Conduit and Pylon Pro. The chapters in “Syncing custom databases (Pylon Pro only)” (page 131) addresses Pylon Pro users only.

In general, desktop operations for Pylon are the same for both Palm OS and Pocket PC OS, so desktop topics address both types of users. Any differences between Pylon desktop operations for Palm OS and Pocket PC OS are clearly noted within the instructions.

The on-device operations for Palm OS and Pocket PC OS are significantly different in many cases, so on-device instructions for Palm OS and Pocket PC OS are provided separately within each chapter.

The appendices at the end of the guide provide information on special setup situations, as well as Pylon troubleshooting topics should you experience difficulty installing or using Pylon.

## Conventions

### Text conventions

The following table lists the text formatting conventions used throughout this guide.

**Table 1-1**  
Formatting  
conventions

Item	Treatment	Example
Name of publication	Italic	<i>Administrator Guide for M-Business Anywhere Server</i>
User interface items: buttons, links, keywords	Bold	Click the <b>Reset</b> button.
Multi-level menu selections	Bold with vertical hash	Select <b>Start Settings Control Panel</b> .
Text you type in	Courier New	Type Admin in this field.
Text displayed in a file or on the screen	Courier New	The screen reads: Backup Complete
Variables	Angle brackets	<servername>
Keyboard command key	Angle brackets	<Enter>
File names	Italic	<i>pods.h</i> <i>Setup.exe</i>

### Graphics conventions

Device screenshots in this guide represent Pocket PC OS version 3.0, and Palm OS version 5.4.

## Related publications

In addition to this guide, there are other publications available that you may find useful while using Pylon. The Pylon Conduit and Pylon Pro Technical Support page is located at:

[http://www.ianywhere.com/support/pylon\\_condpro.html](http://www.ianywhere.com/support/pylon_condpro.html)

The Pylon Conduit and Pylon Pro Technical Support page provides access to all of the published Pylon technotes, plus links to a detailed list of supported devices and a page from which you can purchase a trouble ticket.

If you have a question about your Pylon license, you may submit it directly at:

[http://www.ianywhere.com/support/pylon/license\\_questions.html](http://www.ianywhere.com/support/pylon/license_questions.html)

## Contacting iAnywhere Solutions

### Technical support

If you need assistance using iAnywhere software, in North America, please contact iAnywhere Technical Support by calling 1-800-8SYBASE (800-879-2273) and then selecting option 3. You can call Monday through Friday (except major US holidays) between 9:00 a.m. and 9:00 p.m. Eastern time. Services will be provided in accordance with your support agreement.

Outside of North America, for your local support number and hours, please see:

<http://www.sybase.com/contactus/support>

---

---

#### Note

For Pylon Conduit and Pylon Pro, the technical support that is included at no additional charge is limited to installation assistance in the first 30 days following your purchase. You may purchase further support by calling the technical support number. You may also be able to find the answer to your Pylon Conduit or Pylon Pro question in one of the technotes linked from the product's Technical Support page at:

[http://www.iAnywhere.com/support/pylon\\_condpro.html](http://www.iAnywhere.com/support/pylon_condpro.html).

### *Registering as a Named Contact*

Calling the 800-number during business hours should always work to get you technical support — a Customer Number is created for you as soon as your purchase is completed. You will find it faster and easier to get technical support, by phone or online, if you have registered as a Named Contact.

When you purchase an iAnywhere product, a *Sybase Technical Support Contact Form* will automatically be emailed to you within 7-10 days. If your company should need to add another Named Contact, or change the one initially registered, call the Technical Support 800-number and request a *Sybase Technical Support Contact Change Form*.

The *Sybase Technical Support Contact Form* will contain your Customer Number, with spaces for you to provide an email address and other identifying information for the Named Contact for your product. Fill in the requested information and fax the form back to the phone number indicated.

When your fax is received, an email will be sent to you, providing your Technical Contact ID number. You can then use this number to speed up the process when you call for technical support, and to access technical support online.

### ***Using the Sybase Online Support Services***

A major benefit of using the Sybase Online Support Services is 24x7 availability. Online support also allows you to look up and review past and current support issues.

When you register as a Named Contact, the email sent to you with your Technical Contact ID number also contains instructions for registering and using the Sybase Online Support Services. Follow these instructions to register as a first-time user, or to update your account with information for the new product you have purchased.

If you have any trouble registering for the Sybase Online Support Services, you can of course call iAnywhere Technical Support for assistance!

### **Application development — customizing iAnywhere software**

If you need help with customizing iAnywhere software to better serve your enterprise, please contact iAnywhere Solutions Professional Services at [contact\\_us@ianywhere.com](mailto:contact_us@ianywhere.com).

### **Product information**

If you need information about other iAnywhere products for your enterprise, please contact iAnywhere Workforce Sales at [contact\\_us@ianywhere.com](mailto:contact_us@ianywhere.com).

### **Feedback on documentation**

If you have questions or suggestions about this document or other iAnywhere technical publications, please contact iAnywhere Technical Publications at [iasdoc@ianywhere.com](mailto:iasdoc@ianywhere.com).

We would like to receive your opinions, suggestions, and feedback on this documentation. Although we do not reply to individual emails, we read all suggestions with interest and attempt to incorporate them in future releases.



# Getting started

“Introduction” (page 27)

“Installing” (page 35)





## CHAPTER 2. **Introduction**

---

- “About Pylon Conduit and Pylon Pro” (page 28)
- “System requirements” (page 30)

## About Pylon Conduit and Pylon Pro

With Pylon Conduit and Pylon Pro from iAnywhere Solutions, moving your data back and forth between Lotus Notes and your Pocket PC OS or Palm OS device has never been easier.

### About Pylon Conduit

In today's mobile world, you need access to your email, address book, calendar, and to do list, whether you are at the office or on the go. Pylon Conduit provides seamless synchronization between Lotus Notes Personal Information Management (PIM) applications and the native applications on your Pocket PC or Palm OS device.

### About Pylon Pro

Pylon Pro includes all of the Lotus Notes PIM to mobile device functionality of Pylon Conduit, but also functions as a separate device application that can take on the look and feel of any Lotus Notes custom database. Using Pylon Pro, you can create a fully-customized Pocket PC or Palm application from any Lotus Notes database.

### Installation, configuration, and security

You easily can install and configure Pylon yourself. And you can use Pylon knowing that your personal information is secure — both Pylon Conduit and Pylon Pro maintain the Lotus Notes security model.

### Components of Pylon

Pylon consists of software for your desktop computer and for your mobile device.

#### *Pylon on your desktop computer*

On your desktop, either Pylon Conduit or Pylon Pro (depending on which product you purchased) is installed as a configuration database that you access from within Lotus Notes. From within the Pylon Configuration Database, you can control which Lotus Notes databases you sync with, how the information is displayed and organized on your device, and which specific information within each database is synchronized. For example, if you want to sync only the unread mail in your Inbox, you indicate this preference in the configuration database.

#### *Pylon Conduit on your mobile device*

On your device, Pylon Conduit provides you with access to your Lotus Notes PIM content, using the native Pocket PC or Palm applications that you are already familiar with, such as Calendar, Contacts, and Inbox.

### ***Pylon Pro on your mobile device***

On your device, Pylon Pro includes all of the Lotus Notes PIM functionality of Pylon Conduit, but also functions as a device application that can take on the look and feel of any Lotus Notes custom database. Using Pylon Pro, you can create a fully-customized Pocket PC application from any Lotus Notes database.

### ***Synchronization between your desktop and your device***

Your device communicates with your desktop computer when you use Microsoft ActiveSync (for Pocket PC OS) or Palm HotSync Manager (for Palm OS) and a cradle to sync. During the sync process, Pylon moves information from Lotus Notes, such as unread mail or new appointments, to your device. Pylon also moves information from your device, such as replies to mail or new contacts, to Lotus Notes.

## System requirements

### Lotus Notes/Domino Server requirements

#### *Servers*

- Domino Server 5.x or 6.x or 7.0

#### *Templates*

- Domino R5 and R6 templates

---

---

**Note**

Pylon does not support the use of a Lotus Notes server and client on the same machine.

### Desktop computer requirements

#### *Palm OS and Pocket PC OS*

- Any of the following versions of Microsoft Windows:
  - Windows 98 Second Edition
  - Windows 2000 Professional with Service Pack 3
  - Windows NT 4 with Service Pack 6a
  - Windows XP Second Edition (Home or Professional)
- Notes Client 5 or 6 or 7
- Internet Explorer version 5.0 or greater

#### *Pocket PC OS Only*

- Microsoft ActiveSync 4.0 or later for Windows Mobile 5
- Microsoft ActiveSync 3.1 or later for other Pocket PC versions

#### *Palm OS Only*

- Palm Desktop version 4.0 or later

### Mobile device requirements

#### *Pocket PC OS and Palm OS details*

For the most current information about mobile devices and operating systems that Pylon supports, see the Pylon Supported Platforms page:

[http://www.ianywhere.com/developer/technotes/pylon\\_supported\\_platforms.html](http://www.ianywhere.com/developer/technotes/pylon_supported_platforms.html)

***Supporting Word and Excel email attachments on Palm OS***

Pylon is compatible with following DataViz *Documents to Go* components and versions to support Word and/or Excel email attachments:

- DataViz Word-To-Go v5, v6, v7, to support Word email attachments
- DataViz Sheet-To-Go v5, v6, v7, to support Excel email attachments

**Caution**

Pylon is *not* compatible with the DataViz *Inbox to Go* email component. If you are purchasing a DataViz product to support Pylon on your Palm device, you only need the *Documents to Go* product. If you have already purchased the *Inbox to Go* product, make sure you install only the DataViz components for Word and Excel documents.

## Overview of Lotus Notes applications in Pylon

### Mail overview

Using Pylon Conduit and Pylon Pro from iAnywhere Solutions, you can synchronize your Lotus Notes Mail application on your desktop computer with the native Mail application on your Palm OS or Pocket PC OS device.

You also can create new mail on your device. When you sync, the mail is sent for you and a copy of the mail is placed in your Lotus Notes Inbox for your reference.

---

---

#### Note

Mail stored in your Mail (Palm OS) or Inbox (Pocket PC OS) application on your device prior to installing Pylon will not be transferred to the Lotus Notes Mail application on your desktop.

Using Pylon, you can choose what you will sync, including:

- The entire contents, both read and unread, of your Lotus Notes Inbox
- Contents from the last thirty days, both read and unread, of your Lotus Notes Inbox
- Contents from last seven days, both read and unread, of your Lotus Notes Inbox
- Any unread mail only from your Lotus Notes Inbox
- Any of the above with or without Microsoft® Word® and Excel® attachments

You also can decide not to sync your Mail.

If you choose any of the above Mail sync options, you can also specify how Word and Excel attachments are to be handled:

- Download Word attachments (*.doc* and *.rtf* files), as Word files or as text appended to the message.
- Download Excel attachments (*.xls* files).
- Limit total size of binary file attachments per message.

### Calendar overview

Note that application names differ slightly on different devices. On older Palm devices, the Calendar application is called Date Book. See Table 4-1, “Application names on different device platforms,” on page 63.

Using Pylon Conduit and Pylon Pro from iAnywhere Solutions, you can synchronize your Lotus Notes Calendar application on your desktop computer with the Pocket PC OS Calendar or Palm OS Calendar/Date Book application on your mobile device.

---

You also can create new Calendar entries on your device. When you sync, your Calendar entries are placed in your Lotus Notes Calendar.

Using Pylon, you can choose what you will sync, including:

- All entries in your Lotus Notes Calendar
- Entries in your Lotus Notes Calendar from the last two months
- Entries in your Lotus Notes Calendar from any specified time frame

You also can decide not to sync your Calendar.

## Address Book overview

Note that application names differ slightly on different devices. On newer Palm devices and on Pocket PC devices, the Address Book application is called Contacts. See Table 4-1, “Application names on different device platforms,” on page 63.

Using Pylon Conduit and Pylon Pro from iAnywhere Solutions, you can synchronize your Lotus Notes Address Book application on your desktop computer with the native Address Book application on your Palm OS or Pocket PC OS mobile device.

You also can create new entries on your device. When you sync, your Pocket PC Calendar or Palm OS Address Book entries are placed in your Lotus Notes Address Book.

Using Pylon, you can choose what you will sync, including:

- All entries in your Lotus Notes Address Book
- Another Lotus Notes Address Book, either yours or someone else’s

You also can decide not to sync your Address Book.

## To Do List overview

Note that application names differ slightly on different devices. On newer Palm devices and Pocket PC devices, the To Do List application is called Tasks. See Table 4-1, “Application names on different device platforms,” on page 63.

Using Pylon Conduit and Pylon Pro from iAnywhere Solutions, you can synchronize your Lotus Notes To Do application on your desktop computer with the native To Do application on your Palm OS or Pocket PC OS device.

You also can create new To Do entries on your device. When you sync, your To Do entries are placed in your Lotus Notes To Do.

Using Pylon, you can choose what you will sync, including:

- All entries in your Lotus Notes To Do
- Entries in your Lotus Notes To Do from any specified time frame
- Another Lotus Notes To Do List, either yours or someone else’s

You also can decide not to sync your To Do.

## **Memo Pad (Palm only) overview**

Note that application names differ slightly on different devices. On newer Palm devices, the Memo Pad application is called Memo. See Table 4-1, “Application names on different device platforms,” on page 63.

Using Pylon Conduit and Pylon Pro from iAnywhere Solutions, you can synchronize the Memo Pad application on your Palm OS device with your choice of Lotus Notes databases on your Desktop.

You also can create new entries on your device. When you sync, your Palm OS Memo Pad entries are placed in the Lotus Notes database that you have selected.

Using Pylon, you can choose what you will sync, including:

- All entries in your Lotus Notes Mail Drafts folder (this is the default setting).
- All entries in another Lotus Notes Database such as a Journal.

You also can decide not to sync your Memo Pad.

## **Expense (Palm only) overview**

Using Pylon Conduit and Pylon Pro from iAnywhere Solutions, you can create a Lotus Notes Expense database on your Desktop and synchronize it with the native Expense application on your Palm OS device.

You also can create new entries on your device. When you sync, your Palm OS Expense entries are placed in your Lotus Notes Expense database.

Using Pylon, you can choose what you will sync, including:

- All entries in your Lotus Notes Expense database
- Multiple Expense databases organized by category on your Palm device

You also can decide not to sync your Expense.

## CHAPTER 3. **Installing**

---

- “Overview” (page 36)
- “Before you install” (page 37)
- “Installing Pylon” (page 39)
- “Configuring Pylon” (page 48)
- “Modifying your Pylon installation” (page 49)
- “Repairing your Pylon installation” (page 51)
- “Uninstalling Pylon” (page 52)

## Overview

Once you install Pylon Conduit and Pylon Pro from iAnywhere Solutions, using Pylon is as easy as setting your personal preferences and syncing.

To help you with the installation process, we suggest that you print out this chapter on installing so that you can refer to it as you move through the installation process. The sequence of steps and how they are performed is critical, and running the installer is only one step in the installation process.

Spending the time now to properly install Pylon will mean spending less time later trying to troubleshoot a failed installation. If, however, you find that you do have questions and need to troubleshoot, see “Troubleshooting” (page 179) for some helpful suggestions.

### Installation checklist

Before you attempt to install Pylon, review the following task checklist. Keep referring to the checklist as you continue with the installation process.

---

---

**Note**

These instructions assume that you already have purchased the product and obtained an access key or a license key. An *access key* allows you to connect to the Notes Licensing Tool at iAnywhere to generate a *license key*; the license key generated is automatically placed in your *notes.ini* file. If you have not yet obtained either an access key or a license key, see “Technical support” (page 22) for instructions on how to get assistance.

- ✓ Download the latest version of Pylon software from our downloads site. The software comes in the form of an installer executable file. Save this file, either *pylondesktopPocket PC.exe* or *pylondesktoppalm.exe*, to a local drive where you easily can access it.
- ✓ Read the section in this guide entitled, “Before you install” (page 37). Follow any relevant instructions in that section to ensure that your desktop computer and mobile device environments are set up properly for the installation.
- ✓ Run the installer executable to install the software on both your computer and your device. See “Installing Pylon” (page 39).
- ✓ Once you have installed the software, proceed to CHAPTER 4., “Configuring basic PIM sync settings”.

## Before you install

Before you install Pylon, perform the steps outlined in the following sections.

### Tasks for existing Pylon users

The Pylon installer cannot directly upgrade an existing Pylon installation. If you already have an earlier version of Pylon installed, complete the tasks below before installing Pylon Conduit or Pylon Pro Version 5.4.1:

- “Sync with your current version of Pylon one last time” (page 37)
- “Record your current Pylon configuration settings” (page 37)
- “Uninstall other versions of Pylon” (page 37)
- “Uninstall Pocket PC first if switching to a Palm device” (page 38)

#### *Sync with your current version of Pylon one last time*

To avoid any confusion and potential for data loss, make sure that you sync your current version of Pylon immediately before upgrading it.

#### *Record your current Pylon configuration settings*

If you are using an earlier version of Pylon, manually record any configuration settings from your existing Pylon Configuration Database (*pyloncfg.nsf*) that you want to save.

When you install the current version of Pylon, your old configuration database (typically found at C:\Lotus\notes\Data or C:\Lotus\Domino\Data) is renamed to include a date and time extension, for example, *pyloncfg.nsf.11-19-2001-171857*.

You cannot reuse the renamed configuration database with the current version of Pylon. However, to access the old database to review a previous configuration setting, do the following:

1. Delete the date and time extension.
2. Rename the file to something other than *pyloncfg.nsf*, for example, *old.nsf*.

---

#### Note

Be sure to keep the *.nsf* extension unchanged when you rename the file. If the Pylon installer finds a *pyloncfg.nsf* file in the Lotus Notes data directory, it will automatically rename it at that time.

3. Double-click the file to open the database in Lotus Notes.
4. Manually record your configuration settings to duplicate them after you install the current version of Pylon.

#### *Uninstall other versions of Pylon*

The current release of Pylon cannot be run on the same desktop with an earlier version of Pylon software.

**Note**

This includes the 4.03C version of Pylon Conduit.

If you are running an earlier version of Pylon software, including any version of Pylon Conduit, Pylon Pro, or Pylon Application Server, do the following:

- Sync your device a final time to back up your data.
- Uninstall the old version from both your desktop and your device. See “Uninstalling Pylon” (page 52)

***Uninstall Pocket PC first if switching to a Palm device***

If you are switching from a Pocket PC OS device to a Palm OS device at the same time that you are upgrading your Pylon installation, be sure to uninstall the software supporting the Pocket PC OS device first. Then install the software for your new Palm OS device before upgrading Pylon.

**Uninstall or disable other PIM conduits**

Installing Pylon will allow you to sync Lotus Notes custom databases (Pylon Pro only) plus your Mail, Calendar, Address Book, To Do, Memo Pad (Palm OS only), Expense (Palm OS only), or some combination of those six Lotus Notes applications.

If you are currently using another piece of software to sync one or more of those PIM applications, you should uninstall the software or disable the software from syncing those applications that you have chosen to sync with Pylon.

**Make sure Domino Server is not running on the same machine**

This release of Pylon does not support running a Lotus Notes (Domino) server and a Lotus Notes client on the same machine.

**Establish a partnership with ActiveSync (Pocket PC only)**

You must have established at least one partnership with a mobile device in ActiveSync before installing Pylon for Pocket PC OS. Establishing a partnership means using ActiveSync to allow your desktop computer to recognize your device. Only after establishing a partnership will you be able to sync your device with your computer. If you have been syncing your device with your desktop, you have been using ActiveSync and have established a partnership.

**Tip**

If you need instructions on how to establish a partnership with ActiveSync, see Microsoft's documentation. With ActiveSync open, click **Help|Microsoft ActiveSync Help**.

Establishing a partnership with ActiveSync is the final step in the “Before you install” section. You are now ready to move on to “Installing Pylon” (page 39).

## Installing Pylon

Once you have followed the steps outlined in the section, “Before you install” (page 37), you are ready to move on to installing Pylon Conduit or Pylon Pro on both your desktop computer and your mobile device.

When you are installing Pylon you will be prompted to choose from one of two install options:

### ■ Typical

Installs all conduits: Mail, Calendar, Address Book, To Do, Memo Pad (Palm OS only), and Expense (Palm OS only). If you have purchased Pylon Pro, choosing Typical install option also installs Pylon Pro custom database conduits.

### ■ Custom

Installs only the PIM conduits you choose. If you have purchased Pylon Pro, choosing the Custom install option also installs Pylon Pro custom database conduits. If you choose not to install certain PIM conduits at this time, but later wish to install them, you will need to reinstall Pylon at that time.

Think about which option you will choose before you initiate the installer.

#### Caution

Be sure to place your Pylon installer file (*pylondesktopPocket PC.exe* or *pylondesktoppalm.exe*) in a permanent location where you can easily find it. You may need to run it again to modify or repair your Pylon installation. See “Modifying your Pylon installation” (page 49) and “Repairing your Pylon installation” (page 51).

#### Note

If your installation fails to complete successfully, first see “Troubleshooting: Installing” (page 180). If the information there does not provide a solution, consult the Pylon technotes that are linked from the Pylon Technical Support page, referenced in “Related publications” (page 21).

To install Pylon:

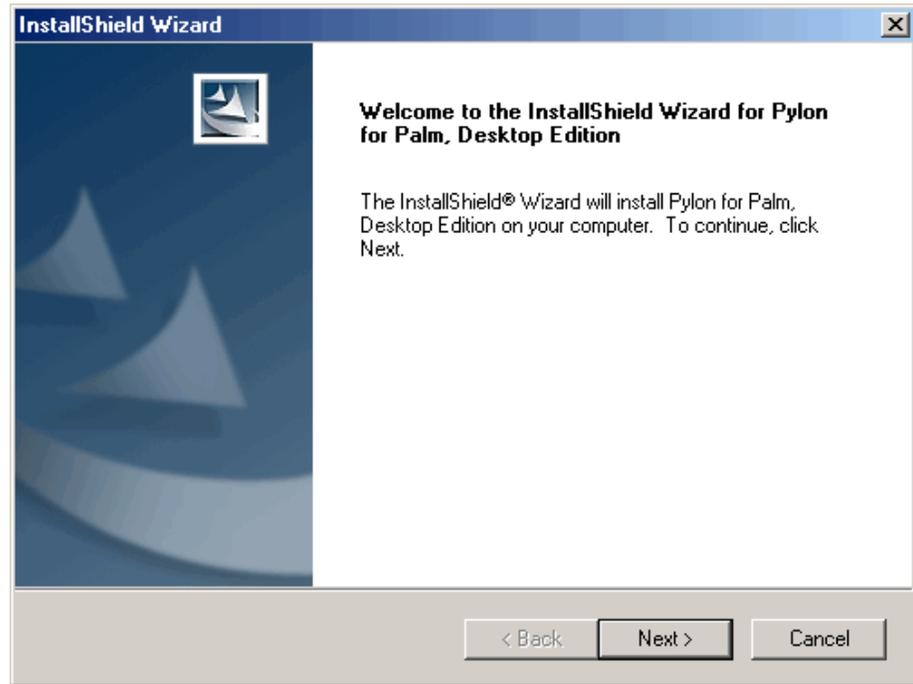
1. Place your Pocket PC or Palm OS device in its cradle and perform a final sync. After syncing, leave your device in its cradle.
2. Close Lotus Notes.
3. Double-click the installer file *pylondesktopPocket PC.exe* or *pylondesktoppalm.exe*.

#### Note

If you forgot to uninstall a previous version of Pylon software that is running on your desktop, you will receive a prompt asking if you want to uninstall at this time. Click **Yes** to uninstall, then double-click the installer file again to restart the installation process.

The Pylon installer Welcome panel appears.

**Figure 3-1**  
Pylon installer  
Welcome panel



---

---

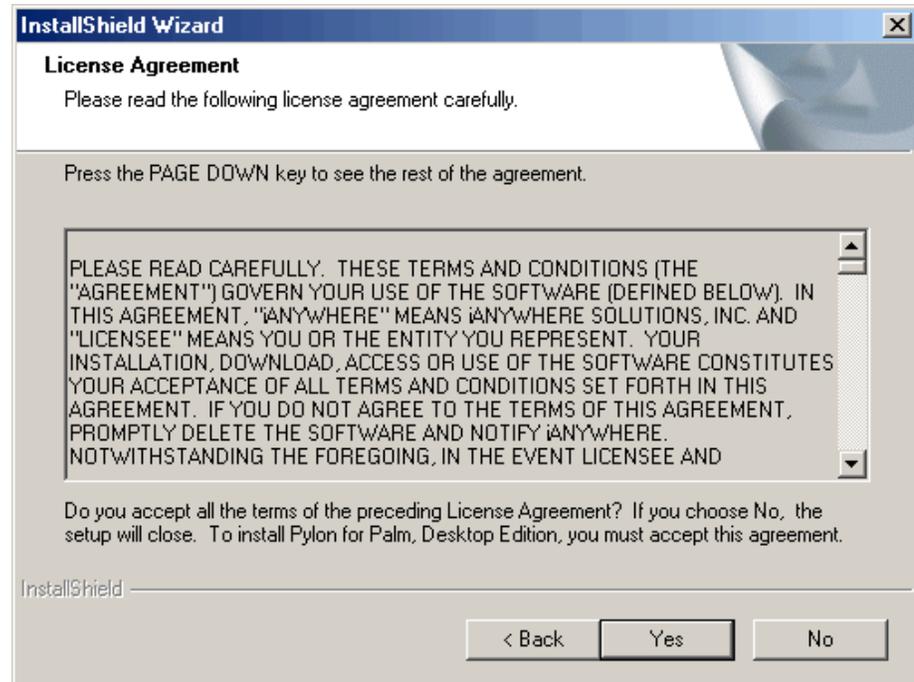
**Note**

If you have forgotten to close Lotus Notes, you will see the Close Down Lotus Notes dialog box instead of the Welcome panel. To solve this problem, close Lotus Notes, then return to the installer and click **Yes** to proceed with installation.

4. Click **Next** to continue.

The Pylon License Agreement panel appears.

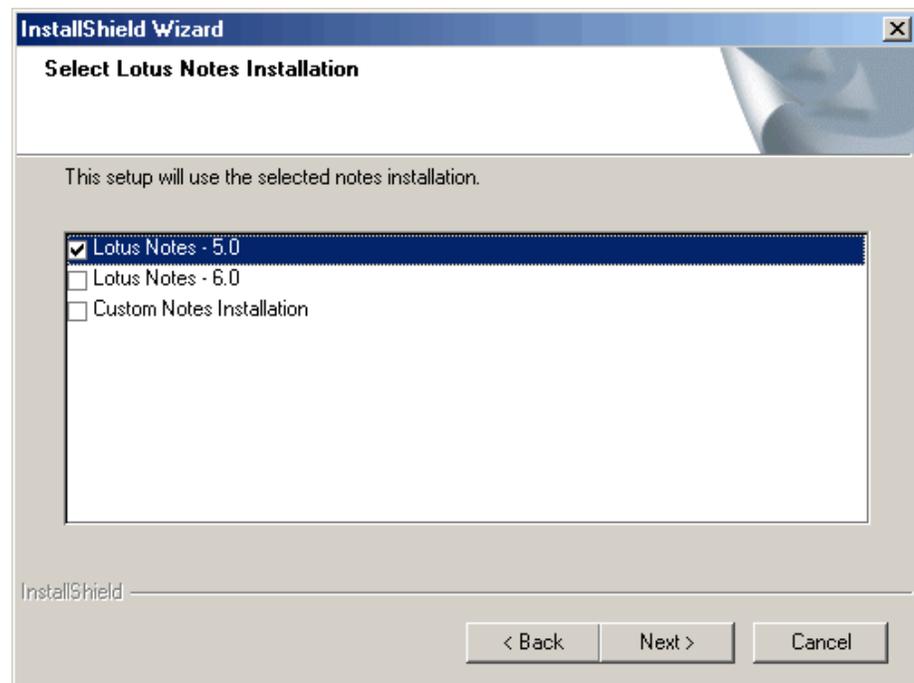
**Figure3-2**  
Pylon installer  
License Agreement  
panel



5. Read the license agreement, then click **Yes** to accept the agreement and continue with the installation.

The installer Select Lotus Notes Installation panel appears.

**Figure3-3**  
Pylon installer  
Select Lotus Notes  
Installation panel



6. Select the Lotus Notes Installation that you want Pylon to use.

Select one of the Lotus Notes Installations listed and click **Next** to continue with the installer License Key Information panel, in step 7 below.

Select **Custom Notes Installation** if you have a non-standard configuration of Lotus Notes. Two panels will be displayed for you to specify the information necessary for Pylon to work with your custom Notes configuration:

- **Locate Lotus Notes Program Directory** — enter or browse to the directory containing the *nnotes.dll* file for the Notes installation you want Pylon to use.
- **Select Lotus Notes Base Version** — select the base version for the installation of Lotus Notes that you want Pylon to use. Ignore the point number of your Lotus installation and select the base version that matches your major version number. For example, if you are using Notes version 6.5, select base version 6.0.

When you click **Next** after selecting your Lotus Notes base version, the Pylon installer License Key Information panel appears,

7. Enter the Pylon access key or license key provided in your purchase confirmation email or by your system administrator, then click **Next**.

---

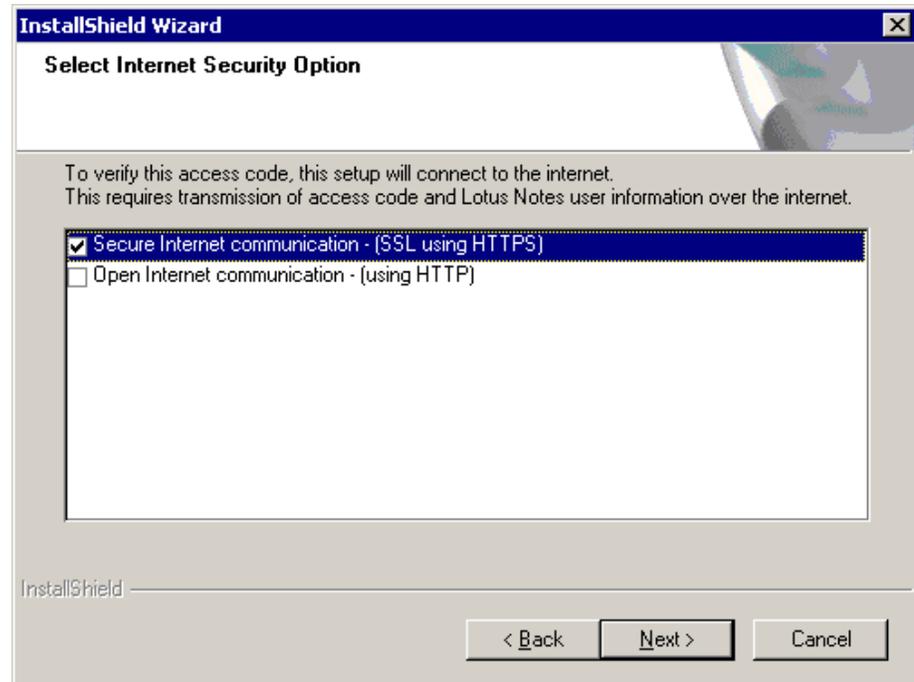
---

**Note**

If you see an invalid access key error message, check to confirm that you have entered your access key exactly as it was given to you. For instructions, see “Troubleshooting: Installing” (page 180).

If you entered an access key, or a license key that is invalid, the Pylon installer Select Internet Security Option panel appears. If you entered a valid license key, go to step 9.

**Figure3-4**  
Pylon installer  
Select Internet  
Security Option  
panel



8. Select the Internet security option that you want Pylon to use.

Pylon will use the method you select to send your Lotus Notes user name and domain name to the iAnywhere access key server, and then to send the generated license key back to your PC, where it is placed into the *notes.ini* file and the Pylon Configuration database.

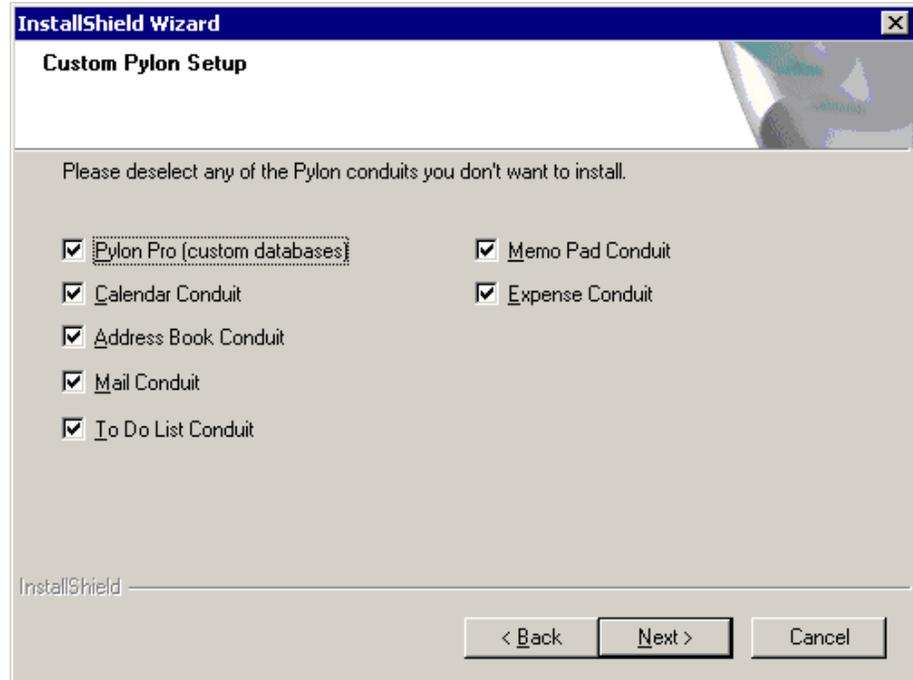
- **Secure Internet communication** — uses SSL and HTTPS to secure the information.
- **Open Internet communication** — uses normal, insecure HTTP; information could be intercepted during synchronization.

Click **Next** to display the installer Select Setup Type panel.

9. Select the type of Pylon setup you prefer.

- **Typical** — installs all of the Pylon conduits that are available for your mobile device platform. Click **Next** to display the installer Select Palm Users (for Palm devices) or Select Additional CE Devices (for Pocket PC OS devices). Continue with step 10 below.
- **Custom** — allows you to specify which Pylon conduits are installed. Click **Next** to display the installer Custom Pylon Setup panel.

**Figure 3-5**  
Pylon installer  
Custom Pylon Setup  
panel



Deselect any Pylon conduits that you do not wish to install and click **Next** to continue.

---

---

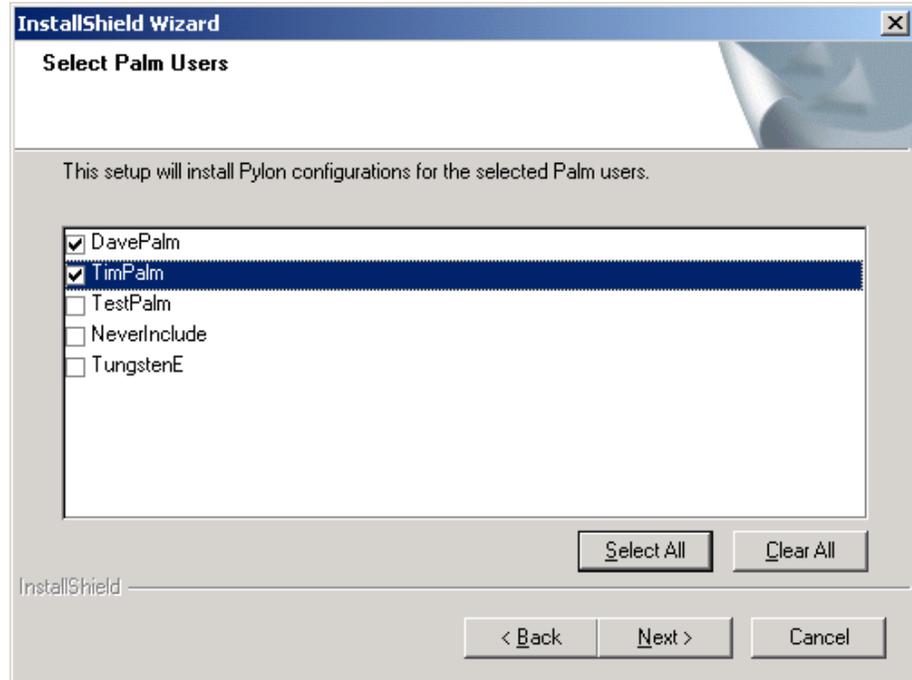
**Note**

If you are installing with a Pylon Conduit license, the “Pylon Pro (custom databases)” option does not appear in this panel.

10. At this point, the installer panel specific for your mobile device platform is displayed.

If you are installing for a Palm device the Select Palm Users panel is displayed.

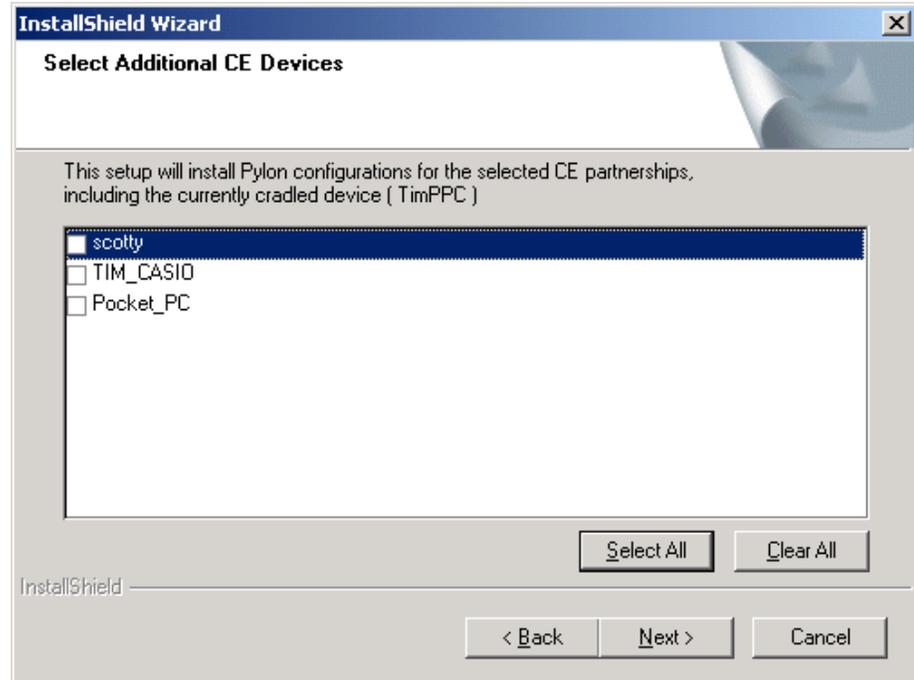
**Figure 3-6**  
Pylon installer  
Select Palm Users  
panel



Select one or more Palm users that you want to enable, then click **Next** to display the installer Choose Destination Location panel — continue with step 11 below.

If you are installing for a Pocket PC OS device the Select Additional CE Devices panel, in place of the Select Palm Users panel.

**Figure 3-7**  
Pylon installer  
Select Additional CE  
Devices panel



Select one or more CE devices that you want to enable, then click **Next** to display the installer Choose Destination Location panel.

11. On the Choose Destination Location panel, specify the installation directory for Pylon.

Just click **Next** if the default location is acceptable, or click **Browse...** to choose a different destination folder for Pylon, then click Next.

The Pylon installer Select Program Folder panel appears.

12. The default Program Folder name is **Pylon for Pocket PC** or **Pylon for Palm**, depending on which product you purchased. This name will appear in your Start|Programs menu after installation. Click **Next** to keep this as the program folder name.

The Pylon installer Setup Status panel appears, indicating the percentage completed in the automated installation process.

13. If prompted, enter your Lotus Notes password, then click **OK**.
14. On a Pocket PC OS device, click **Yes** to install Pylon to the default application install directory on your device.
15. On a Pocket PC OS device, when prompted, check your device screen to see if additional steps are necessary, then click **OK**.
16. On a Pocket PC OS device, if you are installing with a Pylon Pro license, click **Yes** again to install Pylon Pro to the default application install directory on your device, then click **OK**.
17. When the installer has completed its work, you are asked whether you wish to open Lotus Notes to view the Pylon Configuration database.

- Click **Yes** to start Lotus Notes and open the Pylon Configuration database so that you can configure Pylon to work best for your specific mobile needs. See “Configuring Pylon” (page 48).
- Click **No** to configure Pylon later.

18. After you exit Lotus Notes, or after clicking No above, the last Pylon installer panel, InstallShield Wizard Complete, is displayed.

Click **Finish** to complete the installation process.

The Pylon installer completes the installation process. Pylon now is installed on both your desktop and your device.

---

---

**Note**

If your installation fails to complete successfully, first see “Troubleshooting: Installing” (page 180). If the information there does not provide a solution, consult the Pylon technotes that are linked from the Pylon Technical Support page, referenced in “Related publications” (page 21).

---

---

**Caution**

Make sure you do not delete your Pylon installer file (*pylondesktopPocket PC.exe* or *pylondesktoppalm.exe*) after the installation is complete. Make a note of where it is located so that you can easily find it. You may need to run it again to modify or repair your Pylon installation. See “Modifying your Pylon installation” (page 49) and “Repairing your Pylon installation” (page 51).

## Configuring Pylon

After installation, you can move on to configuring Pylon to work for your specific mobile needs. Unless you specified during installation that you did not want all Pylon conduits installed, Pylon is configured by default to sync your Mail, Calendar, Address Book, To Do, Memo Pad (Palm OS only), and Expense (Palm OS only).

To modify the default settings for your Lotus Notes applications, see CHAPTER 4., “Configuring basic PIM sync settings”. To Sync one or more Lotus Notes custom databases (Pylon Pro only), see CHAPTER 7., “Syncing custom databases”.

---

---

**Note**

If you need to enable a Pylon conduit that you did not install, or disable a Pylon conduit that you did install, see “Modifying your Pylon installation” (page 49).

---

## Modifying your Pylon installation

If you need to change any of the settings you specified when you installed Pylon Conduit or Pylon Pro, you can do so easily by running the installer again. The Pylon installer detects the previous Pylon Conduit or Pylon Pro, Version 5.4.1 installation and uses all its settings as the default values when it presents its series of panels. You may change any setting you need to.

---

---

### Caution

When you do a Modify install, all of your manual configuration settings are changed back to the defaults. This may be necessary if you need to add a conduit that was not previously installed, but you should make notes on all of your manual configuration settings before proceeding, so that you can manually restore them.

Some useful things you can do in a Modify install:

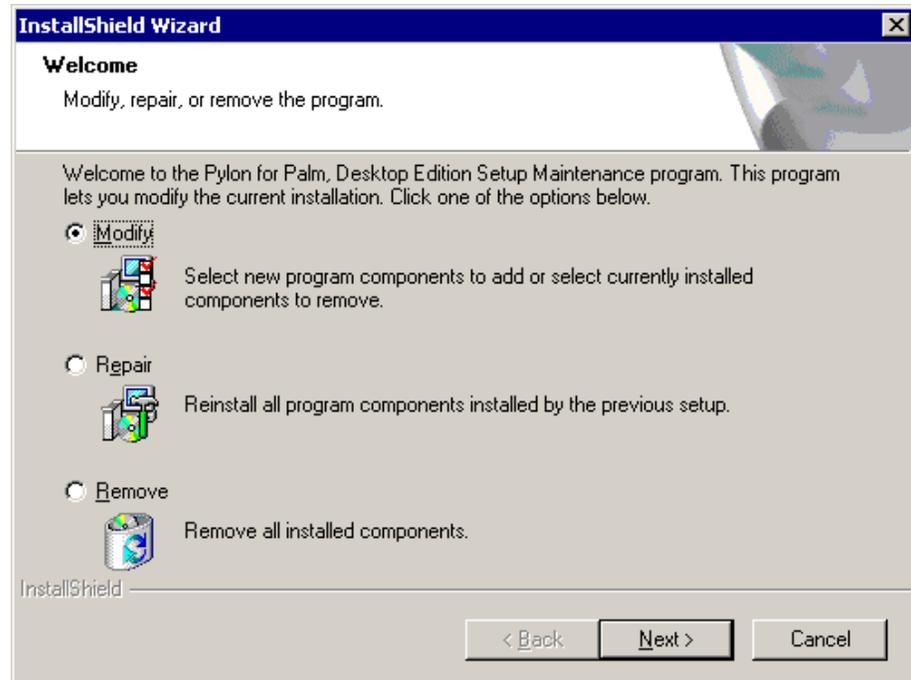
- Change your license key from an eval key to a permanent key, or from a Pylon Conduit key to a Pylon Pro key.
- Change your Lotus Notes information, when your Lotus Notes installation is upgraded to a new base version.
- Disable a conduit, like Calendar, that you installed but no longer want to use.
- Enable a conduit, like Calendar, that you did not install but now decide you want.

To modify your Pylon installation:

1. Place your Pocket PC or Palm OS device in its cradle and perform a final sync. After syncing, leave your device in its cradle.
2. Close Lotus Notes.
3. Double-click the installer file *pylondesktopPocket PC.exe* or *pylondesktop-palm.exe*.

The Pylon installer Welcome panel for a maintenance install appears.

**Figure 3-8**  
Pylon installer  
Welcome panel for  
maintenance install



4. Select **Modify** and click **Next**.

You are prompted to confirm that you want to modify your Notes installation settings.

5. Click **Yes** to confirm your intent.

The Pylon installer takes you through the same series of panels that you filled in during the previous install, with the values you specified then used as the defaults now.

Continue with step 6 in the main “Installing Pylon” (page 39) instructions.

---

## Repairing your Pylon installation

If you suspect that a file supporting your Pylon installation may have become corrupted, you can use the Pylon installer to repair any damaged files while preserving all of your installation settings.

---

---

### Caution

When you do a Repair install, all of your manual configuration settings are changed back to the defaults. This is faster than uninstalling and reinstalling Pylon, but you should make notes on all of your manual configuration settings before proceeding, so that you can manually restore them.

To repair your Pylon installation:

1. Place your Pocket PC or Palm OS device in its cradle and perform a final sync. After syncing, leave your device in its cradle.
2. Close Lotus Notes.
3. Double-click the installer file *pylondesktopPocket PC.exe* or *pylondesktop-palm.exe*.

The Pylon installer Welcome panel for a maintenance install, shown in Figure 3-8, “Pylon installer Welcome panel for maintenance install” (page 50), appears.

4. Select **Repair** and click **Next**.

The Pylon installer Setup Status indicates the percentage progress. When it is complete, the Pylon installer Maintenance Complete panel is displayed.

5. Click **Finish**.

## Uninstalling Pylon

To uninstall Pylon software completely, you must uninstall it from both your desktop computer and your mobile device.

### Uninstalling Pylon from your desktop computer

---

---

**Note**

When you installed Pylon on your desktop computer, any Palm conduits that had been enabled prior to installation were disabled when the installer enabled the corresponding Pylon conduits. These disabled Palm conduits will not be re-enabled when you uninstall Pylon; you will have to re-install the Palm Desktop software in order to re-enable any of them that you wish to use.

#### *Uninstalling version 5.4.1 for Pocket PC OS or Palm OS*

Follow these instructions to remove both Pylon Conduit and Pylon Pro for either Pocket PC or Palm OS.

To uninstall version 5.4.1:

1. Place your Pocket PC or Palm OS device in its cradle and perform a final sync. After syncing, leave your device in its cradle.
2. Close Lotus Notes.
3. Double-click the installer file *pylondesktopPocket PC.exe* or *pylondesktop-palm.exe*.

The Pylon installer Welcome panel for a maintenance install, shown in Figure 3-8, “Pylon installer Welcome panel for maintenance install” (page 50), appears.

4. Select **Remove** and click **Next**.

You are prompted to confirm your intent to completely remove Pylon and all of its components.

5. Click **Yes** to confirm your intent.

The Pylon installer Setup Status indicates the percentage progress.

---

---

**Note**

If any potentially shared files are detected, you will be prompted as to whether these should be removed or left. You can probably delete these files safely, but if you want to be cautious here, answer **No** to these prompts.

When the removal is complete, the Pylon installer Maintenance Complete panel is displayed.

6. Click **Finish**.

---

---

**Note**

When you uninstall Pylon, the *pyloncfg.nsf* file is not removed. It remains in the Lotus Notes data directory for you to view later if you need to refer to your old Pylon settings.

### *Uninstalling older versions for Pocket PC OS*

Follow these instructions to remove both Pylon Conduit and Pylon Pro for Pocket PC.

To uninstall older versions for Pocket PC OS:

1. Click **Start|Settings|Control Panel**.
2. Click **Add/Remove Programs**.
3. Select **Pylon for Pocket PC, Desktop Edition (5.3)**, **Pylon for Pocket PC (4.03C)**, or **Pylon Conduit (4.02C)**.
4. Click **Remove**, then click **Yes** to confirm the uninstall.
5. If you are upgrading to a newer version of Pylon Conduit or Pylon Pro, you can install the new version now. For instructions, see “Installing Pylon” (page 39).

---

---

#### Note

If you are not upgrading Pylon Conduit or Pylon Pro and you want to synchronize your device with non-Lotus Notes PIM applications, after uninstalling Pylon Conduit you will need to re-enable them. To do this, open Microsoft ActiveSync, click **Options**, then check the box beside any applications you wish to sync.

### *Uninstalling older versions for Palm OS*

Follow these instructions to remove both Pylon Conduit and Pylon Pro for Palm.

To uninstall older versions for Palm:

1. Click **Start|Settings|Control Panel**.
2. Click **Add/Remove Programs**.
3. Select **Pylon for Palm, Desktop Edition (5.3)** or **Enterprise for Lotus Notes (4.0 or lower)**.
4. Click **Remove**.
5. During the uninstall process, you may be asked if you want to uninstall the files *instaide.dll* and *vb40032.dll*. Click **No**.

---

---

#### Note

If you are upgrading to a higher version of Pylon, you can install that version now. If you are not upgrading Pylon and want use Palm Desktop instead, you will need to reinstall your Palm Desktop software at this time.

## Uninstalling from your mobile device

To complete the uninstall procedure, delete all Pylon files from the device.

### *Uninstalling from a Pocket PC OS device*

To uninstall from a Pocket PC OS device:

1. Remove your device from its cradle.
2. Tap **Start|Settings**.
3. Tap the **System** tab.
4. Tap **Remove Programs**.  
The Remove Programs screen appears.
5. Tap Pylon, tap **Remove**, then tap **Yes**.
6. If you have installed Pylon Pro, tap **Pylon Pro**, tap **Remove**, then tap **Yes**.
7. Tap **OK**.
8. Tap **Start|Programs**.
9. On the Programs screen, tap **File Explorer**.
10. In File Explorer, tap **Windows|Pylon|Databases**.  
The Databases folder appears, with your Pylon Pro databases listed
11. Tap **Edit|Select All**.
12. Tap and hold on one of the databases, then select **Delete** from the drop down menu.
13. Click **Yes** to confirm deletion of the files.

### *Uninstalling from a Palm OS device*

Pylon on your mobile device consists of several components. Be sure to delete all files from your mobile device.

To uninstall from a Palm OS device:

1. Tap the **Menu** silk screen button.
2. Tap **App|Delete**.
3. Select all **Pylon** files.  
For version 4.0 and lower, there are multiple files.
4. Tap **Delete**.

---

---

#### Note

# Syncing Lotus Notes PIM applications

“Configuring basic PIM sync settings” (page 57)

“Customizing Pylon” (page 71)

“Accessing PIM applications on your device”  
(page 97)





# CHAPTER 4. **Configuring basic PIM sync settings**

---

---

- “Overview of configuration tasks and documentation” (page 58)
- “Accessing Pylon on your desktop computer” (page 60)
- “Disabling or enabling a PIM application” (page 64)
- “Setting the sync Action” (page 65)
- “Choosing a sync filter” (page 67)

## Overview of configuration tasks and documentation

### PIM configuration task checklist

Use the following checklist when modifying the sync options for each Lotus Notes PIM application.

- ✓ Determine what you want Pylon to do with the PIM application. With Mail, for example, if you sync frequently, you may need only your unread Mail from the last seven days on your device. Or, you may decide that you do not need to sync Mail, either permanently or temporarily.
- ✓ Open the Pylon Configuration database in Notes.
- ✓ Enable or disable syncing of the PIM application.
- ✓ Set the sync action for the PIM application.
- ✓ Select the most appropriate filter for the PIM application, depending on your mobile needs.
- ✓ Modify one of the provided filters if necessary, in order to better meet your specific mobile needs.
- ✓ **Tip:** If you are upgrading from an earlier version of Pylon, to avoid any unwanted duplicate entries, set the sync **Action** on all applications to **Desktop overwrites handheld** for your first sync.
- ✓ Save and close the Pylon Configuration database.
- ✓ Sync your device to test your new configuration and access your Lotus Notes PIM applications on your device.
- ✓ **Tip:** If you are upgrading from an earlier version of Pylon, and do not want to the sync **Action** for all your applications to be **Desktop overwrites handheld**:
  - Reopen the Pylon Configuration database in Notes
  - Set the permanent sync Action settings that you want for each application
  - Save and close the Pylon Configuration database.

### Roadmap to Pylon configuration instructions

The instructions for performing each of the tasks above for each of the different PIM application are very similar. You configure all of the PIM applications from the same Lotus Notes screen. In the following sections, you will find generic instructions for performing each of the tasks listed above for any PIM application:

- The generic instructions, beginning with “Accessing Pylon on your desktop computer” (page 60), take you all the way through the first part of modifying a sync filter for an application.
- Application-specific instructions for modifying a sync filter complete this chapter, starting with “Making Mail-specific changes to a sync filter” (page 81).

- If you need to sync additional Calendars, Address Books, To Do Lists, or Expense databases, instructions are provided in the next chapter, in “Syncing additional application databases or views” (page 91).
- If you have Pylon Pro and need to sync custom databases, instructions are provided in the three chapters in the section titled, “Syncing custom databases (Pylon Pro only)” (page 131),

## Accessing Pylon on your desktop computer

Access the Pylon Lotus Notes database in Lotus Notes to configure your sync options for Lotus Notes PIM applications (Pylon Conduit and Pylon Pro) and Lotus Notes custom databases (Pylon Pro only). The name of the Pylon Lotus Notes database is the Pylon Configuration Database (*pyloncfg.nsf*).

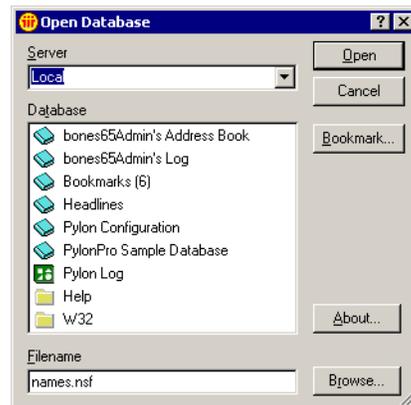
### Opening the Pylon Configuration Database

To open the Pylon Configuration Database:

1. Open Lotus Notes.
2. Click **File|Database|Open**.

The Open Database dialog box appears.

**Figure 4-1**  
Open Database  
dialog box



3. Choose **Local** as the server.
4. Choose **Pylon Configuration** as the database. The Filename is *pyloncfg.nsf*.
5. Click **Open**.

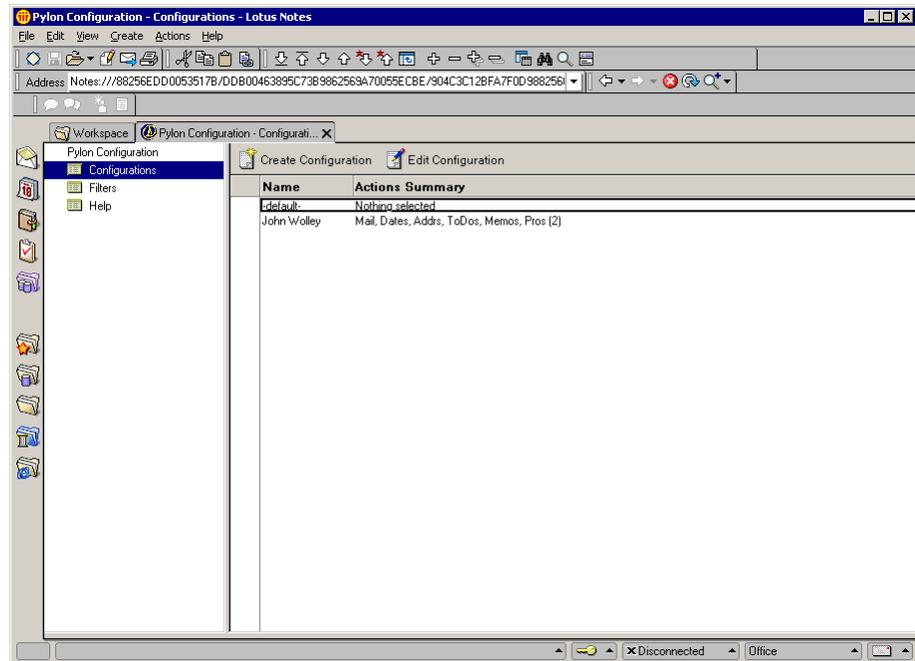
The Pylon Configuration Database appears.

#### Tip

If Lotus Notes is not already running, you can open it and go directly to the Pylon Configuration Database by making a selection from the Windows Start menu:

**Start|Programs|Pylon for <platform>|Pylon Configuration Database**

**Figure 4-2**  
Pylon Configuration  
Database



The Pylon Configuration Database consists of two Views:

- **Configurations:** Choose this View to access and edit your Pylon Configuration document. Settings in the Pylon Configuration document determine the general behavior of your Lotus Notes PIM and, if you have Purchased Pylon Pro, of your custom database conduits.
- **Filters:** Choose this View to access and edit all of your available Pylon filters, or to create new filters. Your Pylon filters determine the specific information that is synchronized through your Lotus Notes PIM and, if you have purchased Pylon Pro, through your custom database conduits.

## Opening your Pylon Configuration document

To open your Pylon Configuration document:

1. Open the Pylon Configuration Database in Lotus Notes. For instructions, see “Opening the Pylon Configuration Database” (page 60).
2. Click **Configurations** in the navigation pane, then click **Edit Configuration**.

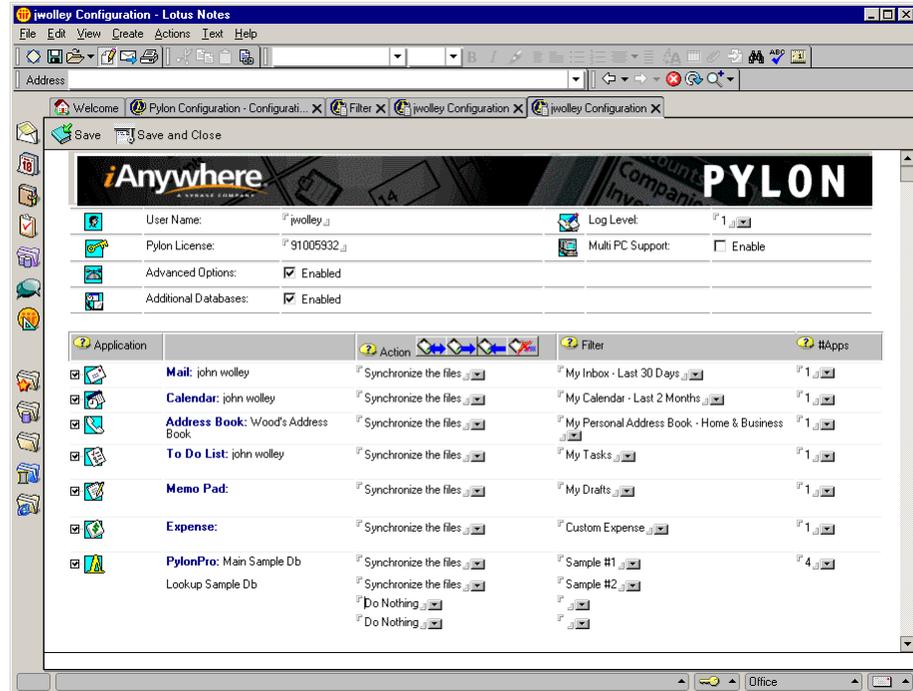
### Note

The first time you open the configuration document, you may see a Create Cross Certificate dialog box. Click **Yes** to close the box. You also will see one or several Execution Security Alert dialog boxes. Click **Trust Signer** to close the boxes. You only have to perform this action once (for each box). For more information about these

dialog boxes, see “Troubleshooting: Accessing Pylon Configuration document” (page 189).

Your configuration document appears. You configure Pylon in this document.

**Figure 4-3**  
Your Pylon  
configuration  
document



### Note

The above screen shows a Pylon Pro installation for a Palm device, with all applications, Advanced Options, and Additional Databases enabled. If you have Pylon configured differently, your screen may look different:

- If you have not enabled Advanced Options, the Log Level and Multi PC Support fields do not appear.
- If you have not enabled Additional Databases, the column of entries for #Apps does not appear.
- If you have not enabled one of the applications, its checkbox on the left is not selected and its icon appears as black outlines only.
- If you have installed Pylon for a Pocket PC OS device, the Memo Pad and Expense applications do not appear.
- If you have licensed Pylon Conduit, the entry for the PylonPro application does not appear.

The names of the applications listed on the Pylon Configuration document are the same, independent of the mobile device you are using. However, the names of some applications on your device may be different. Table 4-1 lists the application names on different platforms that correspond to the applications listed on your Pylon Configuration document.

**Table 4-1**  
Application names  
on different device  
platforms

Pylon Configuration Document	Pocket PC	Older Palm OS devices*	Newer Palm OS devices*
Mail	Inbox	Mail	Mail
Calendar	Calendar	Date Book	Calendar
Address Book	Contacts	Address	Contacts
To Do List	Tasks	To Do List	Tasks
Expense	(not available)	Expense	Expense
Memo Pad	(not available)	Memo Pad	Memo

\* “Newer Palm OS devices” are palmOne devices with Palm OS 5.2.1 or later. “Older Palm devices” are those Palm OS devices made by manufacturers other than palmOne, or palmOne devices with Palm OS version prior to 5.2.1.

For information on configuring Pylon to sync individual Lotus Notes PIM applications, see the following sections in this chapter.

For information on configuring Pylon to do the following, see these other sections of this guide:

- Syncing multiple Lotus Notes databases for the same application — “Syncing additional application databases or views” (page 91).
- Setting the Pylon Log Level for troubleshooting purposes — “Troubleshooting: Using the Pylon Log database” (page 182)
- Supporting multiple users on one PC — APPENDIX B., “Setting up Pylon for multiple users,” starting on page 191
- Supporting multiple PCs (Palm only) — APPENDIX C., “Syncing from multiple desktop computers (Palm OS only),” starting on page 197
- Syncing one or more Lotus Notes custom databases (Pylon Pro only) — CHAPTER 7., “Syncing custom databases,” starting on page 133

## Disabling or enabling a PIM application

To enable or disable a PIM application conduit in Pylon:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the navigation pane, click **Configurations**, then click **Edit Configuration**.
3. In your configuration document, check the box beside the icon for the PIM application you want to enable.

A check in the box indicates the application is enabled. No check and a gray icon indicates the application is disabled.

---

---

### Note

When you disable the application, the sync action changes to **Do Nothing**.

4. Click **Save and Close** to save your changes and exit your configuration document, or continue making changes to your Pylon configuration.

## Setting the sync Action

There are four synchronization actions from which you can choose. Table 4-2 describes in detail what happens with the information on your device and data on your desktop when you sync.

Table 4-2 Sync Action options

Icon*	Action	Description	Use When...
	<b>Synchronize the files</b> (default action for active applications)	All documents created or modified since the last sync will sync to the other side, whether they originate in Lotus Notes or on your device. Modified documents will replace the old ones. If a document is deleted on one side, it will be deleted on the other side during the sync. <b>Note:</b> The amount of time it takes to sync is directly proportional to the amount of data being transferred.	When your normal way of working is to make changes in information both your device and in Notes on your desktop, and you want to keep the two sets of information in sync. Note, however that if you change the same item on <i>both</i> ends, the item may be <i>duplicated</i> —the default Conflict Resolution setting in Calendar and To Do List filters is Keep both Versions.
	<b>Desktop overwrites handheld</b>	All documents in Lotus Notes will sync to your device based on the selection criteria. <b>Note:</b> All existing documents on the device will be deleted.	Use this as a <i>permanent setting</i> if your device data is read-only — you download from your desktop, but never make changes on your device. Use this as a <i>one-time sync option</i> , to refresh your device data with a clean copy from Notes on your desktop.
	<b>Handheld writes to desktop</b>	All documents on your device will be copied to Lotus Notes. Existing data in Lotus Notes will not be deleted. The first time you sync, all records on the device are copied to Lotus Notes. Each time you sync again, without deleting all the records from your device, duplicate records will be created in Lotus Notes.	When you have information on your mobile device and you want to have it copied to Notes on your desktop. <b>Caution:</b> This is a one-time sync option — after syncing once to copy device data to your desktop, switch immediately to <b>Synchronize the files</b> or <b>Desktop overwrites handheld</b> before syncing again.
	<b>Do Nothing</b>	No action is taken during a sync. This is the default for non-active applications.	When you want to temporarily disable syncing individual applications.

\* Clicking the icon sets *all* of your applications to the associated sync Action.

---

---

**Tip**

If you are upgrading from an earlier version of Pylon, to avoid unwanted duplicate entries, set the sync **Action** to **Desktop overwrites handheld** for your first sync after upgrading. Then, after syncing, set the sync Action to the permanent setting you want for each application.

To change the sync action for a PIM application:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the navigation pane, click **Configurations**, then click **Edit Configuration**.
3. In your configuration document, make sure the box beside the icon for the PIM application you are configuring is checked.
4. Underneath **Action**, click the drop-down arrow.

The sync Action Select Keywords panel appears.

**Figure 4-4**  
Select Keywords  
panel



5. From the **Keywords** list, click the new action.
6. Click **OK**.

The panel closes and you return to your configuration document.

7. Click **Save and Close** to save your changes and exit your configuration document, or continue making changes.

## Choosing a sync filter

Pylon software comes with several pre-defined sync filters for each PIM application. Table 4-3 describes the pre-defined sync filters that are available. When you use one of these filters to further define your sync options for a PIM application, you may not need to specify any additional Lotus Notes or device specifications.

**Table 4-3**  
Pre-defined sync  
filter options

Filter	Choose this filter to...
<b>Mail</b>	
My Inbox	Synchronize all Mail in Lotus Notes Mail, both read and unread, to device Mail or Inbox.
My Inbox - Last 30 days (default)	Synchronize all Mail in Lotus Notes Mail, both read and unread, to device Mail or Inbox from the last thirty days.
My Inbox - Last 7 days	Synchronize all Mail in Lotus Notes Mail, both read and unread, to device Mail or Inbox, for last seven days.
My Inbox - Unread Only	Synchronize all unread Mail in Lotus Notes Mail to device Mail or Inbox.
<b>Calendar*</b>	
My Calendar	Synchronize all items in your Lotus Notes Calendar and Pocket PC or Palm OS device Calendar.
My Calendar - Last 2 Months (default)	Synchronize only those items in your Lotus Notes Calendar and Pocket PC or Palm OS device Calendar from the last 2 months.
<b>Address Book*</b>	
My Personal Address Book	Synchronize all items in your Lotus Notes Address Book and Pocket PC or Palm OS device Address Book application.
My Personal Address Book - Home & Business (default)	Synchronize all items in your Lotus Notes Address Book and Pocket PC or Palm OS device Address Book application — assigning the personal address as the primary address and mapping the business address to a custom field.

Filter	Choose this filter to...
<b>To Do List*</b>	
My Tasks (default)	Synchronize items in your Lotus Notes To Do List and your mobile device To Do List (Palm) or Tasks (Pocket PC) application.
<b>Memo Pad (Palm OS only)</b>	
My Drafts (default)	Synchronize all items in your Lotus Notes Mail Drafts folder and Palm OS device Memo Pad application.
My Journal	Synchronize items in a Journal database of Lotus Notes and Palm OS device Memo Pad. <b>Note:</b> The Journal database (journal.nsf), is manually installed on Lotus Notes Client installations for versions 4.6 or later.
<b>Expense (Palm OS only)</b>	
Custom Expense (default)	Synchronize items in an Expense database in Lotus Notes and Palm Expense. <b>Note:</b> We provide a template (pylonexp.ntf) that you can use to manually create an Expense database for use with Lotus Notes. See “Making Expense-specific changes to a sync filter (Palm only)” (page 89).

\* Application names differ slightly on different devices — see Table 4-1, “Application names on different device platforms,” on page 63.

If none of the pre-defined filters meet your needs, you may customize one of them to work exactly the way you want. See “Customizing a sync filter” (page 74).

To select a sync filter for a PIM application:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the navigation pane, click **Configurations**, then click **Edit Configuration**.
3. In your configuration document, make sure the box beside the icon for the PIM application you are configuring is checked.
4. Under **Filter**, click the drop-down arrow.  
The Inbox Select Keywords panel appears.

5. From the **Keywords** list, click the name of the new filter.
6. Click **OK**.

The panel closes and you return to your configuration document.

7. Click **Save and Close** to save your changes and exit your configuration document, or continue making changes.



## CHAPTER 5. Customizing Pylon

---

- “Making a copy of a sync filter” (page 72)
- “Customizing a sync filter” (page 74)
  - “Displaying the list of Pylon filters — Filters view of Pylon Configuration Database” (page 74)
  - “Making changes to Custom Field Mapping” (page 75)
  - “Making generic changes to a sync filter” (page 76)
  - “Making Mail-specific changes to a sync filter” (page 81)
  - “Making Calendar-specific changes to a sync filter” (page 83)
  - “Making Address Book-specific changes to a sync filter” (page 85)
  - “Making To Do List-specific changes to a sync filter” (page 86)
  - “Making Memo Pad-specific changes to a sync filter” (page 88)
  - “Making changes to the My Journal filter (Palm only)” (page 88)
  - “Making Expense-specific changes to a sync filter (Palm only)” (page 89)
- “Syncing additional application databases or views” (page 91)
  - “Creating a new filter for the additional database or view” (page 93)
  - “Enabling the additional database or view with initial sync Action of “Desktop overwrites handheld”” (page 94)
  - “Syncing your device” (page 95)
  - “Changing the sync Action on the additional database or view” (page 95)

## Making a copy of a sync filter

If you wish to create a new sync filter based on the settings in an existing filter, you may make a copy of the existing filter and then make changes to the copy. There are two reasons why you might want to make a copy of a sync filter:

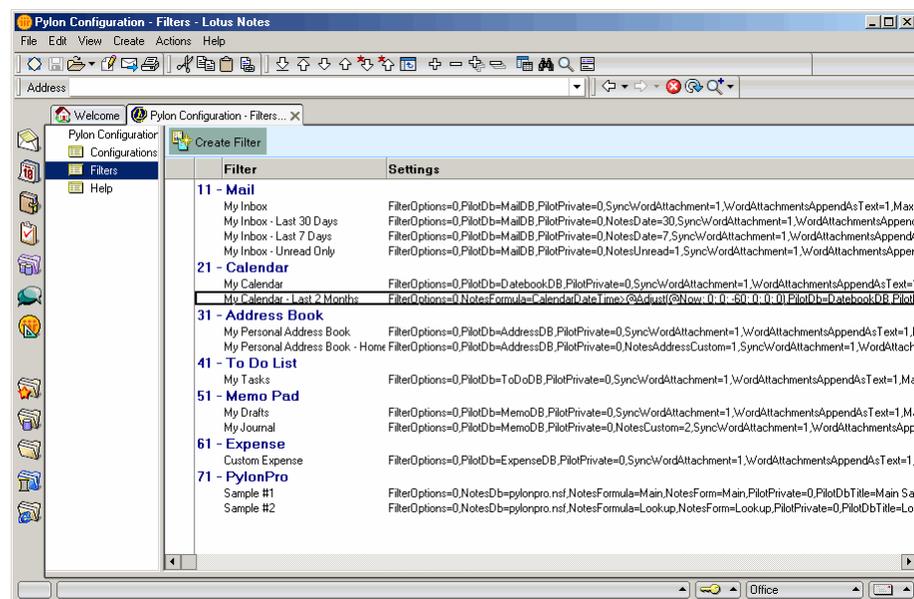
- Preserve the original filter settings in case you want to restore them later.
- Sync additional databases for the same application, with slightly different filter settings for each.

To make a copy of a sync filter for a PIM application:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the Navigation pane, click **Filters**.

A list of all available filters appears in the View pane.

**Figure5-1**  
All available pre-defined filters



### Note

The above screen shows a Pylon Pro installation for a Palm device. If you have licensed Pylon Conduit, you will not see the “PylonPro” application entry. If you install Pylon for Pocket PC, the “Date Book” entry is labeled “Calendar.”

3. Under the heading for the PIM application you are configuring, click the filter name that you wish to copy.
4. In the Lotus Notes menu, select **Edit|Copy**.
5. In the Lotus Notes menu, select **Edit|Paste**.

To modify the copy of the sync filter that you just created, see “Customizing a sync filter” (page 74).

To use the copy of the sync filter with an additional databases for the same application. see “Syncing additional application databases or views” (page 91).

## Customizing a sync filter

Filters determine the specific databases that are accessed during a sync, and the specific information that is synchronized from each individual Lotus Notes PIM and custom database. If none of the pre-defined sync filters allows you to sync an application exactly the way that you want to, you can customize a filter to better meet your needs.

---

---

**Caution**

To be safe, make a copy of any pre-defined filter and then modify the copy. This approach will allow you to restore particular settings from the original filter if you should ever need to. Some settings, like the “View or Formula” entry, may be difficult to recreate by hand. For instructions on copying a filter, see “Making a copy of a sync filter” (page 72).

---

---

**Caution**

Before customizing a sync filter, if the sync **Action** for the application using the filter is set to **Synchronize the files**, sync your device immediately before making any filter changes.

---

---

**Caution**

After customizing a sync filter, if the sync **Action** for the application using the filter has is not already set to **Desktop overwrites handheld**, set the sync **Action** to **Desktop overwrites handheld** for the first sync after making the changes, then set the sync Action back to what it was before you customized the filter.

### Displaying the list of Pylon filters — Filters view of Pylon Configuration Database

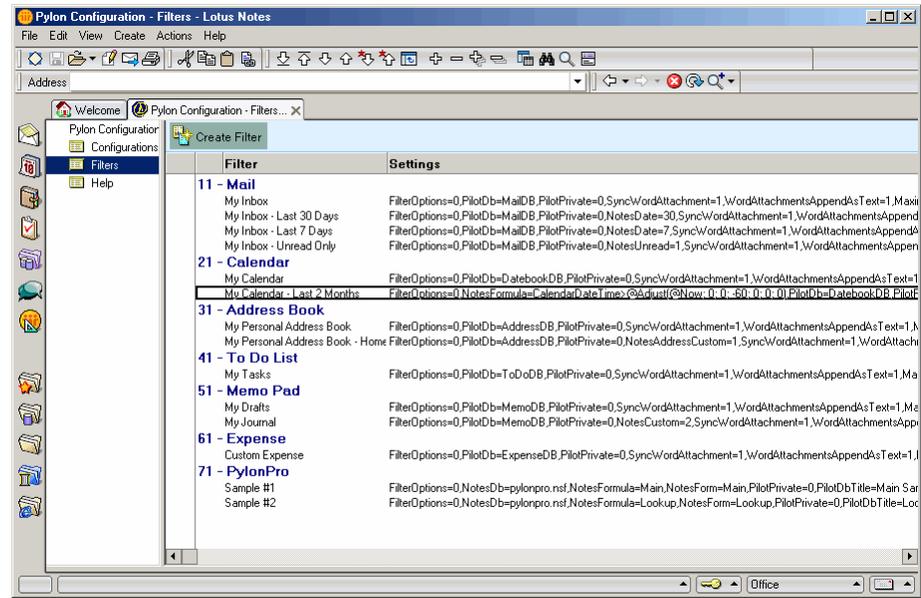
All available filters can be accessed from the Filters View of the Pylon Configuration Database.

To access your Pylon filters:

1. Open the Pylon Configuration Database in Lotus Notes. For instructions, see “Opening the Pylon Configuration Database” (page 60).
2. In the navigation pane, click **Filters**.

A list of all available Pylon filters appears in the View pane.

**Figure 5-2**  
All available filters



### Note

The above screen shows a Pylon Pro installation for a Palm device. If you have licensed Pylon Conduit, you will not see the “PylonPro” application entry.

To make changes to a PIM application sync filter, continue with the following section, “Making generic changes to a sync filter” (page 76). to make changes to a PIM application sync filter.

For information on how to create and edit filters for Lotus Notes custom databases, see “Syncing custom databases” (page 133).

## Making changes to Custom Field Mapping

Although the Custom Field Mapping section on filter configuration documents contains a list of fields that is specific to each application, it is not listed under the application-specific instructions that follow. It is not listed in the generic instructions below, either. It is a special case, for these two reasons:

- Pylon’s default field mappings are the best match-up of fields in the Notes database with fields in the device application, so you will probably never need to change them.
- Typical Notes and Pylon users should not try to modify the default field mappings. If you want to change the default mappings, you should either be a Lotus Notes expert yourself, or bring in a Lotus Note expert to assist you.

That said, here is an overview of what is involved in changing the custom field mappings for a sync filter:

- In the Custom Field Mapping section of a filter configuration document, the names on the left are the device field names.
- The default Lotus Notes field name mapped is not displayed.

- To override a default, enter the appropriate Lotus Notes field name next to the device field name.
- The Lotus Notes field name that you enter must be a valid field name in the database specified in the Lotus Notes Configuration section.
- You can enter an asterisk (\*) to prevent a field from being mapped. If you enter an asterisk for the field name, the data will not synchronize in either direction for the field.
- Formulas can be used in Custom Field Mapping fields, but the device field data then can never sync back to Lotus Notes.

**Caution**

If you start to make a change in the Custom Field Mapping section of an application filter, you will be warned to sync with the old settings before making the change *if* all of the following are true:

- the application sync Action is not “Desktop overwritten handheld”
- you already have application data on your device
- you have a Palm OS device, or the Pocket PC application is Calendar or To Do List

Ignoring this warning may lead to loss of changes made in device data.

For details on Pylon’s default field mappings, see APPENDIX F, “Custom field mapping on Palm,” starting on page 215.

## Making generic changes to a sync filter

**Caution**

If you wish to preserve the existing sync filter, make a copy of it first and then make changes to that copy. See “Making a copy of a sync filter” (page 72).

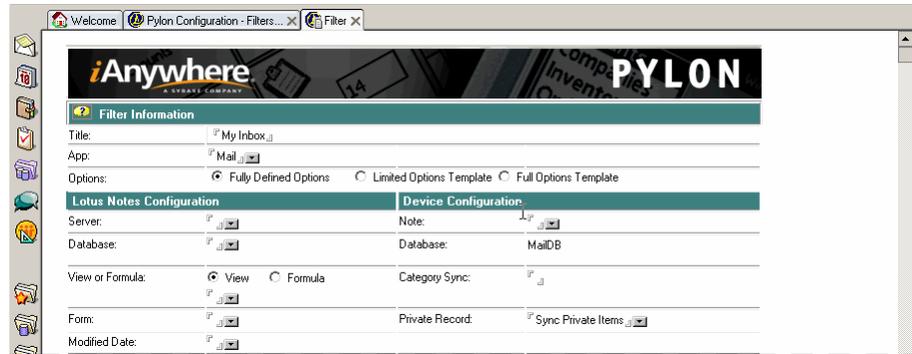
To make generic changes to a sync filter for a PIM application:

1. Display the list of Pylon filters in the Pylon Configuration Database.  
For detailed instructions, see “Displaying the list of Pylon filters — Filters view of Pylon Configuration Database” (page 74).
2. Under the heading for the PIM application you are configuring, double-click a filter name.

For a description of the pre-defined filters that are available, see Table 4-3, “Pre-defined sync filter options,” on page 67.

The filter configuration document appears.

**Figure 5-3**  
Generic filter  
settings, shown on  
My Inbox Mail filter



The figure above shows the first three sections of the filter configuration document for a Mail filter. Filter configuration screens for all PIM applications look very similar in these first three sections, which are covered in sequence in the steps that follow. The few differences are noted in the detailed instructions.

If you want to go directly to one of those sections, here are the cross references:

- “Filter Information section” (page 77)
- “Lotus Notes Configuration section” (page 78)
- “Device Configuration section” (page 79)

Each filter configuration screen also has at least one section with details that are specific to the PIM application. Most applications have an application configuration section. All applications have a Custom Field Mapping section. These application-specific sections are covered after the generic sections:

- “Making Mail-specific changes to a sync filter” (page 81)
- “Making Calendar-specific changes to a sync filter” (page 83)
- “Making Address Book-specific changes to a sync filter” (page 85)
- “Making To Do List-specific changes to a sync filter” (page 86)
- “Making Memo Pad-specific changes to a sync filter” (page 88)
- “Making Expense-specific changes to a sync filter (Palm only)” (page 89)

### *Filter Information section*

#### 3. Double-click **Fully Defined Options**.

The filter configuration document becomes a full options filter template. Any configuration document for a filter for a PIM application has the same general layout. The default settings for the **My Inbox** filter are shown in Figure 5-3, “Generic filter settings, shown on My Inbox Mail filter” (page 77).

#### **Caution**

*Do not change* the filter’s:

**App** — if you need a filter for a different application, select or copy

one from the list of available filters; see “Customizing a sync filter” (page 74).

**Title**, if the filter is already in use by an application.

---

---

**Caution**

*Do change* the filter’s **Title**, if f this filter is a copy you have made. When you copy a filter, the copy has the same name in Filter View until you change the Title. Give your filter copies descriptive Titles that let you easily identify them in Filter View.

**Lotus Notes Configuration section**

4. Make changes as necessary to the **Lotus Notes Configuration** section, which contains these Lotus Notes database-specific fields.
  - **Server:** Select or enter the name of the Notes server (for example, <server name>/<your domain name>) where the Notes database is located. Click on the drop-down arrow to display a Keyword list of known servers. You can also select “Local” if your database is on your local computer, instead of a “remote” server.
  - **Database:** Select or enter the name of the Notes database (for example, Mail\jdoe.nsf) that should be used for syncing. Click on the drop-down arrow to display a Keyword list of known name-paths.

---

---

**Note**

If you have not specified a valid server or “Local” in the Server field, you will not be able to edit the Database field.

- **View or Formula:** Select or enter the View or folder name, or enter a selection formula to designate which documents in Notes should be used for syncing. Click on the drop-down arrow to display a Keyword list of known Views and folders in the current database.

---

---

**Note**

When using @Adjust(@Now;... in a formula, the second position after Now denotes the number of days in the past, using a negative integer, and the third position denotes the number of days in the future, using an unsigned integer.

The following are examples of formulas you could enter:

- documents from the past 10 days

"CalendarDateTime>@Adjust(@Now; 0; -10; 0; 0; 0)"

- documents from the past two months

"CalendarDateTime>@Adjust(@Now; 0; -60; 0; 0; 0)"

- documents within a period, for example, from two weeks ago to one week in the future

"CalendarDateTime>@Adjust(@Now; 0; -14; 0; 0; 0) &  
CalendarDateTime<@Adjust(@Now; 0; 0; 7; 0; 0)"

- documents from 30 days in the past to 30 days in the future

"CalendarDateTime > @Adjust(@Now; 0; 0; -30; 0; 0) &  
CalendarDateTime < @Adjust(@Now; 0; 0; 30; 0; 0)"

- documents that have a subject that contains the word "year"  
"@Contains(Subject; "year")"

---

---

**Note**

If you enter a formula that specifies a date range, for Calendar and Tasks this affects only the syncing of documents *from* Lotus Notes *to*

your device. When the sync **Action** is set to **Synchronize the files**, if device Calendar or Task events have dates that are outside of the range of the formula, they will still be synced to Lotus Notes when they are first encountered. However, on the very next sync they will be deleted from the device.

- **Form:** Select or enter the form name. Click on the drop-down arrow to display a Keyword list of known forms in the current database.
- **Modified Date:** Click on the drop-down arrow to display a Keyword list of days. Options are listed below. Any selection other than All restricts the scope of the sync **Action** setting. Only records that have been created or modified within the specified date range are synced.

**All** - Syncs all the entries (this is the default setting).

**Last # days** - Syncs all the entries modified in the last # days.

**Last day** - Syncs the entries modified in the last 24 hours.

**Since last sync** - Syncs only the entries that have been modified since the last sync.

### *Device Configuration section*

5. Make changes as necessary to the **Device Configuration** section, which contains these device-specific fields.

- **Note:** Lotus Notes included a Note field that Pylon uses in different ways with different applications. The Note field on a filter tells Pylon how to process the Note field when it is synced from Lotus Notes to your device. You can specify a size to which the Note field will be truncated, all the way from the Lotus Notes' limit maximum of 32,000 characters down to only 50 characters. You may also specify that the Note field not be synchronized at all.

#### Note

On Pocket PC OS, whenever you view the contents of the Note field in an application on your device, it is marked as changed, even if you actually make no changes. With sync Action set to "Synchronize the files", can sometimes lead to unexpected results in the corresponding record in Lotus Notes.

- **Category Sync:** Categories are a Lotus Notes feature that can be used with Pylon to simulate multiple folders or multiple databases within a single device application.

Note

Category Sync is not used with the Calendar application on Palm. In versions of Palm OS before 5.2, Pylon uses PylonSelect instead of categories for multiple Calendars. In Palm OS 5.2 and later, Pylon only supports syncing of one Calendar database. Pylon only supports syncing a single To Do database on all versions of Palm OS.

Note

Categories are handled similarly in both Lotus Notes and in Pocket PC OS applications — both support zero or more categories. Palm OS applications support only zero or one categories; when syncing from Lotus Notes to a Palm device, only the first category listed in Notes syncs to the device.

Note

Category values in records will sync normally to the device unless the Category Sync field has a value or multiple filters are configured for an application. If this field has a value, the records for this filter will have the Category Sync value and not the records' Category field value when synced to the device. The Category field value will remain in Notes, however. For example, if a record in Lotus Notes has a Category value of "Travel" and the Category Sync value in the filter is "Calendar A," the Category value on the device after sync will be "Calendar A." In Notes, the Category value will remain "Travel."

Note

If a Notes document is associated with two or more Categories in Lotus Notes, your Category Sync entry is compared to the first Notes Category to determine if the item should be included in a sync.

Caution

On Palm OS devices, Category names are truncated to 15 characters — make sure your Category names in Lotus Notes do not exceed 15 characters in length if you are using a Palm OS device.

- **Private Record:** The feature refers to records that you mark as Private. Click the drop-down arrow to display a Keyword list with choices.
  - **Sync Private Items** - syncs records marked as private just like records that are not marked as private — this is the default
  - **Encrypt Private Items** - syncs records marked as private, but encrypt them first
  - **Do not synchronize** - Private records that had not been synced, before "Do not synchronize" was set, now will not sync to the other side. If private records from either Lotus Notes or the device have been synced to the other side (by using the "Sync Private Items" setting), the "Do not synchronize" setting will remove the private records from the non-originating side. If the private value for any synced record (using "Sync Private Items") is changed, and the setting is changed to "Do not synchronize," the private field value will be synced on the first sync; on the second sync the record will then be removed from the non-originating side, if applicable.
- For example: record A is created in Notes and synced to the device, it is not marked private. On the device the record is marked private. The private setting is changed from Sync to Do not sync. The first sync record A in notes will now also be marked private, record A is now "in sync" in Notes and on device. During

the second sync record will be removed from device, since it originated in Notes. This functionality only applies to calendar and tasks.

On Palm, configure the device Security application to show or hide Private Records. For instructions on how to mark records as private on Palm OS, see “Marking the record private” (page 174).

Continue customizing your sync filter by making application-specific changes in the appropriate section below:

- “Making Mail-specific changes to a sync filter” (page 81)
- “Making Calendar-specific changes to a sync filter” (page 83)
- “Making Address Book-specific changes to a sync filter” (page 85)
- “Making To Do List-specific changes to a sync filter” (page 86)
- “Making Memo Pad-specific changes to a sync filter” (page 88)
- “Making Expense-specific changes to a sync filter (Palm only)” (page 89)

## Making Mail-specific changes to a sync filter

In addition to the Custom Field Mapping section, Mail filters have a Mail Configuration section that is specific to the Mail application.

Figure 5-4  
Mail-specific filter  
settings

1. Display the filter configuration document for the Mail filter you wish to modify.

Detailed instructions are provided in the first few steps in “Making generic changes to a sync filter” (page 76).

### *Mail Configuration section*

2. Make changes as necessary to the **Mail Configuration** section, which contains these mail-specific fields.

- **Send mail first:** Check to have Pylon send any Mail drafts before it syncs your Lotus Notes Mail with your device Inbox.
- **Sync only unread:** Check to have Pylon sync only the unread Mail in your Lotus Notes Mail application.

Read all the notes and cautions that follow below before finalizing your **Attachment types to sync** settings.

- **Attachment types to sync:**
  - **Word:** Check to enable, uncheck to disable, syncing of Microsoft Word (*\*.doc* and *\*.rtf*) attachments.
  - **append as text:** Check to enable conversion of Word attachments to text that is appended to the message body; uncheck to keep the Word document as a separate attachment.
  - **Excel:** Check to enable, uncheck to disable, syncing of Microsoft Excel (*\*.xls*) attachments.

---

---

**Caution**

If you select **append as text** for Word documents, and an incoming message has a Word attachment that is too large to fit within the operating system's email message size limitation, none of the attachment is appended to the message body.

---

---

**Note**

When a Word file is appended to the message body as text, it takes up less memory on the device, but you should be aware of the following:

- In the body of the email you will see the file name of the attachment, followed by its content, without any formatting.
- If you reply to or forward the email from your device, the new email message will also contain the text of the attachment.
- The size of the email with the attachment cannot exceed the size limit for an email message, which is set by the device OS. The message size limit is 32KB on a Palm OS device, and 2MB on a Pocket PC OS device. A longer email will appear truncated.
- Graphics will appear as placeholders.
- Foreign characters are supported.
- Complex or older Microsoft Word documents may not display properly.

---

---

**Note**

On Palm OS devices, **Attachment types to sync** settings for attachments that are *not* appended as text are only supported on Palm OS v4.0 and higher. For messages forwarded *from* the Palm mail client, Pylon automatically reattaches server-based attachments from the original message to the forwarded mail message if the original message's attachments were not downloaded to the mobile device.

---

---

**Note**

On a Palm OS device, in order to view attached Microsoft Word or Excel files, you must have DataViz *Documents To Go*, version 4, 5, 6, or 7 installed. You may order DataViz software from <http://www.dataviz.com/products/documentstogo/index.html>. Pocket PC OS devices come with comparable software pre-installed. If you already have the DataViz software installed, you will see the *Word To Go* and *Sheet To Go* applications listed on your Palm device.

---

---

**Note**

On *all* platforms, the **Attachment types to sync** settings apply only to messages *downloaded* to the mobile device in a sync. Any attachments to messages *uploaded from* the mobile device are always processed as is, regardless of file format. When **append as text** is selected for Word attachments, any text causing the message to exceed the operating system's maximum message size will be truncated. On Palm OS devices the maximum message size is 32KB; on Pocket PC OS devices the maximum is 2048KB.

- **Maximum total size of attachments per message:** Change the number here from the default of 100 (KB) to whatever size you prefer. Allowable range is 1 to 2048 (KB). Any attached file that does not fit within the maximum size limit is simply not synced; attached files are never truncated.

---

---

**Note**

The **Maximum total size of attachments per message** setting is applied by Pylon to messages *downloaded to* the mobile device in a sync. This limit applies only to attachments carried as separate files, not to Word files appended as text. With multiple attached files, the files are processed in the order that they were attached. Any file that would cause the total size of attachments to exceed the maximum allowed is not synced.

**Custom Field Mapping section (Palm only)**

3. Leave this section as is, unless you are a Lotus Notes expert.

See “Making changes to Custom Field Mapping” (page 75) for an explanation of this advanced feature.

---

---

**Note**

The next step is very important to be sure that all of your changes are recognized.

4. Click **Save Filter**.

Pylon saves your changes. The change to your sync options will occur the next time you sync your device.

Continue with “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

**Making Calendar-specific changes to a sync filter**

In addition to the Custom Field Mapping section, Calendar filters have a Calendar Configuration section that is specific to the Calendar application.

**Figure 5-5**  
Calendar-specific  
filter settings

1. Display the filter configuration document for the Calendar filter you wish to modify.

Detailed instructions are provided in the first few steps in “Making generic changes to a sync filter” (page 76).

### *Calendar Configuration section*

2. Make changes as necessary to the **Calendar Configuration** section, which contains these fields.

- **View Chairperson:** Select the **Enabled** checkbox to include the entry in the Notes Chairperson field in the Note field on your device.
- **Display To Do List items in Calendar:** Select this checkbox to have your Notes To Do data copied to your device Calendar.

### Note

On Palm OS devices, when this checkbox is selected, some repeating To Do records can sync incorrectly:

- On device, regular repeating To Do records may fail to appear in Calendar.
- In Lotus Notes, custom repeating To Do records may not appear in Calendar as All Day Events.

- **Conflict Resolution:** Click the drop-down arrow to display a Keyword list of conflict resolution choices. Any change to a record on either side is considered a conflict. For example, changing different fields in the same record, or different instances of a repeating series, in Notes or on the device, would be considered a conflict. The Conflict Resolution options specify how Pylon should handle the case where the same event has been modified separately in Notes and on your device:

**keep both versions** - if modified on both sides, duplicate the event, keeping both versions; if modified on one side and deleted on other, recreate deleted from modified side

**handheld version wins** - replace the Notes version with the handheld version

**Notes version wins** - replace the handheld version with the Notes version

**add handheld info to Notes doc** - keep the Notes version, but update it by adding data from the handheld version to the Notes field

### *Custom Field Mapping section*

3. Leave this section as is, unless you are a Lotus Notes expert.

See “Making changes to Custom Field Mapping” (page 75) for an explanation of this advanced feature.

#### Caution

Do not change the default field mappings for Start Date and End Date — you must leave these fields blank.

#### Note

The next step is very important to be sure that all of your changes are recognized.

4. Click **Save Filter**.

Pylon saves your changes. The change to your sync options will occur the next time you sync your device.

Continue with “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

## Making Address Book-specific changes to a sync filter

In addition to the Custom Field Mapping section, Address Book filters have an Address Book Configuration section that is specific to the Address Book application.

**Figure5-6**  
Address Book-specific filter settings

Address Book Configuration	
Address:	<input type="checkbox"/> Use business address
Map Business to custom field:	
Custom Field Mapping	
Notes Category:	Address
Last name	City
First name	State
Title	Zip Code
Company	Country
Phone 1	Custom 1
Phone 2	Custom 2
Phone 3	Custom 3
Phone 4	Custom 4
Phone 5	Note
<input type="button" value="Cancel"/> <input type="button" value="Save Filter"/>	
This is the protected text area of the form.	

1. Display the filter configuration document for the Address Book filter you wish to modify.

Detailed instructions are provided in the first few steps in “Making generic changes to a sync filter” (page 76).

2. Double-click **Fully Defined Options**.

The filter configuration document changes to edit mode.

The filter configuration document becomes a full options filter template. Any configuration document for an Address Book filter has the same general layout. The default settings for the **My Personal Address Book** filter are shown in Figure 5-6, “Address Book-specific filter settings” (page 85).

3. Make changes as necessary to the **Address Book Configuration** section, which contains these device-specific fields.
- **Address:** To enable using a business address, check the **Use business address** box, then enter the business address in the field to the right.
  - **Map Business to custom field:** Select the field to which the business address should be mapped when the personal address is assigned as the primary key; options are **Custom 1**, **Custom 2**, **Custom 3**, or **Custom 4**. Select **No Mapping** to retain the business address as the primary key.

*Custom Field Mapping section (Palm only)*

4. Leave this section as is, unless you are a Lotus Notes expert.

See “Making changes to Custom Field Mapping” (page 75) for an explanation of this advanced feature.

**Note**

The next step is very important to be sure that all of your changes are recognized.

5. Click **Save Filter**.

Pylon saves your changes. The change to your sync options will occur the next time you sync your device.

Continue with “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

## Making To Do List-specific changes to a sync filter

To Do List filters have To Do List Configuration and Custom Field Mapping sections that are specific to the To Do List application.

**Figure 5-7**  
To Do List-specific  
filter settings

The screenshot shows a dialog box titled "To Do List Configuration". It has a "Conflict Resolution" dropdown menu set to "keep both versions". Below this is a section titled "Custom Field Mapping" which contains a table with columns for field names and dropdown menus for mapping. The fields listed are "Notes Category", "Due Date", "Completed", "Priority", "Description", and "Note". At the bottom of the dialog are "Cancel" and "Save Filter" buttons. A status bar at the bottom of the window shows "Unable to open database on server" and "Office".

1. Display the filter configuration document for the To Do List filter you wish to modify.

Detailed instructions are provided in the first few steps in “Making generic changes to a sync filter” (page 76).

### *To Do List Configuration section*

2. Make changes as necessary to the **To Do List Configuration** section, which contains these fields.

- **Conflict Resolution:** Click the drop-down arrow to display a Keyword list of conflict resolution choices. Any change to a record on either side is considered a conflict. For example, changing different fields in the same record, or different instances of a repeating series, in Notes or on the device, would be considered a conflict. The Conflict Resolution options specify how Pylon should handle the case where the same event has been modified separately in Notes and on your device:

**keep both versions** - if modified on both sides, duplicate the event, keeping both versions; if modified on one side and deleted on other, recreate deleted from modified side

**handheld version wins** - replace the Notes version with the handheld version

**Notes version wins** - replace the handheld version with the Notes version

**add handheld info to Notes doc** - keep the Notes version, but update it by adding data from the handheld version to the Notes field

### *Custom Field Mapping section*

3. Leave this section as is, unless you are a Lotus Notes expert.

See “Making changes to Custom Field Mapping” (page 75) for an explanation of this advanced feature.

#### Caution

Do not change the default field mappings for Start Date and Due Date — you must leave these fields blank.

#### Note

The next step is very important to be sure that all of your changes are recognized.

4. Click **Save Filter**.

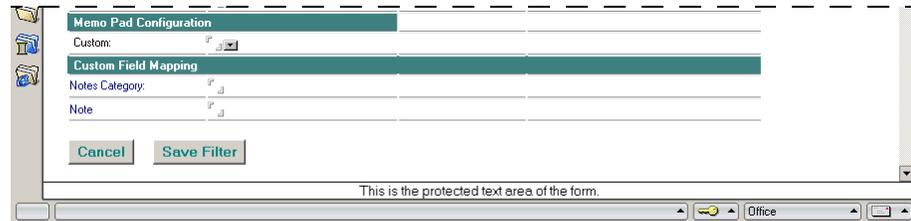
Pylon saves your changes. The change to your sync options will occur the next time you sync your device.

Continue with “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

## Making Memo Pad-specific changes to a sync filter

In addition to the Custom Field Mapping section, Memo Pad filters have a Memo Pad Configuration section that is specific to the Memo Pad application.

**Figure 5-8**  
Memo Pad-specific  
filter settings



1. Display the filter configuration document for the Memo Pad filter you wish to modify.

Detailed instructions are provided in the first few steps in “Making generic changes to a sync filter” (page 76).

### *Memo Pad Configuration section*

2. Make changes as necessary to the **Memo Pad Configuration** section, which contains these device-specific fields.
  - **Custom:** Click the drop-down arrow for a list of custom configuration keywords. If you are syncing a Journal database, select **Map journal database**. For more information about syncing a Journal database, see “Making changes to the My Journal filter (Palm only)” (page 88).

### *Custom Field Mapping section (Palm only)*

3. Leave this section as is, unless you are a Lotus Notes expert. See “Making changes to Custom Field Mapping” (page 75) for an explanation of this advanced feature.

#### Note

The next step is very important to be sure that all of your changes are recognized.

4. Click **Fully Defined Options** in the Options area.
5. Click **Save Filter**.

Pylon saves your changes. The change to your sync options will occur the next time you sync your device.

## Making changes to the My Journal filter (Palm only)

Make the following changes to the predefined My Journal filter in order to sync with a Lotus Notes Journal.

1. Under **Lotus Notes Configuration**, click on the drop-down arrow for **Server Keywords**, and select **Local**.

**Note**

- For **Database**, click the drop-down arrow and select **Journal.nsf** from the list of keywords.

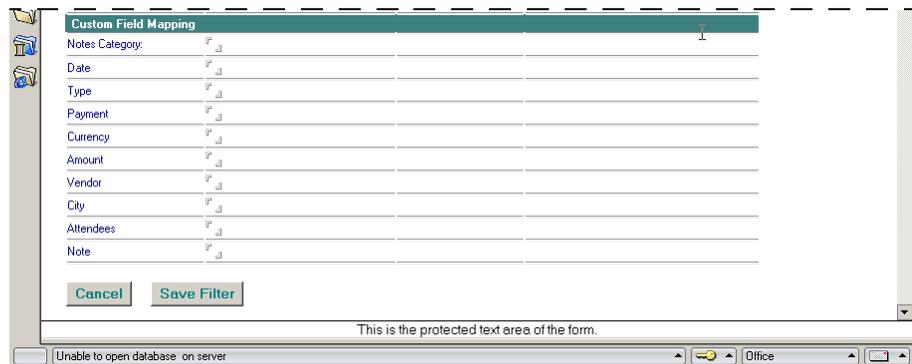
The Journal database (journal.nsf) is manually installed on Lotus Notes Client installations for versions 4.6 or later. To create a Journal database, click **File|Database|New** in Lotus Notes, then select the Personal Journal template to create the new database. Name the database journal.nsf.

- For **View or Formula**, enter a formula or click the drop-down arrow and select a View from the list of keywords.
- In the **Form** field click the drop-down arrow and select a Form from the list of keywords.
- Under **Memo Pad Configuration**, click on the drop-down arrow for **Custom**, then select **Map journal database** from the list of keywords.
- Click **Save Filter** to save your changes and exit the filter document.

### Making Expense-specific changes to a sync filter (Palm only)

In addition to the Custom Field Mapping section, Expense filters have only an Expense Configuration section that is specific to the Expense application.

**Figure5-9**  
Expense-specific  
filter settings



- Display the filter configuration document for the Expense filter you wish to modify.

Detailed instructions are provided in the first few steps in “Making generic changes to a sync filter” (page 76).

#### *Custom Field Mapping section*

- Leave this section as is, unless you are a Lotus Notes expert.

See “Making changes to Custom Field Mapping” (page 75) for an explanation of this advanced feature.

**Note**

The next step is very important to be sure that all of your changes are recognized.

3. Click **Save Filter**.

Pylon saves your changes. The change to your sync options will occur the next time you sync your device.

Continue with “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

## Syncing additional application databases or views

Pylon Conduit and Pylon Pro support additional application databases for most applications. The additional databases or views may be ones you have set up for yourself on your desktop, or they may belong to another Notes user who has delegated administrative access rights to you. Table 5-1 shows the total number of databases supported for each PIM application on Palm OS and Pocket PC OS.

**Table 5-1**  
Total number of databases/views supported for each application

Application	Total number of databases/views supported	
	Palm OS	Pocket PC OS
Mail	3	1
Calendar	5*	5
Address Book	5	5
To Do	1	5
Memo Pad	5	0
Expense	5	0
Custom Databases	20	20

\* Newer Palm OS devices (palmOne devices with Palm OS 5.2.1 or later) support only one Calendar database. Note that application names differ slightly on different devices — see Table 4-1, “Application names on different device platforms,” on page 63.

This section provides instructions for setting up the syncing of additional application databases. For instructions on setting up additional custom databases with Pylon Pro, see the chapters in “Syncing custom databases (Pylon Pro only)” (page 131).

The basic tasks required to sync one or more additional application database are:

- Make sure you have specified a unique Category Sync name in the filter used by the first application database.
- Create a new filter for the additional application database or view and specify a unique Category Sync name in that filter.
- Enable the additional application database or view with initial sync Action of “Desktop overwrites handheld.”
- Sync your device.
- Change the sync Action on the additional application database or view to Synchronize the Files.

Follow the steps in each of the following tasks to implement an additional database or view for an application.

## Making sure the first database or view has a unique Category Sync name in its filter

---

---

**Note**

You can skip this task, if:

(A) You have previously been successfully syncing two or more databases for the application; or  
(B) Calendar or Tasks on Palm OS is the application for which you are setting up an additional database or view — Calendar on Palm distinguishes the different databases by database name only, using Pylon Select; the Tasks application on Palm is limited to syncing only one database or view.

---

---

**Note**

For multiple Mail databases on Palm, the first Mail database automatically syncs to the Palm “Inbox” folder; additional Mail databases sync to the Palm “Drafts” and “Filed” folders. There are two ways to control which Mail database syncs to which folder:

A) **Sequence** - do not specify a Category Sync entry for the Mail filters and the order in which the filters are listed in the Filters view of the Pylon Configuration Database determines the folder:

- "" (leaving it blank) syncs with the first filter’s database.
- Drafts syncs with the second filter’s database.
- Filed syncs with the third filter’s database (if a third is listed).

A) **Category name** - specify a Category Sync entry for the Mail filters and use the folder name as the Category Sync entry:

- Enter "" (leave it blank) for the Inbox folder to sync with the database.
- Enter “Drafts” or “Filed” for one of those folders to sync with the database.

---

---

**Note**

For Calendar on Pocket PC only, if you have the sync **Action** set to **Desktop overwrites handheld**, you should leave the Category Sync name blank for the first Calendar database. This is the only way to ensure that all Calendar records are deleted on the device before the the database is overwritten by the current Lotus Notes Calendar records.

1. Open the Pylon Configuration Database.

For instructions, see “Opening the Pylon Configuration Database” (page 60).

2. Open the Pylon Configuration document.

For instructions, see “Opening your Pylon Configuration document” (page 61).

3. In the **Filter** column for the application, make a note of the filter name listed.

4. Display the list of filters.

For instructions, see “Displaying the list of Pylon filters — Filters view of Pylon Configuration Database” (page 74).

5. Under the heading for the application, double-click the name of the filter that you just made a note of.

The filter information is displayed in a filter configuration screen.

6. Make sure the **Category Sync** field contains a unique name.

If **Category Sync** is blank, enter a unique name now — for instructions on modifying a filter, see “Making generic changes to a sync filter” (page 76).

If **Category Sync** has an entry, make a note of the name now.

## Creating a new filter for the additional database or view

### Note

You *must* make a copy of an existing filter in order to create a new filter for the additional database or view. The multiple databases or views for the same application *cannot* use the same filter, because each must have a filter with a unique entry in the Category Sync field.

1. Make a copy of the filter that has settings that are closest to what you want to use to sync the additional database or view.

For instructions, see “Making a copy of a sync filter” (page 72).

### Tip

Be sure you give the new filter a name that describes how it is to be used. For example, you could name it the same as the filter from which it is copied, but add some text at the right end like “db2” or the Notes database name with which it will work.

2. Display the list of filters.

For instructions, see “Displaying the list of Pylon filters — Filters view of Pylon Configuration Database” (page 74).

3. Under the heading for the application, double-click the name of the filter that you just created.

The filter information is displayed in a filter configuration screen.

4. In the **Lotus Notes Configuration** section, enter the information for the additional database or view.

### Caution

This information must be technically accurate in order for Pylon to be able to sync the additional database or view.

5. In the **Category Sync** field, enter a unique name.

### Note

Category Sync is not available with the Calendar application on Palm. The Calendar application, viewed through the Palm Date Book, works directly with the Calendar database name.

### Caution

This name must be unique (within the set of category names for the application) in order for Pylon to be able to sync the additional database or view correctly. If the same category name is used in multiple filters, syncing duplicates information on the updated platform.

### Note

You can leave the Category Sync field empty, and let Pylon generate a unique name. The name that Pylon generates for the first

additional database or view is “Pylon 2”; the second additional database or view is “Pylon 3”; and so on.

---

---

**Tip**

Use a name that describes the source of this additional database. For example, if the additional database or view is for your manager’s calendar, you might call it “Mgr Calendar.”

6. Click **Save Filter** to save the changes you have made.

### Enabling the additional database or view with initial sync Action of “Desktop overwrites handheld”

1. Open the Pylon Configuration Database.

For instructions, see “Opening the Pylon Configuration Database” (page 60).

2. Open the Pylon Configuration document.

For instructions, see “Opening your Pylon Configuration document” (page 61).

3. Make sure the **Additional Databases** box is checked.

After installation this box is unchecked by default. You *must* check this box in order to be able to sync an additional database or view for any application.

Checking this box causes a #Apps column to appear.

4. In the **#Apps** column for the application, select the number of databases you wish to sync.

Click the drop-down to display the Select Keywords panel, then select the *total* number of databases you wish to sync for the application — if you are adding one additional database or view, select the number that is one more than the number you were previously syncing for this application. If you know you need to sync several more databases or views for this application, you can select that total number now.

5. Click **OK** to store your selection.

The Configuration Document screen adds an entry for each additional #Apps (database) you have specified.

6. Set the **Filter** for the additional database or view.

In the **Filter** column of the row for the application’s additional database or view, select the filter you created in “Creating a new filter for the additional database or view” (page 93).

See Note,n “For multiple Mail databases on Palm...,” under “Making sure the first database or view has a unique Category Sync name in its filter” (page 92) for special considerations with Mail on Palm.

7. Set the synchronization **Action** for all the databases and views for the application.

In the synchronization **Action** column of the row for the application's additional database or view, select **Desktop overwrites handheld**.

8. Click **Save and Close** to save your changes and exit the Pylon Configuration document.

## Syncing your device

1. Sync your device.

For instructions, see “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

2. Verify that the additional database(s) or view(s) were downloaded successfully.

For instructions, see the “Accessing additional...” heading for the application under “Accessing Pylon on your Pocket PC OS device” (page 98) or “Accessing Pylon on your Palm OS device” (page 112).

## Changing the sync Action on the additional database or view

At this point all the databases or views for your PIM application have sync Action set to “Desktop overwrites handheld.” If this is the permanent sync Action you want, skip the steps below. Follow these steps to change the sync Action to “Synchronize the Files.”

1. Open the Pylon Configuration Database.

For instructions, see “Opening the Pylon Configuration Database” (page 60).

2. Open the Pylon Configuration document.

For instructions, see “Opening your Pylon Configuration document” (page 61).

3. Change the sync Action to **Synchronize the Files**.

In the row for the additional database(s) or view(s) for which you just completed the initial sync, change **Desktop Overwrites** to **Synchronize the Files**.

4. Click **Save and Close** to save your changes and exit the Pylon Configuration document.



## CHAPTER 6. Accessing PIM applications on your device

---

---

- “Accessing Pylon on your Pocket PC OS device” (page 98)
  - “Syncing your Windows Mobile 5 device” (page 98)
  - “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98)
  - “Using Mail on Pocket PC OS” (page 100)
  - “Using Calendar on Pocket PC OS” (page 101)
  - “Using Address Book on Pocket PC OS” (page 107)
  - “Using To Do List on Pocket PC OS” (page 108)
- “Accessing Pylon on your Palm OS device” (page 112)
  - “Syncing your Palm OS device” (page 112)
  - “Using Mail on Palm OS” (page 112)
  - “Using Calendar on Palm OS” (page 114)
  - “Using Address Book on Palm OS” (page 125)
  - “Using To Do List on Palm OS” (page 126)
  - “Using Memo Pad on Palm OS” (page 129)
  - “Using Expense on Palm OS” (page 130)

## Accessing Pylon on your Pocket PC OS device

### Syncing your Windows Mobile 5 device

---

---

**Note**

If you have previously been using Pylon on a Pocket PC OS device, the Windows Mobile 5 procedure for syncing is entirely different. You must now use the Pylon icon in the system tray instead of ActiveSync.

To access Pylon on your Windows Mobile 5 device by syncing manually:

1. On your desktop computer, right-click the **Pylon** icon in the system tray — lower right corner of icons shown below:



A shortcut menu is displayed.

2. If **Enable Continuous Sync** is selected, click **Disable Continuous Sync**, then right-click the **Pylon** icon again to redisplay the shortcut menu.
3. In the shortcut menu, click **Synchronize**.
4. If prompted, enter your Lotus Notes password to complete the sync.

---

---

**Tip**

You can prevent the password prompt dialog box from appearing during future syncs by changing a setting in Lotus Notes. For instructions on how to do this, see “Every time you sync, you are prompted to enter your Lotus Notes user password.” (page 187).

When ActiveSync has completed the sync, you will see confirmation that Pylon successfully synced.

---

---

**Note**

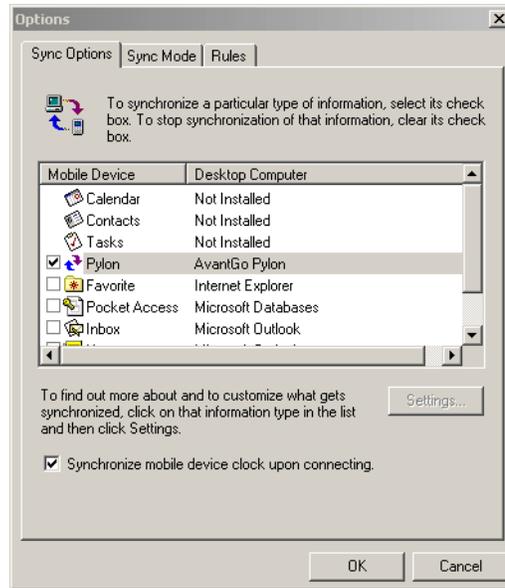
The instructions above are for initiating a sync manually. If you would prefer to have your device sync automatically every five minutes, right-click the **Pylon** icon in the system tray and click **Enable Continuous Sync**. If you want to return to initiating syncs manually, right-click the **Pylon** icon in the system tray and click **Disable Continuous Sync**.

### Syncing other Pocket PC OS devices not running Windows Mobile 5

To access Pylon on your Pocket PC OS device that is not running Windows Mobile 5:

1. On your desktop computer, open ActiveSync.
2. Click the **Options** button.
3. The Options dialog box appears.

**Figure 6-1**  
ActiveSync Options dialog box



4. Make sure the box beside **Pylon** is checked.
5. Click **OK**.
6. Initiate a sync.

**Note**

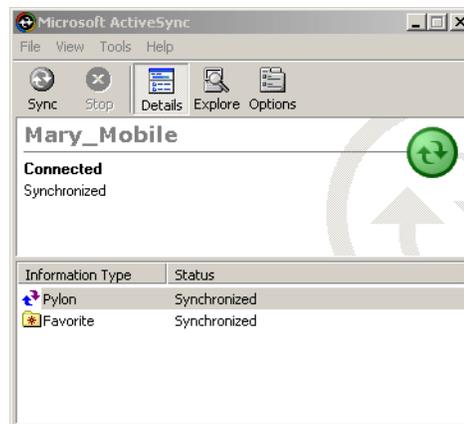
There are several ways to initiate a sync, depending on how you have your ActiveSync settings configured. If you are having problems initiating a sync, refer to Microsoft’s documentation.

**Tip**

You can prevent the password prompt dialog box from appearing during future syncs by changing a setting in Lotus Notes. For instructions on how to do this, see “Every time you sync, you are prompted to enter your Lotus Notes user password.” (page 187).

When ActiveSync has completed the sync, you will see confirmation that Pylon successfully synced.

**Figure 6-2**  
Confirmation of a successful Pylon sync



If your sync is not successful and you receive an error message, it is most likely the fault of a licensing mismatch. For instructions on how to solve this problem, see “Troubleshooting: Syncing” (page 184).

## Using Mail on Pocket PC OS

1. Sync your device.

For instructions, see “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98).

2. On your device, tap **Start|Inbox**. On some devices you may need to tap **Start|Programs|Inbox**.

The Inbox application appears. You will see your Lotus Notes Mail there.

---

---

**Note**

Any mail larger than 64K is truncated on the device. This is a Lotus Notes limitation.

### *Deleting Mail on Pocket PC OS*

Follow these steps to delete the mail from your Pocket PC OS device.

---

---

**Note**

If the sync action is set to “Synchronize the files,” mail items you delete on your device also will be removed from your Lotus Notes Inbox when you sync.

To delete Mail on your device:

1. In your Inbox, tap the Mail item you wish to delete.

The item will open.

2. At the bottom of the item, tap the red **X**.

The item moves to the Deleted Items folder. 

3. Delete as many items as you wish.

4. In your Inbox, tap **Tools|Empty Deleted Items**.

When you sync your device, the items will be removed from your Lotus Notes Mail.

---

---

**Note**

The Empty Deleted Items command may not work on Microsoft Pocket PC 2002 devices, in which case you will need to manually delete items from the Deleted folder on your device.

## Using Calendar on Pocket PC OS

Note that application names differ slightly on different devices. On older Palm devices, the Calendar application is called Date Book. See Table 4-1, “Application names on different device platforms,” on page 63.

### *Working with Calendar events on your desktop and on your device*

Because of inherent differences in the way Calendar events are handled in Lotus Notes vs. your Pocket PC Calendar application, the Calendar information is often represented differently on the two platforms. For example, every type of event in Lotus Notes becomes an Appointment in your Pocket PC Calendar. You should be aware of these differences as you work with Calendar events on your device.

**Table 6-1**  
Calendar events in Lotus Notes and on Pocket PC OS device

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Subject	Subject	(No difference from Lotus Notes)
Starts	Starts	(No difference from Lotus Notes)
Ends	Ends	(No difference from Lotus Notes)
Invitees	Attendees	<p>From Lotus Notes to device, values for Required, Optional, and FYI Invitees are added to the device Attendees field. From device to Lotus Notes, all Attendees sync back to the Lotus Notes Required field.</p> <p><b>Note:</b> If you are not the meeting Chair in Lotus Notes, any changes in Attendees on device are ignored. If you are the meeting Chair, changes in Attendees on device sync back to Lotus Notes as follows:</p> <ul style="list-style-type: none"> <li>- Deleted Attendees are deleted from the corresponding Lotus Notes Invitees field;</li> <li>- Added Attendees are added to the Lotus Notes Required field;</li> <li>- Attendees are sorted, possibly losing the Chair’s critical first position in the list, when syncing back to Lotus Notes; to avoid accidentally changing the Chair, close the record without saving as soon as you notice that the Attendees list has been sorted.</li> </ul> <p><b>Note:</b> Any Attendees that you add to a Reminder or an All Day Event on device will not sync back to Lotus Notes; Lotus Notes does not support Invitees on Reminders or All Day Events.</p>

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Required (to)	Attendees	Stored in on-device Attendees field. Required vs. Optional vs. FYI Invitees are not distinguished on device. From device to Lotus Notes, all changes to Attendees field map back into Lotus Notes Required (to) field.
Optional (cc)	Attendees	Stored in on-device Attendees field. Required vs. Optional vs. FYI Invitees are not distinguished on device. From device to Lotus Notes, all changes to Attendees field map back into Lotus Notes Required (to) field.
FYI (bcc)	Attendees	Stored in on-device Attendees field. Required vs. Optional vs. FYI Invitees are not distinguished on device. From device to Lotus Notes, all changes to Attendees field map back into Lotus Notes Required (to) field.
Chair	Attendees	Stored as first entry in on-device Attendees field if, on your Calendar filter, you select the View Chairperson checkbox. From device to Lotus Notes, all changes to Attendees field map back into Lotus Notes Required (to) field. <b>Note:</b> If you modify the Attendees field on device, the entries will be sorted when syncing back to Lotus Notes, possibly losing the Chair's critical first position in the list.
Location	Location	From Lotus Notes to device, combines three Lotus Notes fields: Location, Rooms, and Resources. <b>Note:</b> Changes in the Location field on device are ignored in a synchronization. <b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only.
Rooms	—	Stored in on-device Location field. <b>Note:</b> Changes in the Location field on device are ignored in a synchronization. <b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only, but no information about rooms syncs to the Rooms field.

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Resources	—	Stored in on-device Location field. <b>Note:</b> Changes in the Location field on device are ignored in a synchronization. <b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only, but no information about resources syncs to the Resources field.
Categorize	Categories	(No difference from Lotus Notes.)
Notify me	Reminder	From device to Lotus Notes, the Lotus Notes “Notify me” setting is set relative to the device Start time. Lotus Notes events with notification time set “After” the event start time sync to the device with notification time set equal to event start time. <b>Note:</b> An alarm that is set on either end (Lotus Notes or device) is always preserved in a sync.
Mark Private	Sensitivity = Private	(No difference from Lotus Notes)
Pencil In checked	Status = Tentative or Status = Free	Lotus Notes Pencil In checked converts back and forth to Status = Tentative on device. From device to Lotus Notes, Status of either Tentative or Free converts to Pencil In checked. <b>Note:</b> If you change on device the Status of all instances of a repeating Reminder, that change is not reflected in the individual instances on device and does not sync back to Lotus Notes.
Pencil In unchecked	Status = Busy or Status = Out of Office	From Lotus Notes to device, Pencil In unchecked converts to Status = Busy on device. From device to Lotus Notes, Status of either Busy or Out of Office converts to Pencil In unchecked. <b>Note:</b> If you change on device the Status of all instances of a repeating Reminder, that change is not reflected in the individual instances on device and does not sync back to Lotus Notes.
Description	Notes	From device to Lotus Notes, all the information in the on-device Notes field goes into the Lotus Notes Description field.

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
attachments	—	Not supported — attachments to events in Lotus Notes do not appear when event syncs to device
—	event spanning days	<p>From device to Lotus Notes, any appointment with an end-date/time that spans midnight is truncated at 11:55PM. Pocket PC OS devices do not support time-specified events that span midnight. Pocket PC OS devices do support All Day appointments that span multiple days. From Lotus Notes to device,</p> <ul style="list-style-type: none"> <li>■ All calendar types except for non-repeating All Day Events are truncated at 11:55PM.</li> <li>■ Non-repeating All Day Events are not truncated; they are passed to Notes as is.</li> </ul>
GMT support	—	GMT not supported on device; all times from Lotus Notes convert to local time on device based on desktop's timezone setting.
<b>Event Types</b>		
Appointment	Appointment	Appointment with no Attendees
Meeting	Appointment	Appointment with attendees (listed in on-device Attendees field.)
All Day Event	Appointment	Appointment with Type = All Day. From Lotus Notes to device, an all day event that spans multiple days is converted to a repeating all day event with separate instances for each day. Attendees added on device do not sync back to Lotus Notes.
Reminder	Appointment	Appointment with same date/time for Starts and Ends. Attendees added on device do not sync back to Lotus Notes.
Anniversary	Appointment	Appointment with Occurs = Every <date> and Type = All Day
<b>Repeats Options</b>		

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Repeats	Occurs	Settings in Lotus Notes and on device are comparable, until individual instances in a series are modified.
Daily	Every <number> weeks <days list>	(No difference from Lotus Notes)
Weekly	Every <day>	(No difference from Lotus Notes)
Monthly by Date	Day <date> of every <number of> month(s)	(No difference from Lotus Notes)
Monthly by Day	The <1st, 2nd... last> <day>	(No difference from Lotus Notes)
Yearly	Every <month> <day>	(No difference from Lotus Notes)
Custom	Occurs: <any option other than "Once">	Lotus Notes custom repeating events appear on device as a repeating appointment. Pocket PC OS devices do not directly support custom repeating events, so you cannot create one on device.
Exceptions for weekends	individual Appointment in series moved to avoid weekend	Treated as Custom in sync.
maximum number of repetitions	—	If repetitions on device are bounded by an end date, the entire series syncs to Lotus Notes. If device repetitions are not bounded by an end date, only first 51 sync to Lotus Notes. With 51 repetitions in Lotus Notes, Appointment on device repeats indefinitely.

***Creating and modifying Calendar events on your device***

**Note**

If you have the Calendar sync Action set to “Desktop overwrites handheld” or “Do Nothing,” you can skip this section.

Here are some tips for creating or changing Calendar events on your Pocket PC OS device so that they sync back to your desktop as smoothly as possible:

- To create a Lotus Notes **All Day Event**, create an Appointment and set **Type** to **All Day**.
- To create a Lotus Notes **Anniversary**, create an Appointment and set set **Type** to **All Day** and set **Occurs** to **Every <month> <date>**.
- To create a Lotus Notes **Appointment**, create an Appointment with no Attendees.
- To create a Lotus Notes **Meeting**, create an Appointment and add Contacts to the **Attendees** field.
- To create a **Reminder**, create an Appointment with the **Starts** date/time equal to the **Ends** date/time.
- Remember that information in the on-device **Location** field never updates any other fields in Lotus Notes when the event syncs back to the Lotus Notes desktop; if this field contains information for Rooms and Resources fields in Lotus Notes, all the information goes into the Lotus Notes Location field.
- Remember that information in the on-device **Notes** field never updates any other fields in Lotus Notes when the event syncs back to the Lotus Notes desktop; if this field contains information for Attendees, Rooms, and Resources, all the information goes into the Lotus Notes **Description** field.
- When you accept a Lotus Notes invitation for a meeting, do not delete the invitation from your Inbox — that will prevent the Calendar entry from syncing to your device.

---

---

**Tip**

If you have your Calendar sync **Action** set to **Synchronize the files** and you create or modify events on the device:

- Any time you create appointments on your device, or modify or cancel appointments synced from Lotus Notes, any invitees to the appointment are not automatically notified when the information syncs to Lotus Notes. To notify invitees, open the event in Lotus Notes and click the **Save and Send Invitations** button.
- You can avoid many potential problems with repeating events by never modifying the repeat rule for the series on your device.
- Any events on the device that span midnight are truncated at 11:55PM when they sync back to Lotus Notes.
- When editing the **Status** on repeating events on your device, make changes only at the individual event level, not at the series level.
- In a custom repeating series of events that repeat on consecutive days, do not shift the date of each event in the series by one day — one or more of the events will sync back to Lotus Notes with an incorrect date.

### *Accessing your Calendar on Pocket PC*

To access Calendar on your Pocket PC OS device:

1. Sync your device.

For instructions, see “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98).

2. On your device, tap **Start|Calendar**.

The Calendar application appears. You will see your Lotus Notes Calendar entries there.

---

---

**Note**

Any note in a Calendar entry you create on your device will be truncated in Lotus Notes to 32K. This is a Lotus Notes limitation.

### *Accessing additional Calendars on Pocket PC OS*

For instructions on how to configure Pylon to sync additional Calendars, see “Syncing additional application databases or views” (page 91).

To access additional Calendars on your Pocket PC OS device:

1. Tap **Start|Calendar**.
2. Tap **Tools|Categories** to display the Categories list and select the category you are using to map the additional Calendar you wish to view.

The Calendar items from the additional Calendar appear.

## Using Address Book on Pocket PC OS

Note that application names differ slightly on different devices. On newer Palm devices and on Pocket PC devices, the Address Book application is called Contacts. See Table 4-1, “Application names on different device platforms,” on page 63.

1. Sync your device.

For instructions, see “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98).

2. On your device, tap **Start|Contacts**.

The Contacts application appears. You will see your Lotus Notes Address Book entries there. All information from your Lotus Notes entries are there with the exception of home fax and pager numbers, which are not brought down to the device.

---

---

**Note**

Any note in an Address Book entry you create on your device will be truncated in Lotus Notes to 32K. This is a Lotus Notes limitation.

### *Accessing additional Address Books on Pocket PC OS*

For instructions on how to configure Pylon to sync additional Address Books, see “Syncing additional application databases or views” (page 91).

To access additional Address Books on your device:

1. Tap **Start|Contacts**.

The Contacts application appears.

2. Tap the **Categories** drop down list and select the category you are using to map the additional Address Book you wish to view.

The entries from the additional Address Book appear.

## Using To Do List on Pocket PC OS

Note that application names differ slightly on different devices. On newer Palm devices and Pocket PC devices, the To Do List application is called Tasks. See Table 4-1, “Application names on different device platforms,” on page 63.

### *Working with To Do items on your desktop and on your device*

Because of inherent differences in the way To Do items are handled in Lotus Notes vs. your Pocket PC To Do application, the To Do information is often represented differently on the two platforms. For example, Assign To in Lotus Notes To Do List is not supported in your Pocket PC To Do application. You should be aware of these differences as you work with To Do events on your device.

**Table 6-2**

To Do events in Lotus Notes and on Pocket PC OS device

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Subject	Subject	(No difference from Lotus Notes)
Due by	Due	(No difference from Lotus Notes)
Start by	Starts	No formal difference from Lotus Notes, but Pocket PC application sometimes requires a Starts date and sometimes does not. If Pylon detects that a Starts date is required and the task has only a Due date, it automatically assigns the Starts date to the Due date. And sometimes, when you create a task on device with different Starts and Due dates, the Pocket PC application shifts both dates by the duration (the time between Starts and Due dates when you specify that the task Occurs repeatedly.
Priority	Priority	(No difference from Lotus Notes)
Category	Categories	(No difference from Lotus Notes)
Status	Status	(No difference from Lotus Notes)

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Description	Notes	(No difference from Lotus Notes)
Assign To	—	Assign To is not supported.
Mark Private	Sensitivity = Private	(No difference from Lotus Notes)
Notify me	Reminder	From device to Lotus Notes, the Lotus Notes “Notify me” setting is set relative to the device Start time. Lotus Notes events with notification time set “After” the event start time sync to the device with notification time set equal to event start time.
Repeats Options		
Repeats	Occurs	Settings in Lotus Notes and on device are comparable, until individual instances in a series are modified. Once a repeating To Do item is modified in Lotus Notes, it is treated like a Custom repeating To Do item on the device.
Daily	Weekly; Every 1 week(s) <select all days or all-weekdays in days list>	(No difference from Lotus Notes)
Weekly	Weekly; Every 1 week(s) <select day in days list>	(No difference from Lotus Notes)
Monthly by Date	Monthly; Day <date> of every <number> month(s)	(No difference from Lotus Notes)
Monthly by Day	Monthly; The <1st, 2nd... last> <day> of every <number> month(s)	(No difference from Lotus Notes)

Lotus Notes Item	Pocket PC item	Different representation on Pocket PC OS device
Yearly	Yearly; Every <month> <date> -or- Yearly; The <1st, 2nd... last> <day> of <month>	(No difference from Lotus Notes)
Custom	Occurs: Edit pattern	Custom repeating pattern of events from Lotus Notes appear as individual To Do items on on the device, with no connection to the series — you must modify or delete them individually.
Exceptions for weekends	individual To Do item in series moved to avoid weekend	Treated as Custom in sync; individual Appointments appear on device, with no connection to the series.
maximum number of repetitions	—	If repetitions on device are bounded by an end date, the entire series syncs to Lotus Notes. If device repetitions are not bounded by an end date, only first 51 sync to Lotus Notes. With 51 repetitions in Lotus Notes, Appointment on device repeats indefinitely.

### *Accessing To Do List on Pocket PC*

1. Sync your device.

For instructions, see “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98).

2. On your device, tap **Start|Tasks**.

The Tasks application appears. You will see your Lotus Notes To Do List entries there.

If you organize your To Do List entries by categories, tap the **Categories** drop down list and select the category to view your To Do List entries.

---

---

#### **Note**

Any note in a Task entry you create on your device will be truncated in Lotus Notes to 32K. This is a Lotus Notes limitation.

### *Accessing additional To Do List databases on Pocket PC OS*

For instructions on how to configure Pylon to sync additional To Do Lists, see “Syncing additional application databases or views” (page 91).

To access an additional To Do List on your Pocket PC OS device:

1. Tap **Start|Tasks**.
2. Tap the **Categories** drop down list and select the category you are using to map the additional To Do List you wish to view.

The To Do List items from the additional To Do List appear.

## Accessing Pylon on your Palm OS device

### Syncing your Palm OS device

To access Pylon on your Palm OS device:

1. Verify that your applications are enabled in the Pylon Configuration Database. For instructions, see “Disabling or enabling a PIM application” (page 64).
2. Initiate a sync.
3. If prompted, enter your Lotus Notes password to complete the sync.

---

---

#### Tip

You can prevent the password prompt dialog box from appearing during future syncs by changing a setting in Lotus Notes. For instructions on how to do this, see “Every time you sync, you are prompted to enter your Lotus Notes user password.” (page 187).

### Using Mail on Palm OS

1. Sync your device.  
For instructions, see “Syncing your Palm OS device” (page 112).
2. Tap the **Applications** silk screen button on your device.
3. Tap the **Mail** icon.
4. Navigate your mail folders by selecting from the drop down list in the upper-right corner of your device screen.

### *Deleting Mail on Palm OS*

Follow these steps to delete the mail from your Palm OS device.

---

---

#### Note

If the sync action is set to “Synchronize the files,” mail items you delete on your device also will be removed from your Lotus Notes Inbox when you sync.

To delete Mail on your Palm OS device:

1. In your Inbox, tap the Mail item you wish to delete.  
The item will open.
2. At the bottom of the item, tap **Delete**.
3. Click **Yes** when prompted to confirm deletion.  
The item moves to the Deleted folder.
4. Select **Deleted** from the drop-down list of Mail folders to view deleted items.
5. Tap **Mail|Purge Deleted**, then tap **Yes** to confirm.  
When you sync your device, the item(s) will be removed from your Lotus Notes Mail.

### ***Accessing additional Mail databases on Palm OS***

A single Mail database automatically syncs messages to your Palm Mail application's Inbox. With multiple Mail databases, messages from the additional databases sync to your Palm Mail application's Drafts and Filed folders.

Which Mail database syncs to which Palm Mail folder depends on how you set up the filters for the Mail databases. See the last "Note" under "Enabling the additional database or view with initial sync Action of "Desktop overwrites handheld"" (page 94).

To view messages from a particular Mail database, go to the folder to which it syncs.

The folder you are viewing on your Palm device determines the Notes Mail database to which replies and new messages created on the device will sync.

## Using Calendar on Palm OS

Note that application names differ slightly on different devices. On older Palm devices, the Calendar application is called Date Book. See Table 4-1, “Application names on different device platforms,” on page 63.

### *Working with Calendar events on your desktop and on your device*

Because of inherent differences in the way Calendar events are handled in Lotus Notes vs. your Palm Calendar application, the Calendar information may be represented differently on the two platforms. For example, the distinction between the different types of events in Lotus Notes — Meetings, Appointments, Anniversaries, Reminders, and All Day Events — is hard to see in your Palm Calendar. You should be aware of these differences as you work with Calendar events on your device.

#### Note

The differences between the way that Lotus Notes and the Palm Calendar application handle information are most apparent when the sync **Action** for Calendar is set to **Synchronize the files**. If your Calendar sync **Action** is set to **Desktop Overwrites Handheld**, you may never notice these differences.

**Table 6-3**  
Calendar events in  
Lotus Notes and on  
Palm OS device

Lotus Notes Item	Calendar item	Different representation on Palm OS device
Subject	(event description in Calendar)	(Other than not displaying a label like “Subject” on device, there is no difference from Lotus Notes.)
Starts time	Start Time	(No difference from Lotus Notes)
Ends time	End Time	(No difference from Lotus Notes)
Starts date	Date	The date is displayed separately from the time and an event cannot span midnite.
Invitees	Note	From Lotus Notes to device, values for Required, Optional, and FYI Invitees are concatenated to the device Note field. From device to Lotus Notes, the device Notes field syncs back to the Lotus Notes Description field — if you enter invitees in the device Notes field, they will not automatically notified of the event via email.
Required (to)	Note	Stored in on-device Note field.* Required vs. Optional vs. FYI Invitees are not distinguished on device.
Optional (cc)	Note	Stored in on-device Note field.* Required vs. Optional vs. FYI Invitees are not distinguished on device.

Lotus Notes Item	Calendar item	Different representation on Palm OS device
FYI (bcc)	Note	Stored in on-device Note field.* Required vs. Optional vs. FYI Invitees are not distinguished on device.
Chair	Note	Stored in on-device Note field* if, on your Calendar filter, you select the View Chair-person checkbox.
Location	Location	<p><b>Palm OS versions prior to 5.2.1:</b> Stored in on-device Note field.*</p> <p><b>Palm OS version 5.2.1+:</b> From Lotus Notes to device, combines three Lotus Notes fields: Location, Rooms, and Resources.</p> <p><b>Note:</b> Changes in the Location field on device are ignored in a synchronization.</p> <p><b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only.</p>
Rooms	Note	<p><b>Palm OS versions prior to 5.2.1:</b> Stored in on-device Note field.*</p> <p><b>Palm OS version 5.2.1+:</b> From Lotus Notes to device, Rooms field is merged into on-device Location field.</p> <p><b>Note:</b> Changes in the Location field on device are ignored in a synchronization.</p> <p><b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only, but no information about rooms syncs to the Rooms field.</p>
Resources	Note	<p><b>Palm OS versions prior to 5.2.1:</b> Stored in on-device Note field.*</p> <p><b>Palm OS version 5.2.1+:</b> From Lotus Notes to device, Resources field is merged into on-device Location field.</p> <p><b>Note:</b> Changes in the Location field on device are ignored in a synchronization.</p> <p><b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only, but no information about resources syncs to the Resources field.</p>

Lotus Notes Item	Calendar item	Different representation on Palm OS device
FYI (bcc)	Note	Stored in on-device Note field.* Required vs. Optional vs. FYI Invitees are not distinguished on device.
Chair	Note	Stored in on-device Note field* if, on your Calendar filter, you select the View Chairperson checkbox.
Location	Location	<p><b>Palm OS versions prior to 5.2.1:</b> Stored in on-device Note field.*</p> <p><b>Palm OS version 5.2.1+:</b> From Lotus Notes to device, combines three Lotus Notes fields: Location, Rooms, and Resources.</p> <p><b>Note:</b> Changes in the Location field on device are ignored in a synchronization.</p> <p><b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only.</p>
Rooms	Note	<p><b>Palm OS versions prior to 5.2.1:</b> Stored in on-device Note field.*</p> <p><b>Palm OS version 5.2.1+:</b> From Lotus Notes to device, Rooms field is merged into on-device Location field.</p> <p><b>Note:</b> Changes in the Location field on device are ignored in a synchronization.</p> <p><b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only, but no information about rooms syncs to the Rooms field.</p>
Resources	Note	<p><b>Palm OS versions prior to 5.2.1:</b> Stored in on-device Note field.*</p> <p><b>Palm OS version 5.2.1+:</b> From Lotus Notes to device, Resources field is merged into on-device Location field.</p> <p><b>Note:</b> Changes in the Location field on device are ignored in a synchronization.</p> <p><b>Exception:</b> If the event is created on the device, the Location field syncs to Lotus Notes in the first sync only, but no information about resources syncs to the Resources field.</p>

Lotus Notes Item	Calendar item	Different representation on Palm OS device
Categorize	Categories	Only available on newer Palm devices (palmOne devices with Palm OS 5.2.1 or later); only one category is support on those devices — the first category from Lotus Notes is used.
Notify me	Alarm	Only available on newer Palm devices (palmOne devices with Palm OS 5.2.1 or later). From device to Lotus Notes, the Lotus Notes Notify me setting is set relative to the device Start time. From Lotus Notes to device, a notification set <i>after</i> the event start time is changed to be <i>at</i> the event start time. <b>Note:</b> An alarm that is set on either end (Lotus Notes or device) is always preserved in a sync.
Mark Private	Private	(No difference from Lotus Notes)
Pencil In	Note	Stored in on-device Note field.*
Description	Notes	From Lotus Notes to device, information from Invitees field is automatically included in the on-device Note field. From device to Lotus Notes, all the information in the on-device Note field goes into the Lotus Notes Description field.
attachments	—	Not supported — attachments to events in Lotus Notes do not appear when event syncs to device
—	event spanning days	From device to Lotus Notes, any event with an end-date/time that spans midnight is truncated at 11:55PM. Palm OS devices do not support time-specified events that span midnight. Palm OS devices do support All Day events that span multiple days.
GMT support	—	GMT not supported on device; all times from Lotus Notes convert to local time on device based on desktop's timezone setting.
<b>Event Types</b>		
Appointment	event	Event with Start Time and End Time that are different.

Lotus Notes Item	Calendar item	Different representation on Palm OS device
Meeting	event	Event with attendees listed in on-device Notes field.*
All Day Event	event	Event with No Time specified. Note: All Day option on Palm sets time to 8:00 a.m. to 6:00 p.m., which syncs to Lotus Notes as an Appointment.
Reminder	event	Event with Start Time and End Time that are the same.
Anniversary	event	Event that repeats yearly and has no Start Time or End Time.
<b>Repeats Options</b>		
Repeats	Repeat	Settings in Lotus Notes and on device are generally comparable, until individual instances in a series are modified. Modifying individual instances in the series on either end tends to create duplicates.
Daily	Day; Every <number> Day(s)	(No difference from Lotus Notes)
Weekly	Week; Every <number> Week(s)	(No difference from Lotus Notes)
Monthly by Date	Month; Every <number> Months(s), Repeat by Date	From Lotus Notes to device, multiple occurrences per month, such as first and fifteenth, become individual events, not part of the series on the device. (Otherwise, no difference from Lotus Notes.)
Monthly by Day	Month; Every <number> Months(s), Repeat by Day	From Lotus Notes to device, multiple occurrences per month, such as second and fourth Thursdays, become individual events, not part of the series on the device. (Otherwise, no difference from Lotus Notes.)
Yearly	Year; Every <number> Year(s)	(No difference from Lotus Notes)

Lotus Notes Item	Calendar item	Different representation on Palm OS device
Custom	—	Custom repeating pattern of events from Lotus Notes appear as individual events on on the device, with no connection to the series — you must modify or delete them individually.
Exceptions for weekends	—	Custom repeating pattern of events from Lotus Notes appear as individual events on on the device, with no connection to the series — you must modify or delete them individually.
maximum number of repetitions	—	If repetitions on device are bounded by an end date, the entire series syncs to Lotus Notes. If device repetitions are not bounded by an end date, only the first 51 sync to Lotus Notes. With 51 repetitions in Lotus Notes, Appointment on device repeats indefinitely.

\* These Lotus Notes fields are merged into the on-device Note field when Lotus Notes data is downloaded to Palm in a sync. If you sync the same information back to Lotus Notes, information in the on-device Note field only syncs back to the Lotus Notes Description field; the information is *not* split into the separate Lotus Notes Location, Rooms, and Resources fields.

*Creating and modifying Calendar events on your device*

Note

If you have the Calendar sync Action set to “Desktop overwrites handheld” or “Do Nothing,” you can skip this section.

Tip

If you have your Calendar sync **Action** set to **Synchronize the files**, most of the problems you may encounter arise from features in the Lotus Notes Calendar that are not supported in the Palm Calendar. For example, Lotus Notes allows you to make exceptions for individual events in a repeating series, while the Palm Calendar does not.

Here are some tips for creating or changing Calendar events on your Palm OS device so that they sync back to your desktop as smoothly as possible:

- To create a Lotus Notes **All Day Event**, create an event and tap the **No Time** option.

Note

Any Palm Calendar event with no time specified becomes an All Day Event in Lotus Notes.

- To create a Lotus Notes **Anniversary**, create an event with no **Start Time** or **End Time**, and set **Repeat** to **Yearly, Every 1 Year(s)**.

- Do not create an **Anniversary** in Lotus Notes that only occurs one time — it will be duplicated when it syncs to the device.
- To create a Lotus Notes **Appointment**, create an event with **Start Time** and **End Time** that are different.
- To create a Lotus Notes **Meeting**, create an event and add attendees to the **Note** field. Note that these attendees will appear only in the Lotus Notes Description field, when you sync them back to Notes.
- To create a **Reminder**, create an event with the **Start Time** equal to the **End Time**.
- Alarms (**Notify me** in Lotus Notes, **Alarm** on the Palm OS device) take precedence, regardless of your setting for Conflict Resolution. In other words, if an alarm is set on either the desktop end or the mobile device end, syncing will *always* cause that alarm to be added to the event on the other end.
- When you accept a Lotus Notes invitation for a meeting, do not delete the invitation from your Inbox — that will prevent the Calendar entry from syncing to your device.
- Remember that information in the on-device **Note** field never updates any other fields in Lotus Notes when the event syncs back to the Lotus Notes desktop; if this field contains information for attendees or Private, all the information goes into the Lotus Notes **Description** field.
- You cannot enter an event on your device that will sync back to Lotus Notes as an Anniversary — it will show up as an All Day Event.
- If you must modify individual instances of repeating events, your changes will sync better if you always make the changes in Lotus Notes.
- If you modify all instances of a repeating series in Lotus Notes, the updates sync to the device as exceptions.
- You can avoid many other potential problems with repeating events by never modifying the repeat rule for the series on your device.
- If your repeating series in Lotus Notes has exceptions for weekends, the series syncs to the device as exceptions — Palm Calendar does not support exceptions in a repeating series.
- Any time you modify appointments synced from Lotus Notes, any invitees to the appointment are not automatically notified when the information syncs to Lotus Notes. To notify invitees, open the event in Lotus Notes and click the **Save and Send Invitations** button.
- When editing the **Note** field on an Appointment, do not enter any text after the tildes (“~” characters) — text in this location will not sync back to Lotus Notes.
- Any time you cancel on device appointments synced from Lotus Notes, any invitees to the appointment are not automatically notified when the information syncs back to Lotus Notes. To notify

invitees, you must manually send them an email asking them to manually delete the event from their Calendars.

- Dates after 2031 in Lotus Notes may not sync to your device as expected:
  - Any event that starts after 2031 is completely ignored.
  - A repeating series of events with 51 or fewer occurrences will drop any events occurring after 2031.
  - A repeating series of events that has more than 51 occurrences is treated as having no end date on your device.
- After upgrading Pylon, if you have your Calendar sync Action set to “Synchronize the files” and you have made changes either in Lotus Notes or on your device since your last sync, you may get some problematic results. Some entries in Calendar that should be duplicated may not be — these will be corrected automatically on your next sync. Other entries that should not be duplicated may be — you will have to manually locate and reconcile these.

### *Accessing your Calendar on Palm*

To access your Calendar on your Palm OS device:

1. Verify that the Calendar application is enabled in the Pylon Configuration Database. For instructions, see “Disabling or enabling a PIM application” (page 64).
2. Initiate a sync.
3. Tap the **Applications** silk screen button on your device.
4. Tap the **Date Book** icon.

The Calendar application appears. You will see your Lotus Notes Calendar entries there.

---

---

#### Note

Any note in a Calendar entry you create on your device will be truncated in Lotus Notes to 32K. This is a Lotus Notes limitation.

### Rules appearing to change with repeating Calendar events

In testing syncing of repeating Calendar events with Pylon, some non-ideal behavior has been discovered in the way that Lotus Notes displays the rule for a repeating event after it has been created. The rule itself is saved as entered, and works as intended, both in Lotus Notes and on your device, but in Lotus Notes the rule is displayed incorrectly:

- When the time unit for which the event repeats (Days, Weeks, Months) is greater than the time unit in the frequency of the event, (Daily, Weekly, Monthly), when the rule is displayed later it changes the time unit for which the event repeats to be the same as the time unit in the frequency of the event.

For example, a *weekly* appointment, repeating for six *months*, is displayed as a weekly appointment, repeating for six *weeks*. Internally the rule is stored as entered and the event is maintained correctly as repeating for six months.

- When a weekly event repeats on more than one day of the week, when the rule is displayed later it shows only the latest day in the week.

For example, if you set up an event to repeat weekly on Wednesday and Friday, when the rule is displayed later it shows that the event repeats weekly on Friday only. Internally the rule is stored as entered and the event is maintained correctly as repeating weekly on Wednesday and Friday.

### *Accessing additional Calendars on Palm OS via Pylon Select*

Pylon Select is an application that works in conjunction with the Palm Date Book. Using Pylon Select allows you to switch back and forth between two or more Calendar databases quickly and easily.

---

---

#### Note

Pylon Select only works with Palm OS versions earlier than 5.2. Pylon Select installs on your device if you enable two or more Calendar databases. Pylon Select installs with a HotSync operation.

### Accessing Pylon Select

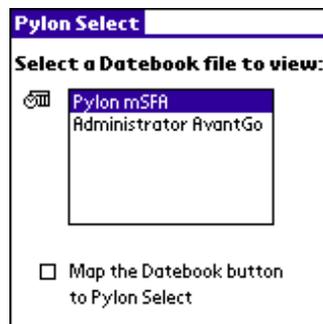
1. On a Palm device, tap the **Applications** silk screen button.  
The Applications screen appears.

**Figure 6-3**  
Pylon Select Icon  
on the Applications  
Screen



2. Tap the **Pylon Select** icon.
3. The Pylon Select application appears.

**Figure 6-4**  
Pylon Select on a  
Palm Device



### Switching between databases

In the Pylon Select application, tap on the name of a Calendar to open the database in the Palm Date Book application.

### Mapping a hard button

Select the checkbox at the bottom of the Pylon Select screen to map or unmap a your Palm device's Date Book hard button to Pylon Select. By doing this, you significantly reduce the number of keystrokes required to switch between databases.

Selecting the checkbox is equivalent to going to the Palm Preferences application, choosing **Buttons**, and mapping the Date Book hard button to the Pylon Select application. The checkbox is merely a shortcut for quick enabling and disabling of this feature.

After selecting the checkbox, the next time you press the Date Book hard button will launch the Date Book to display the currently selected database. Press the hard button again to return to Pylon Select. Use the

**Palm up and down buttons to quickly choose the next database, and then hit the hard button to view it.**

## Using Address Book on Palm OS

Note that application names differ slightly on different devices. On newer Palm devices and on Pocket PC devices, the Address Book application is called Contacts. See Table 4-1, “Application names on different device platforms,” on page 63.

1. Sync your device.

For instructions, see “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98).

2. Tap the **Applications** silk screen button on your device.
3. Tap the **Address Book** icon.

### *Accessing additional Address Book databases on Palm OS*

To access a second Address Book on your Palm OS device:

1. Tap the **Applications** silk screen button on your device.
2. Tap the **Address Book** icon.
3. Tap the **Categories** drop down list and select the category you are using to map the additional Address Book you wish to view.

The entries from the additional Address Book appear.

## Using To Do List on Palm OS

Note that application names differ slightly on different devices. On newer Palm devices and Pocket PC devices, the To Do List application is called Tasks. See Table 4-1, “Application names on different device platforms,” on page 63.

### *Working with To Do List on your desktop and on your device*

Because of inherent differences in the way To Do items are handled in Lotus Notes vs. your Palm To Do application, the To Do items may be represented differently on the two platforms. You should be aware of these differences as you work with To Do records on your device.

---

#### Tip

If you have your To Do sync **Action** set to **Synchronize the files**, most of the problems you may encounter arise from features in the Lotus Notes To Do that are not supported in the Palm To Do. For example, Lotus Notes allows you to make exceptions for individual events in a repeating series, while the Palm To Do application does not.

- You can avoid many potential problems with repeating events by never modifying individual instances in the series on your device.
- Dates after 2031 in Lotus Notes may not sync to your device as expected:
  - Any event that starts after 2031 is completely ignored.
  - A repeating series of events with 51 or fewer occurrences will drop any events occurring after 2031.
  - A repeating series of events that has more than 51 occurrences is treated as having no end date on your device.

**Table 6-4**  
To Do events in  
Lotus Notes and on  
Palm OS device

Lotus Notes Item	Palm item	Different representation on Palm OS device
Subject	(item description in To Do)	(Other than not displaying a label like “Subject” on device, there is no difference from Lotus Notes.)
Due by	Due Date	(No difference from Lotus Notes)
Start by	—	Not supported. Palm To Do items only have a Due Date.
Priority	Priority	(No difference from Lotus Notes)
Category	Category	(No difference from Lotus Notes)
Status	Status	(No difference from Lotus Notes)
Description	Note	(No difference from Lotus Notes)

Lotus Notes Item	Palm item	Different representation on Palm OS device
Assign To	—	Not supported. You can make a note to yourself in the device Note field if you want to assign the task to someone else, but that information remains in the Lotus Notes Description field when you sync back to Notes.
Mark Private	Private	(No difference from Lotus Notes)
attachments	—	Not supported. Attachments to items in Lotus Notes do not appear when item syncs to device
GMT support	—	GMT not supported. All times from Lotus Notes convert to local time on device, based on desktop's timezone setting.

**Table 6-5**  
Repeating To Do events in Lotus Notes and on newer Palm OS devices\*

Lotus Notes Item	Palm item	Different representation on Palm OS device
Repeats	Repeat	Settings in Lotus Notes and on device are comparable, until individual instances in a series are modified. Once a repeating To Do item is modified in Lotus Notes, it is treated like a Custom repeating To Do item on the device.
Daily	Day; Every <number> Day(s)	(No difference from Lotus Notes)
Weekly	Week; Every <number> Week(s)	(No difference from Lotus Notes)
Monthly by Date	Month; Every <number> Months(s), Repeat by Date	(No difference from Lotus Notes)
Monthly by Day	Month; Every <number> Months(s), Repeat by Day	(No difference from Lotus Notes)
Yearly	Yearly	(No difference from Lotus Notes)

Lotus Notes Item	Palm item	Different representation on Palm OS device
Custom	Occurs: Edit pattern	Custom repeating pattern of items from Lotus Notes appear as individual To Do items on the device, with no connection to the series — you must modify or delete them individually.
Exceptions for weekends	individual To Do item in series moved to avoid weekend	Treated as Custom in sync; individual To Do items appear on device, with no connection to the series.
maximum number of repetitions	—	If repetitions on device are bounded by an end date, the entire series syncs to Lotus Notes. If device repetitions are not bounded by an end date, only first 51 sync to Lotus Notes. With 51 repetitions in Lotus Notes, Appointment on device repeats indefinitely.

\* This table applies only to newer Palm OS devices (palmOne devices with Palm OS 5.2.1 or later). On older Palm OS devices, all Lotus Notes repeating tasks sync to device as Custom repeats.

### *Accessing your To Do List on Palm OS*

1. Sync your device.  
For instructions, see “Syncing other Pocket PC OS devices not running Windows Mobile 5” (page 98).
2. Tap the Applications silk screen button on your device.
3. Tap the To Do List icon.

### *Accessing additional To Do Lists on Palm OS*

For instructions on how to configure Pylon to sync additional To Do Lists, see “Syncing additional application databases or views” (page 91).

To access an additional To Do List on your Palm OS device:

1. Tap the Applications silk screen button on your device.
2. Tap the To Do List icon.
3. Tap the **Categories** drop down list and select the category you are using to map the additional To Do List you wish to view.

The entries from the additional To Do List appear.

## Using Memo Pad on Palm OS

Note that application names differ slightly on different devices. On newer Palm devices, the Memo Pad application is called Memo. See Table 4-1, “Application names on different device platforms,” on page 63.

1. Sync your device.  
For instructions, see “Syncing your Palm OS device” (page 112).
2. Tap the **Applications** silk screen button on your device.
3. Tap the **Memo Pad** icon.

### *Accessing additional Memo Pad databases on Palm OS*

For instructions on how to configure Pylon to sync additional Memo Pads, see “Syncing additional application databases or views” (page 91).

To access an additional Memo Pad on your Palm OS device:

1. Tap the Applications silk screen button on your device.
2. Tap the Memo Pad icon.
3. Tap the **Categories** drop down list and select the category you are using to map the additional Memo Pad you wish to view.

The entries from the additional Memo Pad appear.

## Using Expense on Palm OS

1. Sync your device.

For instructions, see “Syncing your Palm OS device” (page 112).

2. Tap the **Applications** silk screen button on your device.
3. Tap the **Expense** icon.

### *Accessing additional Expense databases on Palm OS*

When you sync multiple Expense databases using Pylon Conduit, you define an on-device category for each additional database. See “Syncing additional application databases or views” (page 91) for details. On your Palm OS device, you use these on-device categories to access individual Expense databases.

To access additional Expense databases on your Palm OS device:

1. Open **Expense** on your Palm OS device.
2. Click the drop-down arrow in the upper-right corner of your device screen to access your list of on-device categories.
3. Select the category that you defined for the additional Expense database that you want to access.

# Syncing custom databases (Pylon Pro only)

“Syncing custom databases” (page 133)

“Working with custom databases on a Palm OS device” (page 159)

“Working with custom databases on a Pocket PC OS device” (page 147)





## CHAPTER 7. **Syncing custom databases**

---

---

- “Overview” (page 134)
- “Creating a Pylon Pro filter to sync a custom database” (page 135)
- “Enabling or disabling Pylon Pro” (page 139)
- “Selecting a Pylon Pro sync filter” (page 140)
- “Setting sync action” (page 141)
- “Making changes to a Pylon Pro sync filter” (page 142)
- “Enabling additional databases” (page 144)
- “De-activating and re-activating a custom database” (page 145)

## Overview

Using Pylon Pro you can synchronize virtually any Lotus Notes custom database to your Palm OS or Pocket PC OS device. You also can modify database entries on your device.

Using Pylon Pro, you can choose what you will sync, including:

- Up to 20 Lotus Notes custom databases or custom database Views
- Lotus Notes custom databases that you have created yourself specifically for use on your mobile device
- Existing databases, such as a Journal or Expense database (on Pocket PC OS), that are not associated with your Lotus Notes PIM applications.
- Multiple Views from the same database

You can also decide not to sync any custom databases using Pylon Pro. How to enable and disable Pylon Pro from syncing is covered in this chapter, as well as instructions on how to configure Pylon Pro to modify your sync options for each custom database.

### Custom database configuration task checklist

- ✓ Determine what you want Pylon Pro to do. For example, you may want to sync one View from a single Notes custom database. Or, you may decide to sync multiple custom databases or multiple Views from the same database.
- ✓ Access Pylon Pro from within Lotus Notes.
- ✓ Create or edit a filter to sync a Notes custom database.
- ✓ Enable or disable Pylon Pro.
- ✓ Select a custom database filter.
- ✓ Set the sync action.
- ✓ De-activate or re-activate a custom database.

## Creating a Pylon Pro filter to sync a custom database

With Pylon Pro, you create a new filter for each custom Lotus Notes database that you want to sync. Each custom database on your device represents only one View from the Lotus Notes custom database that you are syncing to.

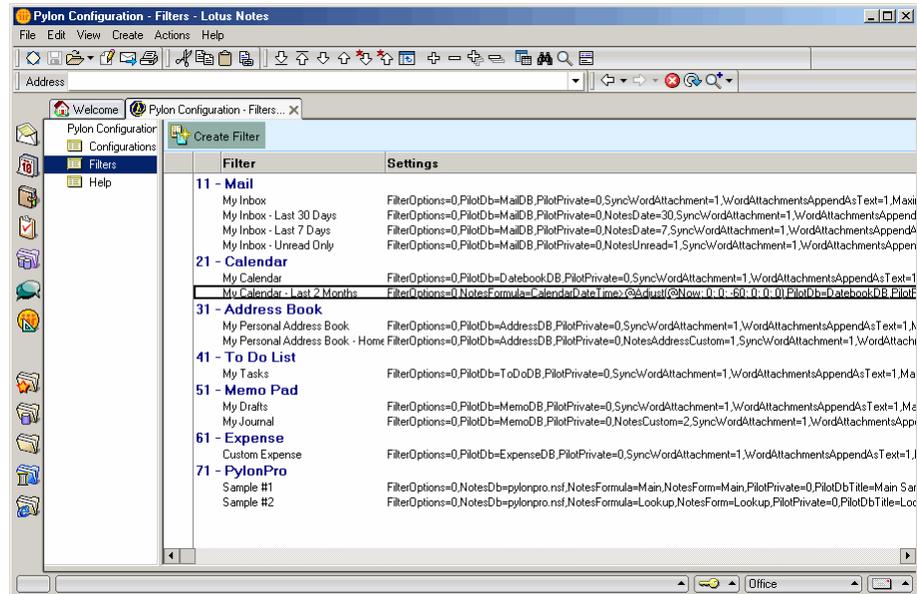
You will note that many of the steps below are similar to the ones for creating a new filter for a PIM application, except in this instance you do not map to the Mail database, for example, but to a custom Lotus Notes database View of your design.

To create a new Pylon Pro filter:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the Navigation pane, click **Filters**.

The Filters View appears in the View pane.

**Figure 7-1**  
All available filters



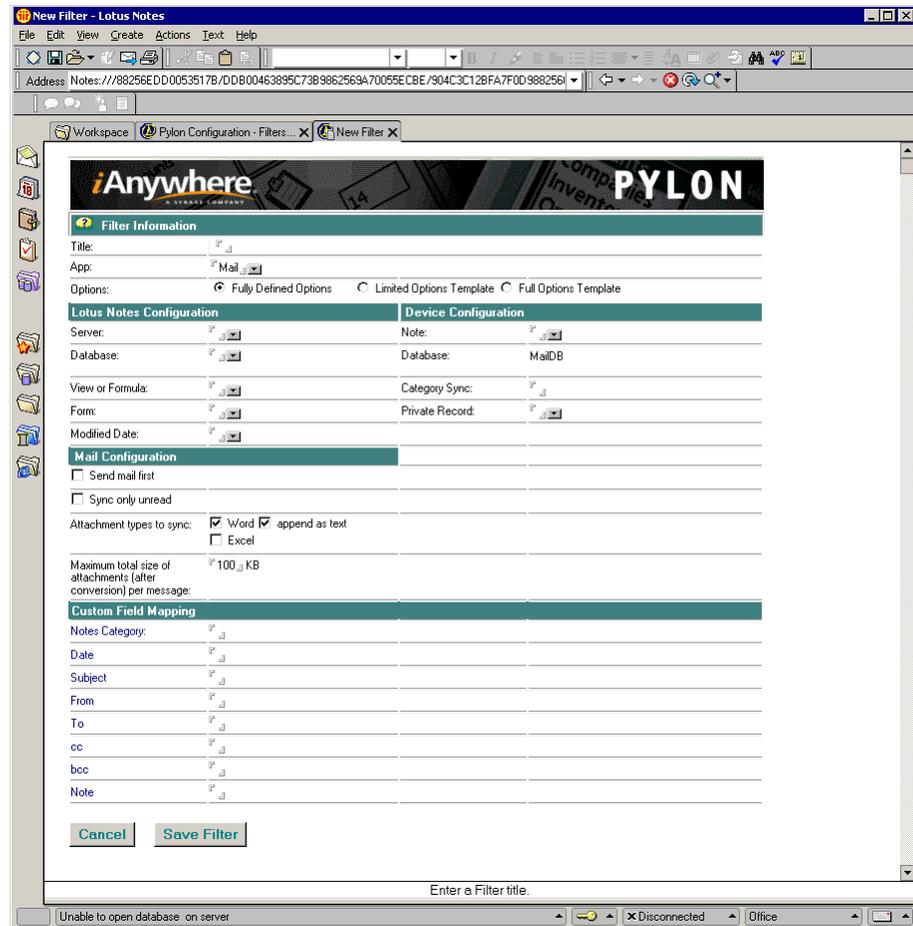
### Note

The above screen shows a Pylon Pro installation for a Palm device. If you have licensed Pylon Conduit, you will not see the “PylonPro” application entry. If you install Pylon for Pocket PC, the “Date Book” entry is labeled “Calendar.”

3. In the Lotus Notes toolbar, click **Create Filter**.

The filter configuration document appears.

**Figure 7-2**  
Filter configuration  
document



4. Enter a title for your new filter in the **Title** field. Following are some useful guidelines for filter titles:
    - All filters must have a title.
    - The filter title should be unique to avoid duplication and possible sync errors.
    - Filter titles are limited to a maximum of 128 characters.
- Tip** It is a good idea to give the filter the same name as the custom database or View that you plan to sync. This is very helpful if you plan to sync multiple custom databases.
5. In the **App** field, click the drop-down arrow, then select **Pylon Pro** from the keyword list (if it is not already selected).
  6. In the **Options** field, click Fully Defined Options.
  7. Make changes to the **Lotus Notes Configuration** section, which contains these Lotus Notes database-specific fields.
    - **Server:** Click the drop-down arrow to display a Keyword list of known servers. Select Local if you are syncing to a Lotus Notes custom database on your desktop, or enter the name of the Lotus

Notes server where the Lotus Notes database (for example, <server name>/<your domain name>) is located.

- **Database:** Select or enter the name of the Lotus Notes custom database name-path that should be used for synchronization. Click on the drop-down arrow to display a Keyword list of known name-paths.
- **View or Formula:** Select or enter the View or folder name, or enter a selection formula to designate which documents in Lotus Notes should be used for syncing. Click on the drop-down arrow to display a Keyword list of known views and folders in the current database.

---

#### Note

It is recommended that a special Form and View be used that are designed for viewing on a mobile device. For more information on how to design databases for use with a mobile device, see “Creating device-friendly Notes databases” (page 201).

- **Form:** Select or enter the form name to be used for new documents created on the Palm or Pocket PC OS device.

If you wish to exercise more control over the look and feel of the Pylon Pro database, you can create a special form for the Pylon Pro design download.

- **Modified Date:** Click on the drop-down arrow to display a Keyword list of days.

#### 8. Make changes as necessary to the **Device Configuration** section, which contains these device-specific fields.

- **Note:** The **Note** field (text) in Pylon Pro is mapped by default to the Notes **Body** field. If you use this feature, click the drop-down arrow to select a size limit for this field.
- **Category Sync:** Categories are a device feature that Pylon uses to organize application events. Each device application supports up to fifteen categories. Each category name is limited to fifteen characters. In order to be able to sync more than one custom database, each custom database must have a unique category name.
- **Private Record (Palm OS only):** The feature refers to records on the Palm device that are marked as Private. Click the drop-down arrow to display a Keyword list with Sync Private Items choices. Configure the Palm device Security application to show or hide Private Records. For instructions on how to mark records as private on Palm OS, see “Marking the record private” (page 174).

---

#### Note

Selecting “Do not synchronize” from the **Keyword** list for **Private Record** will stop new or edited records that are marked as private from syncing from your Palm OS device to your desktop. However, changes made to private records on the desktop still will still be updated to your Palm OS device.

9. Under **Pylon Pro Configuration**, enter an on-device title for the database. If you leave this field blank, the on-device database name will be the same as the database name on the desktop by default.
10. Make changes as necessary to the **Custom Field Mapping** section, which contains these Lotus Notes database-specific fields.
  - **Notes Category:** Enter Lotus Notes field names to designate which notes fields should be used to create categories on the Palm OS device. By default, this field will automatically map to the standard Category field within Lotus Notes.
  - **Note:** The Pylon Pro application's **Note** field (text) is mapped by default to the Notes **Body** field. Enter an appropriate field name in the Note field to override the default. If you use \* for the field name, then data will not synchronize in either direction for this field.
  - **Image:** The Pylon Pro application's **Image** field (a bitmap) is mapped by default to the Notes **Body** field. Enter an appropriate field name in the Image field to override the default. If you use \* for the field name, the data will not synchronize in either direction for the field.

**Figure 7-3**  
Pylon Pro Filter  
Custom Mapping  
Options

Custom Field Mapping	
Notes Category:	<input type="text"/>
Note	<input type="text"/>
Image	<input type="text"/>

11. Click the **Save Filter** button.

Repeat this process to create filters for any other custom databases or for Views within the same database that you want to sync. Or, start making changes to your Pylon Pro sync options by “Enabling or disabling Pylon Pro” (page 139).

## Enabling or disabling Pylon Pro

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the navigation pane, click **Configurations**.
3. Select the user configuration you wish to edit, then click **Edit Configuration**.
4. In your configuration document, check the box beside the **Pylon Pro** icon.

A check in the box indicates the application is enabled. No check and a gray icon indicates the application is disabled.

When you disable the application, the sync action for all Pylon Pro application filters changes to **Do Nothing**.

5. Click **Save and Close** to save your changes and exit your configuration document, or continue making changes to your Pylon Pro sync options by “Selecting a Pylon Pro sync filter” (page 140).

## Selecting a Pylon Pro sync filter

Once you have created one or more Pylon Pro filters to sync custom databases, you activate them by selecting them in your configuration document, then setting the sync Action. If you have not yet created any Pylon Pro filters, see “Creating a Pylon Pro filter to sync a custom database” (page 135) for instructions.

To select a Pylon Pro sync filter:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the navigation pane, click **Configurations**.
3. Select the user configuration you wish to edit, then click **Edit Configuration**.
4. In your configuration document, make sure the box beside the **Pylon Pro** icon is checked.

By default, Pylon Pro has four rows for syncing four different custom databases or database views.

5. Under **Filters**, click the drop-down arrow in a row that has not been assigned a filter or that contains a filter reference that you want to change.

### Note

If all of the rows are in use, you can enable additional databases (the maximum is 20). For instructions, see “Making changes to a Pylon Pro sync filter” (page 142).

The Pylon Pro Select Keywords panel appears.

**Figure 7-4**  
Select Keywords  
panel for Pylon Pro  
Filter



6. From the **Keywords** list, select the desired filter.
7. Click **OK**.  
The panel closes and you return to your configuration document.
8. Click **Save and Close** to save your changes and exit your configuration document, or continue making changes to your Pylon Pro sync options by “Setting sync action” (page 141).

## Setting sync action

Sync actions determine the general sync behavior of Pylon Pro filters. There are four sync options to choose from for each filter you choose to sync:

- Synchronize the files
- Handheld writes to Desktop
- Desktop overwrites Handheld
- Do Nothing

These four options are explained in detail in Table 4-2, “Sync Action options,” on page 65.

### Note

If you are syncing a custom database for the first time, set Desktop overwrites Handheld as the sync action for the initial sync. Change the sync action to back to Synchronize the files for two-way syncing in subsequent sync operations.

To set the sync action for a Pylon Pro custom database:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the Navigation pane, click **Configurations**.
3. Select the configuration you wish to edit, then click **Edit Configuration**.
4. In your configuration document, make sure the box beside the **Pylon Pro** icon is checked.
5. Underneath **Action**, click the drop-down arrow corresponding to the custom database filter for which you want to set the sync Action.

The sync Action Select Keywords panel appears.

**Figure 7-5**  
Select Keywords  
panel for Pylon Pro  
Action



6. From the **Keywords** list, select an action, then click **OK**.  
The panel closes and you return to your configuration document.
7. Click **Save and Close** to save your changes and exit your configuration document.

## Making changes to a Pylon Pro sync filter

Make changes to an existing Pylon Pro sync filter in order to:

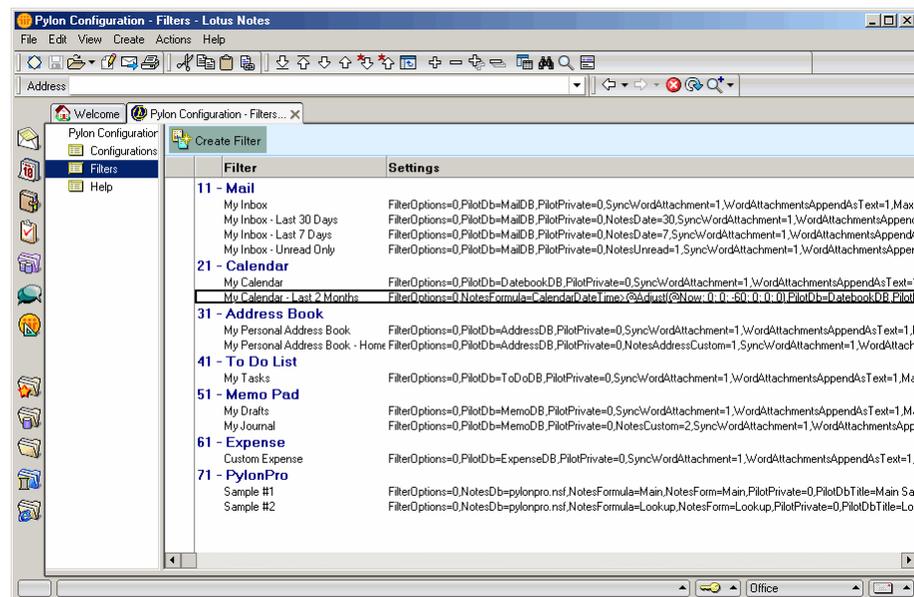
- Sync a custom database located on a different server
- Sync a different View within the same database
- Make other changes to either the Lotus Notes or the mobile device configuration of an existing sync filter

To make changes to a Pylon Pro sync filter:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the Navigation pane, click **Filters**.

A list of all available filters appears in the View pane.

**Figure 7-6**  
All available filters



### Note

The above screen shows a Pylon Pro installation for a Palm device. If you have licensed Pylon Conduit, you will not see the “PylonPro” application entry. If you install Pylon for Pocket PC, the “Date Book” entry is labeled “Calendar.”

3. Under the **Pylon Pro** application, double-click the filter that you want to modify.
4. With the filter open, double-click anywhere in the filter document.

The filter configuration document becomes a full options filter template. **Cancel** and **Save Filter** buttons appear at the bottom of the screen, and the editable fields have brackets around them. The filter document is now in Edit mode. Any configuration document

for a Pylon Pro filter has the same general layout. The default settings for the **Sample 1** filter are shown below.

**Figure 7-7**  
Pylon Pro Sample 1  
filter, default  
settings

The screenshot shows the 'Filter - Lotus Notes' dialog box with the following settings:

- Filter Information:**
  - Title: Sample #1
  - App: PylonPro
  - Options:  Fully Defined Options,  Full Options Template
- Lotus Notes Configuration:**
  - Server: [Dropdown]
  - Database: PylonPro Sample Database (pylonpro.nsf)
  - View or Formula: Main
  - Form: Main
  - Modified Date: [Dropdown]
- Device Configuration:**
  - Note: [Dropdown]
  - Database: [Dropdown]
  - Category Sync: [Dropdown]
  - Private Record: [Dropdown]
- PylonPro Configuration:**
  - PylonPro database title: Main Sample Db
- Custom Field Mapping:**
  - Notes Category: [Dropdown]
  - Note: [Dropdown]
  - Image: [Dropdown]

Buttons: Cancel, Save Filter

Footer: This is the protected text area of the form.

5. Make changes to the **Lotus Notes Configuration**, **Pylon Pro Configuration**, and **Device Configuration** settings to suit your needs. For detailed descriptions of the individual filter document settings, see “Creating a Pylon Pro filter to sync a custom database” (page 135).
6. Click the **Save Filter** button to save your changes and return to the main Filters View.

## Enabling additional databases

By default, Pylon Pro is set up in the configuration document to sync up to four custom databases or database views. If you need more, however, you can enable syncing with up to 20 custom databases or database Views.

To enable additional databases:

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. In the navigation pane, click **Configurations**.
3. Select the user configuration you wish to edit, then click **Edit Configuration**.
4. In the configuration document, check the box to enable **Additional Databases**.

The screen refreshes and the #Apps column appears.

5. Underneath #**Apps** in the Pylon Pro section, click the drop-down arrow.

The Select Keywords panel appears.

6. From the **Keywords** list, select the total number of custom databases or database views that you want to sync.
7. Click **OK**.

The panel closes and you return to your configuration document. You now have the option of choosing a additional filters to sync additional databases or database views.

## De-activating and re-activating a custom database

You can activate or deactivate a custom database using the sync Action setting in your configuration document in the Pylon Configuration database. This option is useful in managing the amount of Notes information you sync to your device. For example, if you have not made any changes to your database since your last sync, you can deactivate it to reduce sync time and free memory on your device. Later, when you need it, you can re-activate it.

### De-activating a custom database

To de-activate a custom database from syncing, change the sync action setting for the database filter to **Do Nothing**. For instructions, see “Setting sync action” (page 141).

### Re-activating a custom database

To re-activate syncing a custom database, change the sync action setting for the database filter from **Do Nothing** to any of the other three available sync action settings. For instructions, see “Setting sync action” (page 141).



## CHAPTER 8. Working with custom databases on a Pocket PC OS device

---

---

- “Overview” (page 148)
- “Installing custom databases on a Pocket PC OS device” (page 149)
- “Navigating custom databases on a Pocket PC OS Device” (page 150)
- “Making changes to custom databases on a Pocket PC OS device” (page 155)

## Overview

Pylon Pro is a flexible database engine that takes on the look and feel of the custom Lotus Notes databases with which it is synchronized. Each custom database on your device represents only one View from the Lotus Notes custom database to which you are syncing. To sync multiple Views from the same database, you create a separate filter for each View, which then appears as a separate database on your Pocket PC OS device. For information on configuring Pylon Pro to sync custom databases, see CHAPTER 7., “Syncing custom databases”

It is beyond the scope of this guide to describe exactly what your Pylon Pro application will look like on the device. That will depend upon how you design your custom databases to look.

For information about creating custom Lotus Notes databases that are optimized for viewing on a Pocket PC OS device, see “Creating device-friendly Notes databases” (page 201).

For information about creating databases that take advantage of the Pylon Pro Lookup feature, see “Implementing on-device database lookups” (page 209).

## Installing custom databases on a Pocket PC OS device

Custom databases are installed on your Pocket PC OS device when, after configuring a Pylon Pro conduit, you perform a Desktop overwrites Handheld sync operation. Configuring a conduit consists of the following steps:

- Creating a filter that maps to a custom database. For instructions, see “Creating a Pylon Pro filter to sync a custom database” (page 135)
- Selecting the filter in your configuration document. For instructions, see “Selecting a Pylon Pro sync filter” (page 140)
- Setting the sync Action. For instructions, see “Setting sync action” (page 141)

**Note**

Set the sync Action to Desktop overwrites Handheld for the initial sync of each custom database.

- Syncing your device.

During this initial sync, the custom databases to which you have mapped are installed on the device.

**Note**

Set the sync Action to Synchronize the files for two-way communication in subsequent syncs between your desktop computer and your Pocket PC OS device.

For more information about configuring conduits in the Pylon Configuration database, see “Syncing custom databases” (page 133).

## Navigating custom databases on a Pocket PC OS Device

Pylon Pro is installed on the device when you perform a sync operation after enabling the conduit. Enabling the conduit means creating a filter that maps to a custom database, selecting the filter, and setting the synchronization action to Desktop overwrites Handheld. For more information about configuring the conduit in the Pylon Configuration database, see “Syncing custom databases” (page 133).

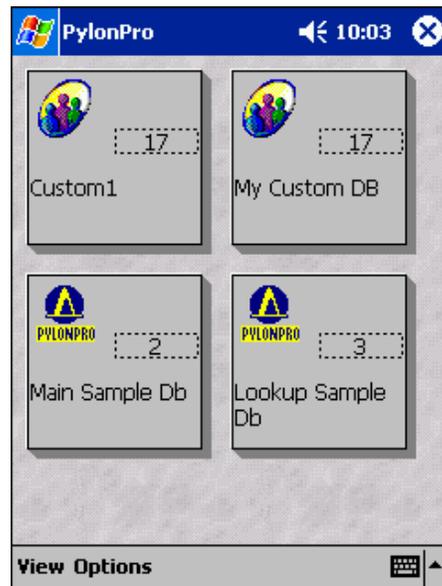
### Viewing custom databases on a Pocket PC OS device

To view custom Lotus Notes databases on a Pocket PC OS Device:

1. Tap **Start|Pylon Pro**.

The Pylon Pro Workspace appears. By default, the Pylon Pro Workspace is the initial screen that appears when you start Pylon Pro for the first time.

**Figure8-1**  
Pylon Pro  
Workspace on a  
Pocket PC OS device



#### Note

If no databases are loaded, then a “No custom databases installed” message displays in the Workspace.

The Workspace displays the following information:

- **Notes database title:** The title of the Lotus Notes database is displayed at the bottom of the box. If the name is too long to fit in the box, it is truncated, and an ellipsis (...) is appended to the string. By default, this is the title of the Lotus Notes database. You can also enter an on-device title for the database under Pylon Pro Configuration in the filter document. For instructions, see “Creating a Pylon Pro filter to sync a custom database” (page 135).

- **Number of records:** The number of records currently in the database is displayed at the top right corner of the box.

## 2. Tap **View|List View**.

The screen switches from Workspace view to database List View.

**Figure8-2**  
Pylon Pro database  
List View on Pocket  
PC OS

Database	Records#
Custom1	17
Lookup Sample Db	3
Main Sample Db	2
My Custom DB	17

## 3. Tap **View|Workspace View** to return to Workspace View.

## 4. Tap an individual database.

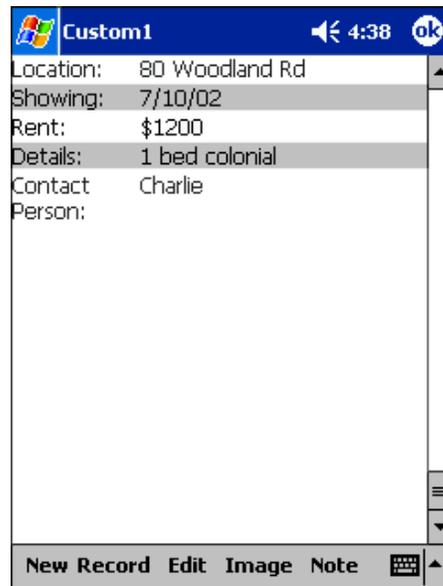
The database opens in record List View, with all individual database records listed.

**Figure8-3**  
Custom database  
open in record List  
View

Location	Showing	Rent	Details
345 Tr...	2/04/98	\$1987	no dog
345 23...	2/9/02	\$3461	3 Bed..
3093 1...	4/05/02	\$2456	nice
2334 G...	4/19/02	\$1100	
1100 S...	4/23/02	\$3877	5 Bed
1735 M...	4/23/75	\$800	1 bed..
746 H ...	4/26/02	?	No de..
213 34...	4/9/02	\$56/w...	Studio.
45 Cana	5/03/90	\$3647	none
2345 G...	5/22/02	\$750	Dogs ..
56 Dal...	5/25/02	\$800	1 bedr.
22 Aca...	5/30/02	\$1200	2 Bedr.
1098 P...	6/12/02	\$2850	4 Bed
1212 H...	6/17/02	\$29289	chalet

5. Scroll through the list of records manually using the scrollbar, or directional pad, or type in the **Lookup** field to navigate automatically to first Column 1 entries. For example, typing “r” in the Lookup field will scroll automatically to records whose Column 1 field entry begin with an “r.”
6. From the record List View, tap an individual record.  
The individual record opens in Read View.

**Figure8-4**  
Read View on a  
Pocket PC OS device



7. From the Read View of an individual record , tap **Edit**.  
The record opens in Edit View:

**Figure8-5**  
Edit View on a  
Pocket PC OS device



8. Tap **OK** to return to the database List View, then tap **OK** again to return to the Pylon Pro Workspace View.

## Changing column attributes

The default column layout in the record List View corresponds directly to the design of the Lotus Notes database View upon which it is based. The default layout defines how many columns are to be displayed (between 1 and 4) and which field will appear in which column.

Pylon Pro allows you to override the design defaults and manually select the number of columns displayed as well as which field maps to which column.

To change column attributes:

1. From the List View of a database, tap **Options|Columns**.  
The Pylon Pro column attributes page appears.

**Figure8-6**  
Pylon Pro Column  
attributes page

The screenshot shows a dialog box titled "Custom1" with a status bar at the top showing a speaker icon, the time "4:49", and an "ok" button. The main content area is titled "# of columns:" and contains four radio buttons labeled "1", "2", "3", and "4". The "4" radio button is selected. Below this are four dropdown menus labeled "Column 1:", "Column 2:", "Column 3:", and "Column 4:". The dropdown menus contain the following text: "Location", "Showing", "Rent", and "Details" respectively. At the bottom of the dialog are two buttons: "OK" and "Cancel".

2. Tap a radio button to select the **# of columns** you wish to view. Choosing less than 4 columns will disable unused column field selectors.
3. Tap the drop-down for each column a select a field to map to.
4. Tap **OK** to save your changes and return to the List View.

## Resizing columns

To resize columns in the List View of a database, tap and drag the edge of a column heading to the desired position.

The default layout of a database in the Pylon Pro List View corresponds directly to the design of the Lotus Notes database View that it is based upon. The default layout defines how wide each column should initially be in relation to other columns.

## Making changes to custom databases on a Pocket PC OS device

### Creating a new record

1. From the List or Read View of a database, tap **New**.  
A new blank record opens in the Edit View.
2. Make changes to the database record.
3. Tap **OK**. to save the new record and return to the database List View.

### Editing a record

1. From the List View of a database, tap the the record you wish to edit.  
The record opens in Read View.
2. Tap anywhere in the body of the record.  
The record opens in Read View.
3. Make changes to the database record, then tap **OK**. to save your changes and return to the database List View.

### Deleting a record

1. From the List View of a database, tap the individual record you wish to delete.
2. Tap **Record|Delete**.  
The record is deleted, and you are returned to the database List View.

### Attaching and editing an image

If you wish to attach an image to a record or to edit an image that is already attached, do the following:

1. In the Edit or Read View of a database record, tap **Image**, or tap in the **Image** field of the record.  
The Edit Image screen appears.
2. Select **Pen** or **Eraser** from the tool drop-down.
3. Select **Thin**, **Medium** or **Thick** from the style drop-down.
4. Use your stylus to make changes in the edit image screen.
5. Tap **Cancel** to cancel your changes and return to the record in Edit View.
6. Tap **Clear** to erase the image.

7. Tap **OK** when you are done editing the image.

Your changes are saved and you are returned to the record in Edit View.

## Working with text

Edit text fields using the virtual Keyboard and the editing functions accessible from the **Edit** menu.

### *Entering text*

To type in text fields:

1. From the Edit View of a database record, tap in the text field you wish to edit.
2. Use the virtual Keyboard to enter or edit text, then tap **OK** to save your changes and return to the database List View.

### *Selecting text*

With a database record open in Edit View, double tap a word to select it, or drag your stylus to select blocks of text.

### *Editing functions*

1. With a database record open in Edit View, tap **Edit**.

The Edit functions include:

- **Undo**: to undo the last editing operation
- **Cut**: to delete the highlighted portion of the current text field and store it in the clipboard
- **Copy**: to copy the highlighted portion of the current text field into the clipboard.
- **Paste**: to insert the contents of the clipboard at the current focus cursor position.
- **Select All**: To select all text in the field with the cursor in it.

### Editing date fields

1. From the Edit View of a database record, tap on the drop-down arrow to the right of a date data field.

A scrollable calendar opens.

**Figure8-7**  
Date field calendar  
on a Pocket PC OS  
device



2. Tap **Today** to select the current date, or use the right and left arrows to scroll to the month you want, then tap on the specific day you want to set.

The calendar closes, and the new date appears in the **Date** field.

## Deleting a database

You can delete databases from the Pylon Pro Workspace View on your Pocket PC OS device.

---

---

**Note**

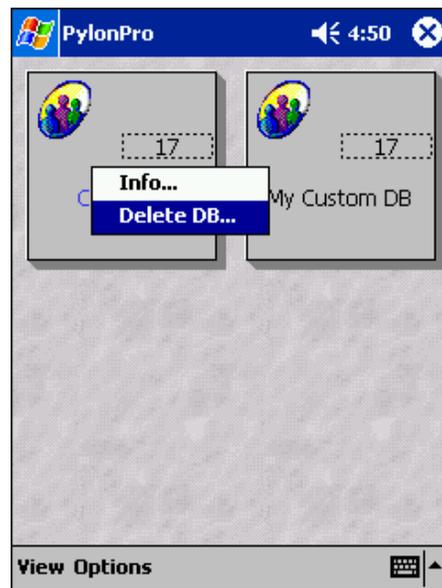
Databases deleted on the device will not be deleted from the desktop.

To delete a database from your Pocket PC OS device:

1. In Workspace View on your device, tap and hold on the database you wish to delete.

A popup menu appears.

**Figure 8-8**  
Delete database  
popup on a Pocket  
PC OS device



2. Select **Delete DB...** from the popup menu.
3. Tap **OK** to confirm deletion.

The database is removed from your device.

---

---

**Note**

To retrieve deleted databases on your device, set the sync action of the filter associated with the deleted database to Desktop overwrites Handheld. For instructions, see “Setting sync action” (page 141).

# CHAPTER 9. Working with custom databases on a Palm OS device

---

---

- “Overview” (page 160)
- “Installing custom databases on a Palm OS device” (page 161)
- “Navigating custom databases on a Palm OS Device” (page 162)
- “Making changes to custom databases on a Palm OS device” (page 169)

## Overview

Pylon Pro is a flexible database engine that takes on the look and feel of the custom Lotus Notes databases with which it is synchronized. Each custom database on your device represents only one View from the Lotus Notes custom database to which you are syncing. To sync multiple Views from the same database, you create a separate filter for each View, which then appears as a separate database on your Palm OS device. For information on configuring Pylon Pro to sync custom databases, see CHAPTER 7., “Syncing custom databases”

It is beyond the scope of this guide to describe exactly what your Pylon Pro application will look like on the device. That will depend on how you design your custom databases to look.

For information about creating custom Lotus Notes databases that are optimized for viewing on a Palm device, see “Creating device-friendly Notes databases” (page 201).

For information about creating databases that take advantage of the Pylon Pro Lookup feature, see “Implementing on-device database lookups” (page 209).

## Installing custom databases on a Palm OS device

Custom databases are installed on your Palm OS device when, after configuring a Pylon Pro conduit, you perform a Desktop overwrites Handheld sync operation. Configuring a conduit consists of the following steps:

- Creating a filter that maps to a custom database. For instructions, see “Creating a Pylon Pro filter to sync a custom database” (page 135)
- Selecting the filter in your configuration document. For instructions, see “Selecting a Pylon Pro sync filter” (page 140)
- Setting the sync Action. For instructions, see “Setting sync action” (page 141)

---

---

**Note**

Set the sync Action to “Desktop overwrites Handheld” for the initial sync of each custom database.

- Syncing your device.

During this initial sync, the custom databases which are mapped in selected filters are installed on the device.

---

---

**Note**

Set the sync Action to “Synchronize the files” for two-way communication in subsequent syncs between your desktop computer and your Palm OS device.

For more information about configuring conduits in the Pylon Configuration database, see “Syncing custom databases” (page 133).

## Navigating custom databases on a Palm OS Device

Custom databases appear on your device after you configure the conduit and perform a Desktop overwrites Handheld sync. For instructions, see “Installing custom databases on a Palm OS device” (page 161).

### Opening Pylon Pro on a Palm OS device

1. Tap the **Applications** silk screen button.

The Applications screen appears.

**Figure9-1**  
Pylon Pro icon on  
Palm OS  
applications screen



2. Tap the **Pylon Pro** icon.

The Pylon Pro Workspace appears.

**Figure9-2**  
Pylon Pro  
Workspace on a  
Palm OS device



## Navigating custom databases in the Pylon Pro Workspace

By default, the Pylon Pro Workspace is the initial screen that appears when you run the Pylon Pro application for the first time.

### Note

If no databases are loaded, then a No custom databases installed message displays in the Workspace. For instructions on how to install custom databases on your Palm OS device, see “Installing custom databases on a Palm OS device” (page 161)

The Pylon Pro Workspace on a Palm OS device displays the following information:

- **Notes icon:** The icon from the Lotus Notes database design is translated to an icon in the Pylon Pro Workspace. The familiar image makes it easy to quickly identify which database you want to work with.
- **Notes database title:** The title of the Lotus Notes database is displayed at the bottom of the box. If the name is too long to fit in the box, it is truncated, and an three dots (...) are appended to the string.
- **Number of records:** The number of records currently in the database is displayed at the top right corner of the box.

### Note

This is different from Lotus Notes Workspace, which displays the number of unread documents on an icon.

Here is an example of how your Pylon Pro Workspace might look:

Figure 9-3  
Sample Pylon Pro  
Workspace



By tapping the **Additional Features** drop-down arrow associated with a database, you can:

- Display an Information dialog box containing information about the database, including:
  - the full **Title** of the Lotus Notes database.
  - the Lotus Notes **User name** and **Pylon Pro license number** at the time of synchronization. This information is updated every time the Palm device database design is updated with a Desktop overwrites Handheld sync action.
  - the number of **Bytes** used up by the database design and data.
  - Delete the selected database from the Palm device memory.

**Note**

This feature does not allow for archiving of data. Selecting this feature will delete the database and all data associated with it.

- Find out Pylon Pro product version information.

## Navigating custom databases in List View

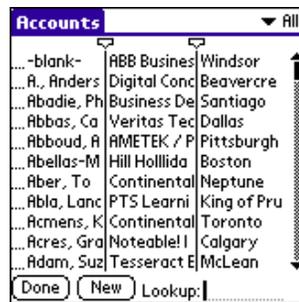
List View displays all of the individual records associated with a custom database on your Palm OS device.

To open a custom database in List View:

1. In the Pylon Pro Workspace, tap an individual database.

The database opens in List View, with all individual database records listed.

**Figure 9-4**  
Sample Database in  
Pylon Pro List View

**Note**

The title in the upper left corner of the List View screen is the name of the Lotus Notes View selected when this database was created. The default View (\$All) is represented by the name All Documents.

2. Tap **Done** to return to the Pylon Pro Workspace, or tap an individual record to open it and view all associated form fields.

### *Changing column attributes*

The default column layout in the List View corresponds directly to the design of the Lotus Notes database View upon which it is based. The default layout defines how many columns are to be displayed (between 1 and 4) and which field will appear in which column.

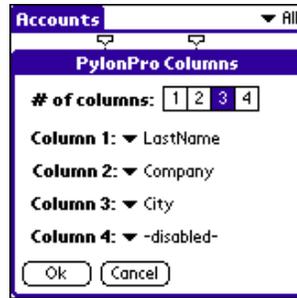
Pylon Pro allows you to override the design defaults and manually select the number of columns displayed as well as which field maps to which column.

To change column attributes:

1. From the List View of a database, tap the **Menu** silk screen button.
2. Tap **Options|Columns**.

The Pylon Pro Columns dialog box appears.

**Figure 9-5**  
Pylon Pro Columns  
dialog box



3. Tap the **# of columns** you wish to view. Choosing less than 4 columns will disable unused column field selectors.
4. Tap **Column 1**, **Column 2**, **Column 3**, and **Column 4** as necessary to reassign the field mapping for that column, choosing new field mappings from the pop-up list.
5. Tap **OK** to effect the changes and return to the List View.

#### Note

If a new field is chosen for Column 1, then after tapping the **OK** button, the record items will be sorted based on the new field. The sorting may take a few seconds. A **Sorting...** dialog box will appear for the duration of the sort.

#### *Resizing columns*

The default layout of a database in the Pylon Pro List View corresponds directly to the design of the Lotus Notes database View that it is based upon. The default layout defines how wide each column should be in relation to other columns. You can resize columns while working in Pylon Pro on a Palm device.

To resize columns in the List View of a database, tap and drag the column indicator control to the desired position.

#### *Restoring column defaults*

Restoring column defaults restores all column attributes to the default attributes assigned when the database was created.

To restore column defaults:

1. From the List View of a database, tap the **Menu** silk screen button.
2. Tap **Options|Restore Defaults**.

### *Using Categories*

Categories help to organize individual items into groups of items. Each record item in a database belongs to a category. Access this folder-like mechanism through the Categories pop-up list at the upper right-hand corner of the List View screen.

To use Categories:

1. From the List View of a database, tap the down arrow in the upper right-hand corner of the screen.

The Categories pop-up list appears.

2. Select a category:
  - **All** indicates that all record items should be displayed.
  - **Unfiled** is a fixed category name that is always valid.
  - **Edit Categories** brings up a dialog box that allows you to add, delete, or rename category names.
  - Based on how the database was set up, the pop-up list can contain other categories.

The list of database records in the List View will reorganize according to the category chosen.

### **Navigating the Pylon Pro Read View**

To view all of the information in a database record, open the record in the Pylon Pro Read View.

To access the Pylon Pro Read View:

1. From the List View of a database, there are several ways to find the record item you need:
  - Use your stylus to scroll the record list until the item you want to see is visible.
  - Enter text in the Lookup field if the first column is a text string.
  - Tap the Up and Down buttons located between the Address button and the To Do List button.

2. Tap the item.

The item appears in the Read View.

**Figure 9-6**  
Sample Database  
Record item in Read  
View

Account		Unfiled
Name:	Philip Atkins	
Email:	philip@somethingorother.Net or Com	
Last, First:	Atkins, Philip	
Company:	AutoGas	
Address:	1202 Estates Dr., Suite D	
City:	Abilene	
State:	TX	
Zip:	79602	
Country:	Greenland	
<input type="button" value="Done"/> <input type="button" value="Edit"/> <input type="button" value="New"/>		

The tile shown in the upper left corner of the screen is the name of the Lotus Notes form that was selected for this database in the Pylon Pro conduit Configuration form.

The category name assigned to this record is displayed at the upper right corner of the screen.

All record data, other than Note and Image, is displayed as label and data fields. If the data takes up more than one line, scroll to see the rest.

The presence of an Image field is indicated with the <IMAGE> string without a label.

The contents of the Note field (if any) are displayed last without a label.

## Navigating the Pylon Pro Edit View

The Edit View is a scrollable Pylon Pro screen that displays the contents of the currently selected record item. All editable fields can be modified on this screen.

The title of the window at the upper left corner of the screen is also the name of the Lotus Notes form that was selected for this database in the Pylon Pro Conduit configuration form.

All record data other than Note and Image is displayed as label and data pairs. If the data takes up more than a line, it is displayed in its entirety and can be accessed by scrolling.

To access the Pylon Pro Edit View:

1. From the Read View of a database record, tap **Edit**.

The Edit View screen appears.

### Viewing Built-in help for a field

1. From the Edit View of a database record, tap a field to highlight it.  
The Help description of the current field is displayed in the Help banner at the bottom of the Edit View screen.

**Figure 9-7**  
Viewing help for the  
User List field



2. If the Help description is too large for the banner, tap on the **Help** banner.  
A Tips dialog box appears with the full help description.

**Figure 9-8**  
Full help in the Tips  
dialog box



## Making changes to custom databases on a Palm OS device

- “Creating a new record” (page 169)
- “Deleting a record” (page 169)
- “Editing a record” (page 170)
- “Working with notes” (page 170)
- “Working with images” (page 171)
- “Editing record fields” (page 172)
- “Setting global preferences” (page 174)

### Creating a new record

1. From the List View of a database, tap **New**.  
A blank record form appears.
2. Fill out the form.
3. Tap **Done**.

### Deleting a record

1. From the List View of a database, tap the dotted line next to the item you wish to delete.  
A check appears on the line.
2. Tap the **Menu** silk screen button.
3. Tap **Record**.
4. Tap **Delete Items**.  
The Delete Item dialog box appears

Figure9-9  
Delete Item dialog  
box



5. Select **Save archive copy on PC** if you want the item deleted from the Palm device to remain in the Lotus Notes database on the computer.
6. Tap **OK**.

## Editing a record

1. From the Read View of a database record, tap **Edit**.

The item appears in the Edit View.

2. Make changes to the database record.
3. Tap **Done**.

## Working with notes

The Note View is a text-only field attached to the current record item. It is like any other text field, but with a larger size limit.

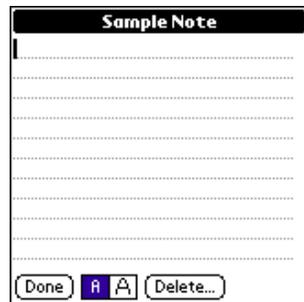
### *Attaching and editing a note*

If you wish to attach a Note to a record or to edit a Note that is already attached, do the following:

1. From the Edit View of a database record, tap **Note**.

The Note View screen appears.

Figure9-10  
Pylon Pro Note View



The Edit Note screen appears.

2. Edit the Note View screen using Graffiti, the virtual Keyboard, and the Editing functions accessible from the Menu silk screen button.
3. When you are done, tap **Done**.

### *Deleting a note*

1. From the Read View of a database record, tap the **Menu** silk screen button.
2. Tap **Record|Delete Note**.
3. Tap **Yes** when prompted.

## Working with images

The Image View is a special bitmap field attached individual records. It can be used to store one bitmap in any given Pylon Pro custom database record.

### *Adding or editing an image*

1. From the Edit View of a database record, tap **Image**.

The Image View screen appears.

2. Edit the Image View screen using your stylus as a pen anywhere on the screen. By default, the Image View provides a black shade paintbrush of medium size.
3. Tap the **Menu** silk screen button and select **Image**, **Tool**, and **Shading** options.

**Figure9-11**  
Sample signature in  
Pylon Pro Image  
View



4. Tap **Done** to save your changes and return to the Edit View screen.

or

To exit without saving your changes, tap the **Menu** silkscreen button, then tap **Image|Cancel**.

### *Deleting an Image*

1. From the Read View of a database record, tap the **Menu** silk screen button.
2. Tap **Record|Delete Image...**
3. Tap **Yes** when prompted.

## Editing record fields

### *Editing text fields*

Edit text fields using Graffiti, the virtual Keyboard, and the Editing functions accessible from the Menu silk screen button.

To edit text fields:

1. From the Edit View of a database record, place the Graffiti focus in the text field you wish to edit.
2. Tap the **Menu** silk screen button.
3. Tap **Edit**.

The Edit functions include:

- **Undo**: To undo the last editing operation
- **Cut**: To delete the highlighted portion of the current text field and store it in the clipboard
- **Copy**: To copy the highlighted portion of the current text field into the clipboard.
- **Paste**: To insert the contents of the clipboard at the current focus cursor position.
- **Select all**: To highlight the entire text field.
- **Keyboard**: To display a virtual keyboard that you can use to tap out keystrokes.

### *Editing date fields*

From the Edit View of a database record, tap on a date data field to display a list of choices:

- **Today**: To insert today's date into the field.
- **Tomorrow**: To insert tomorrow's date into the field.
- **One week later**: To insert the date one week from today.
- **No Date**: to clear this field of any date.
- **Choose Date...**: To display a date selection dialog. Choose any date between January 1, 1904 and December 31, 2031.

### *Editing time fields*

From the Edit View of a database record, tap on a time data field to display a list of choices:

- **Current Time**: To insert the current time into this field.
- **No Time**: To clear this field of any time.
- **Choose Time...**: To display a time selection dialog box. Select the time for the **Start Time** field.

---

---

Note

Ignore the **End Time** field. It is not used.

***Editing information in a pop-up list***

1. From the Edit View of a database record, tap on a pop-up list to display a list of choices.
2. Tap on the desired selection.
3. To clear the field, tap **No selection**.

***Editing checkbox fields***

1. From the Edit View of a database record, tap on a checkbox field to display a list of choices.
2. Select or deselect the checkbox.

***Editing lookup fields***

Lookups are similar to pop-up lists, with one key difference: the choices are not hardcoded. Instead, they exist in a database residing on the Palm device. For more information about lookups, see APPENDIX E., "Implementing on-device database lookups," starting on page 209.

To edit a lookup field:

1. From the Edit View of a database record, tap on a lookup control to display a list of choices.
2. Tap on the desired selection.

***Assigning the record to a category***

Categories help to organize individual items into groups of items. Each record item in a database belongs to a Category.

To assign the record to a Category:

1. From the Edit View of a database record, tap the **Menu** silk screen button.
2. Tap **Options|Properties**.

The Pylon Pro Entry Details dialog box appears.

**Figure9-12**  
Pylon Pro Entry  
Details dialog box



3. Select a Category from the **Category** drop-down list.
4. Click **OK**.

### *Marking the record private*

If the Palm device Security application is configured to hide Private Records, enable this feature if you want to mark the record Private.

1. From the Edit View of a database record, tap the **Menu** silk screen button.
2. Tap **Options|Properties**.  
The Pylon Pro Entry Details dialog box appears.
3. Select **Private**, then tap **OK**.

### Setting global preferences

Set the global preferences in the Preferences dialog box.

To access the Preferences dialog box:

1. From the Pylon Pro Workspace, tap the **Menu** silk screen button.  
The Options menu appears.
2. Tap **Preferences**.  
The Preference dialog box appears.

**Figure 9-13**  
Pylon Pro  
Preferences dialog  
box



In the Pylon Pro Preferences dialog box, you can:

- Select/deselect **Sort recent dates first**. Selecting this options means that sorting a database by date will show the most recent dates first. This option is selected by default. After changing this option, perform another HotSync operation to effect your selection.
- Select/deselect **Remember last database**. Selecting this option means that when you run Pylon Pro on a Palm device, the first screen displays the List View of the most recently used database. By default, this option is deselected, which means that when you run Pylon Pro on a Palm device, the first screen displays the Pylon Pro Workspace.

## Using the Palm Find function with Pylon Pro

You can use the Palm device Find function to search for any text string in a Pylon Pro database.

To use the Palm Find function:

1. From the Pylon Pro Workspace, tap the **Find** silk screen button.

The Find dialog box appears.

2. Enter a partial or full text string.
3. Click **OK**.

A Find screen appears with all matches found.

4. Tap on any record item to open that record.

## Deleting a database

You can delete databases from the Pylon Pro Workspace View on your Palm OS device.

---

---

### Note

Databases deleted on the device will not be deleted from the desktop.

To delete a database from your Palm OS device:

1. In Workspace View on your device, tap the **Additional Features** drop-down arrow associated with a database.
2. Select **Delete DB...** from the drop-down menu.
3. Tap **OK** to confirm deletion.

The database is removed from your device.

---

---

### Note

To retrieve deleted databases on your device, set the sync action of the filter associated with the deleted database to **Desktop overwrites Handheld**. For instructions, see “Setting sync action” (page 141).



# Appendices

“Troubleshooting” (page 179)

“Setting up Pylon for multiple users” (page 191)

“Syncing from multiple desktop computers (Palm OS only)” (page 197)

“Creating device-friendly Notes databases”  
(page 201)

“Implementing on-device database lookups”  
(page 209)



# APPENDIX A. Troubleshooting

---

- “Troubleshooting: Installing” (page 180)
- “Troubleshooting: Upgrading” (page 181)
- “Troubleshooting: Using the Pylon Log database” (page 182)
- “Troubleshooting: Syncing” (page 184)
- “Troubleshooting: Accessing Pylon Configuration document” (page 189)
- “Troubleshooting: Using Pylon with M-Business Anywhere client” (page 190)

## Troubleshooting: Installing

**Table A-1**  
Problems with  
installation

Problem	Possible cause/steps to take
<p>During installation, you see the error message: “You have entered an access key that is invalid. Please check that you have entered your access key correctly.”</p>	<p>The access key that you entered during installation did not exactly match the access key provided by iAnywhere. In either case, do the following:</p> <ol style="list-style-type: none"> <li>1. Check your information.</li> <li>2. Enter your access key exactly as you received it, using the same case and including dashes.</li> </ol> <p>If you encounter the error message again, see “Technical support” (page 22) for instructions on how to get assistance.</p>
<p>During installation, you see the Close Down Lotus Notes dialog box. You click Yes but the installer does nothing.</p>	<p>If you have forgotten to close Lotus Notes, you will see the Close Down Lotus Notes dialog box instead of the Welcome panel. To move past this dialog box, do the following:</p> <ol style="list-style-type: none"> <li>1. Close Lotus Notes. (In Lotus Notes, click <b>File Exit Notes</b>).</li> <li>2. Return to the installer and click <b>Yes</b> in the dialog box.</li> </ol> <p>The installer will not close down Lotus Notes for you.</p>
<p>During installation on Windows XP or Windows 2003, you see the error message: “Error loading Lotus Notes library.”</p>	<p>There is a DLL conflict between the <i>js32.dll</i> file that Lotus Notes has installed and a version of <i>js32.dll</i> installed by another application in the <i>C:\WINDOWS\system32</i> directory. Contact your company’s tech support service and ask them to:</p> <ol style="list-style-type: none"> <li>1. Determine the application(s) that are using the <i>js32.dll</i> file from the <i>C:\WINDOWS\system32</i> directory.</li> <li>2. Move a copy of the <i>C:\WINDOWS\system32\js32.dll</i> file to the startup directory of each application that is using it.</li> <li>3. Delete the <i>C:\WINDOWS\system32\js32.dll</i> file.</li> </ol> <p><b>Note:</b> If, after this DLL conflict has been resolved, some other application is installed and places another <i>js32.dll</i> file in the <i>C:\WINDOWS\system32</i> directory, this issue will reappear. See entry under “Other problems with syncing” (page 186).</p>

## Troubleshooting: Upgrading

**Table A-2**  
Problems with upgrading

Problem	Possible cause/steps to take
<p>Your previous configuration settings do not appear when you access Pylon.</p>	<p>If you are using a previous version of Pylon, you need to record manually any configuration settings from your Pylon Configuration Database (<i>pyloncfg.nsf</i>) that you want to save.</p> <p>When you install the current version of Pylon, your old configuration database (typically found at C:\Lotus\Notes\Data or C:\Lotus\Domino\Data) is renamed to include a date and time extension, for example, <i>pyloncfg.nsf.11-19-2001-171857</i>.</p> <p>You cannot reuse the renamed configuration database with the current version of Pylon. However, to access the database to review a previous configuration setting, do the following:</p> <ol style="list-style-type: none"> <li>1. Delete the date and time extension.</li> <li>2. Rename the file to something other than <i>pyloncfg.nsf</i>, for example, <i>old.nsf</i>.</li> <li>3. Double-click the file to open the database in Lotus Notes.</li> <li>4. Record your configuration settings to duplicate them in the current version.</li> </ol>

## Troubleshooting: Using the Pylon Log database

### Viewing log messages

By default, Pylon writes all error messages and important status information for each sync to the Pylon Log database.

To view messages in the Pylon Log database:

1. Open the Pylon Log database in Lotus Notes.  
In Lotus Notes, choose **File|Database|Open**, in the **Database** list select **Pylon Log**, then click **Open**.
2. Select the Usage view that seems best to view the messages.
  - **By Date** lists the messages in the order in which they were logged.
  - **By Notes Database** lists the messages sorted by the Notes database involved.
  - **By Palm/Pocket PC Database** lists the messages sorted by the device database involved.
  - **By User** lists the messages sorted by the user involved (same result as By Date, if you have only one user).
3. Look for messages related to the problem you are troubleshooting:
  - Messages indicating an error (look at these first, then check nearby status messages)
  - Logged at the approximate time of the sync in which the problem occurred
  - Involving the related Notes or device database
4. To determine corrective actions, look up error messages in the tables under “Troubleshooting: Syncing” (page 184).

### Changing the Log Level

For most troubleshooting purposes, the default level of information logged should be adequate to allow you to troubleshoot problems that arise. If you want Pylon to log more detailed information, you can temporarily set the Log Level higher.

To set the Pylon Log Level:

1. Open the Pylon Configuration document.  
See “Opening your Pylon Configuration document” (page 61) for instructions.
2. Make sure the **Advanced Options** checkbox is selected.  
Advanced Options must be checked in order to display the Log Level field.

3. In the Log Level list, select the number for the level of logging you want Pylon to perform:
  - **0** - none
  - **1** - errors and important status information (the default level)
  - **2** - level 1 plus warnings
  - **3** - level 2 plus debugging information
  - **4** - level 3 plus detailed informational messages
4. Click **Save**, or **Save and Close**, to save the new Log Level setting.

---

---

**Caution**

You should change the Log Level setting back to the default level of 1 after you have finished troubleshooting a particular problem. At higher levels, the log file grows rapidly and Pylon's performance may be affected.

## Troubleshooting: Syncing

A key source of information that you can use to troubleshoot syncing problems is your on-device sync log. This location of this file is:

- Pocket PC OS device:  
*C:\Program Files\lotus\notes\data\pylon\<device name>\pylon*
- Palm OS device:  
*...<vendor name>\<username>\Pylon\pylon*

### Problems with first sync

**Table A-3**  
Problems with your  
first sync

Problem	Possible cause/steps to take
<p>Your first sync is unsuccessful. The Pylon Sync Log shows the error: Pylon has an invalid license</p>	<p>Your license key is issued based on your Lotus Notes user name. If you receive this error during your first sync after installation, it usually means that the user name you gave iAnywhere does not match your actual Lotus Notes user name.</p> <p>If you receive this error, do the following:</p> <ol style="list-style-type: none"> <li>1. Open Lotus Notes</li> <li>2. Confirm your Lotus Notes user name by clicking <b>File Tools User ID Name</b>.</li> <li>3. See “Technical support” (page 22) for instructions on how to get assistance with this problem.</li> </ol> <p>iAnywhere will issue you a new license key.</p>

Problem	Possible cause/steps to take
<p>Your first sync is unsuccessful. When you access your Pylon configuration document in Lotus Notes, the correct User Name and License number are there.</p>	<p>Pylon Conduit and Pylon Pro for Palm and Pocket PC creates your configuration document using your ActiveSync partnership name. Your ActiveSync partnership name should be listed in the Mobile Device field of your configuration document.</p> <p>To confirm these two names match, do the following:</p> <ol style="list-style-type: none"> <li>1. Open Activesync.</li> <li>2. Confirm your ActiveSync partnership name.</li> <li>3. Open Lotus Notes.</li> <li>4. Open your Pylon configuration document by clicking <b>File Database Open</b>, then selecting <b>Pylon Configuration</b>.</li> <li>5. Under <b>Name</b>, you should see your ActiveSync partnership name listed.</li> <li>6. If another name is listed, click <b>Edit Configuration</b>.</li> <li>7. Edit the <b>Mobile Device</b> name to exactly match your ActiveSync partnership name. <b>Note:</b> ActiveSync partnership names are case sensitive and cannot contain spaces.</li> <li>8. Click <b>Save and Close</b>.</li> <li>9. Perform another sync.</li> </ol>

## Other problems with syncing

**Table A-4**  
Other problems with syncing

Problem	Possible cause/steps to take
<p>Your sync is unsuccessful. The Pylon Sync Log shows the error: Pylon has an invalid license</p>	<p>If you receive this error message unexpectedly (because you had been syncing fine up until this point), it may indicate one of three things:</p> <ul style="list-style-type: none"> <li>■ Your Lotus Notes user name has changed.</li> <li>■ Your Pylon license number was accidentally modified in your Pylon Configuration database.</li> <li>■ Your evaluation license has expired.</li> </ul> <p>If you receive this error and it is not due to an expired license, do the following:</p> <ol style="list-style-type: none"> <li>1. Open Lotus Notes.</li> <li>2. Confirm your Lotus Notes user name by clicking <b>File Tools User ID Name</b>.</li> <li>3. If your Lotus Notes user name is different from the user name you gave iAnywhere, see “Technical support” (page 22) for instructions on how to get assistance with this problem. iAnywhere will issue you a new license key.</li> <li>4. If your Lotus Notes user name matches the user name you gave iAnywhere, check to make sure the license number in your Pylon Configuration database matches the license number you were issued by iAnywhere. To open your configuration database in Lotus Notes, click <b>File Database Open Pylon Configuration</b>. Re-enter your license number, save and close the database, and try syncing again.</li> </ol>
<p>Your sync is unsuccessful. The Pylon Sync Log shows the error: Server not responding</p>	<p>If your Lotus Notes mail file is on a server, the server may be down. In this case, contact your system administrator to determine the status of the server.</p>

Problem	Possible cause/steps to take
<p>Every time you sync, you are prompted to enter your Lotus Notes user password.</p>	<p>This problem can be solved by changing a setting in Lotus Notes:</p> <ol style="list-style-type: none"> <li>1. Open Lotus Notes.</li> <li>2. Click <b>File Tools User ID</b>.</li> <li>3. Enter your Lotus Notes password when prompted.</li> <li>4. Check the box beside <b>Don't prompt for a password from other Notes-based programs (Share these user ID password with these Notes add-ins)</b>.</li> <li>5. Click <b>OK</b>.</li> </ol> <p>You will no longer be prompted for your password during syncs.</p>
<p>Your sync is unsuccessful, but you are not seeing an error message.</p>	<p>Check ActiveSync to make sure the option to sync Pylon is enabled.</p> <ol style="list-style-type: none"> <li>1. On your desktop computer, open ActiveSync.</li> <li>2. Click the <b>Options</b> button.</li> <li>3. The Options dialog box appears.</li> <li>4. Make sure the box beside <b>Pylon</b> is checked.</li> <li>5. Click <b>OK</b>.</li> <li>6. Initiate a sync.</li> </ol> <p>When ActiveSync has completed the sync, you will see confirmation that Pylon successfully synced.</p>
<p>Your first sync returns a "resolve Items" message ActiveSync. Your second sync appears to work, but no Calendar or To Do items appear on the device.</p>	<p>If your Calendar or To Do database contains a record with a foreign character, it may cause problems in the first sync. To solve this problem, either remove foreign characters from your Calendar and To Do items, or sync again as follows:</p> <ol style="list-style-type: none"> <li>1. In your Pylon Configuration document, set the sync action for your Calendar and To Do conduits to Desktop overwrites Handheld. <b>Note:</b> A Desktop overwrites Handheld sync will remove all items previously stored on the device.</li> <li>2. Sync your device.</li> <li>3. Set the sync action back to "Synchronize the files" for two way syncing in future sync operations.</li> </ol>

Problem	Possible cause/steps to take
<p>You have been syncing successfully with Windows XP or Windows 2003 on your desktop, then after installing a new application your attempt to sync hangs with:</p> <ul style="list-style-type: none"><li>■ <i>Pocket PC OS</i> - error message, "Trying to connect to Lotus Notes (# sec) ...," where # is counting the seconds that are passing without successfully connecting.</li><li>■ <i>Palm OS</i> - "Syncing to Lotus Notes" dialog box displaying "Read User Info."</li></ul>	<p>There is a DLL conflict between the <i>js32.dll</i> file that Lotus Notes installed and a version of <i>js32.dll</i> that was installed by the new application in the <i>C:\WINDOWS\system32</i> directory. Contact your company's tech support service and ask them to:</p> <ol style="list-style-type: none"><li>1. Determine the application(s) that are using the <i>js32.dll</i> file from the <i>C:\WINDOWS\system32</i> directory.</li><li>2. Move a copy of the <i>C:\WINDOWS\system32\js32.dll</i> file to the startup directory of each application that is using it.</li><li>3. Delete the <i>C:\WINDOWS\system32\js32.dll</i> file.</li></ol>

## Troubleshooting: Accessing Pylon Configuration document

**Table A-5**  
Problems accessing  
your configuration  
document

Problem	Possible cause/steps to take
<p>When attempting to open your configuration document in Pylon, you encounter an Execution Security Alert dialog box.</p>	<p>The Execution Security List is part of the Domino Security model, and cannot be bypassed without user intervention. The Execution Security Alert dialog box is alerting you that you are about to perform an operation using an object signed by a person or organization that Lotus Notes does not trust, or with an organization that does not have cross certification with your Domino Domain.</p> <p>To solve this problem, click <b>Trust Signer</b> when you encounter the dialog box. You should only have to do this once.</p> <p><b>Note:</b> For more information about the Execution Security List or the Domino Security model, see your Lotus Notes documentation.</p>
<p>When attempting to open your configuration document in Pylon, you encounter a Create Cross Certificate dialog box.</p>	<p>The Create Cross Certificate dialog box is alerting you that you are about to perform an operation with a person or organization that Lotus Notes does not trust, or with an organization that does not have cross certification with your Domino Domain.</p> <p>To solve this problem, click <b>Yes</b> when you encounter the dialog box. You should only have to do this once.</p> <p><b>Note:</b> For more information about the Execution Security List or the Domino Security model, see your Lotus Notes documentation.</p>

## Troubleshooting: Using Pylon with M-Business Anywhere client

**Table A-6**  
Problems using  
Pylon with  
M-Business  
Anywhere client

Problem	Possible cause/steps to take
<p>You install Pylon and M-Business Anywhere client one after another, but Pylon does not seem to be installed on the device.</p>	<p>These two products work together, but you must install one, perform a sync, then install the other. If you do not sync in between, Pylon Conduit will not install correctly.</p> <p>To solve this problem, with M-Business Anywhere client installed:</p> <ol style="list-style-type: none"> <li>1. Uninstall Pylon from the desktop and the device. See “Uninstalling Pylon” (page 52).</li> <li>2. Sync your device.</li> <li>3. Reinstall Pylon. See “Installing Pylon” (page 39).</li> </ol>
<p>You sync wirelessly, but performing a Modem Sync in M-Business Anywhere client does not sync your Lotus Notes applications.</p>	<p>If you are syncing wirelessly, you can perform a Modem Sync to sync your M-Business Anywhere client channels, but you also will have to perform a sync using ActiveSync in order to sync Pylon and your Lotus Notes PIM applications.</p>

## APPENDIX B. **Setting up Pylon for multiple users**

---

---

- “Setting up Pylon for multiple Pocket PC OS users” (page 192)
- “Setting up Pylon for multiple Palm OS users” (page 194)

## Setting up Pylon for multiple Pocket PC OS users

With Pylon Conduit and Pylon Pro from iAnywhere Solutions, multiple Pocket PC OS device users can access Lotus Notes PIM and, with Pylon Pro only, custom database information from the same desktop computer.

### Requirements

Pylon supports syncing multiple Pocket PC OS devices to the same desktop computer under the following conditions:

- Devices running Pocket PC OS version 3.0.11171 (Build 11178) can only be used on the same desktop as other devices running Pocket PC OS version 3.0.11171 (Build 11178). Syncing devices running other versions of Pocket PC OS 3.0 from the same desktop with devices running Pocket PC OS version 3.0.11171 (Build 11178) is not supported and may cause synchronization errors.
- Users must be registered users and have a valid Pylon license number or a valid corporate license number.

### Setup Instructions

Follow these instructions to set up Pylon for each additional Pocket PC OS device user.

---

---

**Note**

These instructions assume that Pylon already is installed on the desktop computer and on the Pocket PC OS device used during installation. You only need to install Pylon once. If Pylon is not yet installed on the desktop, see “Installing” (page 35) for instructions.

1. Place the additional Pocket PC OS device in the cradle, and establish a partnership with Microsoft ActiveSync.
2. Sync the device.

---

---

**Note**

During the initial sync of an additional Pocket PC OS device, you may get an ActiveSync popup with the title “Combine or Replace.” Select the option to “Combine the items on my device with the items on this computer,” then click **OK**.

3. Open the Pylon Configuration database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
4. Click **Create Configuration** and create a configuration document for the additional user, using the individual ActiveSync partnership name and either the individual Pylon license number or a corporate Pylon license number.
5. Click **Save and Close** to save your changes and exit the new configuration document.
6. Click **Filters** in the navigation pane.

7. Create custom filters for each PIM application or custom database that the additional user will synchronize. In order to avoid confusion when working with multiple users and multiple filters, it is a good idea to give the filters names that identify the user and the filter's purpose, such as MMiller - Inbox, MLongust - Inbox.

For information about creating new filters for each application, see the individual chapters in "Syncing Lotus Notes PIM applications" (page 55) and "Syncing custom databases (Pylon Pro only)" (page 131).

8. When you have finished creating new filters for the additional user, click **Configurations** in the navigation pane.
9. Select the additional user's configuration in the view pane, then click **Edit Configuration**.
10. In the configuration document, select the new filters you created for each PIM application and Pylon Pro custom database.
11. Set the sync action for each filter, then click **Save and Close**.
12. With the additional user's Pocket PC OS device in the cradle, open ActiveSync on the desktop.
13. Click **Tools|Add/Remove Programs**.
14. Check the boxes for **Pylon** and (if applicable) **Pylon Pro**, then click **OK** to install Pylon to the device.
15. Remove the device from the cradle, then put it back in the cradle to reconnect.
16. Open ActiveSync on the desktop, then click **Tools|Options**.
17. In the **Sync Options** tab, check the checkbox for Pylon, then click **OK**.
18. Perform a sync to receive Lotus Notes PIM and custom database information on the additional Pocket PC OS device.

## Setting up Pylon for multiple Palm OS users

With Pylon Conduit and Pylon Pro from iAnywhere Solutions, multiple Palm OS device users can access Lotus Notes PIM and, with Pylon Pro only, custom database (Pylon Pro only) information from the same desktop computer.

### Requirements

Pylon supports syncing multiple Palm OS devices to the same desktop computer under the following conditions:

- Each user must be a registered user and have a valid Pylon license number or a valid corporate license number.
- Each additional user must have their own Palm user name set up in Palm Desktop.

### Setup Instructions

Follow these instructions to set up Pylon for each additional Palm OS device user.

---

---

**Note**

These instructions assume that Pylon already is installed on the desktop computer and on the Palm OS device used during installation. You only need to install Pylon once. If Pylon is not yet installed on the desktop, see “Installing” (page 35) for instructions.

1. Open the Pylon Configuration Database. For instructions, see “Accessing Pylon on your desktop computer” (page 60).
2. Click **Create Configuration** and create a configuration document for the additional user, using her Palm user name and either her individual Pylon license number or your corporate Pylon license number.
3. Click **Save and Close** to save your changes and exit the new configuration document.
4. Click **Filters** in the navigation pane.
5. Create custom filters for each PIM application or custom database that the additional user will synchronize. In order to avoid confusion when working with multiple users and multiple filters, it is a good idea to give the filters names that identify the user and the filter’s purpose, such as MMiller - Inbox, MLongust - Inbox.

For information about creating new filters for each application, see the individual chapters in “Syncing Lotus Notes PIM applications” (page 55) and “Syncing custom databases (Pylon Pro only)” (page 131).

6. When you have finished creating new filters for the additional user, click **Configurations** in the navigation pane.

7. Select the additional user's configuration in the view pane, then click **Edit Configuration**.
8. In the configuration document, select the new filters you created for each PIM application and Pylon Pro custom database.
9. Set the sync action for each filter, then click **Save and Close**.
10. Sync the additional Palm OS device to install Pylon and to receive Lotus Notes PIM and custom database information.



APPENDIX C. **Syncing from multiple  
desktop computers  
(Palm OS only)**

---

---

- “About Multi PC Support (Palm OS only)” (page 198)

## About Multi PC Support (Palm OS only)

With Pylon Conduit and Pylon Pro from iAnywhere Solutions for Palm, you can synchronize your Lotus Notes PIM and custom databases from multiple desktop computers. For instance, you can use your Palm OS device to sync from your desktop computer at home to the same Lotus Notes PIM and custom databases that you sync to at work. The Multi PC Support option provides you with even greater flexibility in accessing and updating your Lotus Notes PIM and custom database information.

Setting up to sync with multiple desktop computers consists of three steps:

- Enabling Multi PC Support
- Duplicating your Pylon configuration
- Replicating your Lotus Notes databases

### Enabling Multi PC Support

In order to sync with multiple desktop computers, Multi PC support must be enabled on each desktop computer with which you plan to sync. Multi PC Support is an advanced option that you can enable in your Pylon configuration document.

To enable Multi PC Support:

1. Open the Pylon Configuration Database. For instructions, see “Configuring basic PIM sync settings” (page 57)
2. In the navigation pane, click **Configurations**.
3. Click **Edit Configuration**.
4. Check the checkbox to enable **Advanced Options**.  
Advanced options, including **Multi PC Support**, appear in the top right corner of your configuration document.
5. Check the checkbox to enable **Multi PC Support**.
6. Click **Save and Close** to save your changes and exit the configuration document.

### Copying your Pylon configuration

In order for syncing from multiple desktops to work, Pylon must be configured the same way in each location from which you wish to sync. This means that your Pylon configuration document and the filters that it references for each PIM or custom database conduit need to be duplicated at any additional locations. There are several ways to do this:

- Manually record your settings in the Pylon Configuration Database, then manually recreate them at the additional location.

- Transfer (via email or disk) a copy of the actual Pylon Configuration Database from Lotus Notes at your primary desktop location to Lotus Notes at the additional location.
- Replicate the Pylon Configuration Database (*pyloncfg.nsf*) from a copy on a Lotus Notes server to the additional desktop location. For information about replicating, see “Replicating your Lotus Notes databases and syncing” (page 199)

Note

You cannot use both Pylon and another application (such as Palm Desktop) to sync the same PIM conduit, so be sure that you are using Pylon to sync the same conduits at each location.

## Replicating your Lotus Notes databases and syncing

Replicating your Lotus Notes databases ensures that Pylon can sync without conflict to both copies of a given database.

To replicate a Lotus Notes database:

1. From the additional desktop computer, open a Lotus Notes database you wish to sync from multiple desktop computers.
2. Click **File|Replication|Replicate**.
3. Follow the steps to replicate the database on the server to Lotus Notes on your Local drive.

Note

See Lotus Notes documentation for more information on replicating databases.

4. Sync your Palm device to the replicated databases to receive the most current information from the main (server) databases.



## APPENDIX D. **Creating device-friendly Notes databases**

---

---

- “About SmartDesigner” (page 202)
- “General design guidelines” (page 203)
- “Forms” (page 204)
- “Views” (page 205)
- “Icons” (page 206)
- “Unsupported design objects” (page 207)
- “Synchronization issues” (page 208)

## About SmartDesigner

The heart of the Pylon Pro custom database conduit is SmartDesigner. This technology automatically translates a Lotus Notes database design and data into a Pylon Pro application-compatible format.

Although the SmartDesigner translation is automatic, you also can change the View and Form design of the Lotus Notes database to further control the look and feel of the database when it is viewed in Pylon Pro on the device.

Supported and unsupported design objects are explained in this appendix. Also, a sample database, Pylon Pro Sample Database (*pylonpro.nsf*), is provided with your install to show some of the base features of Pylon Pro.

## General design guidelines

The following are some more general guidelines for creating device-friendly custom databases for use with Pylon Pro.

- Only one View and one Form per Pylon Pro database.
- Each View may contain up to four columns (additional columns will be ignored by SmartDesigner).
- Each Form may contain up to 128 fields (additional fields will be ignored by SmartDesigner).
- Only non-hidden, editable fields will be copied to the Palm device Pylon Pro design.
- Help text is copied to the Palm device and displayed at the bottom of Pylon Pro's Edit View screen.
- Time fields will be converted to Palm device **Time** fields if the format is set to **Show Time**. Otherwise, the field will be a date field.
- Only hard-coded keyword values are supported. Formulas will be ignored.
- Change the Keywords interface to Checkbox to enable checkboxes.

## Forms

Each Pylon Pro database on the Palm device can contain exactly one Form. A Pylon Pro Form design has support for up to 128 fields, including the following field types:

- Text
  - Date
  - Time
  - Numeric
  - Keyword
  - Checkbox
  - Rich-text (converted to text)
  - Images (if in a rich-text field named **body**)
  - Computed fields:
    - Computed text (read only)

A computed field formula that calculates each time a user creates, saves, or refreshes a document.
    - Computed when composed (read only)

A computed-when-composed field formula that calculates only once, when the user first creates the document.
- In order for the fields to be computed during the sync from the device to Lotus Notes, add `$PylonAdvancedFormulas=1` to the *Notes.ini* file. In the Pylon Configuration database, check **Run Compute with Form** to enable the functionality.
- Lookup—for more information, see “Implementing on-device database lookups” (page 209).

---

---

### Note

Formulas are not supported except for in the Lookup field.

## Views

Each Pylon Pro database on a Palm or Pocket PC OS device contains exactly one View. The View can contain up to four columns. For views with more than four columns, only the first four columns will end up in Pylon Pro. Each column must be linked to a field name that resides on the currently mapped form.

Views are customizable on the device and Fields can be reassigned and column widths can be resized as you work. However, changes made to the View on the device are not synced back to Lotus Notes. For more information, see “Navigating custom databases on a Pocket PC OS Device” (page 150) or “Navigating custom databases on a Palm OS Device” (page 162).

In the current release of Pylon Pro, there is no support for formulas. In general, computed fields are ignored by SmartDesigner. However, if a computed column contains exactly one valid Field within a View’s formula, SmartDesigner will extract that Field name and use it in the Pylon Pro database. For example, if the formula is `@UpperCase (Name )`; the `@UpperCase` formula will not be applied, but the column will be populated with a Field called **Name**.

## Icons

Create a custom icon when designing your database. This icon will appear in the Lotus Notes Workspace as well as in Pylon Pro on the device. To do this while in design mode, click **Resources|Icon**.

**FigureD-1**  
Database icon in  
Lotus Notes



**FigureD-2**  
Database icon in  
Pylon Pro on device



## Unsupported design objects

Unsupported design objects will be ignored by SmartDesigner. The following are not supported on the device

- Programming languages, for example, LotusScript, JavaScript, and Java
- Outlines
- Framesets
- Pages
- Folders
- Navigators
- Agents
- Synopsis
- Resources, for example, images, applets, subforms, shared fields, script libraries
- Other resources, for example, Using Database documents, About Database documents, Database Script, and Shared Actions
- Image maps
- Background images and background colors
- Action bar and buttons (Pylon Pro provides its own action buttons)

## Synchronization issues

The automatic design conversions are done during Desktop overwrites Handheld sync transfers. When you update a design in Notes, you must update the Pylon Pro designs on the Palm OS or Pocket PC OS device by initiating a Desktop overwrites Handheld sync.

## APPENDIX E. **Implementing on-device database lookups**

---

---

- “About on-device database lookups” (page 210)
- “Creating a lookup field in a Lotus Notes database” (page 211)
- “Designing a bar code lookup database” (page 213)

## About on-device database lookups

Pylon Pro custom database functionality is extended with the addition of the database lookup feature. The database lookup feature allows one custom database to access both the view and the data of one or more custom databases.

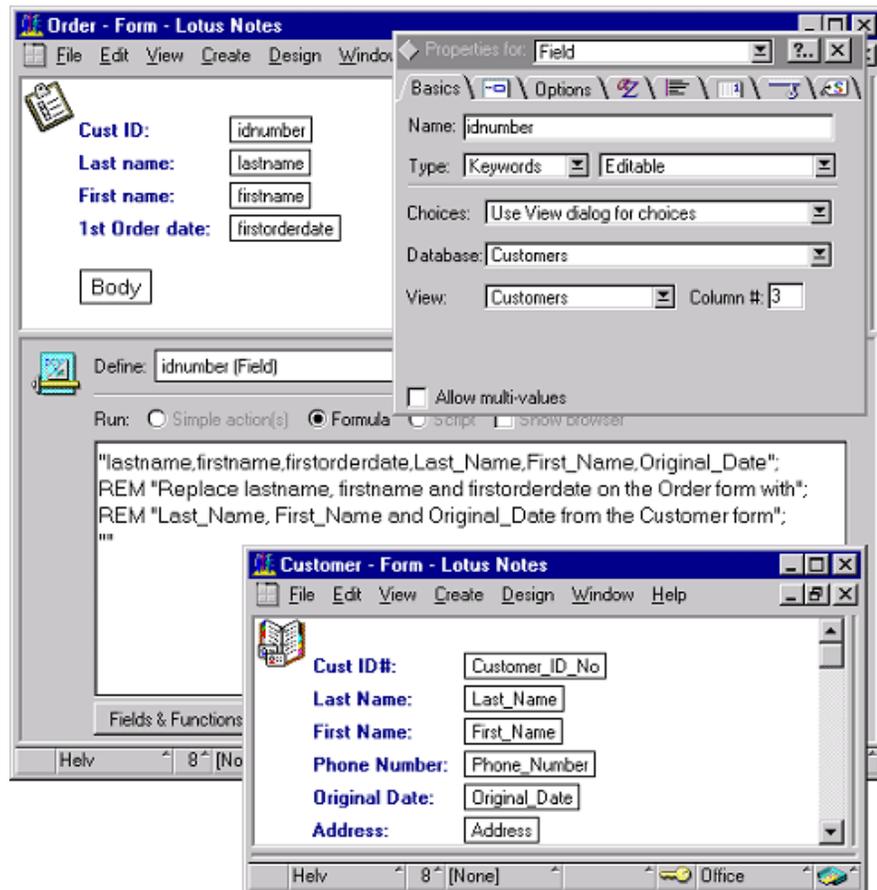
Lookups are an extension to the keyword functionality. The database lookup field allows one database to treat any view in a Pylon Pro database as a user modifiable keyword list.

Another difference between normal keyword fields and lookup fields is the amount of data that can be brought back by a lookup. In a normal keyword field selection, only the keyword field is updated. However, in the case of a lookup field, the lookup operation can update more than just the lookup field; the mechanism supports the ability to update additional fields in the same form.

## Creating a lookup field in a Lotus Notes database

When creating a lookup mapping, there are always two databases involved: the current database and the lookup database. In the example below, “Order” is the current database and “Customer” is the lookup database.

FigureE-1  
Creating a lookup  
field



You can create a lookup field mapping by referencing within a local database form a column within a view of the lookup database. In Pylon Pro, this field is called a lookup field. It is created when you add a specific type of Dialog list field to a Lotus Notes design. In the example above, idnumber is the lookup field.

### Creating a lookup field mapping

To create a lookup field mapping:

1. Create a new field in a form and set the field Type to **Dialog list**.
2. In the Field designer, click the **Control** tab.

3. Set the Choices field in the Control panel to **Use View dialog for choices**.
4. Select a lookup **Database**, a specific lookup **View** within the lookup database, and a **Column #** within the view.

---

---

**Note**

The lookup database does not have to be a separate database; it may actually be a different View within the same database. The lookup View can contain any fields that will be transferred into the current Pylon Pro database, but the first column should contain the field which Pylon Pro will be use for sorting the database.

## Retrieving additional fields

It is possible to retrieve more than just the lookup field in a lookup operation.

The lookup field within the current database references a remote field in a separate lookup database. This remote field must exist in both the view and form of the lookup database. However, any additional fields that you wish to be copied from the lookup database to the current database need only exist in the respective forms.

To return additional fields, you must create a formula and place it in the "Default Value" formula of the lookup field. The formula should contain the field names in the current form, followed by the field names in the lookup form.

For example:

```
"CurrentFld1,CurrentFld2,CurrentFld3,LookupFld1,
    LookupFld2,LookupFld3"; ""
```

or

```
"Selected_Item,itemName"; ""
```

The entire formula should be within quotes and contain each field separated by a comma. After the quotes add a semicolon and another set of quotes for the actual default formula within Notes (or a formula).

## Synchronization issues

Make sure to synchronize both the current database and the lookup database and lookup view specified by the lookup field in the current database. If you are using a lookup view within the same database, then you must synchronize the current database twice, creating one Pylon Pro database using the current form and a regular view and the second Pylon Pro database containing the lookup form and lookup view.

## Designing a bar code lookup database

Pylon Pro has built-in support for the Symbol SPT1500 (or compatible) and its bar code scanning capability. Scanning is enabled from Pylon Pro's List View (other views are not enabled at this time). In this case, the current database form must contain a lookup field (or, if none is present, a text/numeric field).

Keep the following in mind when designing a bar code scanner-ready lookup database:

- The first column in the Pylon Pro lookup database must contain the UPC bar code values listings to enable the scanning feature. This is because the search for a bar code match depends on a pre-sorted lookup database.
- The current database's form may contain more than one lookup field, but only the first of them will be used in the bar code lookup operation.

### Triggering a bar code scan for lookups

From the List View of the current database, trigger a bar code scan that returns a valid UPC number. When the beep is sounded to indicate a UPC value has been found, Pylon Pro will automatically follow the current database lookup field's link to the lookup database and search it for a UPC match.

If a match is found, Pylon Pro will create a new record on the current database.

If no match is found, a Warning dialog box will pop up.

### Triggering a bar code scan for text/numeric values

If the current database contains no lookup fields, then triggering a bar code scan will cause Pylon Pro to open a new record with the first text or numeric field filled in with the UPC code.



# APPENDIX F. Custom field mapping on Palm

---

- “Overview” (page 216)
- “Default field mappings” (page 217)

## Overview

On Palm, Pylon supports custom mapping of fields from Lotus Notes to the Palm application. By default, Pylon maps each Lotus Notes field to the best match available in the corresponding Palm application. Thus you should only implement custom field mappings when:

- You have a really good reason to override the Pylon defaults, and
- You are a Lotus Notes expert.

The rest of this appendix details Pylon's default field mappings.

## Default field mappings

Table F-1 lists the field names from the Lotus Notes applications, with the field names in the corresponding Palm application to which Pylon maps them by default.

Table F-1 Default field mappings on Palm

Notes label*	Notes field name	Palm field name	Comments
<b>Address Book</b>			
Notes Category	Categories	Category	
Last Name	LastName	Last name	
First Name	FirstName	First name	
Title	JobTitle	Title	
Company	CompanyName	Company	
Phone 1	OfficePhoneNumber	Work (1st phone)	Office Phone
Phone 2	PhoneNumber	Home (2nd phone)	Home Phone
Phone 3	OfficeFaxPhoneNumber	Fax (3rd phone)	Office Fax
Phone 4	CellPhoneNumber	Other (4th phone)	Cell Phone
Phone 5	EmailAddress or HomeFaxPhoneNumber	E-mail (5th phone)	Email or Home Fax
Address	StreetAddress	Address	Office may proceed field to indicate busi- ness
City	City	City	Office may proceed field to indicate busi- ness
State	State	State	Office may proceed field to indicate busi- ness
Zip Code	Zip	Zip Code	Office may proceed field to indicate busi- ness
Country	Country	Country	Office may proceed field to indicate busi- ness

Notes label*	Notes field name	Palm field name	Comments
Custom 1		Custom 1	
Custom 2		Custom 2	
Custom 3		Custom 3	
Custom 4		Custom 4	
Note	Body	Note	
<b>Calendar</b>			
Notes Category	Categories	Category	
Start Date	StartDateTime	Start Time	Start Time
End Date	End Date	EndDateTime	End Time
Subject	Subject	Subject	
Note	Body	Note	
<b>Expense</b>			
Notes Category	Categories	Category	
Date			
Type			
Payment			
Currency			
Amount			
Vendor			
City			
Attendees			
Note	Body	Note	
<b>Mail</b>			
Notes Category	Categories	Category	
Date	DeliveredDate or PostedDate	Date	
Subject	Subject	Subj	

Notes label*	Notes field name	Palm field name	Comments
From	From	From	
To	SendTo	To	
cc	CopyTo	CC	
bcc	BlindCopyTo	BCC	
Note	Body	Body	
<b>Memo Pad</b>			
Notes Category	Category	Categories	Category
Note	Body	Note	
<b>To Do List</b>			
Notes Category	Categories	Category	
Due Date	DueDateTime	Due Date	
Completed	CompletedDateTime	Completed	(any field with a valid date)
Priority	Importance	Priority	1=1, 2=2, 3 or 4=3, 5=99
Description	Subject	Subject	
Note	Body	Note	

\* **Note:** The Notes screen label is what is displayed as the field name in the Pylon filter configuration document.



# Index

## Symbols

SAll 164

## A

access key 36

ActiveSync, *see* Microsoft ActiveSync

Address Book

installing conduit 39

overview 33

Palm OS device

accessing additional databases 125

using 125

Pocket PC OS device

accessing 111

accessing additional databases 107, 111

size limit 107

using 107

Application Server, *see* Pylon Application Server

attachments

Word and Excel email attachments on Palm OS 31

## B

bar code scanning

designing a lookup database for 213

## C

Calendar 122

installing conduit 39

Lotus Notes size limit for entry 107, 122

overview 32

Palm OS device

accessing additional databases 122

using 114–121

Pocket PC OS device

accessing 107

accessing additional databases 107

using 101–107

setting sync action 141

categories, assigning records to 173

changing your license key after installing 49

changing your Lotus Notes information after installing 49

checkbox fields, editing 173

Close Down Lotus Notes dialog box 40, 180

columns

changing attributes

on Palm OS 164

on Pocket PC OS 153

resizing

on Palm OS 165

on Pocket PC OS 154

restoring defaults on Palm OS 165

conduits

Address Book 33

Calendar 32

Expense (Palm only) 34

Mail 32

Memo Pad (Palm only) 34

To Do List 33

configuration database 60

configuration document, opening 61

configuration instructions, roadmap 58

configuration tasks, overview 58

configurations, accessing in the Pylon Configuration

Database 61

configuring Pylon 48

conventions 20

Create Cross Certificate dialog box 61, 189

creating a lookup field 211

Custom Field Mapping, overview 75

Custom install, definition 39

Custom Notes Installation 42

customizing Pylon 71–95

sync filters 74–90

## D

database configuring, *see* Pylon Conduit, configuring

Database field 78, 137

DataViz, for Word and Excel email attachments on

Palm OS 31

date fields

editing on Palm OS 172

editing on Pocket PC OS 157

deleting

- image 171
- Lotus Notes custom databases 142
- deleting a database
  - on Palm OS device 175
  - on Pocket PC OS device 158
- deleting a record
  - on Palm OS device 169
  - on Pocket PC OS device 155
- Desktop overwrites handheld sync Action, definition 65
- disabling
  - Microsoft Excel attachments 82
  - Microsoft Word attachments 82
- disabling a conduit after installing 49
- Do nothing sync Action, definition 65
- documentation, overview 58
- Domino Server
  - running on different machine from Lotus Notes client 38
  - system requirements 30
- downloading Pylon Pro 36

## E

- Edit View
  - accessing 167
  - accessing Image View from 171
  - assigning records to categories in 173
  - creating a new record in 155
  - definition of 167
  - editing checkbox fields in 173
  - editing date fields in 157, 172
  - editing information in a pop-up list in 173
  - editing lookup fields in 173
  - editing text fields in 156, 172
  - editing the current record in 155, 170
  - editing time fields in 172
  - marking records private in 174
  - viewing built-in help in 168
- editing
  - checkbox fields 173
  - functions, on a Pocket PC device 156
  - lookup fields 173
  - pop-up list 173
  - text fields 172
  - time fields 172
- enabling
  - Microsoft Excel attachments 82
  - Microsoft Word attachments 82
- enabling a conduit after installing 49
- error message
  - Serial Number is Not Valid 42, 180
  - Server not responding 186
  - troubleshooting 179–190
- Excel email attachments on Palm OS 31
- Execution Security Alert dialog box 61, 189
- Expense (Palm only)
  - accessing additional databases 130
  - overview 34
  - template, location of 68
  - using 130

## F

- field name
  - entering in Image field 138
  - how Pylon Pro uses 205
  - linking to a column 205
  - using asterisk as 76
  - using in formula for lookup fields 212
- filter, *see* sync filters
- Find Dialog Box on a Palm Device, the 175
- Find function on a Palm device 175
- formulas 137, 203
  - creating 212
  - support for 205
- Full Help in the Tips Dialog Box 168

## G

- Graffiti 170

## H

- Handheld overwrites desktop sync Action, definition 65
- Help, viewing in Pylon Pro 168

## I

- iAnywhere Solutions, contacting 22
- image
  - attaching to a record 155
  - deleting 171
- Image option 171
- Image View, editing 171
- installation
  - changing your license key after installing 49
  - changing your Lotus Notes information after installing 49
  - Custom Notes Installation 42
  - disabling a conduit after installing 49
  - enabling a conduit after installing 49
  - Internet Security Option 43
  - modifying your Pylon installation 49
  - repairing your Pylon installation 51
  - Select Additional CE Devices 46
  - Select Palm Users 45
- installer file (pylondesktopPocket PC.exe or pylondesktoppalm.exe), safeguarding 39, 47
- installing
  - Pylon 35–54, 150
  - Pylon Pro on a Palm OS device 161
  - Pylon Pro on a Pocket PC OS device 149
- Internet Explorer 5.0 or greater, system requirement for 30
- Internet Security Option 43
- invalid license, troubleshooting 184

## J

- Journal database, creating 89

**K**

key, *see* license key

**L**

License Agreement dialog box 40

license key 36

invalid 42

license number, in Lotus Notes custom database 163

license, troubleshooting invalid license error 184

List View 174

accessing Read View from 166

changing column attributes in 153, 164

creating a new record from 169

enabling scanning from 213

resizing columns in 154, 165

restoring column defaults in 165

using categories in 166

lookup fields

creating 211

editing 173

Lotus Domino Security model 189

Lotus Notes

applications

names on different device platforms 63

Pylon overview 32

Base Version, installation 42

custom database

de-activating 142

deleting 142

re-activating 142

Open Database dialog box 60

password prompt 98, 99, 112

system requirements 30

user password prompt, removing 187

Lotus Notes Configuration field

Database 78, 137

Form 79

Modified Date 79, 137

Server 78

View or Formula 78

Lotus Notes server, running on different machine from

Lotus Notes client 38

Lotus Notes User name, in custom Lotus Notes

database 163

**M**

Mail

installing conduit 39

overview 32

Palm OS device

accessing additional databases 113

deleting mail 112

using 112–113

Pocket PC OS device

accessing 100

deleting 100

sync filters

choosing 68

modifying 81

M-Business Anywhere client, using with Pylon

Conduit 190

Memo Pad (Palm only)

accessing additional databases 129

overview 34

using 129

Microsoft ActiveSync

establishing partnership 38

Options dialog box 98, 187

syncing multiple users 192

using to sync 98, 187

Microsoft Excel attachments

disabling 82

enabling 82

Microsoft Word attachments

appending as text 82

disabling 82

enabling 82

Mobile Device field 185

Modify install, manual configuration settings revert to

defaults 49

modifying your Pylon installation 49

multiple users, setting up for 192, 194

**N**

New Filter Template, using with Pylon Pro 135

note

attaching to a record 170

deleting from a record 170

Note View

definition of 170

editing screen 170

**O**

Options menu in Pylon Pro 174

**P**

Palm conduits, re-enabling after uninstalling Pylon 52

Palm OS device

accessing 122

Address Book

accessing additional databases 125

using 125

Calendar

accessing 122

accessing additional databases 122

using 114–121

differences, newer vs. older 63

Expense

accessing additional databases 130

using 130

keyboard 170

Mail

accessing additional databases 113

deleting mail 112

using 112–113

Memo Pad 129

accessing additional databases 129

- switching to from Pocket PC 38
- To Do List
  - accessing 129
  - accessing additional databases 129
  - using 126–129
- partnership, with Microsoft ActiveSync 38
- password prompt dialog box 98, 99, 112
- password prompt, Lotus Notes, removing 187
- PIM applications
  - accessing on your device 97–130
    - Palm OS 112–130
    - Pocket PC OS 98–111
  - additional application databases or views 91
    - Category Sync name must be unique 92
    - creating new filter 93
    - enabling with initial sync Action of Desktop Overwrites Handheld 94
    - setting permanent sync Action 95
    - syncing initially 95
  - disabling or enabling 64
  - syncing 55–130
- Pocket PC OS device
  - Address Book
    - accessing additional databases 107
    - using 107
  - Calendar
    - accessing 107
    - accessing additional databases 107
    - using 101–107
  - Mail
    - accessing 100
    - deleting 100
  - switching from to Palm OS device 38
  - syncing 98, 112
  - To Do List
    - accessing 111
    - accessing additional databases 111
    - using 108–110
- pop-up list, editing 173
- private records, marking 174
- publications, related 21
- Pylon
  - accessing 60
  - customizing 71–95
  - installing 35–54
    - troubleshooting 180
    - typical installation, defined 39
  - license key, obtaining 36
  - modify install 49
  - repair installation 51
  - uninstalling 37, 52–54
  - upgrading 37
    - troubleshooting 181
- Pylon Application Server, uninstalling 38
- Pylon Conduit
  - about 28
  - configuring 32–111
  - configuring for multiple users 192, 194
  - Mobile Device field 185
  - system requirements 30
  - troubleshooting 180–190
  - using with M-Business Anywhere client 190
  - viewing sync log 184

- Pylon Configuration Database
  - accessing 60
  - Configurations View 61
  - Filters View 74
  - opening 60
  - opening from Windows Start menu 60
  - recording settings 37
  - renaming 37, 181
  - saving information 181
- Pylon Configuration document
  - opening 61
  - screen shot 62
- Pylon installer file (pylondesktopPocket PC.exe or pylondesktoppalm.exe), safeguarding 39, 47
- Pylon Pro
  - about 28
  - access key, obtaining 36
  - adding support for computed fields 204
  - downloading 36
  - Edit View, accessing 167
  - enabling additional databases 144
  - Entry Details Dialog Box 173
  - installing on a Pocket PC device 150
  - License Agreement dialog box 40
  - navigating Edit View in 167
  - navigating on a Pocket device 150
  - Read View on a Pocket device 152
  - supported field types 204
  - unsupported design objects 207
  - using the Palm Find function with 175
  - viewing Help in 168
  - viewing on a Palm device 162
  - viewing on a Pocket device 150, 151
  - Workspace on a Palm Device 162
- Pylon Select, used to access additional Calendar databases on Palm 122
- Pylon ServerSync, *see* Pylon Application Server
- pyloncfg.nsf file, not removed on uninstall 52
- pylonexp.ntf 68

## R

- Read View
  - accessing 166
  - accessing Edit View from 167
  - attaching image from 155
  - deleting image from 171
  - navigating 166
- record
  - assigning to categories 173
  - attaching image to 155
  - attaching note to 170
  - creating new 155
  - deleting note from 170
  - editing on a Pocket PC device 155
  - making private 174
- removing Lotus Notes user password prompt 187
- Repair install, manual configuration settings revert to defaults 51
- repairing your Pylon installation 51
- resolve items error message 187

## S

- sample database in Pylon Pro List View 164
- sample Pylon Pro Workspace 163
- sample signature in Pylon Pro Image View 171
- Select Additional CE Devices 46
- Select Palm Users 45
- selecting text, on Pocket PC device 156
- Send mail first 82
- Server not responding error message 186
- ServerSync, *see* Pylon Application Server
- Shading option 171
- signature, creating in Pylon Pro 171
- Symbol SPT1500 213
- sync Action
  - options table 65
  - setting 65
- sync filters
  - Address Book
    - My Personal Address Book 67
    - My Personal Address Book - Home & Business 67
  - Calendar
    - My Calendar 67
    - My Calendar - Last 2 Months 67
  - choosing 67
  - copying 72
  - creating for multiple users
    - Palm OS 194
    - Pocket PC OS 193
  - customizing 74–90
    - Calendar Configuration section 84
    - Calendar-specific changes 83
    - Custom Field Mapping 75
    - Device Configuration section 79, 83
    - Expense-specific changes 89
    - Filter Information section 77
    - generic changes 76
    - Lotus Notes Configuration section 78
    - Mail Configuration section 81
    - Mail-specific changes 81
    - Memo Pad Configuration section 88
    - Memo Pad-specific changes 88
      - Custom 88
    - My Journal-specific changes 88
    - To Do List Configuration section 87
    - To Do List-specific changes 86
      - Conflict Resolution 87
  - customizing Address Book-specific changes 85
    - Address 86
    - Attachment types to sync 82
    - Map Business to custom field 86
    - Maximum total size of attachments per message 83
    - Send mail first 82
    - Sync only unread 82
  - customizing Calendar-specific changes
    - Conflict Resolution 84
    - Display To Do List items in Calendar 84
    - View Chairperson 84
  - customizing generic changes
    - Category Sync 79
    - Database 78
    - Form 79
    - Modified Date 79
    - Note 79
    - Private Record 80
    - Server 78
    - Title 78
    - View or Formula 78
- displaying in Pylon Configuration Database 74
- Expense (Palm only)
  - Custom Expense 68
- Mail
  - My Inbox 67
  - My Inbox - Last 30 days 67
  - My Inbox - Last 7 days 67
  - My Inbox - Unread only 67
- Memo Pad (Palm only)
  - My Drafts 68
  - My Journal 68
- pre-defined filters screenshot 72
- pre-defined options table 67
- Pylon Pro
  - configuration fields 137
  - custom database configuration template 136
  - custom database, syncing 135
  - Custom Field Mapping 138
- To Do List
  - My Tasks 68
- Sync only unread mail field 82
- Synchronize the files sync Action, definition 65
- syncing 174
  - instructions 99
  - multiple users 192
  - Palm OS device 112
  - PIM applications 55–130
  - Pocket PC OS device 98
  - Windows Mobile 5 device 98
- system administrator 186
- system requirements 30

## T

- Tasks, *see* To Do List
- technical support
  - obtaining 22
  - Sybase Online Support Services 23
- text fields, editing 172
- time fields, editing 172
- To Do List
  - installing conduit 39
  - on device 107, 111
  - overview 33
  - Palm OS device
    - accessing 129
    - accessing additional databases 129
    - using 126–129
  - Pocket PC OS device
    - using 108–110
- Tool option 171
- troubleshooting 179–190
  - accessing Pylon Configuration document 189
  - installing 180
  - syncing 184
  - upgrading 181

- using Pylon Conduit with M-Business Anywhere
  - client 190
- using Pylon log database 182
- truncated
  - Calendar entries 107, 122
  - Contacts 107
  - emails 100
  - To Do items on Pocket PC 111
- Trust Signer button 61, 189
- Typical install, definition 39

## U

- uninstalling Pylon 52–54
  - re-enabling Palm conduits after 52
- upgrading 37, 181
- users, multiple 192, 194
- using 129

## V

- Viewing Help for the User List Field 168

## W

- Windows Mobile 5 device
  - syncing 98
- Word email attachments on Palm OS 31