

SmartList To Go Access Sync Guide

Synchronize Data between your SmartList To Go Databases
and Microsoft Access.

DataViz, Inc.

MERRITT CORPORATE WOODS
612 WHEELERS FARMS ROAD
MILFORD, CT 06460
www.dataviz.com

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1. Introducing SmartList To Go

SmartList To Go is an application that can synchronize data bi-directionally between SmartList To Go databases on your handheld computer and Microsoft Access databases.

SmartList To Go resides on your desktop and is the place where synchronization relationships are set up with Access databases. Using the desktop application, you will design Access Sync Configurations, sets of specific instructions telling SmartList To Go how the data should be synchronized between your handheld and your desktop. Once a Configuration is created, the SmartList To Go Conduit carries out its instructions automatically when you perform a normal HotSync.

In This Chapter . . .

- **1.2 Using this Manual**
 - **1.2.1 The Scope of this Manual**
 - **1.2.2 How to Use this Manual**
 - **1.2.3 Conventions**
 - **1.2.4 Documentation for Our Other Products**
- **1.3 Contacting Customer Service and Technical Support**
 - **1.3.1 Online Resources**
 - **1.3.2 Required Information to Have Before You Call**
 - **1.3.3 Contact Information**

1.2 Using this Manual

1.2.1 The Scope of this Manual

This manual provides complete instructions on how to use SmartList To Go to synchronize data in SmartList To Go databases with data in a Microsoft Access table. Included in this manual are instructions and examples describing how to:

- Create configurations to control the synchronization process in a manner that satisfies your project needs.
- Map fields and their types in SmartList To Go to the corresponding fields in Access.
- Accomplish synchronization during a normal HotSync.
- Handle advanced synchronization design issues.

Some functionality described in this manual may not be included in previous versions of SmartList To Go. Similarly, while the functionality described in this manual is current as of its release, it may not reflect new functionality or bug corrections implemented after the manual's date of publication. For the most complete and current information, please refer to the release information on our Web site at www.dataviz.com.

Please be aware that the scope of this manual encompasses SmartList To Go only. This manual must and does assume that users are already versed in the use of their handheld device, SmartList To Go and Microsoft Access. For information regarding the use of your handheld device, please refer to the manufacturer's documentation for that device. For more information regarding the use of Microsoft Access, please refer to the manufacturer's documentation.

1.2.2 How to Use this Manual

The purpose of this manual is to serve users as both a set of complete instructions and a quick reference guide. By that we mean that we designed this manual to be used in two distinct ways.

First, feel free to read this manual from front to back like a book. Doing so will guide you through the process of learning how to use SmartList To Go. That process begins with learning your way around SmartList To Go configurations and how SmartList To Go works, then it proceeds to the creation and use of your own configurations for synchronizing with Access. Finally, it ends by addressing some of the more advanced issues you may encounter in creating configurations, such as creating configurations for multiple users.

The second method of using this book is to provide a quick reference for those who, for the most part, already know SmartList To Go or are comfortable enough with the product in general to prefer working things out largely for themselves. To accommodate this method, each section in this manual is designed to lead off with quick and detailed information describing the functionality of the interfaces that section addresses. Using the Table of Contents at the front of the guide and the Index in the back of the manual, users can quickly find the sections or pages with the answers they are looking for. The design of the pages will make the specific items of information they are looking for easy to find.

1.2.3 Conventions

Throughout this guide, we will use certain visual conventions to set off different kinds of information. The purpose of this is to make it easier for you to understand what you are reading. Among these conventions are:

- The names of screens, commands, icons and other distinct items in the SmartList To Go interface are capitalized, as shown below:

To add this new field to the form, open the Design tab.

- Any text depicting what you will see on the PDA or desktop screen will be displayed in a sans serif font that imitates the PDA screen display. Further, such text will be presented in separate paragraphs that are indented to further differentiate it from other text. For example, when an instruction directs you to enter a value for the text field "Last Name", you would see the following:

Last Name: Jones

- Instructions in this manual at times refer to items of information generally; the word or phrase in the guide is a stand in for the actual text that applies to your specific information, not the literal text itself. These variables, as we will refer to them, appear in a bold-face font to differentiate them from text that may be taken literally, as shown in the two examples below:

Enter Your Last Name: **Your Last Name**

-OR- Enter **Today's Date** in the input box provided.

- Instructions that guide you in selecting items in a menu path will separate items with the ">" symbol. Also, such menu paths will appear in bold-face, as in the example below:

Select **Tool > Design Views** to open the View Designer screen.

- Shortcut commands allow you to accomplish common tasks quickly by bypassing the normal menu commands. As in most Palm OS applications, you use such commands by making a forward slash with the stylus - starting from the lower left corner of the graffiti pad, draw the stylus across to the upper right corner - followed by the shortcut's identifying letter. For example, the shortcut for creating a new database in SmartList To Go is a forward slash followed by the letter Y. This manual will refer to shortcuts by typing the forward slash and the letter together in bold face, as shown below:

To create a new database, open the Main SmartList To Go screen and tap the new SmartList button or use the shortcut **/Y**.

In addition to these conventions, this guide includes the following kinds of additional information that are set off by their icons and borders.



Note: Notes provide extra items of information that expand upon the nearby text. For example, a note might direct you to another location within the manual or elsewhere that provides additional information about the current topic.



Warning: Warnings set off cautions and other items of information that will help you to avoid situations that might result in a loss of data or temporary or permanent damage to your software or damage to your hardware. Always take a moment to stop and read these cautions, as the information they contain will always be valuable to you.



Tip: Tips inform you of key items to remember as you proceed or of tricks you can use or of work-arounds you might employ if they are useful to you. Anything that might enable you to streamline your processes and increase efficiency will be included in a tip.



Example: Examples take the concepts discussed in the section and show you how they might be applied to better your understanding of how a function or capability might be used to satisfy your project needs.

1.3 Contacting Customer Service and Technical Support

In This Section . . .

- **1.3.1 Required Information to Have Before Calling**
- **1.3.2 Contact Information**

1.3.1 Required Information to Have Before Calling

In order for our Customer Service and Technical Support staff to serve you better, please have the following items available and close at hand before you call. Some items may depend on your specific issue, but the first four items are always required for all calls.

- **The name and email address under which you registered your copy of SmartList To Go.**
- **The registration code provided to you when you registered SmartList To Go.**
- **The PDA with SmartList To Go installed must be with you as our support personnel may ask you to perform certain tasks to better determine the nature of the problem or to correct the problem.**
- **The desktop computer with SmartList To Go installed must be close by and ready for use as our support personnel may ask you to perform certain tasks to better determine the nature of the problem or to correct the problem. Make sure you know what operating system you are running before you call.**
- If you are calling in regards to a software problem, please be prepared to describe the errant behavior fully, including, if applicable, taking exact notes of any error messages you may be receiving and what causes them to appear.
- If you are calling in regards to a problem synchronizing with Microsoft Access, support personnel will require the version number of your copy of Microsoft Access.

1.3.2 Contact Information

The hours of operation for both Customer Service and Technical Support are from 9:00 A.M. until 5:00 P.M. EST, Monday through Friday, excluding holidays. Under most circumstances, your email or phone call will be returned no later than one business day from the time it is received. Please be aware that Service and Support is not available on weekends and holidays at this time.

Customer Service

Contact Customer Service for issues regarding registration of the software or to purchase software. Visit our website at www.dataviz.com/salesfaq for frequently asked sales questions, or call toll free 1-800-733-0030.

Technical Support

Contact Technical Support for technical issues addressing the software's operation and capabilities. Visit our website at www.dataviz.com/support_options for information in regards to obtaining technical support.

2. Getting Started with SmartList To Go

In This Chapter . . .

- **2.1 OS and PDA Compatibility and System Requirements**
- **2.2 Installing SmartList To Go**
- **2.3 Installing Other Products that Work With SmartList To Go**

2.1 OS and PDA Compatibility and System Requirements

SmartList To Go resides on your desktop and is compatible with Windows™ Operating Systems, including 98, NT, 2000, ME and XP. SmartList To Go works with HotSync Manager versions 4.0 or higher. To install SmartList To Go, you will need 2 MB free space on your desktop for the application and approximately 10 MB for product documentation.

Requires Palm OS version 3.5 or higher on your handheld. If you do not see your Palm OS handheld listed below, please click to check the OS of your device.

Garmin

iQue 3600

Handera

330

Handspring

Treo 180, Treo 180G, Treo 270, Treo 300, Treo 600, Treo 90, Visor Edge, Visor Neo, Visor Platinum, Visor Prism, Visor Pro

Kyocera

7135 Smartphone, QCP-6035 Smartphone

Palm

i705, IIIc, IIIxe, m105, m125, m130, m500, m505, m515, Tungsten C, Tungsten E, Tungsten T, Tungsten T2, Tungsten T3, Tungsten W, VIIx, Zire 21, Zire 71

Samsung

i300, i330, i500

Sony

PEG-N610C, PEG-N710C, PEG-N760C, PEG-NR70, PEG-NR70v, PEG-NX60, PEG-NX70v, PEG-NX80V, PEG-NZ90, PEG-S300, PEG-S320, PEG-S360, PEG-SJ20, PEG-SJ22, PEG-SJ30, PEG-SJ33, PEG-SJL10, PEG-T415, PEG-T615C, PEG-T665C, PEG-TG50, PEG-TJ25, PEG-TJ35, PEG-UX40, PEG-UX50

3. An Overview of SmartList To Go

SmartList To Go is a powerful tool you can use to effectively combine the advantages of a desktop data source with those of a handheld database in a way that best fits the challenges you face. The goal, whether the data you work with is related to business or pleasure, is greater productivity and convenience, and the variety of ways you can use SmartList To Go to accomplish this goal is limited only by your creativity.

SmartList To Go creates a link between a SmartList To Go database on your handheld device and a data source you access on your desktop using Microsoft Access. SmartList To Go then uses this link to pass data from one source to the other, and this exchange of data is integrated directly into your normal HotSync operations.

How SmartList To Go selects what data to exchange and how to exchange it depends upon how you design the link between the data sources. The purpose of this chapter is to familiarize you with the options you have to work with as you design this link, what decisions you can make. This chapter will also introduce you to the components of SmartList To Go that first guide you through the design process and then use your design to exchange data during a HotSync.



Example: For example, you will need to determine which direction data should flow during synchronization based on how you will use each data source. A doctor might use the handheld database on his personal digital assistant (PDA) to enter observations and diagnoses while he's with a patient and later synchronize that data with an Microsoft Access database on his desktop. In this case, the handheld is the most common interface for entering and modifying patient data, while the desktop is primarily used to archive the handheld data and to view trends, so the doctor would direct data to flow from the handheld to the desktop.

Conversely, a collector might use a desktop database and a handheld database as a unit to track her collection of books. She would use the full-sized keyboard on her desktop computer to more easily enter the large amounts of information about the books she already owns and take the handheld database with her to update information and enter new acquisitions immediately. In this case, the collector would use both that handheld and the desktop for data entry, so she would direct SmartList To Go to pass data in both directions, selecting the newest information in each location and updating both data sources accordingly.

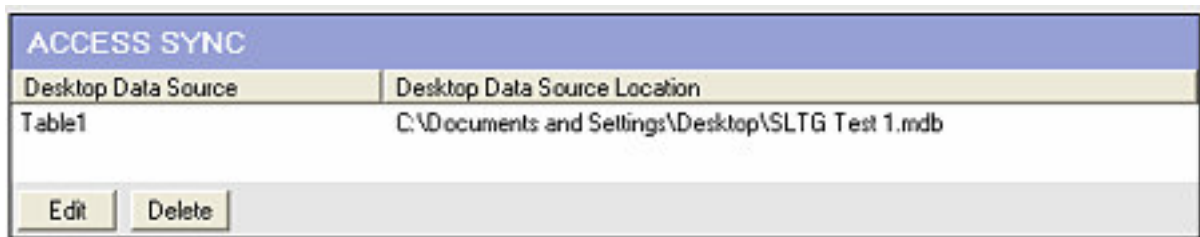
In This Chapter . . .

- **3.1 The Data Exchange Tab**
- **3.2 Configuration Design Choices**
 - **3.2.1 Desktop Data Sources: Microsoft Access and Intuit QuickBase**
 - **3.2.2 Synchronization Modes**
 - **3.2.3 Conflict Resolution Methods**
 - **3.2.4 Handheld Users**
- **3.3 Creating Data Source "On-the-Fly"**
- **3.4 The SmartList To Go Conduit**

3.1 The Data Exchange Tab

The SmartList To Go Data Exchange tab is your interface to establish, design and manage links that each connect a desktop-accessible data source in Microsoft Access to a handheld database located on one or more PDAs.

To open the Data Exchange tab, click on the SmartList To Go icon on your desktop. This will open the main SmartList To Go application interface. Next, click the new button to create a new SmartList



ACCESS SYNC	
Desktop Data Source	Desktop Data Source Location
Table1	C:\Documents and Settings\Desktop\SLTG Test 1.mdb

Edit Delete

The Configuration Assistant Main Window

The Configuration Assistant's main window provides basic information about each existing configuration and buttons for creating, modifying and deleting configurations.

The table of existing configurations dominates the majority of the screen. It consists of four columns and as many rows as there are configurations. Each row describes a single configuration. The columns, in order from left to right, provide the following information:

- **Desktop Data Source** - This column indicates the name of the desktop accessible data source involved in each configuration. This may be an Access table, an Access query, a QuickBase or a QuickBase view.
- **Desktop Data Source Location** - This column indicates the path of the data source indicated in the Desktop Data Source column. For Access tables and queries, this will be the full path name of the Access database that contains the table, whether it is located on a local drive or on

a LAN.

- **Create** - Click the **Add** button to launch a series of Configuration screens that will guide you through the process of creating a new configuration. This process will include selecting the handheld data sources, selecting synchronization and conflict resolution methods, mapping fields, selecting the user(s) who will use the configuration and creating data sources on the fly when necessary. These screens and the controls they contain are described in Section 4.1 Creating a Configuration for Access and Section 4.2 Creating a Configuration for QuickBase.
- **Edit** - Select an existing configuration and click the **Edit** button to open a window in which to modify the configuration. This window contains a variety of different tabs that are nearly identical to the Configuration windows you use to create a new configuration. This window allows you to change the list of users who use a configuration, change the synchronization or conflict resolutions methods or change how fields in one data source are mapped to fields in the other. This window is described in Section 5.3 Modifying Configurations.
- **Delete** - Select an existing configuration that you do not wish to use anymore and click the **Delete** button to erase that configuration.

3.2 Access Sync Design Choices

Designing Access Sync configurations begins with selecting the data sources you will link, then continues - as we discussed in the beginning of this chapter - to making a number of choices about how you want the configuration to exchange data. These choices, of course, will be governed by the task you want the linked data sources to accomplish.

The purpose of this section is to explore the various design choices you will make, list your set of options for each choice and describe the situations in which each options works best. You will use this information in Chapter 4, in which you will use the design screens available from the Configuration Assistant to actually create your own configurations.

In This Section . . .

- **3.2.1 Synchronizing with Microsoft Access**
- **3.2.2 Synchronization Modes**
- **3.2.3 Conflict Resolution Methods**
- **3.2.4 Handheld Users**

3.2.1 Synchronizing with Microsoft Access

Currently, SmartList To Go supports synchronizing SmartList To Go databases with Microsoft Access only. Microsoft Access is a relational database application that resides on your desktop.

Synchronizing with Microsoft Access

Microsoft Access is the relational database application that resides on your desktop created by Microsoft Corporation.

Access files are called **databases**, and they may reside on your desktop with Access or on a local area network (LAN).

Definition: In Microsoft Access, files are called **Databases** and they may contain one or more sets of information, called **Tables**. You will use SmartList To Go to synchronize a SmartList To Go database to one of these Access tables.

An Access database may contain one or more tables. A **table** is the data source inside the database that contains information. When you create a new configuration that uses Microsoft Access as the desktop data source, you will synchronize the SmartList To Go database with an Access Table.

With SmartList To Go, you can take the important data you may already keep in Microsoft Access databases on your desktop and make that data mobile by creating a synchronous copy in SmartList To Go on your handheld. Or you can take advantage of the desktop computer's superior memory space to serve as a backup and archive for the data in your SmartList To Go databases. Synchronizing with Access, you can also create databases that reside on a local network. This is particularly well suited for synchronizing multiple users to the same desktop accessible database.

SmartList To Go also supports synchronization with Access tables through Access queries. A **query** is a request for a specific subset of the information contained in an Access table based on

precisely defined selection criteria. A query does not physically contain information the way a table does, it simply extracts and displays information from a table according to the query criteria.

When you synchronize a SmartList To Go database with a query, you are ultimately synchronizing with the table that query is attached to, but you are choosing to leave the majority of the table information on the desktop and to take only the most relevant information with you on the handheld.

For example, you might create an Access database on your desktop with a table called MyBooks, and you might want to create a synchronous SmartList To Go database on your handheld that will contain only those records from the Access table MyBooks that represent books by Stephen King. To accomplish this, you would first create a query based on MyBooks that would display only those records in which the name "Stephen King" appeared in the field that indicated the author's name; this query might be called MySKBooks. Then you would build a configuration that synchronized with the table MyBooks through the query MySKBooks. When you were finished, you would have a desktop database with a record of all your books and a handheld database with a record of your Stephen King books, and changes made to either would affect both.

3.2.2 Synchronization Modes

Synchronizing data is the heart of how SmartList To Go takes two disparate data sources - one a handheld SmartList To Go database, the other a desktop-accessible data source - and combines it into a single tool that increases your productivity and convenience. When we use the word "synchronize" in this manual, we are talking about exchanging data, and there are number of different methods to exchange data. These methods are called **synchronization modes**. The mode you select will depend on the task the linked data sources will accomplish. SmartList To Go offers three different synchronization modes to accommodate different situations: Bi-directional Synchronization, Desktop overwrites Handheld and Handheld overwrites Desktop.

Definition: Synchronization is the process of exchanging data between a SmartList To Go database on your handheld and a desktop-accessible data source. The goal of synchronization is for both data sources to contain the same data, so that you can work with the data on the handheld or the desktop with equal ease. Your configuration design controls how SmartList To Go accomplished this goal.

In This Section . . .

- **3.2.2.1 Bi-directional Synchronization**
- **3.2.2.2 Desktop overwrites Handheld**
- **3.2.2.3 Handheld overwrites Desktop**

3.2.2.1 Bi-directional Synchronization

Bi-directional Synchronization is the most common synchronization mode, and it directs SmartList To Go to update both data sources with the most recent information available regardless of which data source was the interface for entering that information. When you perform a HotSync, SmartList To Go will determine which records have been added, modified or deleted in either data source since the last HotSync. For any such alterations discovered in the SmartList To Go database, SmartList To Go will make corresponding changes in the desktop source, and for any alterations on the desktop, SmartList To Go will make corresponding changes in the SmartList To Go database.

When synchronization is complete, both data sources will contain the same data, and this data will reflect the most recent changes no matter whether they were made on the handheld or the desktop.

3.2.2.2 Desktop overwrites Handheld

The Desktop overwrites Handheld synchronization mode directs all the data flow from the desktop data source to the SmartList To Go database.

When you select this synchronization mode, SmartList To Go will always alter the data in the SmartList To Go database to match the current data on the desktop. The result is that synchronization always preserves changes to the data on the desktop but never preserves changes or deletions that occur on the handheld.

There is only one exception to the rule that all data flows from the desktop to the handheld in this mode: the Desktop overwrites Handheld mode will preserve new records that you added on the handheld. These records will not be added to the desktop.

This mode is useful in situations where the handheld databases are intended for viewing data only. This method ensures that the information in the desktop serves as the master copy of the data.

3.2.2.3 Handheld overwrites Desktop

The Handheld overwrites Desktop synchronization mode directs all data flow from the handheld to the desktop.

When you select this synchronization mode, SmartList To Go will always alter the data on the desktop to match the current data in the SmartList To Go database. The result is that synchronization always preserves changes to the handheld data, but never preserves changes or deletions that occur on the desktop.

There is only one exception to the rule that all data flows from the handheld to the desktop in this mode: the Handheld overwrites Desktop mode will preserve new records that you added on the desktop. These records will not be added to the handheld.

This mode is useful when you use the SmartList To Go database to work with data and the desktop is used to archive and review data only.



Example: For example, a doctor might use the handheld database on his PDA to enter observations and diagnoses while he's with a patient and later to synchronize that data with an Microsoft Access database on his desktop. In this case, the handheld is the most common interface for entering and modifying patient data, while the desktop is primarily used to archive the handheld data and to view trends, so the doctor would direct data to flow from the handheld to the desktop.

As we described above, the Handheld overwrites Desktop synchronization mode forces data to flow from the handheld SmartList To Go database to the desktop-accessible data source. However, this mode also offers two additional options that can limit this data to exclude record deletions, record modifications or both. Toggle these options on and off using the following checkboxes, located just below the Handheld overwrites Desktop radio button:

- **Disable the propagation of handheld record deletion to desktop** - when this box is checked, SmartList To Go will continue to synchronize the desktop to reflect changes and additions to data in the SmartList To Go database, but not record deletions. You can still delete records on the handheld, but they will remain on the desktop, so that it serves as an archive for every record that has ever existed in the handheld database, even if it was later deleted from the SmartList To Go database.
- **Disable the propagation of handheld record modification to desktop** - when this box is checked, SmartList To Go will continue to synchronize the desktop data source to reflect

additions and deletions to data in the SmartList To Go database, but it will ignore record modifications. You can still change records on the handheld, but they will remain unchanged on the desktop, so that the desktop will serve as an archive of the original state of each record, even if it is later changed in the SmartList To Go database.

Checking both boxes disables both record deletion and modification from being reflected on the desktop. In this case, the desktop data source provides an archive of the original state of every record ever contained in the handheld database, despite any changes or deletions that may occur to the handheld data.

3.2.3 Conflict Resolution Methods

If you elect to use the Bi-directional Synchronization mode, it becomes possible for SmartList To Go to encounter conflicts. **Conflicts** are records that were altered in both the SmartList To Go database and the desktop before synchronization, and when such a situation occurs, SmartList To Go will have to make a decision about which version of the record to keep.

You control what decision SmartList To Go makes by selecting one of the three Conflict Resolution Methods as you design the configuration. The three methods are: Handheld Record overwrites Desktop Record, Desktop Record overwrites Handheld Record and Do Nothing .

In This Section . . .

- **3.2.3.1 Handheld Record overwrites Desktop Record**
- **3.2.3.2 Desktop Record overwrites Handheld Record**
- **3.2.3.3 Do Nothing (Records will not be synchronized)**

No matter which method you select, SmartList To Go will notify you that a conflict occurred and indicate the action it took to resolve it in the SmartList To Go Log.

Conflicts are not possible using the other synchronization modes.

3.2.3.1 Handheld Record overwrites Desktop Record

When you select this method, SmartList To Go will always resolve conflicts by assuming that the handheld data is more recent, and it will update the desktop record to match the SmartList To Go record.

3.2.3.2 Desktop Record overwrites Handheld Record

With this method, SmartList To Go always assumes that the desktop data is more recent, and it will update the SmartList To Go record to match the desktop record.

3.2.3.3 Do Nothing (Records will not be synchronized)

With this method, SmartList To Go will not change either record, but it still notifies you of the conflict in the SmartList To Go Log. This provides you with the opportunity to review the data for yourself and decide which version of the record to keep.

3.2.4 Handheld Users

SmartList To Go Access Sync Configurations, like HotSync operations, are specific to individual Handheld Users. A Handheld User is the device username that identifies every handheld device in HotSync operations. When you design configurations, you will define who will use the configuration by selecting Handheld Users.

Single or Multiple-User Access Sync Configurations

In some cases, configurations will be one-to-one, connecting a single desktop data source to a single SmartList To Go database on a single device. However, you can just as easily create multiple-user configurations that link a single desktop-accessible data source to databases that reside on two or more handheld devices. Each handheld device in a multiple-user configuration contains a copy of the same SmartList To Go database.

3.3 Creating Data Sources "On-the-Fly"

When you synchronize a SmartList To Go database with a desktop-accessible data source, it is important that the **schema**, or structure, of the data sources correspond with each other closely. This means that for each field in one data source that contains data you want to synchronize, there must exist a corresponding field in the other data source that can accept the same kind of data and, preferably, has the same field name. The best method to ensure that the schema of the data sources agree, you will almost never begin a new configuration by having two existing data sources. Instead, you will begin with one data source and in the course of creating a new database, you will create the corresponding data source on the fly.

For example, you might begin with an Access table called MyBooks you would like to synchronize with a corresponding SmartList To Go database on your handheld. You will not create a SmartList To Go database called MyBooks on your handheld yourself; instead, SmartList To Go will create the SmartList To Go database MyBooks for you during the process of creating the new configuration.

The same applies in the opposite direction. You might begin with a SmartList To Go database called MyBooks on your handheld you would like to synchronize with a corresponding Access database on your desktop. You will not create an Access table called MyBooks; instead, SmartList To Go will create the Access table MyBooks for during the process of creating the new configuration. If there already exists an Access database in which you would like to create the new table MyBooks, SmartList To Go can create it within the existing database. If, however, you would like to create a whole new database to contain the table MyBooks, SmartList To Go will create the database and the table it contains in the same step.

Definition: The schema of a data source, whether it is a SmartList To Go database or Access table, is the structure of its fields. The schema includes how many fields there are, what are the fields's names, what kind of data are they intended to hold and what limitations are there controlling what data can be entered by the user.

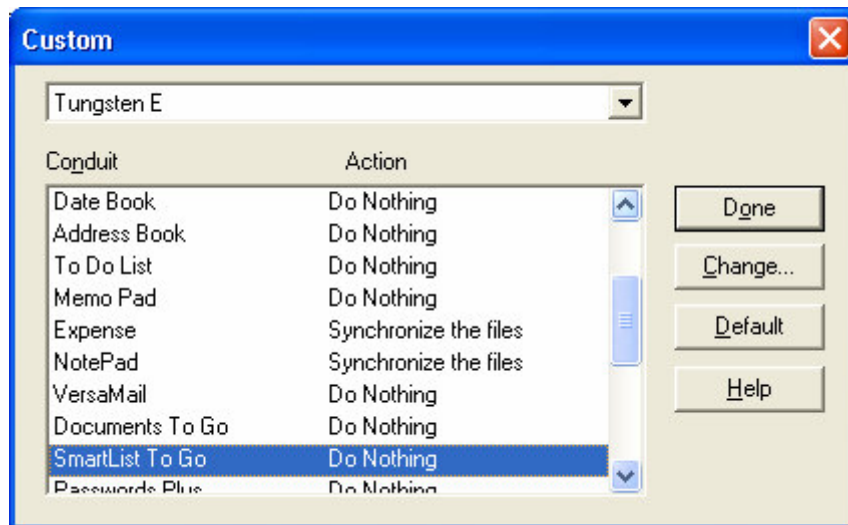
3.4 The SmartList To Go Conduit

Once you have created and designed a configuration, the **SmartList To Go Conduit** is the engine that actually synchronizes data. You need do nothing more than perform a normal HotSync. During the HotSync, the HotSync Manager will temporarily pass control over to the SmartList To Go Conduit. The SmartList To Go Conduit will automatically carry out the instructions contained in the configuration and then pass control back to the HotSync manager. This requires no further action from you.

While this synchronization process is automated, the SmartList To Go Conduit does have an interface screen that will allow you to temporarily disable individual configurations or to temporarily disable SmartList To Go itself. This ability is useful particularly when working with large data sources that you know are already up to date; disabling them during a HotSync that is being performed for other reasons can speed up the HotSync.

To launch the SmartList To Go Conduit's interface window, ensure that the HotSync manager is running and follow these steps:

1. Click on the HotSync Manager icon in your system tray. This will open a pop-up menu of options.
2. Select **Custom** from the pop-up menu. This will display the HotSync Manager's Custom Window.

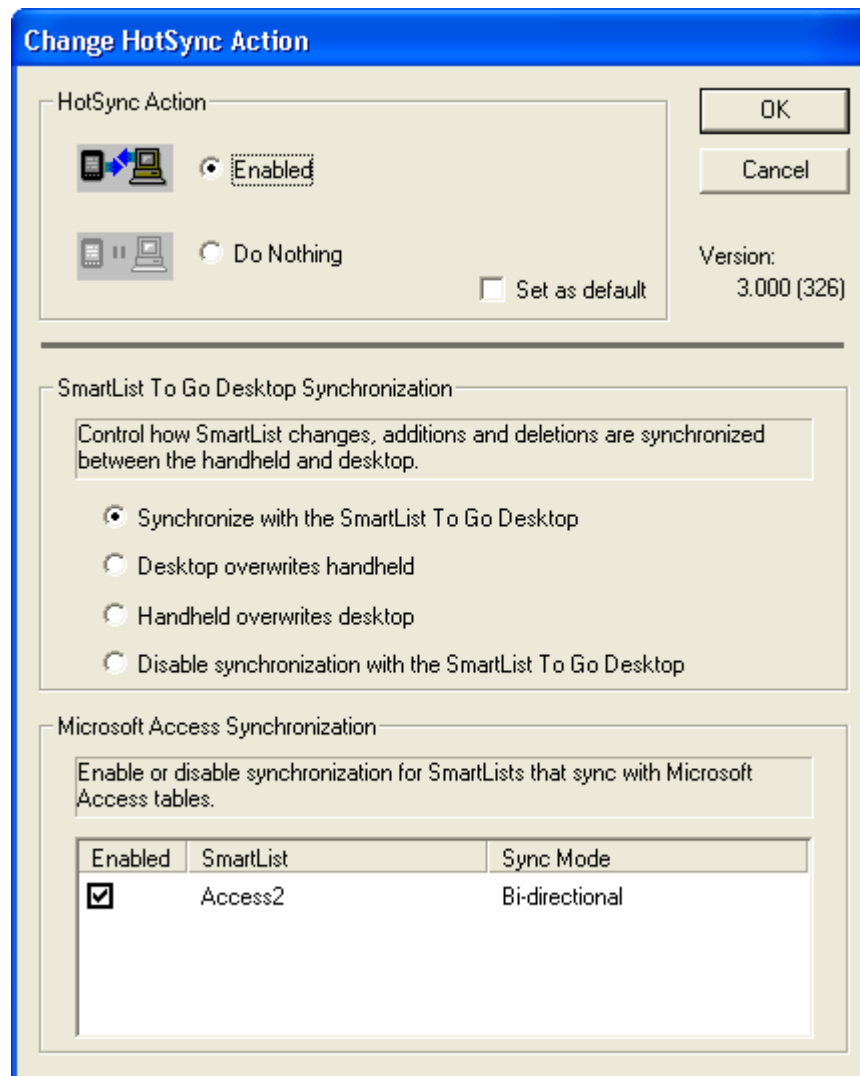


The HotSync Manager Custom Window

The HotSync Manager Custom Window provides controls for altering the behavior of the various application conduits that run during a HotSync.

3. Select **SmartList To Go** and click the **Change** button.

This will launch the SmartList To Go Conduit's interface window.



The SmartList To Go Conduit Interface Window

The SmartList To Go Conduit's interface window enables users to temporarily enable or disable individual SmartList To Go configurations for the individual user or to disable the entire SmartList To Go Conduit.

The bottom of the screen displays a list of the currently existing configurations, identified by the SmartList To Go database involved, each with a corresponding checkbox. A checked box next to a configuration indicates that it is currently enabled; an empty box indicates that it is disabled. These settings apply only to the current user; if any of these configurations have multiple users, disabling a configuration for this user will not disable it for the other users.

Each configuration is enabled when it is first created by default.

To disable an individual configuration for an individual user, click on the corresponding checked box to uncheck it, then click **OK** to close the window and apply the change.

To enable an individual configuration for an individual user, click on the corresponding box to check it and click **OK** to close the window and apply the change.

To disable the SmartList To Go Conduit itself for all users, click on the checkbox labeled Do Nothing to check it and click **OK** to close the window and apply the change.

4.0 The SmartList To Go Conduit

The purpose of this chapter is to provide step-by-step instructions for creating basic configurations.

In This Chapter . . .

- **4.1 Creating a Configuration for Access**
- **4.2 Using the New Configuration**

4.1 Creating a Configuration for Access

This section describes creating configurations that synchronize a SmartList To Go database and an Access table. Creating an Access configuration includes the following steps:

- **Step 1 - Plan Ahead**

How you design a configuration will depend upon the task you want it to accomplish, so it is that good idea to think about the decisions you will need to make before you begin.

- **Step 2 – Set up the Access Sync**

SmartList To Go will guide you through the process of creating a new configuration in a series of windows, each devoted to a different aspect of the configuration.

- **Step 3 - Create an Empty Data Source**

When you create a new Access configuration, you will start with either an existing SmartList To Go database or you will start with an existing Access table. Whichever you begin with, this source constitutes just one end of the synchronization. In this step, you will create the empty data source that will constitute the other end.

- **Step 4 - Synchronize for the First Time**

In this final step, you will synchronize the data sources for the first time. This first synchronization will populate the empty data source you created in Step 3 with records.

In This Section . . .

- **4.1.1 Step 1 - Plan Ahead**
- **4.1.2 Step 2 - Set Up an Access Sync Configuration**
- **4.1.3 Step 3 - Create an Empty Data Source**
- **4.1.4 Step 4 - Synchronize for the First Time**

4.1.1 Step 1 - Plan Ahead

How you design a configuration will depend on the exact job you want it to accomplish.

For example, if you want to make the data contained in an Access database available to handheld users for viewing without granting them the ability to alter the data, you'll create a configuration that only accepts changes on the desktop side.

In This Section . . .

- **4.1.1.1 Selecting a Synchronization Mode**
- **4.1.1.2 Selecting a Conflict Resolution Method**
- **4.1.1.3 Selecting the Handheld Users**
- **4.1.1.4 Selecting Primary Key Fields**

4.1.1.1 Selecting a Synchronization Mode

The Synchronization Mode defines the direction in which data will flow when you use this configuration. SmartList To Go offers three Synchronization Modes: Bi-directional Synchronization, Handheld overwrites Desktop and Desktop overwrites Handheld.

For a complete description of each of these modes, see Section 3.2.2 Synchronization Modes.

4.1.1.2 Selecting a Conflict Resolution Method

When you use the Bi-directional Synchronization Mode, it becomes possible for SmartList To Go to encounter conflicts, or situations in which a record has been modified on both the desktop and the handheld prior to performing the HotSync. The Conflict Resolution Method defines how SmartList To Go should resolve these conflicts. SmartList To Go offers three options: Handheld Record overwrites Desktop Record, Desktop Record overwrites Handheld Record and Do Nothing (Record will not be Synchronizes).

For a complete description of each of these methods, see Section 3.2.3 Conflict Resolution Methods.

4.1.1.3 Selecting the Handheld Users

Selecting the Handheld Users defines which devices will use the configuration when it HotSyncs. Configurations may have a single Handheld User, or you can create a Multi-User Configuration by selecting two or more Handheld Users. Multi-User Configurations work with a single SmartList To Go database, a copy of which resides on each device.

For more information, see Section 3.2.4 Handheld Users.

4.1.1.4 Selecting Primary Key Fields

Microsoft Access requires its tables to have primary keys. A **primary key** is a field or combination of fields in which the data is unique in each and every record. Any field or combination of fields may be used as the primary key field(s) as long as they satisfy that requirement.

When you create a new configuration using an existing Access table or query, that data source already has a field assigned to serve as the primary key, so you do not need to take any action in the regard. SmartList To Go will automatically detect which field is the primary key.

However, when you create a new configuration in which you will create an Access table on the fly, you will be asked to assign one or more fields to serve as the primary key. If the SmartList To Go database contains a Key type field, SmartList To Go will select this field by default when you come to the Field Mapping configuration screen. In general, we recommend using Key type fields as primary keys, but if you wish to change SmartList To Go's default selection, you may do so.

Choosing a Primary Key

As we've stated above, any field or combination of fields can serve as a primary key, as long as the data the field(s) contain is unique in each record.

Definition: A **primary key** is a field or combination of fields in which the data is unique in each and every record. Any field or combination of fields may be used as the primary key field(s) as long as they satisfy that requirement.

4.1.2 Step 2 – Set Up an Access Sync Configuration

SmartList To Go will guide you through the steps of creating a new Access Sync configuration.

To launch the configuration screen, create a new SmartList on the desktop or choose an existing SmartList and click on the Data Exchange tab.

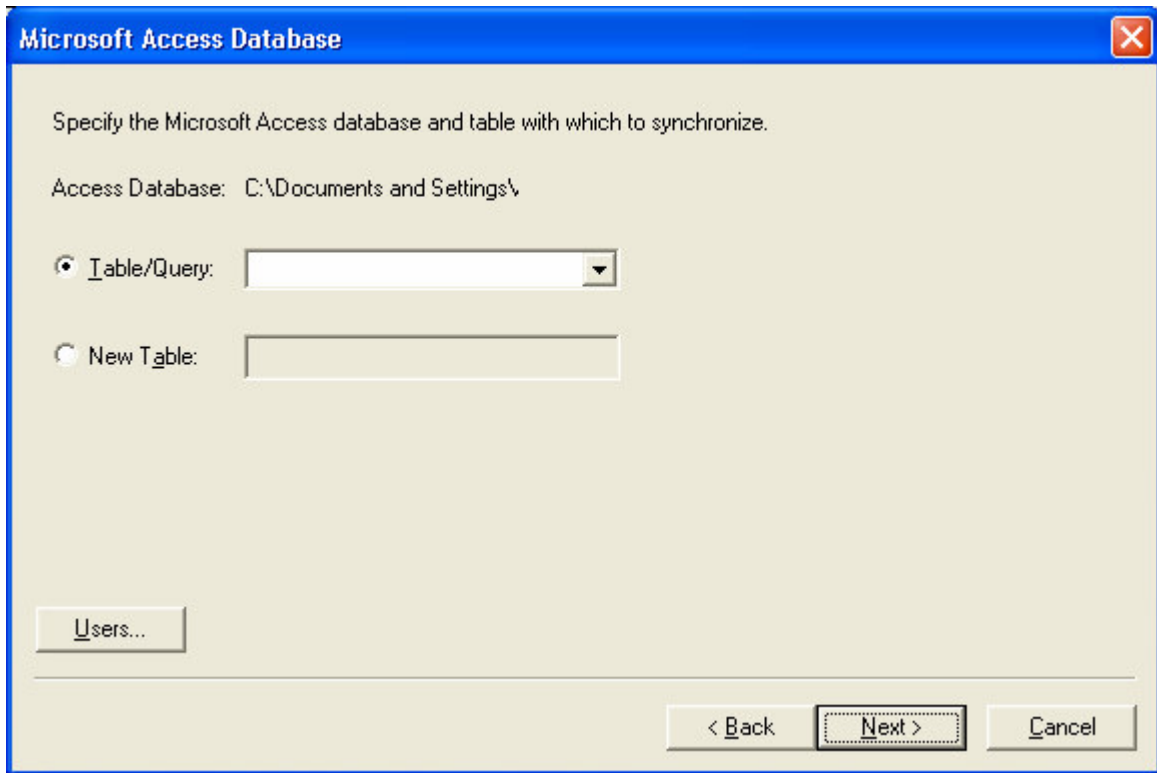
To begin a new Access configuration, choose Access as your data source after clicking the new button in the SmartList To Go desktop. If creating an Access Sync job for an existing SmartList, choose the SmartList from the left hand side of the SmartList To Go desktop and then click on the Data Link tab. On the Data Link tab click the Access Sync button. This will launch the configuration screens that will guide you through the process of creating the new Access configuration as described in the next few subsections.

In This Section . . .

- **4.1.2.1 Create or Select Access Table**
- **4.1.2.2 Select Handheld Users**
- **4.1.2.3 Select Synchronization Mode**
- **4.1.2.4 Select Conflict Resolution Method**
- **4.1.2.5 Map Fields**

4.1.2.1 Create or Select Access Table

In the second configuration screen, you will select an existing Access table to synchronize or create a new Access table to synchronize with this configuration..



You have three options here:

1. You can use an existing table that exists in an existing Access database,
2. You can create a new table in an existing Access database,
3. You can create a new table and a new Access database to contain it.

Use an existing table

To use an existing table, follow these steps:

1. Click on the **Browse** button at the top of the screen. This will open a standard Open As dialogue window in which to select the database file that contains the table you will use.
2. Select the desired file and click **Open**. This will close the dialogue window, and the selected file's pathname will appear in the second line of text labeled Access Database:. The pull-down menu corresponding to the Table/Query radio button below will now list the names of the existing tables in the database you selected.
3. Select the **Table/Query** radio button.
4. Open the corresponding pull-down menu and select the name of the table you wish to use.

5. Click **Next** to proceed to the next configuration screen.

Create a new table in an existing database

To create a new table in an existing database, follow these steps:

1. Click on the **Browse** button at the top of the screen. This will open a standard Open As dialogue window in which to select the database file that contains the table you will use.
2. Select the desired file and click **Open**. This will close the dialogue window, and the selected file's pathname will appear in the second line of text labeled Access Database:. The pull-down menu corresponding to the Table/Query radio button below will now list the names of the existing tables in the database you selected.
3. Select the **New Table** radio button.
4. Enter the name of the new table in the corresponding input.
5. Click **Next** to proceed to the next configuration screen.

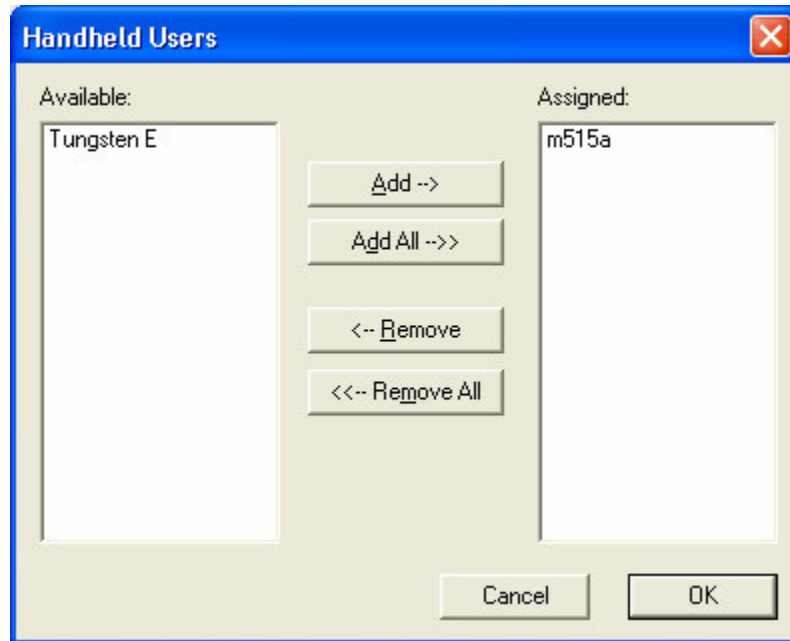
Create a new table in a new database

To create a new table in a new database, follow these steps:

1. Click on the **Browse** button at the top of the screen. This will open a standard Open As dialogue window in which to create the database file.
2. Navigate to the directory in which you wish to create the new database, and enter the name of the new file and click **Open**. This will open a dialogue that indicates that the database you selected does not exist. This dialogue will ask if you wish to create the file.
3. Click **OK** to continue. This will close the dialogue window, and the selected file's pathname will appear in the second line of text labeled Access Database:. The pull-down menu corresponding to the Table/Query radio button below will now list the names of the existing tables in the database you selected.
4. Select the **New Table** radio button.
5. Enter the name of the new table in the corresponding input.
6. Click **Next** to proceed to the next configuration screen.

4.1.2.2 Select Handheld Users

Press the Users button to access the configuration screen to select which users will use this configuration.



This screen provides a list labeled Available of the users that have HotSynced with this PC in the past. This list is located on the left side of the screen. You will use the buttons in the center of the screen to populate the Assigned list on the right side with the users you want to use this configuration.

To add an individual user to the Assigned list, click on the username in the Available list to select it and click the **Add** button. This will remove that user from the Available list and add it to the Assigned list.

To add all the available users to the Assigned list, click on the **Add All** button. This will move all the users to the Assigned list.

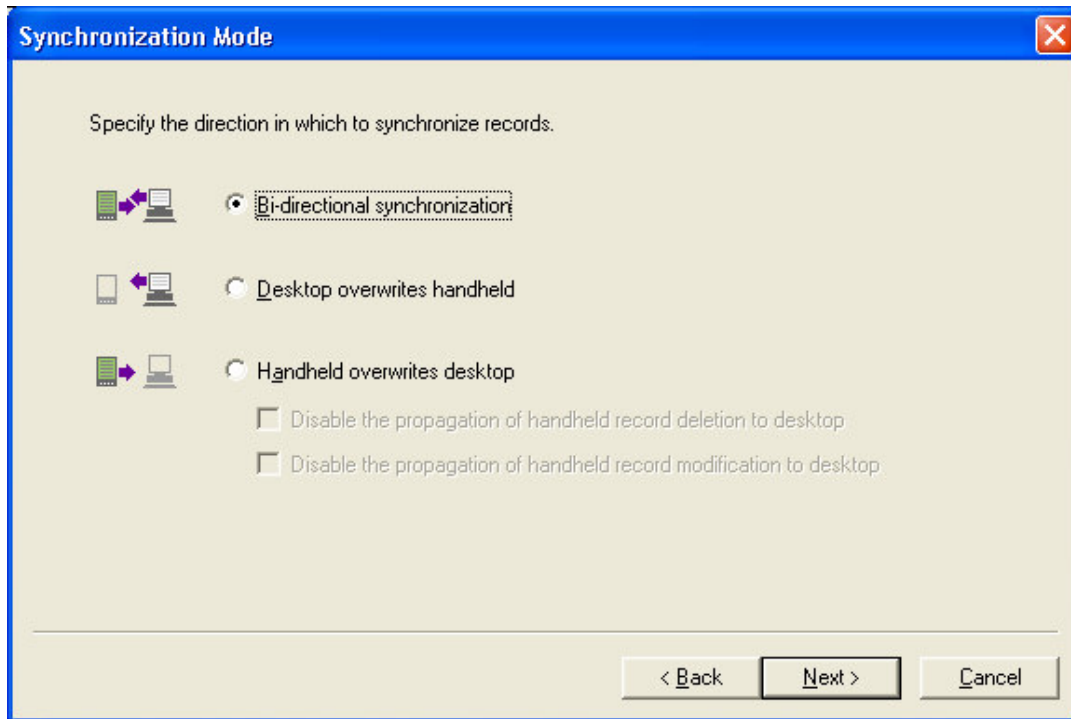
To remove an individual user from the Assigned list, click on the username in the Assigned list to select it and click the **Remove** button. This will remove the user from the Assigned list and add it to the Available list.

To remove all the Assigned users from the list, click on the **Remove All** button. This will empty the Assigned list and add all the users to the Available list.

When the Assigned list contains all the users you wish to select, click OK.

4.1.2.3 Select Synchronization Mode

In this screen you will select a synchronization mode to use when synchronizing data sources using this configuration.



As discussed in Section 3.2.2 Synchronization Modes, you have three options:

1. Bi-directional synchronization (the default mode),
2. Desktop overwrites handheld,
3. Handheld overwrites desktop.

To select a synchronization mode, select the radio button that corresponds to the desired synchronization mode. If you select **Handheld overwrites desktop**, you may choose to check one, both or neither of the mode options below to adjust how this mode behaves.

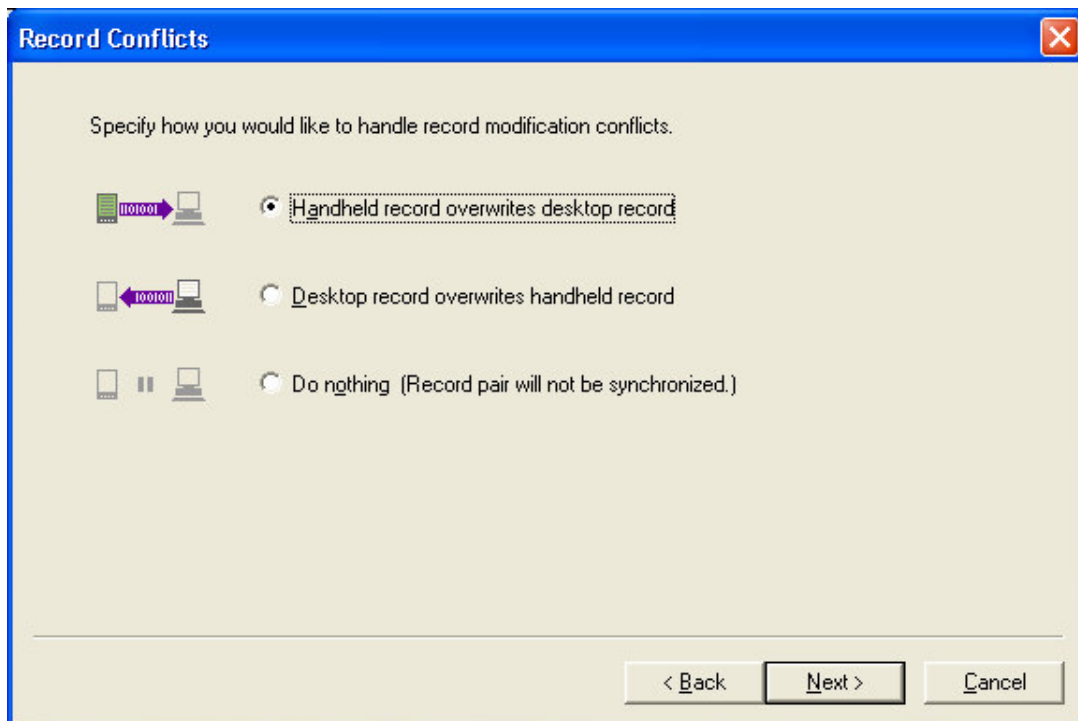
Then click **Next** to continue to the next configuration screen.

4.1.2.4 Select Conflict Resolution Method

In this configuration screen, you will select a method for resolving record conflict during synchronization.



Note: Conflicts are only possible using the bi-directional synchronization mode. Therefore, this configuration screen will only appear if you selected bi-directional synchronization in the previous screen. If you selected a different mode, you will skip this screen and proceed directly to Selecting Handheld Users.



As discussed in Section 3.2.3 Conflict Resolution Methods, you have three options:

1. Handheld record overwrites desktop record,
2. Desktop record overwrites handheld record,
3. Do nothing (Record pair will not be synchronized).

To select a Conflict Resolution method, select the radio button that corresponds to the desired method.

Then click **Next** to continue to the next configuration screen.

4.1.2.5 Map Fields

At this point in the configuration creation, SmartList To Go will decide which field in the Access table corresponds to each field in the SmartList To Go database. This is called **Mapping the fields**, and SmartList To Go maps fields automatically by pairing up fields with identical names. In this configuration screen, you will verify SmartList To Go's choices and make any necessary adjustments. This screen offers you the ability to do so.

For example, while SmartList To Go will map every field it can for you, but you may not want to exchange the data contained in every field. In the figure below, you can see that the Categories field in SmartList To Go is not mapped to a field in Access. Using this screen you can unmap fields that contain data you do not wish to include in synchronization, manually map fields that did not have identical names and change the way fields are mapped.



Example: Consider yet again the example of the database MyBooks, which tracks your collection of books. You may decide that you want to track a lot of different kinds of information about each book in the desktop version of the database. This information might include basic descriptive data like the book's title, the Author's name and whether you own the book yet or want to buy it soon, as well as more detailed information like whether your copy is hard cover or paperback, how pages there are, what its copywrite date is and by which company it was published. However, you may not wish to carry all the detailed information with you on the handheld version of the database. The author's name, title and whether or not you own it may be the only data you wish to take with you. In such a case, you would unmap all the fields you do not wish to take with you, leaving only the Author, Title and Ownership fields mapped.

Field Mapping

Map SmartList fields to Access fields.

	SmartList Field Name	SmartList To Go Fi...	Access Field Name	Access Field Type
	Categories	Category		
<input type="checkbox"/>	ID	Long	ID	AutoNumber
<input checked="" type="checkbox"/>	Text	Text	Text	Text
<input type="checkbox"/>	Integer	Float	Integer	Float
<input type="checkbox"/>	Long	Long	Long	Long
<input type="checkbox"/>	Float	Float	Float	Float
<input type="checkbox"/>	Checkbox	Checkbox	Checkbox	Yes/No
<input type="checkbox"/>	Date	Date	Date	Date/Time
<input type="checkbox"/>	Time	Date	Time	Date/Time
<input type="checkbox"/>	List	Text	List	Text
<input type="checkbox"/>	Memo	Memo	Memo	Memo

Map... Clear... Clear All...

< Back Finish Cancel

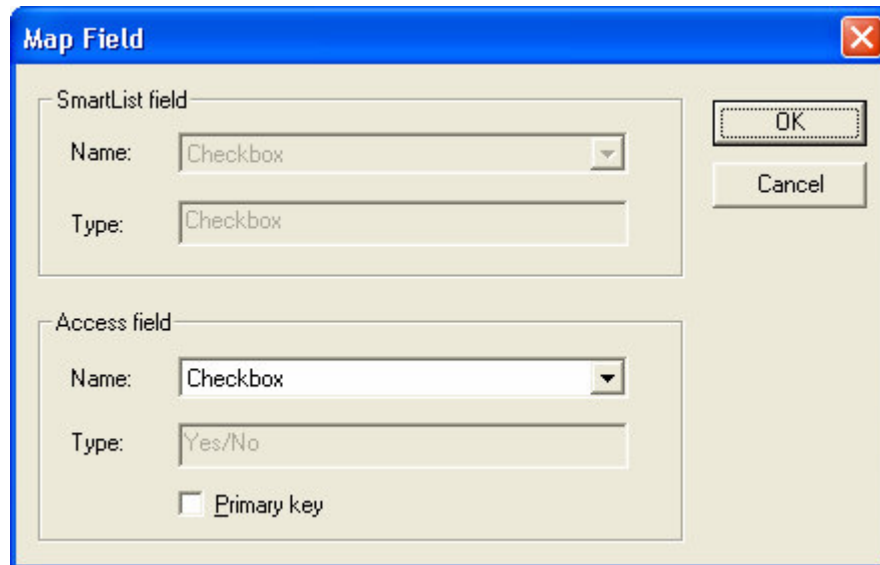
In this configuration screen, you will find a table that shows the connections between the fields in

the SmartList To Go database and the fields in the Access table. This table contains one row for each field and 5 columns.

- The first column, labeled with a key icon, contains checkboxes for selecting the Key field(s)
- The second column, labeled SmartList To Go Field Name, contains the names of each SmartList To Go field.
- The third column, labeled SmartList To Go File Type, contains the field types that correspond to the names in the first column.
- The fourth column, labeled Access Field Name, contains the name of each Access field to which the SmartList To Go file in that row is mapped. If the SmartList To Go field is not mapped to an Access field, that row's cell in this column will be empty.
- The fifth column, labeled Access Field Type, contains the field types that correspond to each Access field.

To map a field or modify how a field is mapped, follow these steps:

1. Click the table row that shows how the field is mapped to select it.
2. Click the **Map** button to open the Map Field window. This window provides controls for adjusting how a field is mapped.



The Map Field Window

The SmartList To Go field section at the top of the window will display the name and type of the SmartList To Go field whose row you selected.

The Access field section at the bottom of the window will display the name and type of the Access field to which the SmartList To Go field is currently mapped.

To change the field, open the **Name** pull-down menu and select the name of the new field. Note that mapping is always one to one, so only those fields that are not currently mapped will appear in the pull-down menu.

To change the field type, open the **Type** pull-down menu and select the new field type. Note that when you map two fields together, their field types must be compatible. For example, you can map a Long field in SmartList To Go to an Auto-Number field in Access because the two field types are compatible with each other, but you cannot map a checkbox field type to an OLE object field because they are not the same kinds of data. Only those field types that are compatible with the SmartList To Go field type will appear as options in the **Type** pull-down menu. If only one field type is compatible, you will not be able to change the type.

To select the field as a primary Key, check the **Primary Key** checkbox at the bottom of the window.

Click **OK** to apply your changes to the field mapping or press **Cancel** to close the Map Field window without applying the changes.

To unmap a field, click on its row in the table to select and click the **Clear** button at the bottom of the screen.

To unmap all fields, click on the **Clear All** button at the bottom of the screen.

4.1.2.5.1 Access/SmartList To Go Field Compatibility

This table describes which Access field types are compatible with which SmartList To Go field types and to what extent.

SmartList To Go Field Type	Access Field Type	Support Level
Address Join	Text	One-directional (SmartList To Go => Access)
Address Lookup	Text	One-directional (SmartList To Go => Access)
Auto Incremental	Numeric (Long Integer)	Bi-directional
Checkbox	Yes/No	Bi-directional
Conditional Expression	Text	One-directional (SmartList To Go => Access)
Date	Date/Time (Short Date, Medium Date, Long Date or General Date)	Bi-directional
DB Join	Depends on the join-field type	Bi-directional
DB Lookup	-	Unsupported
Expression	Depends on the result type	One-directional (SmartList To Go => Access)
Float	Number (Single, Currency or Double)	Bi-directional
Image	OLE Object (Bitmap Image)	Bi-directional
Integer	Number (Integer or Byte)	Bi-directional
Key	Numeric (Long Integer, Integer or Byte)	One-directional (SmartList To Go => Access) Key fields overwrite Access values with SmartList To Go values.
List	Text	Bi-directional
Long	Number (Long Integer)	Bi-directional
Long	AutoNumber	One-directional (SmartList To Go <= Access) AutoNumber fields overwrite SmartList To Go values with Access values.
One-To-Many	-	Unsupported
Memo	Memo	Bi-directional
Plug-In	-	Unsupported
Radio Button	Text	One-directional (SmartList To Go => Access)

Text	Text	Bi-directional
Time	Date/Time (Short Date, Medium Date, Long Date or General Date)	Bi-directional

4.1.2.7.2 Select a Primary Key Field

To select a field as a Primary Key field, click on the box in the first column of the table in this window that corresponds to the desired Primary Key field. You must select a Primary Key field before continuing past this screen.

For information on why and how to choose the Primary Key field(s), see Section 4.1.1.4 Selecting Primary Key Fields.

Once you have mapped all the fields and selected a Primary Key field, the new configuration's design is complete. Click the **Finish** button to proceed to the next step: Installing the new, empty data source.

4.1.3 Step 3 - Install the Empty SmartList To Go Database

While you were designing the new configuration described in Step 2, SmartList To Go was creating a new, empty data source according to the new configuration's design. If you are creating your configuration based on an existing SmartList To Go database, then SmartList To Go has created a new Access table to form the other end of the synchronization set. If you are creating your configuration based on an existing Access table, then SmartList To Go has created a new SmartList To Go database to be the other end of the synchronization set, and now you need to perform a HotSync to install this database to your handheld device.

When creating a new, empty SmartList To Go database, SmartList To Go will prompt you to perform a HotSync when you press the **Finish** button. Follow these steps:

1. Ensure that your PDA is connected to your PC.
2. Close out the SmartList To Go desktop application and perform the HotSync. This will install the new SmartList To Go database, which SmartList To Go created according to the schema you indicated in the Field Mapping configuration window, onto your handheld device.
3. When the HotSync is complete, click the **HotSync Completed** button.

The new SmartList To Go database is installed.

When creating a new, empty Access table, you do not need to take any action during this step. SmartList To Go already created the new table and configured its fields while you were using the Configuration Assistant's design screens.

You can now close the Configuration Assistant by clicking the **Close** button in the lower right corner of the window.

Remember!

By this point, you have created the new data source, but, whether you created an Access table or a SmartList To Go database, that database will not contain any data until you complete the next step, populating the new data source with records.

4.1.4 Step 4 - Populate the New Data Source with Data

As you created your configuration using the Configuration Assistant's design screens, you also created a new, empty SmartList To Go database or a new, empty Access table. In this step, you will populate this new data source with records.

To populate the new data source with records, simply perform a HotSync. This HotSync session will take a little longer than usual because SmartList To Go must copy all the data from one data source to the other. During subsequent HotSyncs, SmartList To Go will only transfer data that has changed since the last HotSync, making the process much more efficient.

When the HotSync is complete, you are now ready to use your new Access configuration.

5. Synchronizing - Advanced Topics

In the last chapter, we presented the basic instructions you will need to get started with SmartList To Go and to create new configurations. In this chapter, we will expand into some of the more advanced issues that will help you design better configurations and deal with special cases.

Some of the design issues described in this chapter include configurations for multiple users and modifying existing configurations. The special cases include working with field types with unique behavior, like Key fields and fields that synchronize in only one direction, working with password-protected databases and synchronizing with an Access Query.

In This Chapter . . .

- **5.1 Synchronizing with an Access Query**
- **5.2 Modifying Configurations**
- **5.3 Special Synchronization Issues for Specific Field Types**
- **5.4 Working with Password-Protected Data Sources**

5.1 Synchronizing with an Access Query

In addition to synchronizing with Access tables, SmartList To Go also supports synchronization with Access queries. Synchronizing with an Access query allows you to create a SmartList To Go database that contains a precisely defined subset of the total records contained in an Access table.

To synchronize a SmartList To Go database with an Access query, first design the query in Access. The query criteria you create will define what records will be included in the SmartList To Go database during synchronization, and the fields you choose to include in the query will define what fields are included in the SmartList To Go records. Then, create the Access configuration exactly as if you were synchronizing with an Access table, except that you will select the query you just created in the Desktop Data Source configuration screen.

When you synchronize with a query, SmartList To Go's behavior during synchronization is a little different than when you synchronize with a table. The exact behavior of SmartList To Go will vary depending on the synchronization mode you have selected. This behavior is not always as simple to describe as synchronizing with a table, but the key thing to remember is this: only those records which satisfy the query criteria - the criteria you created when you created the Access query - can be synchronized.

In This Appendix . . .

- **5.1.1 Synchronization in Bi-Directional Synchronization Mode**
- **5.1.2 Synchronization in Desktop overwrites Handheld Mode**
- **5.1.3 Synchronization in Handheld overwrites Desktop Mode**
- **Table - Behavior of Synchronization with an Access Query**

5.1.1 Synchronization in Bi-Directional Synchronization Mode

In this mode, the SmartList To Go database will always contain the same records as the Access query. You can add, modify and delete any record in either location, but when you perform a HotSync, SmartList To Go will ensure that the SmartList To Go database is identical to the Access query when the HotSync is complete. This is useful in situations where the handheld will be used as a point of data input and modification as readily as the desktop.

For example, if you added a record in SmartList To Go or Access that meets the query criteria and then synchronized, the record would then appear in both data sources. However, if you added a record in Access that did not meet the criteria, it would not appear in the Access query, and, therefore, it would not appear in the SmartList To Go database. Similarly, if you added a record in SmartList To Go that did not meet the query criteria, SmartList To Go would add the record to the Access table, but that record would not then appear in the Access query, and, therefore, it would no longer appear in the SmartList To Go database, even though that is where the record was created.

5.1.2 Synchronization in Desktop overwrites Handheld Mode

In this mode, SmartList To Go will synchronize only those records that meet the query criteria, and it will always overwrite the version contained in the SmartList To Go database with the version contained in Access. This is a one-directional mode that allows SmartList To Go to move data from the desktop to the handheld, but it cannot move data in the other direction, from the handheld to the desktop. This is useful in situations where the desktop alone will be used for entering and modifying data, and the mobile handheld will be used to view data, but not to change it.

For example, if you modified a record in Access that meets the query criteria and then synchronized, the record would be modified in the SmartList To Go database to match. However, if you modified a record in the SmartList To Go database that meets the query criteria and then synchronized, the record would not be modified in Access, because data cannot move from the handheld to the desktop in this mode. Instead, SmartList To Go would restore the modified SmartList To Go record to match the Access database.

For another example, if you created a record in Access that met the query criteria and then synchronized, the record would then appear in the SmartList To Go database. However, if you created a new record in the SmartList To Go database and then synchronized, the record would remain in the SmartList To Go database and it would not be added to the desktop data source, regardless of whether or not it meets the query criteria, because data is never written on the desktop in this mode.

5.1.3 Synchronization in Handheld overwrites Desktop Mode

This mode cannot be applied when synchronizing with an Access query.

Table - Behavior of Synchronization with an Access Query

Change	Result(s)	
	In Bi-Directional Synchronization Mode	In Desktop overwrites Handheld Mode
Changes to Desktop records		
ADD A NEW DESKTOP RECORD THAT ...		
... meets the query criteria.	The new desktop record is added to the SmartList To Go database.	The new desktop record is added to the SmartList To Go database.
... does not meet the query criteria.	The new desktop record is NOT added to the SmartList To Go database.	The new desktop record is not added to the SmartList To Go database.
MODIFY A DESKTOP RECORD THAT ...		
... did not meet the query criteria so that it now meets the criteria.	The modified desktop record is added to the SmartList To Go database.	The modified desktop record is added to the SmartList To Go database.
... met the query criteria so that it still meets the criteria.	The modified desktop record is updated in the SmartList To Go database.	The modified desktop record is updated in the SmartList To Go database.
... met the query criteria so that it no longer meets the criteria.	The modified desktop record is deleted from the SmartList To Go database.	The modified desktop record is deleted from the SmartList To Go database.
DELETE A DESKTOP RECORD ...		
... that met the query criteria.	The deleted desktop record is deleted from the SmartList To Go database.	The deleted desktop record is deleted from the SmartList To Go database.
Changes to SmartList To Go records		
ADD A NEW SMARTLIST TO GO RECORD THAT ...		
... meets the query criteria.	The new SmartList To Go record is added to the desktop data source.	The new SmartList To Go record is NOT added to the desktop, but remains in the SmartList To Go database.
... does not meet the query criteria	The new SmartList To Go record is added to the desktop and deleted from the SmartList To Go database.	The new SmartList To Go record is NOT added to the desktop, but remains in the SmartList To Go database.
MODIFY A SMARTLIST TO GO RECORD THAT ...		
... met the query criteria so that it no longer meets the criteria.	The modified SmartList To Go record is updated on the desktop and deleted from the SmartList To Go database.	The modified SmartList To Go record is restored to match the desktop record.
... met the query criteria so that it still meets the criteria.	The modified SmartList To Go record is updated on the desktop.	The modified SmartList To Go record is restored to match the desktop record.
DELETE A SMARTLIST TO GO RECORD THAT ...		
... met the query criteria.	The deleted SmartList To Go record is deleted from the desktop.	The deleted SmartList To Go record is restored.

Changes to records both on the desktop and in SmartList To Go

**DELETE A DESKTOP RECORD AND MODIFY THE CORRESPONDING SMARTLIST TO GO RECORD THAT .
..**

... met the query criteria.

The deleted desktop record/modified SmartList To Go record is deleted from the SmartList To Go database, and an alert is logged in the HotSync log.

The deleted desktop record/modified SmartList To Go record is deleted from the SmartList To Go database, and an alert is logged in the HotSync log.

5.3 Modifying Configurations

No matter how well you design a configuration initially, sometimes it becomes necessary to alter that design. You may need to do so to account for things you didn't consider originally or to account for changes to the role you want your data sources to fill.

The SmartList To Go Configuration Assistant is your interface for modifying configurations, just as it is for creating them. The Configurations Settings Window contains many of the same controls you used to create the configuration. However, when you created the configuration, the controls were in a series of separate windows; the Configurations Settings Window displays the controls in a series of forms contained in a single window.

In This Section . . .

- **5.3.1 Changing Synchronization Settings**
- **5.3.2 Changing Data Source Schemas**
- **5.3.3 Moving the Access Database**

5.3.1 Changing Synchronization Settings

You can change how SmartList To Go synchronizes data using the Synchronization Mode and Record Conflicts tabs in the Configurations Settings Window.

To change a configuration's synchronization settings, double-click the SmartList To Go icon on your desktop to launch the Configuration Assistant and follow these steps:

1. Click on the Configuration you wish to alter to select it.
2. Click the **Edit** button. This will open the Configuration Settings Window.
3. Select the Synchronization Mode tab and select the radio button that corresponds to the synchronization mode you wish to use. For more information on the different synchronization modes.

5.3.2 Changing Data Source Schemas

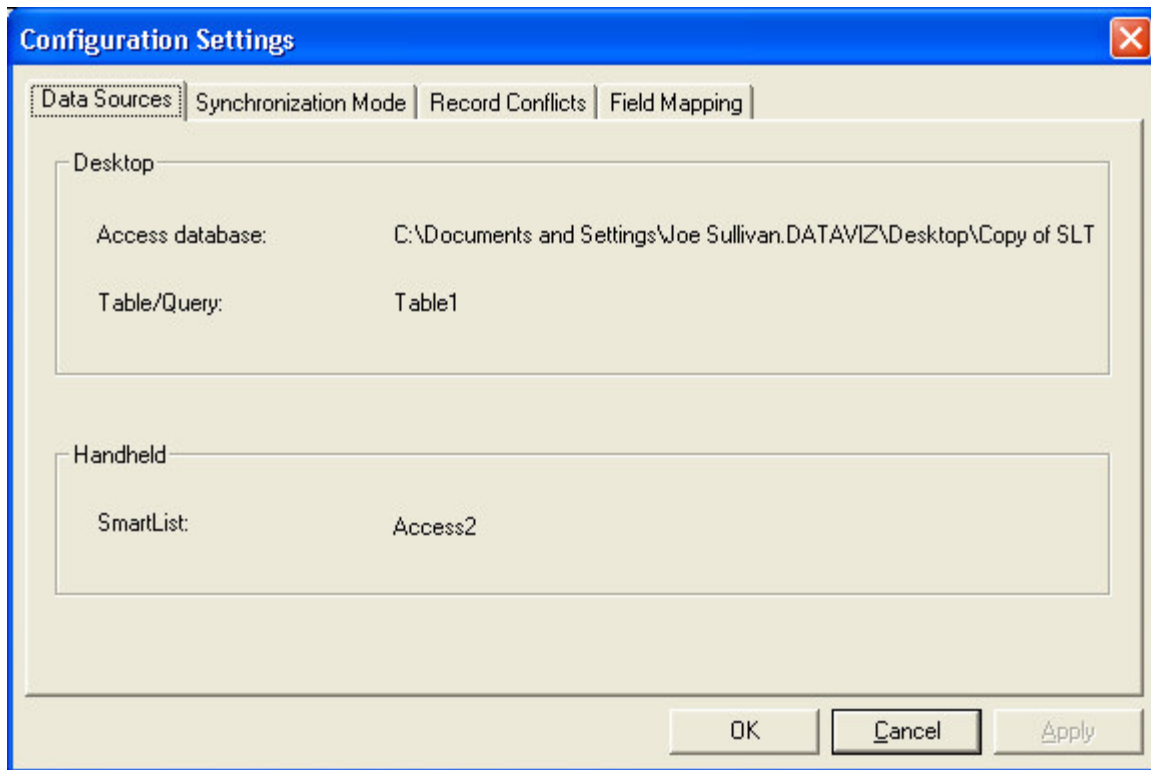
In addition to helping you create new configurations, the Configuration Assistant also provides the Edit button to allow you to modify existing configurations.

The Edit button launches the Configuration Settings window, your interface for making changes to a configuration. The Configuration Settings window is a single window with five different tabs. These tabs contain most of the same controls that were contained in the series of configuration design screens you use to create new configurations.

In particular, if you make any changes to the schema of either data source in the configuration you will have to modify the configuration to reflect those changes before you can continue to synchronize. This includes adding fields, removing fields, changing field names and changing field types in either data source.

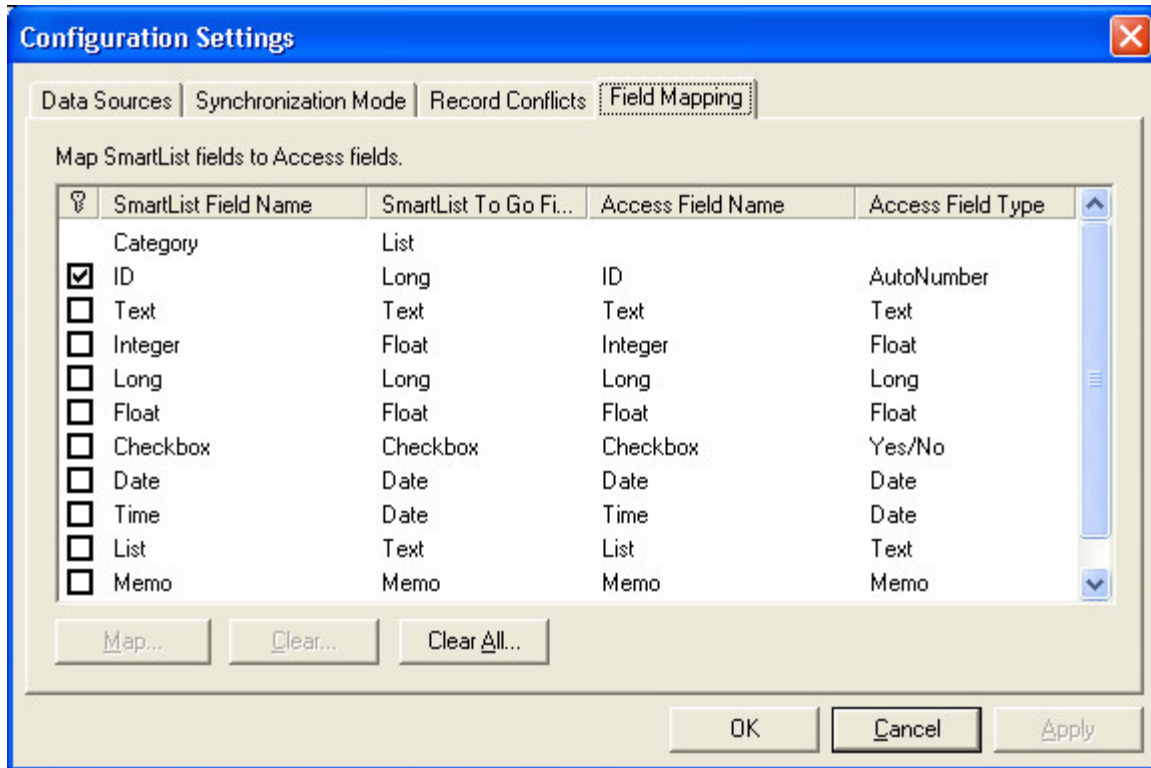
To modify an existing configuration, follow these steps:

1. Double-click the SmartList To Go icon on your desktop to launch the SmartList To Go Configuration Assistant. This will display the Configuration Assistant's main window, which lists basic information about all existing configurations in a table.
2. Click on the row that contains information about the configuration you wish to modify to select it.
3. Click the **Edit** button at the bottom of the screen. This will open the Configuration Settings window, and the window will display the settings relevant to the configuration you selected in Step 2.



The Configuration Settings Window

4. Make any desired changes to the configuration in the tabs of the Configuration Settings window.
 - **The selected data sources cannot be changed.** Select the **Data Source tab** to view information about the data sources that are synchronized using this configuration, but you are not allowed to change these sources.
 - **To change how SmartList To Go synchronization data,** select the **Synchronization Mode tab** and select the desired mode's radio button.
 - **To change the manner in which SmartList To Go resolves conflicting record changes that occur using the bi-directional synchronization mode,** select the **Conflict Resolution Method tab** and select the desired method's radio button.
 - **To change how fields are mapped,** select the **Field Mapping tab**.



The Field Mapping Tab

The controls in this field are as described in Section 4.1.2 and Section 4.2.2 with one exception, the addition of the **Refresh SmartList To Go Schema** button in the lower right corner. If any changes have been to the schema of the SmartList To Go database, you will need to update the field information in this screen before you can make any changes to the mapping that reflect the modified schema.

- **To change the primary key field(s)**, select the **Field Mapping** tab. The checked boxes in the left column indicate the current key field(s). Check only those fields you want to use as primary key fields.
5. Click **OK** to apply the modifications you have made and close the Configuration Setting window or click **Cancel** to close the window without applying the changes.

The configuration is now modified.

5.3.3 Moving the Access Database

SmartList To Go allows you to change the filename or file location of an Access database involved in a configuration without having to create a new configuration from scratch. However, after you have changed the file's name or location or both, you must modify the configuration to reflect the database's new pathname.

To modify a configuration to reflect an Access database's new pathname, follow these steps:

1. Double-click the SmartList To Go icon on your desktop to launch the SmartList To Go

Configuration Assistant. This will display the Configuration Assistant's main window, which lists basic information about all existing configurations in a table.

2. Click on the row that contains information about the Access configuration you wish to modify to select it.
3. Click the **Edit** button at the bottom of the screen. Normally, this will open the Configuration Settings window, but SmartList To Go will first verify that the pathname for the Access database it currently contains is still correct. In this case, SmartList To Go will detect that the Access database's pathname is no longer correct. An alert window will open stating that the database was not found. This alert will also ask if you would like to indicate the database's new location.
4. Click **Yes** to proceed with indicating the new database location. This will open a standard Windows open file dialogue.
5. Use this dialogue window to navigate to and select the old file in its new location or under its new name, then click **Open**.

The configuration now reflects the database's new pathname. SmartList To Go will proceed to open the Configuration Settings window, in which you may make any other modifications that may be necessary.

5.4 Special Synchronization Issues for Specific Field Types

As you work more and more with configurations, you will discover that some fields, due to their characteristics, display unique behavior during synchronization.

For example, the Auto-number field type in Access contains a value that is assigned by Access, not the user. So while the value in this type of Access field is synchronized to the corresponding field in SmartList To Go, if the user changes this value in SmartList To Go, that change cannot be upheld during synchronization. This means that synchronization for this field type is one-directional only, and must always move data from Access to SmartList To Go. A similar situation occurs when using the Key field type in SmartList To Go; the values in Key fields are determined by SmartList To Go, so changes in Access or QuickBase cannot be upheld during synchronization.

In This Section . . .

- **5.4.1 SmartList To Go's Key Field and Access's AutoNumber Field**
- **5.4.2 DB Join Fields**
- **5.4.3 Address Join and Address Lookup Fields**
- **5.4.4 Expression, Conditional Expression and Advanced Expression**
- **5.4.5 Image Fields**

5.4.1 SmartList To Go's Key Field and Access's AutoNumber Field

Both SmartList To Go and Access contain one field type whose values are determined programatically, not entered by the user. This means that the database application itself automatically enters a value in this field as you create each new record. The purpose of such fields is to create a value that is guaranteed to be unique in each record in the database or table; this is often useful for creating an ID field. Such fields are read-only; only the program itself can determine its value, and, once determined, neither the user nor SmartList To Go can modify that value. Therefore, while SmartList To Go can successfully synchronize such fields, the behavior of such synchronization is a little different from that observed in most fields.

SmartList To Go commonly deals with two field types that fit this description: SmartList To Go's Key field type and Microsoft Access's AutoNumber field type.

SmartList To Go's Key Field Type


The SmartList To Go Key field type is designed to contain a unique value in each record in the database. SmartList To Go assigns values to fields of this type automatically, and neither the user nor SmartList To Go can modify these values. This means that SmartList To Go must assign the values for this field type, even if the record was created in Access and even if you are using the Desktop overwrites Handheld synchronization mode.

For example, if you create a new record in SmartList To Go, SmartList To Go will assign the Key field a value and that value will be synchronized to Access along with the rest of the data in that

record. However, if you create a record in Access and assign a value to the field mapped to a SmartList To Go Key field, the record data will be synchronized to SmartList To Go as normal with one exception. During the synchronization, SmartList To Go will generate a new value for the Key field to replace the existing value in SmartList To Go and Access, even if you are using the Desktop overwrites Handheld synchronization mode.

Microsoft Access's Auto-Number Field Type

Like SmartList To Go's Key field type, the Microsoft Access Auto-Number field type (Auto-Num) is designed to contain a unique value in each record in the database. The value in this field is an integer Access determines by adding one to the value in the same field in the last record created. Neither the user nor SmartList To Go can modify values in this field type. This means that Access must assign the values for this field type, even if the record was created in SmartList To Go and even if you are using the Handheld overwrites Desktop synchronization mode.

 **Tip:** Access's AutoNumber field type is particularly useful for creating unique identifiers for multiple-user configurations.

Consider the example of a simple database that has two handheld users, and each user creates one new record. If the database schema includes a SmartList To Go Key field intended to produce a unique identifier, a conflict will arise; as each user synchronizes, SmartList To Go will try to add both new records, but they will both have a Key field value of three. SmartList To Go will not be able to change either Key field value, and SmartList To Go will not be able to add both records to the Access database.

If, however, you use Access's AutoNumber field, then Access will automatically assign a value of three to the first record that is added and a value of four to the second. It is not even necessary for the user's to enter values in that field at all, as Access will automatically reassign values as appropriate.

5.4.2 DB Join Fields

A DB Join is a SmartList To Go field that extracts and displays specific information contained in another SmartList To Go database. Unlike most other fields, the data a DB Join field displays may be different from the data it actually contains. This effects how SmartList To Go is able to transfer data in a DB Join field during synchronization.

How a DB Join Field Works

The SmartList To Go User's Manual contains complete information about how DB Joins work. However, in order for you to understand how SmartList To Go synchronizes data in a DB Join field, it is first necessary to review a little information about how DB Joins work.

The DB Join's design includes three elements that enable it to locate and display the correct information: the **source database**, the **Join To** field and the **Join Display** field. The **source database** is the SmartList To Go database that contains the information to be displayed. When you use a DB Join, you do not enter data as with other fields. Instead, you select the record in which the data is located; the **Join To** field is the field by which you identify the desired record. The **Join Display** field contains the information that you actually want to display in DB Join field.

What all this means is that the data the DB Join field stores may be different from the data it displays. Other field types contain data so that they can display it; DB Join fields contain data so they can identify the specific record in the **source database** that contains the data you want to display. If you select the same field in the **source database** as both the **Join To** and the **Join Display** field, then the data you store is the same as the data you display. If you select different fields, then the data you store in the DB Join field is different than the data you display.

Synchronizing DB Joins

When you synchronize a SmartList To Go database that uses a DB Join field, the data exchange is bi-directional. However, SmartList To Go exchanges the data that is actually contained in the DB Join field, not the data it displays. The values that will appear in the desktop-accessible data source are those that are contained in the **Join To** field, not the **Join Display** field.

We recommend, when possible, that you design the DB Join field so that the **Join To** and **Join Display** are the same field. As we described above, this will mean that the DB Join field contains and displays the same data, and SmartList To Go will synchronize the field normally.

5.4.3 Address Join and Address Lookup Fields

Address Join and Address Lookup fields create a relationship between a SmartList To Go database record and an entry in Address Book, a built-in application in the PalmOS.

Like the DB Join field, Address Join and Lookup fields do not contain data itself, they contain pointers to data contained in Address Book. The Address Book application resides only on the handheld. As a result, Address Join and Address Lookup fields can only synchronize in one direction: from the handheld to the desktop.

When you perform a HotSync, SmartList To Go will pass the data that is currently displayed in the Address Join and Address Lookup fields to their corresponding fields in the desktop-accessible data source. On the desktop, this data is read-only because the desktop-accessible data source cannot communicate with Address Book on your handheld.

5.4.4 Expression, Conditional Expression and Advanced Expression

All expression field types, including Expressions, Conditional Expressions and Advanced Expressions, follow the same rules during synchronization.

In SmartList To Go, these expression field types calculate and display values based on the current values contained in other fields according to the user's design. However, SmartList To Go will automatically map these expression fields to corresponding fields in Microsoft Access whose types are compatible with the results calculated by the SmartList To Go expression fields. For example, if an Advanced Expression field in SmartList To Go produces a floating numerical value, SmartList To Go will map that field to a Float type field.

During synchronization, all fields on which the SmartList To Go expression field relies will pass values back and forth with their corresponding Access fields as normal. The SmartList To Go expression field, however, synchronizes in one direction only; it passes the most recently calculated value from a SmartList To Go expression field to its corresponding static field in Microsoft Access.

In Access, you can modify the values in fields upon which the expression field relies, but you cannot recalculate the new expression results within Access. You must first synchronize the databases to bring the handheld data up to date, then recalculate the expressions on the handheld. Note also that while Access will allow you to modify the data in a field that is mapped to a SmartList To Go expression field, your modifications will be replaced by the calculated results during synchronization.

One last note on working with expression fields: SmartList To Go does not recalculate expressions automatically during a HotSync, so it is a good idea to manually recalculate expressions after every HotSync to ensure that the expression results are up to date.

5.4.5 Image Fields

SmartList To Go Image fields synchronize normally during the HotSync, just be aware that the Image field type in SmartList To Go maps to the OLE Object field type in Access. This Access

field type supports a variety of objects, but for the purposes of synchronizing with a SmartList To Go database, you must only enter bitmap format images in this field.

5.5 Configuration Files

When you create a new configuration, SmartList To Go stores its design information in a file called “dbSync.dat”. This is the configuration file, and all configurations are stored in this one file.

The average user will never work with the configuration file directly. However, system administrators may find configuration files useful when creating and deploying multiple user configurations that synchronize with a desktop-accessible data source, such as an Access database located on a LAN. The administrator can create, deploy and modify a configuration, and the users will never have to even open the Configuration Assistant before making use of that configuration.

By default, SmartList To Go stores the configuration file in the same directory in which SmartList To Go is installed. For example, if you installed SmartList To Go in the default directory suggested **by the Install Wizard**, the configuration file will be located at:

`C:\Program Files\SmartList To Go\dbsync.dat`

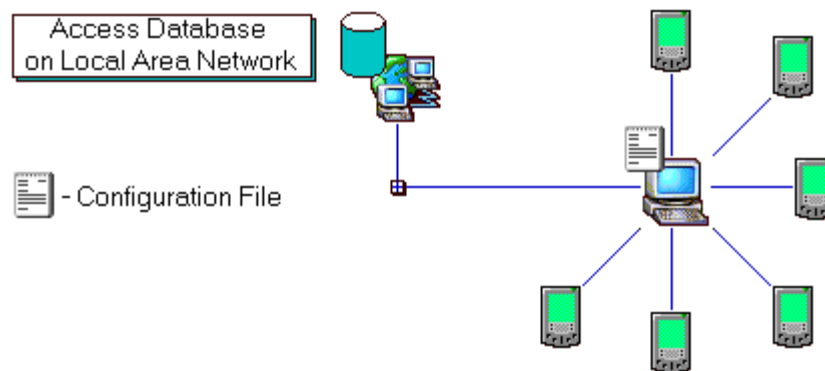
However, a qualified administrator can change the name and location of the configuration file and reflect that change in the registry by modifying the value of the following registry key:

`HKEY_CURRENT_USER/Software/DataViz/SmartList To Go/Configurations.`

In this manner, you can move the configuration file to any common location accessible to all users, including a mapped drive on a LAN.

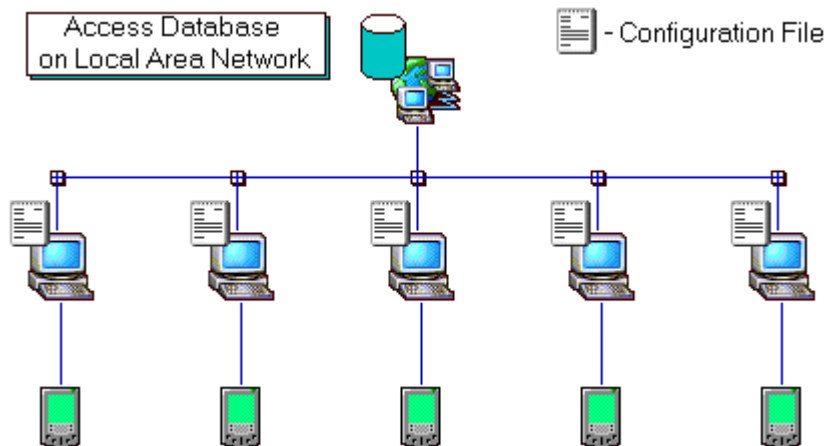
We are confident that you will be able to devise a number of ways to use configuration files to best fit your needs that we would never have thought of. However, we've included the following diagrams to illustrate a few of the most basic possibilities.

The first diagram shows a multiple user configuration in which all the users synchronize from the same desktop. The Access database can reside on that desktop or on a LAN, and the configuration file resides on the desktop.



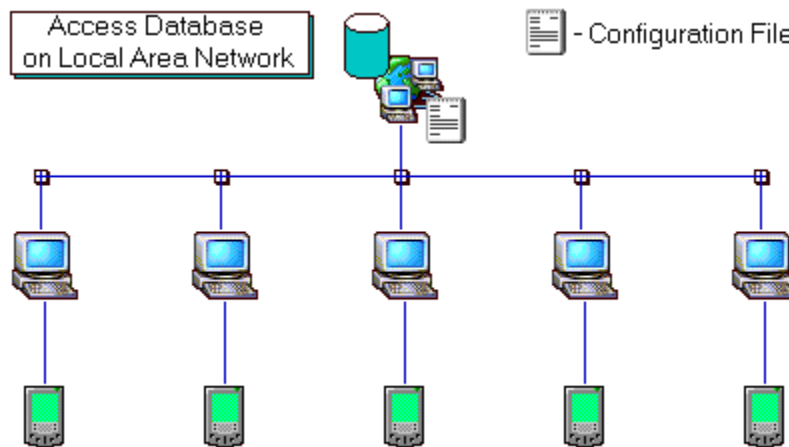
Multiple Users on a Single Desktop

The second diagram shows a multiple user configuration in which each user synchronizes using a different desktop, each with its own configuration file. The Access database is located on a Local Area Network. To do this, you could create the configuration using the Configuration Assistant on each individual desktop. Another option, however, would be to create the configuration using the Configuration Assistant on one desktop, then copy the resulting configuration file, "dbsync.dat", to each of the other desktops. Using the second method, you only have to create the configuration once.



Multiple Users on Multiple Desktops

The third diagram shows a multiple user configuration in which each user synchronizes using a different desktop. As in the previous diagram, the Access database is located on a LAN. In this diagram, however, there is one configuration file located on the LAN rather than separate copies located on each individual desktop. To accomplish this, the administrator has modified the registry on each desktop to reflect the configuration file's location on the LAN. The advantage of this design is that if it is necessary to modify the configuration, you can do so quickly and easily in a single location, and it is not necessary to copy the modified configuration to each desktop.



Multiple User on Multiple Desktops



Warning: Manually editing the Windows registry can be risky and should only be attempted by qualified personnel, such as a trained system administrator. Failure to edit the registry properly can result in applications that function improperly or not at all. It can even result in the inability to boot your computer. DataViz cannot recommend, endorse or provide technical support for manual adjustment to your Windows registry. The information above is to be used at your own discretion.

Appendix: Common Log Messages

The table below contains a listing of some of the most common Log messages you may encounter working with SmartList To Go. The table describes why each message occurs and what action, if any, the message requires.

Log Message:

SmartList To Go could not update one or more records in the desktop table [**Access database**] while synchronizing with SmartList To Go database [**SmartList To Go database**]. For details, see the file: C:\[path]\SmartList To GoLog_0001.txt.

Reason:

This message occurs when one or more records on the handheld have been altered so that the primary key field(s) contain the same value as another record. Therefore, Access would not allow SmartList To Go to modify the corresponding record in the Access table.

Resolution:

Open the SmartList To Go Log file indicated in the message. This text file will list the record or records that SmartList To Go could not synchronize. Modify these records so that their primary key fields contain unique data and perform the HotSync again.

Log Message:

SmartList To Go could not add one or more records from SmartList To Go database [**SmartList To Go database**] to desktop table [**Access database**]. For details, see the file: C:\[path]\SmartList To GoLog_0002.txt.

Reason:

This message occurs when one or more new records have been added to the SmartList To Go database that have primary key field values found in records that already exist. Therefore, Access would not allow SmartList To Go to add these records to the Access table.

Resolution:

Open the SmartList To Go Log file indicated in the message. This text file will list the record or records that SmartList To Go could not add. Modify these records so that their primary key fields contain unique data and perform the HotSync again.

Log Message:

The desktop table [**Access database**] contains a primary key field of type AutoNumber. Values can be assigned to this field only by the desktop database. For any new or modified handheld record, the AutoNumber field value in the handheld record was replaced with the value from the corresponding desktop.

Reason:

This message occurs when an Access data source that contains an AutoNumber field is synchronized using the Handheld overwrites Desktop mode. Only Access can enter a value in an AutoNumber field, so SmartList To Go could not alter these values to match those contained in the corresponding handheld records.

Resolution:

There is no need to take any action. In the Handheld overwrites Desktop mode, SmartList To Go alters the data on the desktop to match the corresponding data on the handheld. With AutoNumber fields, however, SmartList To Go makes an exception and alters the handheld data - in the AutoNumber field only - to match the corresponding data in Access.

Log Message:

SmartList To Go detected one or more conflicts. For details, see the file: C:\[**path**]\SmartList To GoLog_0001.txt.

Reason:

This message occurs when SmartList To Go detects one or more records that were modified on both the handheld and the desktop during bi-directional synchronization using the Do Nothing conflict resolution method. As the Do Nothing conflict resolution method directs, SmartList To Go has left both versions of the record intact and is notifying you - through the message above - that conflicts exist. The text file indicated in the message will list exactly which records are in conflict.

Resolution:

Open the SmartList To Go Log file indicated in the message. This text file will list the records that are in conflict. Decide which version of the record you wish to preserve, and either make the corresponding changes in the other manually, or force SmartList To Go to make the change by temporarily changing to a different conflict resolution method and HotSyncing again.

Log Message:

SmartList To Go found one or more new or modified records in the desktop database while synchronizing with **[SmartList To Go database]**. This SmartList To Go database contains fields of type Key. The values of Key fields are determined only by the handheld database, so the values of these fields in the desktop records have been replaced with the values from the corresponding handheld records.

Reason:

This message occurs when you synchronize an SmartList To Go database that contains a Key field. Only SmartList To Go can enter a value in a Key field, so when you synchronize, SmartList To Go will always use the handheld value regardless of the synchronization mode currently in use. All other fields synchronize normally.

Resolution:

There is no need to take any action. Because only SmartList To Go can enter a value in a Key field, SmartList To Go has automatically overwritten the desktop value with the handheld value for this field. For example, if you created a new record in Access, SmartList To Go would first add the new record to SmartList To Go and allow SmartList To Go to assign a value to the Key field. Then SmartList To Go would alter the corresponding Access field to match the SmartList To Go-assigned value.

Log Message:

An error occurred while trying to sync the database **[SmartList To Go database]**: Cannot synchronize because desktop database **[location and file name]** cannot be opened.

Reason:

This message occurs if you have changed the location and/or name of a desktop-accessible data source, but you have not modified the configuration to reflect the change. SmartList To Go was unable to open the desktop-accessible because it could not find it.

Resolution:

Modify the configuration to reflect the new location and/or filename of the desktop data source according to the instructions in Section 5.3.3 Moving the Access Database.

Log Message:

An error occurred while trying to sync the SmartList database [**SmartList To Go database**]: One or more of the mapped fields have changed or been deleted since the Sync Configuration was created. To correct the problem, edit the Sync Configuration and re-map the fields in the desktop application.

Reason:

This message occurs you have in some way changed the schema of the SmartList To Go database by changing a one or more mapped fields' types, changing field names or removing fields, but you have not updated the configuration to reflect these changes.

Resolution:

Modify the configuration to reflect the new SmartList To Go database schema according to the instructions in Section 5.3.2 Changing Data Source Schemas.

Log Message:

SmartList To Go found one or more new or modified records in the desktop database while synchronizing with [**SmartList To Go database**]. This SmartList To Go database contains fields of type Address Join or Address Lookup. SmartList To Go supports only one-directional syncing of these field types. If these fields have been changed in the desktop, SmartList To Go will ignore the changes. The values of these fields should only be changed in SmartList To Go.

Reason:

This message occurs you synchronize a SmartList To Go database that has Address Join or Address Lookup type fields. These field types are read-only in the desktop-accessible database.

Resolution:

This is an informational log message, so you do not need to take any action. If you change these fields in SmartList To Go, SmartList To Go will make corresponding changes to the desktop-accessible data source. If you change these fields on the desktop, SmartList To Go will not alter the SmartList To Go data and will, in fact, restore the desktop data to its previous state.

