

# Syncing Entourage with the Palm

For addicts of the PalmPilot or its descendants (such as the Palm clones from Handspring, Sony and other companies), one of the most exciting aspects of Entourage is its ability to synchronize the information in its Categories, Address Book, Notes, Calendar, and Task modules with the Palm's built-in corresponding programs, so that you can carry the Mac-based details of your life around in your pocket. Every time you make a change to this information, either on the palmtop or on your Mac, the next HotSync (synchronization) session updates both machines so that they contain the identical information.

In fact, if you've decided to entrust your calendar, address book, and other databases to Entourage, you can safely retire Palm Desktop, the software that normally stores your PalmPilot's data on the Mac.

(It's about time, too. This feature was present in Office 2001, missing from the initial release of Entourage X, released by Microsoft on its Web site in mid-2002, taken down again for bug-fix reasons, and finally reposted.)

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**Note:** Unfortunately, although most Palm-compatible models include a tiny email program called Palm Mail, Entourage can't synchronize your email messages with it. You'll have to be content with sending your Entourage calendar, addresses, notes, and to-do lists to your palmtop.

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## The Hardware Setup

Before you get Entourage to talk to your Palm, you need to get your Palm talking to your Mac. This setup typically involves connecting your Palm cradle to your Mac's serial or USB port, and then installing Palm Desktop (which comes with every Mac,

and is also a free download from the Palm Web site). Palm Desktop, based on the program formerly known as Claris Organizer, is a calendar/address book/to do list/note pad, just like the Palm itself—but it runs on the Mac, and serves as the home base for your Palm-based data. Palm Desktop, in fact, is the program you're about to replace with Entourage.

The Palm Desktop installation also installs, on your Mac, several *conduits*—software modules that let each built-in Palm program (Date Book, Address Book, To Do, and Memo Pad) talk to corresponding Mac programs. Your Palm device's instructions walk you through the process of getting everything set up.

It's important that you get your PalmPilot working with the Palm Desktop before you install the Entourage conduits; otherwise, Entourage won't be able to speak to the palmtop. Once your Palm is able to HotSync (exchange data) with your Mac, you're ready to install the Entourage conduits.

## **About Conduits**

Conduits are small programs that sit in the Library→Application Support→Palm HotSync→Conduits folder. Each translates a different kind of data between the Palm and your Mac; for example, your Palm came with one conduit apiece for the Date Book, Address Book, Memo Pad, and To Do programs, each designed to shuttle information into the Palm Desktop program.

But these aren't the only conduits on earth, as you're about to find out. Various software companies have introduced new kinds of conduits that let more kinds of Palm data talk to more Mac programs. (There are conduits for FileMaker Pro and Quicken, for example.)

When an installer puts a new conduit in the Conduits folder (as Entourage is about to do), the HotSync software will have a new way of moving information to and from your Mac and your Palm. Fortunately, Entourage is clever enough to move the existing conduits out of its own way, into a folder called Disabled Conduits, to avoid confusing your Mac. Otherwise, you might wind up with two side-by-side Address Book conduits, for example, one designed to send the Palm's data to Entourage, and the older one designed to send it to Palm Desktop.

## **Installing the Software**

Once your Palm is working with your Mac, it's time to install the Entourage conduits—the little bits of software that link Entourage to the Palm's Categories, Address List, Date Book, To Do List, and Memo Pad. (The installation software isn't part of the standard Office X installation; it must be downloaded and installed first.)

### ***Downloading the installer***

At this writing, you'll find the necessary conduit software at [www.microsoft.com/mac/DOWNLOAD/OFFICEX/palmsync.asp](http://www.microsoft.com/mac/DOWNLOAD/OFFICEX/palmsync.asp). Don't even bother downloading it, though, unless your equipment already has:

- Mac OS X 10.2.1 or later
- Palm OS 3.0 or later
- Palm Desktop 4.0 software or later
- Entourage 10.1.2 or later

Once you've downloaded the installer (and decompressed it with StuffIt Expander, if necessary), you'll wind up with a file on your desktop called Handheld Sync Installer.

### **Running the installer**

To install the Entourage conduits, double-click the Handheld Sync Installer icon and follow the instructions on the screen.

A few things happen during this installation process. First, Entourage creates a folder called Disabled Conduits inside the Library→Application Support→Palm HotSync folder; it moves the original Address, Datebook, Memo, and ToDo conduits into that folder. Then it installs Entourage Conduit into the Conduits folder. From now on, whenever you press the HotSync button on your palmtop's cradle or cable, Palm Desktop won't "hear" anything that goes on; Entourage is the new Mac home for your PalmPilot's data.

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**Tip:** If you decide that Entourage isn't for you, you can always return to Palm Desktop. To do so, you'll have to uninstall the Entourage conduits. Do that by moving the Entourage Conduit file out of the Palm→Conduits folder (into, say, the Disabled Conduits folder); then move the Address Conduit, Datebook Conduit, Memo Conduit, and ToDo Conduit files (now in the Disabled Conduits folder) back into the Palm→Conduits folder. Your PalmPilot will once again HotSync to the Palm Desktop software.

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## **Conduit Settings**

Now that the Entourage conduits are in their proper places, it's time to set them up to perform as you want them to when you hit the HotSync button. To do this, open the HotSync Manager program.

You can get to it in any of several ways: for example, you can choose its name from the Palm Instant Desktop menu (the small green icon in your menu bar; it's there only if you've correctly installed Palm Desktop) and choose HotSync→Conduit Settings. Or you can simply find the HotSync Manager program in your Applications→Palm folder. Either way, the Conduit Settings window appears.

With the Conduit Settings window open, double-click the Entourage Conduit entry (see Figure D-1). You'll be faced with the Entourage Conduit Settings window, in which you can edit the HotSync settings for the Address Book, Notes, Calendar, and Tasks, and you can decide how private records are handled.

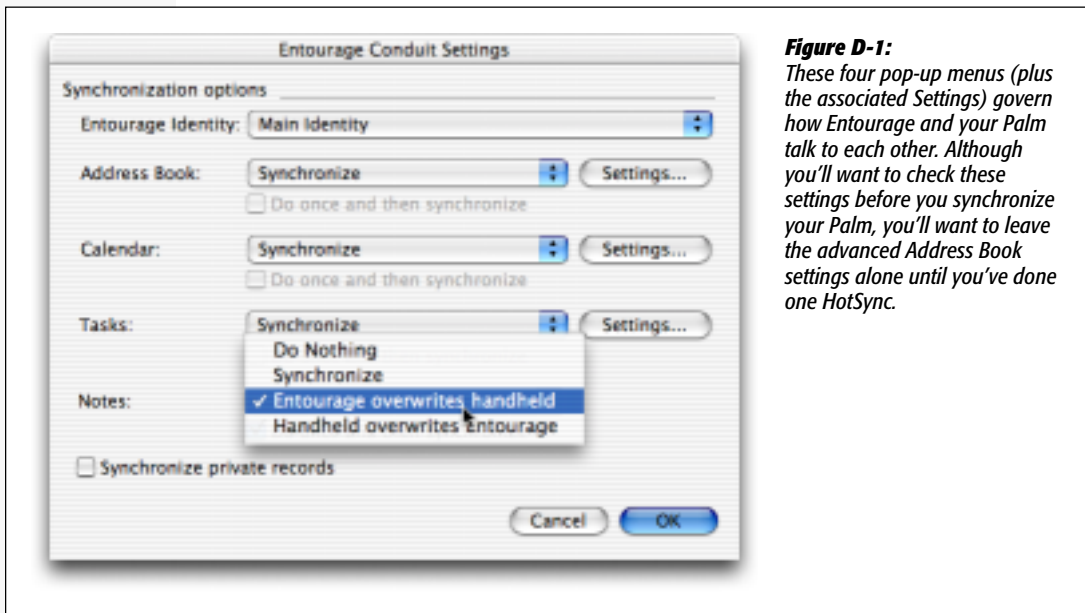
The idea behind synchronization is to combine two different sets of data (such as the notes in Entourage and the notes on your Palm) so that they match. Most of the

time, a HotSync does just this. But every now and then, you may want one of these other options:

- **Synchronize.** Entourage will compare its data with the Palm's data and merge the two together. Any new or edited items on either side of the cable show up in both places after a HotSync; your Mac and palmtop are now mutually up to date.
- **Entourage overwrites handheld.** You may occasionally prefer this option—such as when you've made a mess of the data on your palmtop, for example. When you HotSync, your Entourage data will wipe out, and replace, your Palm's data.
- **Handheld overwrites Entourage.** On the other hand, suppose you want your Palm's data to replace what's on the Mac (after a hard drive crash or sale of your old Mac, for example). This choice is the opposite of “Entourage Overwrites Handheld”; it copies your Palm's data to Entourage, overwriting the data in Entourage in the process.
- **Do Nothing.** Now suppose you would rather not wait for your Entourage addresses and appointments to be transferred—because you want to update only (for example) your FileMaker data. In such cases, select this option; your Palm's data and Entourage's data won't intermingle at all.

These four choices appear in a pop-up menu next to the Address Book, Notes, Calendar, and Tasks labels (Figure D-1), letting you choose one of these synchronization types for each module.

Below each pop-up menu is a “Do once then synchronize” checkbox. If you turn on this box, then whatever setting you've just made in the pop-up menu will take effect only for one HotSync cycle—the next one. After that, the pop-up menu will auto-



**Figure D-1:** These four pop-up menus (plus the associated Settings) govern how Entourage and your Palm talk to each other. Although you'll want to check these settings before you synchronize your Palm, you'll want to leave the advanced Address Book settings alone until you've done one HotSync.

matically reset itself to Synchronize mode. That's a useful arrangement if, for example, you want to have the data in your Palm overwrite the data in your Entourage right now, but to synchronize fully thereafter.

### **Private records**

The checkbox at the bottom of the dialog box pertains to addresses, notes, to-dos, and appointments that, on your Palm, you've designated as private. (Preference settings on the Palm let you mask or completely hide records you've marked this way until a password is correctly entered.) Entourage offers no equivalent feature; if private records are moved into Entourage when you HotSync, they're no longer private. If the security of such records on your Mac is a concern, turn on "Don't synchronize private records"; they'll simply remain on your Palm, hidden as always.

### **Special settings**

The Settings button (to the right of the Address Book, Calendar, and Tasks pop-up menus) opens a second settings window; Figure 2 shows an example.

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**Note:** Microsoft suggests synchronizing your Palm at least once before changing the settings here. The reason: After you change the conduit settings, Entourage's data will *overwrite and replace* the current copy of your Palm's. In other words, if Entourage hasn't already been brought up to date with your Palm, you might lose data in your Palm's address list, to-do items, or calendar.

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These options vary by Palm module. Each lets you limit the syncing to just one category, and also lets you govern the syncing in other ways:

- **Address Book.** In this Settings box, you can specify which Entourage address (Home or Work) you want taken to the Palm, for example (see Figure D-2).
- **Calendar.** Because memory is precious, and Palm memory even more so, Entourage can automatically delete old events from its calendar—a change that will keep your Palm similarly cleansed and updated. That's the purpose of the "Synchronize calendar events in this date range only" controls; after all, how often do you look up appointments you had last year?
- **Tasks.** The "Synchronize incomplete tasks" option tells your Palm to delete tasks from its To Do list once you've marked them as having been completed, which saves you space in your handheld's limited memory. (The items stay in Entourage as completed Tasks until you delete them.)

## **Doing the HotSync**

After establishing your conduit settings, press the HotSync button on the front of your Palm cradle (or on your HotSync cable). It should connect to your Mac and start synchronizing its information with Entourage.

Alas, the complexity doesn't end there. Although Entourage and Palm have similar groups of data, they don't correspond precisely—and that can cause problems.

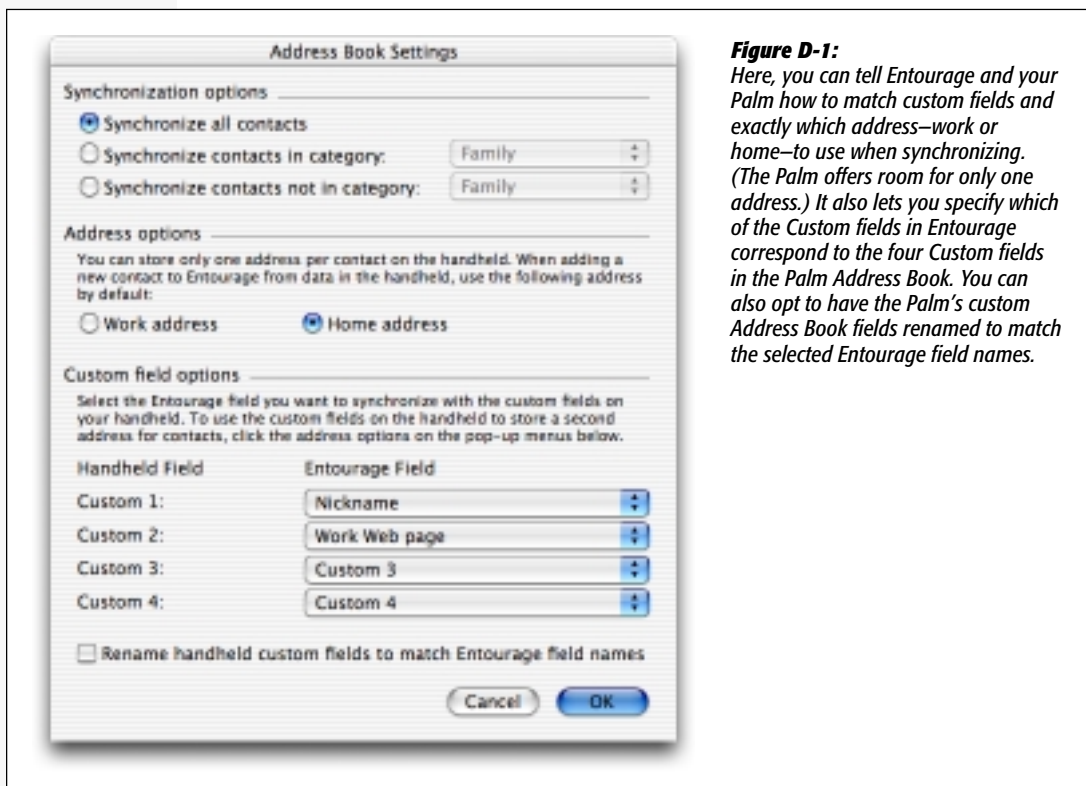
**How the data differ**

Because Entourage data and Palm data differ slightly in some key areas, you might experience some oddities when you synchronize the two. Here's a look at the data that's shared between your Palm and Entourage, and how they differ.

- **Categories.** The category names you create on your Palm come across to Entourage, but not all of the ones you create in Entourage move across to your Palm. Only categories attached to records (names, appointments, tasks, and so on) get transferred. If it's very important that the categories on your Palm and Entourage match, create and edit them on your Palm first, and then synchronize the two.

Furthermore, although Entourage can handle an unlimited number of categories, your Palm can only handle fifteen for each program (Address Book, Memo Pad, and so on). Therefore, if you have 37 categories assigned in Entourage, all of which you're using in your Address Book, you're bound to lose a few categories when transferring your Palm. Remember, too, that Palm category names can only be 15 characters long. (Entourage category names can be nearly endless.)

Another anomaly: An Entourage item can have more than one category at a time, but a Palm item cannot. When an item with multiple categories gets transferred, it loses its categories and gets put in the Unfiled category.



**Figure D-1:** Here, you can tell Entourage and your Palm how to match custom fields and exactly which address—work or home—to use when synchronizing. (The Palm offers room for only one address.) It also lets you specify which of the Custom fields in Entourage correspond to the four Custom fields in the Palm Address Book. You can also opt to have the Palm's custom Address Book fields renamed to match the selected Entourage field names.

Finally, the Palm Date Book doesn't offer a categories feature at all, so Entourage calendar events with categories attached may lose their category flags.

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**Tip:** In the Settings box, you can limit syncing a certain kind of data to all records in just one category, or all records that aren't in a certain category.

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- **Address Book/Address List.** Your Palm offers four custom fields in your Address Book; you can label them Birthday, Spouse Name, Latest hair color, or whatever you desire. Entourage, on the other hand, can handle ten custom fields. To specify which custom fields you want synced to the Palm, open the Settings box shown in Figure D-2.

Furthermore, Entourage can handle two addresses per person in your Address Book, whereas the Palm only offers a single address listing; so you'll need to tell the Entourage conduit which address to use when synchronizing with your Palm. Here again, you specify which address you want synced using the Settings box illustrated in Figure D-2.

- **Calendar/Date Book.** Entourage can store more data about a calendar event than your Palm can. As a result, such Entourage items as the event's location, invitees, travel time, and its category don't migrate to your Palm.

And, although your Palm can handle recurring calendar events, be warned: If you change one event in a recurring series on the palmtop, your Palm turns it into a separate event that's no longer connected to the series. Each individual appointment still finds its way into Entourage, but Entourage no longer treats it as a single repeating event.

Finally, the Palm doesn't treat multi-day events (which appear as a banner across the Entourage calendar) the same way Entourage does. Instead, the Palm treats such an event as a one-day thing that repeats daily until the "banner" ends. But when you sync your Entourage calendar, such an appointment appears only on the first day of the "banner" when transferred to the Palm. You're supposed to tap it, tap Details, and turn it into a daily-repeating event manually.

- **Tasks/To Do List.** Priorities on your Palm's To Do list and Entourage's Tasks are different: Entourage offers priority labels called Highest to Lowest, but your Palm ranks priorities from one to five.

Also, although you can set up alarms (reminders) for your Entourage task list, the Palm doesn't offer alarms for To Do items; don't expect alarms that you've associated with "Turn in IRS tax forms" on the Mac to make your Palm start beeping at the appropriate time.

Finally, although you can set up Entourage To Do items to repeat at regular intervals, the Palm's To Do program doesn't offer this feature. When you sync your Palm with Entourage, only the first occurrence of a recurring task makes it to your Palm.

- **Notes/Memo Pad.** Each “page” of the Palm Memo Pad program can only contain 4K of text (about a page and a half of writing). Entourage notes, on the other hand, can be much longer. When you sync your Entourage data, therefore, any Entourage note larger than 4K gets chopped off when it makes it over to your Palm. (Furthermore, if you’ve used HTML formatting in your Entourage notes, the formatting disappears in the move to the Palm.)

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**Note:** Be careful editing such memos on the handheld; when you perform your next HotSync operation, the truncated memo replaces the full-length one on Palm Desktop. That’s because, during the synchronization process, Entourage sees the version on your Palm that’s been edited after the item in Entourage, so it assumes that the truncated version is the latest, and thus the one to keep.

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#### TROUBLESHOOTING MOMENT

### Troubleshooting Sync Problems

Even after all of these notes and precautions, the HotSync process is a fragile one. After all, it consists of getting two vastly different computers to exchange information without you having to do much at all, and that’s almost wishful thinking in the world of high technology.

If synchronization fails miserably, it’s unlikely that the Entourage conduit itself has anything to do with the problem. Unfortunately, HotSyncing in general has a reputation for flakiness on the Macintosh.

If your HotSync never gets started, or never finishes up, check to make sure that all of the cables are plugged in solidly.

Be sure that you’re using the latest version of Palm Desktop for Mac OS X. If you’re using a USB Palm cradle (or a USB adapter), unplug the connector and replug it after the Mac has finished starting up; doing so often forces the Mac to reload the Palm USB driver software. If you’re still having trouble, contact your palmtop’s tech-support number.