

# User's Guide

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# Pocket Sheet Sync

*for Microsoft® Excel 95/97/2000/2002*  
*Version 1.1*

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**CASIO®**

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- Never run CD-ROMs on an audio CD player, as this may damage your hearing or the speakers if the volume is set too loud.
- Store the CD-ROM in a place where it is safe from direct sunlight, extreme heat and extreme cold.
- Keep the surface of the CD-ROM free from scratches, finger prints, dust and dirt.
- Do not turn off the CD-ROM drive or remove the CD-ROM while the CD-ROM is being read by the computer.

## Section 1 - General

### 1.1 Introduction

Pocket Sheet Sync supports the synchronization of sheets between the CASIO PV Unit (PV) and Microsoft Excel 95, 97, 2000 and 2002.

The documentation of Pocket Sheet Sync consists of the Operating Instructions and the Help system. The Operating Instructions provide an introduction to the basic functions of Pocket Sheet Sync.

To find out how to connect the CASIO PV Unit (PV) to your PC, consult the manual *PC sync for Windows*, for the operation of your CASIO PV consult the relevant operating manual.

### 1.2 List of symbols

Note the following conventions we have used in these Operating Instructions:

- |       |   |
|-------|---|
| [   ] | Button in Pocket Sheet Sync   |
| <   > | Key or combination of keys on your PC, e.g. <Alt D> <N> means: press <Alt> and <D> at the same time, followed by <N>. |
| "   " | File names on hard or floppy disk.  |
| '   ' | Menu or menu item that can be selected on your PC.  |

### 1.3 Minimum system requirements

To run Pocket Sheet Sync with Microsoft Excel 2002 you will need the following system configuration:

- Microsoft Windows Me, Windows 2000 Professional, Windows 98, Windows NT Workstation 4.0 (Service Pack 6 or later)
- PC with a Pentium 150MHz or higher CPU
- 64MB of RAM for Windows 2000 Professional; 32MB of RAM for Windows Me or NT Workstation 4.0; or 24MB of RAM for Windows 98
- Microsoft Excel 2002
- CD-ROM drive for software installation
- 9pin COM Port (serial port)

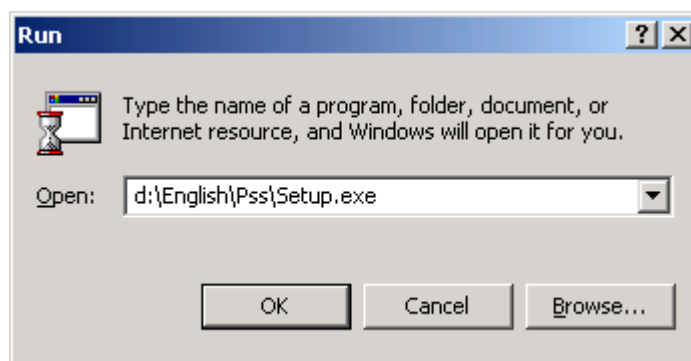
To run Pocket Sheet Sync with Microsoft Excel 95/97/2000 you will need the following system configuration:

- Microsoft Windows Me, Windows 2000 Professional, Windows 98, Windows 95 or Windows NT Workstation 4.0 (Service Pack 3 or later)
- PC with a Pentium 150MHz or higher CPU running Windows Me; a Pentium 133MHz or higher CPU running Windows 2000 Professional; or a Pentium 75MHz or higher CPU running Windows 98, 95 or NT Workstation 4.0
- 64MB of RAM for Windows 2000 Professional; 32MB of RAM for Windows Me or NT Workstation 4.0; or 16MB of RAM for Windows 98 or Windows 95
- Microsoft Excel 2000, Excel 97 or Excel 95
- CD-ROM drive for software installation
- 9pin COM Port (serial port)

## Section 2 - Working with Pocket Sheet Sync

### 2.1 Installing the program to a PC

Run Windows and insert the CD into the CD-ROM drive. Go to the "Start" menu and select "Run". Enter "d:\English\Pss\Setup.exe" into the dialog window that is presented and click **[OK]**.



If your CD-ROM drive has a different drive letter, enter this letter instead of "d". If the installation program cannot be found at this location, please enter "d:\Pss\Setup.exe" or click **[Browse...]** to locate "\Pss\Setup.exe" manually on the CD-ROM.

If the installation program is not on a CD-ROM, but on some other data medium, enter the complete path required for running the installation program (e.g. "c:\download\setup.exe").

Follow the screen prompts presented by the installation program.

#### *Please note:*

The installation of Pocket Sheet Sync includes setting up a new menu titled '**Casio**' in Microsoft Excel. However, you can prevent this from happening by turning off the control box which is presented during installation (see Section 3 – Add-in for Microsoft Excel). You can also decide whether or not to install fast synchronization access in the Task bar (see Section 4 – Quick access through the Task bar).

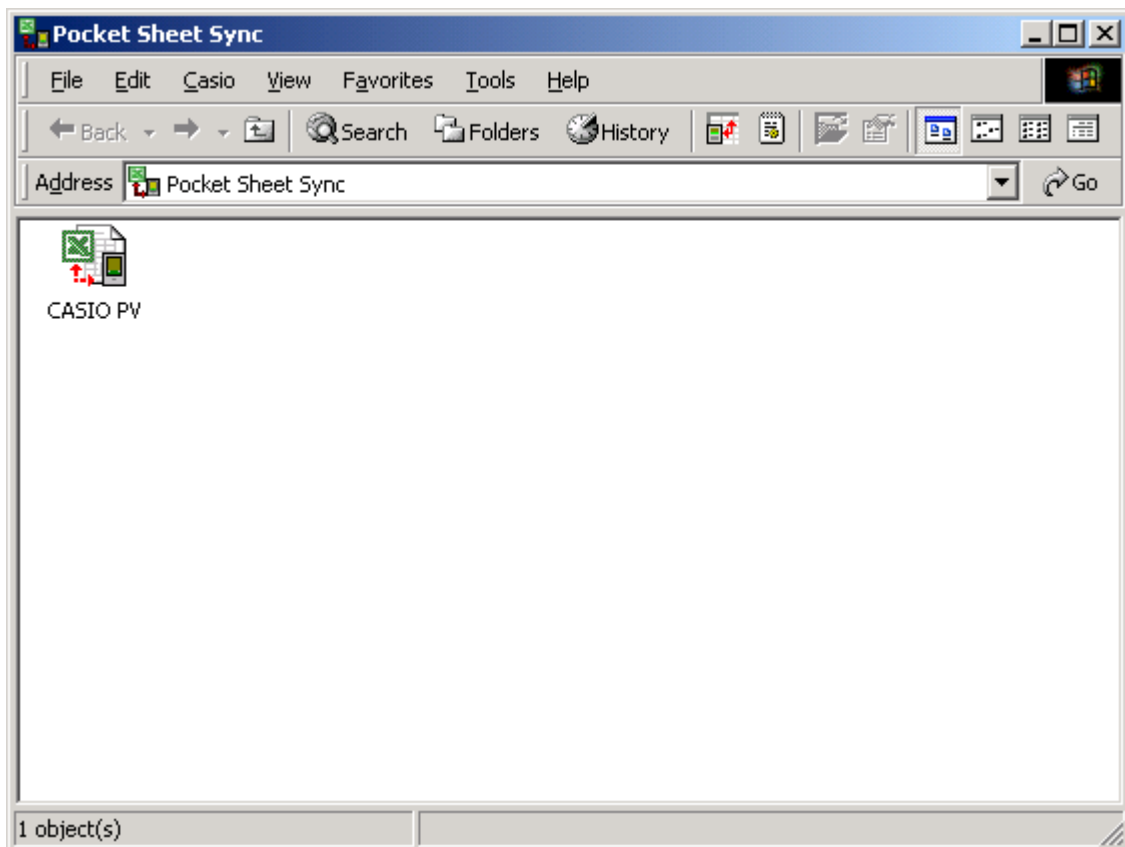
### 2.2 Starting the program

When the installation has been successfully concluded, the Pocket Sheet Sync icon is presented on the desktop. Double-click on this icon to open the Pocket Sheet Sync window. Pocket Sheet Sync is integrated into Windows Explorer and is operated in the same way.

So far, no links are available, and the Pocket Sheet Sync window is empty.

You can access the functions of Pocket Sheet Sync in the usual way via the menu bar or through the icons on the toolbar. Below the toolbar you will find a window, showing the synchronization links you have created.

You can now create a synchronization link between an Excel file and a PV file. Select the relevant Excel file on your computer and drag it into the Pocket Sheet Sync window with the mouse. This action creates a link, bearing the name of your Excel file.



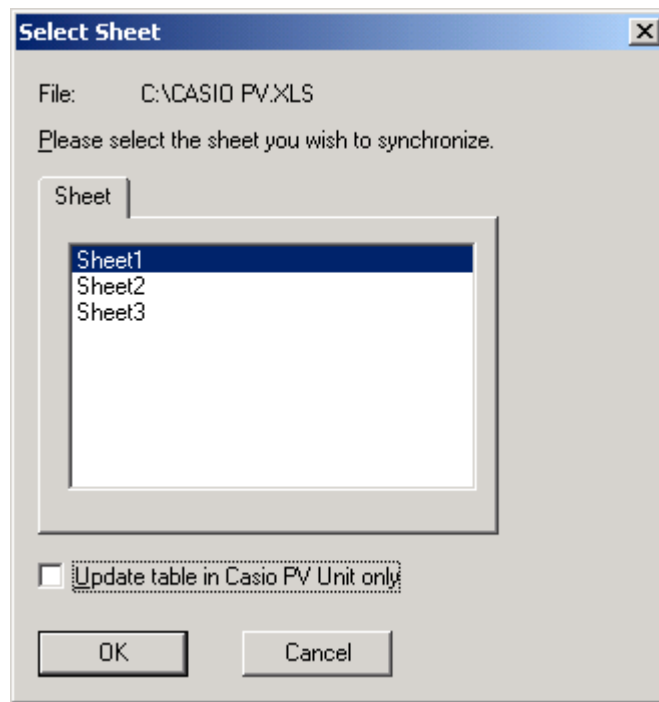
**Important:**

The name of a link in Pocket Sheet Sync must be no more than 32 character in length. Moreover, Pocket Sheet Sync only supports characters that can also be used on the PV. You can drag not only Excel files into the Pocket Sheet Sync window, but also links to Excel files.

By copying several Excel files to the link window at the same time, you can create several links.

When you have created a link, make sure you set the synchronization options between Excel and PV files.

The PV Unit can manage no more than one sheet per file. As an Excel file can contain *several* sheets, you need to specify which sheet is to be synchronized with the PV Unit file. A dialog window is presented, prompting you to select the desired sheet.



You can also specify whether a table should be synchronized completely or only in PV Unit. If you opt for full synchronization, changes are transferred from Microsoft Excel to PV Unit and vice versa. This option is the default.

If, on the other hand, you select the option **[Update Table in Casio PV Unit only]**, then the only changes that are sent to PV Unit will be changes made with Microsoft Excel. If changes have been made to this table in PV Unit, they are lost. Changes made in PV Unit are not sent to Microsoft Excel. Remember that once you have selected the option **[Update Table in Casio PV Unit only]**, you cannot disable it for a link.

If you use **[Update Table in Casio PV Unit only]**, Pocket Sheet Sync can adapt the table to the device much better when it sends it to PV Unit. If, for instance, cells in the table use Microsoft Excel functions that are not supported by PV Unit, then these cells can be replaced by the results of the calculated formulas. This is not possible with full synchronization.

You can tell from the link icon whether a link is fully synchronized or whether the option **[Update Table in Casio PV Unit only]** has been enabled.



Icon for links that are fully synchronized.



Icon if the option **[Update Table in Casio PV Unit only]** has been enabled

Links with the defined synchronization settings can also be deleted again. Note, however, that what you are deleting is mere a link in Pocket Sheet Sync, not the Excel file or the PV Unit file.

### 2.3 Synchronization settings

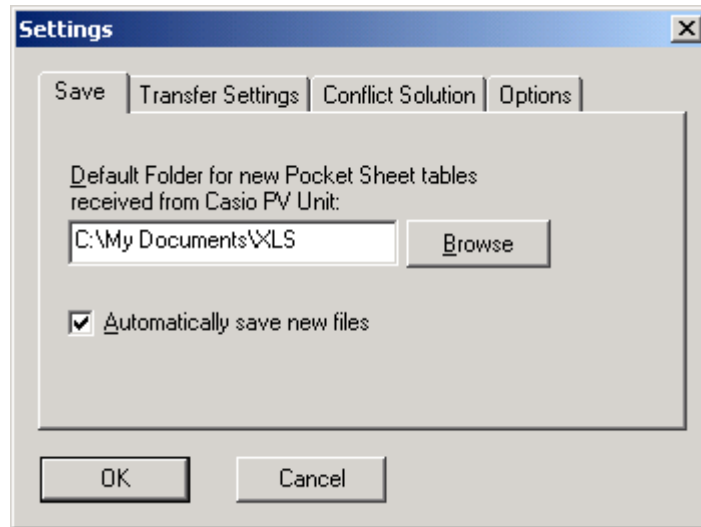
Before starting your first synchronization, we recommend making the required settings. Call up **'Settings'** from the **'Casio'** menu.

#### *Important:*

Any setting that are made through this command are carried out *automatically* at the synchronization stage, *without presenting further queries* to you.

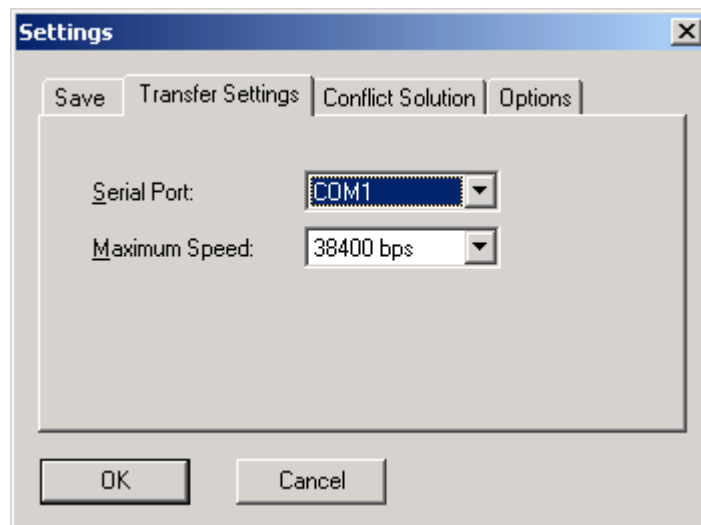
## Save

Select the directory to which you want to save the PV files which have just been transferred to your PC. If the field **[Automatically save new files]** is ticked, new files are saved to the specified directory without presenting any further query. Otherwise you are asked to specify the desired directory for each new file.



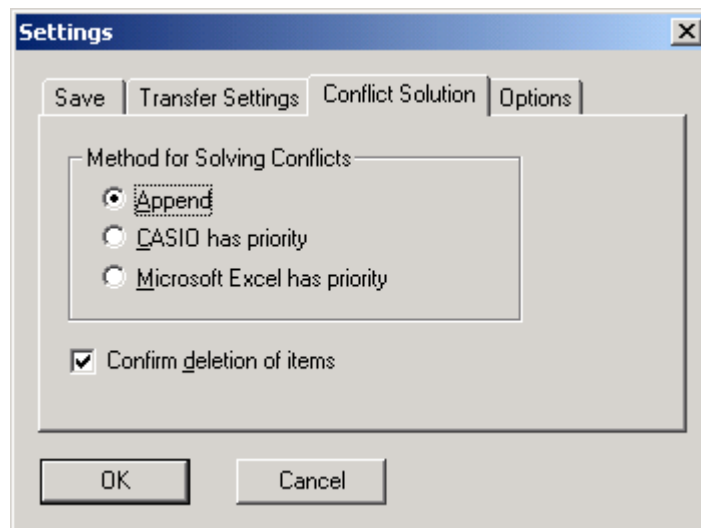
## Transfer settings

Select this tab to specify the settings for transferring files between your PC and PV Unit. Select the port under **[Serial Port]** to which your PV cable is connected. Under **[Maximum Speed]** set the maximum speed for transmission.



## Conflict solution

Select this tab to specify the method for solving conflicts that might occur between files and versions during synchronization. Such conflicts will occur whenever data has been changed on both sides between two synchronization runs or whenever data has been deleted on one side only.



Select **[Append]** if, in the event of a conflict, you wish to append the relevant files in the target device.

Select **[CASIO has priority]** if you want to give priority to the Pocket Sheet files from the PV, so that, in the event of a conflict, the corresponding Excel files on your PC will be replaced by the Pocket Sheet files from the PV.

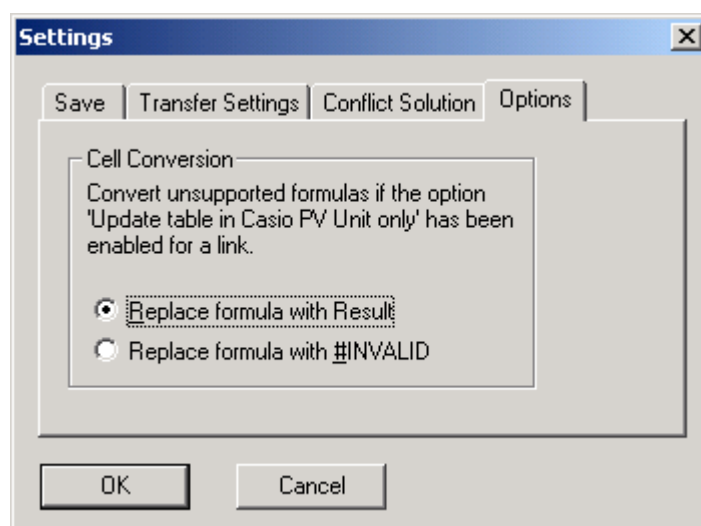
Select **[Microsoft Excel has priority]** if you want to give priority to the Excel files on your PC, so that, in the event of a conflict, the corresponding Pocket Sheet files on your PV will be replaced by the Excel files from the PC.

Select **[Confirm deletion of items]** if, after deleting a link or the associated Excel file, you only wish to delete the table in PV Unit upon presentation of a query. If this option has been enabled and a table has been deleted in PV Unit, a query is also presented before the deletion of links in Pocket Sheet Sync. Note that Excel files are never deleted by Pocket Sheet Sync.

## Options


This dialog allows you to specify certain options for converting cell contents during synchronization. However, we recommend leaving the default settings unchanged.

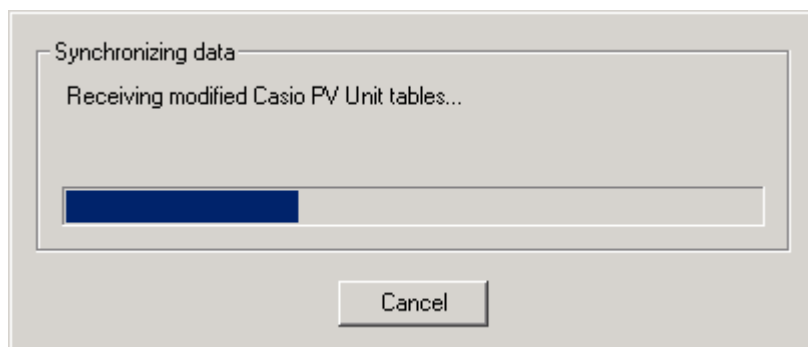
If the option **[Update Table in Casio PV Unit only]** has been enabled for a link, then transmission means, among other things, that all cells with formulas not supported by the Casio are replaced as specified in the option in this dialog. If a formula is not supported by PV Unit and you want to replace the formula by its Microsoft Excel result, select **[Replace Formula with Result]**. As long as you do not change the table in PV Unit, it will be available to you in the same way as in Microsoft Excel. Alternatively, you may wish to enable the option **[Replace Formula with #INVALID]**, so that all invalid cells are marked in PV Unit and you can find them more easily – for instance, in order to edit them.





## 2.4 Start synchronization

Choose '**Synchronize**' from the '**Casio**' menu or click on  on the toolbar. A progress bar is presented during synchronization.



**Important:**

Pocket Sheet Sync can carry out synchronization between *no more than one* CASIO device and Microsoft Excel files. If you connect a different device, Pocket Sheet Sync will set up a new synchronization connection. In such a case all Microsoft Excel tables are sent from Pocket Sheet Sync to PV Unit and all tables from PV Unit to Pocket Sheet Sync.

## Section 3 - Add-in for Microsoft Excel

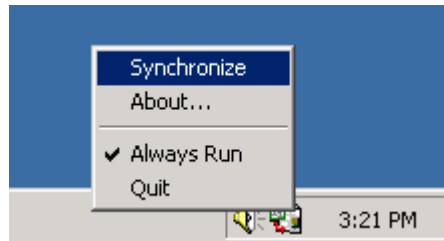
When you install Pocket Sheet Sync, a menu called '**Casio**' is inserted into Microsoft Excel, provided you have selected the relevant option. This menu enables you to set up a link with a PV Unit file directly from Microsoft Excel. Simply call up '**New Link**' from this menu. As soon as you then call up Pocket Sheet Sync from the Windows desktop, you will see the new link in the program window.

*Please note:*

Before you can create a new link, you need to have saved the Excel file at least once. Pocket Sheet Sync can only create a link if there is a file name.

## Section 4 - Quick access through the taskbar

When Pocket Sheet Sync is installed, the installation routine also sets up quick access to synchronization with Pocket Sheet Sync through the taskbar, provided you have selected this option. A double click on the Pocket Sheet Sync icon automatically starts synchronization. This quick access facility will be loaded whenever you start Windows. However, you can also enable/disable this feature: all you need to do is right-click the Pocket Sheet Sync icon and select/deselect the option.



## Section 5 - Frequently Asked Questions

### 5.1 Installation

**Question:** When I install Pocket Sheet Sync, it tells me that it needs administration rights. However, the program still seems to be working.

**Answer:** Some systems may require administration rights. If Pocket Sheet Sync appears to be working properly on your systems in spite of this message (i.e. you can open the program on the desktop), then installation has been successful.

**Question:** I have installed Pocket Sheet Sync, but I can't find it on the desktop.

**Answer:** After installation some systems may require you to click on some free space on the desktop and then press F5. Alternatively, you can restart your computer. Pocket Sheet Sync will definitely be on the desktop now.

**Question:** The screenshots of the Pocket Sheet Sync window in the manual differ from the ones on my computer.

**Answer:** As Pocket Sheet Sync is integrated into Microsoft Windows Explorer, the display may differ with the version of your operating system. On some systems the display is also affected by the installed version of Microsoft Internet Explorer. However, this does not influence the functions of Pocket Sheet Sync. You can use all the functions of the program, regardless of the operating system on your computer.

### 5.2 Links

**Question:** I have a Microsoft Excel file with several worksheets. However, whenever I try to set up a second link for a different worksheet in the same file, I get an error message.

**Answer:** Each Microsoft Excel file can be used for a link no more than once, regardless of the number of worksheets it contains. However, you can also change to the relevant worksheet after creating the link, by displaying the link properties.

**Question:** Whenever I create a new link with a Microsoft Excel file, the program presents a list of worksheets for me to select from.

**Answer:** Each Microsoft Excel file can contain more than one worksheet. Pocket Sheet Sync supports synchronization with one of these worksheets, which you can select. Simply click on the relevant worksheet with the mouse.

If you have not used any other worksheets in the Excel file or if you are not sure how to use worksheets, simply select the first worksheet. This is, in fact, the default setting.

**Question:** Why can't I turn off the option **[Update Table in Casio PV Unit only]** after I've enabled it?

**Answer:** Once this option has been enabled, Pocket Sheet Sync makes changes to the table for PV Unit. If these changes were included in a re-transmission to the Microsoft Excel table, they could lead to a considerable loss of data there. This is why the option cannot be disabled. To allow the full re-synchronization of a table anyway, simply delete the link in Pocket Sheet Sync and create a new one.

### 5.3 Synchronization

**Question:** Synchronization of tables with Pocket Sheet Sync isn't working.

**Answer:** You need to check the following points:

- Is the cable connected properly? Also make sure you have selected the correct port (see section 2.3, Synchronization Settings). Some systems do not work reliably with a high transfer rate. If this is the case, reduce the maximum transfer rate (see section 2.3, Synchronization Settings).
- To start synchronizing, go to Pocket Sheet Sync, '**Casio**' menu, and choose '**Synchronize**', or click on the relevant toolbar icon. The **[Start]** button on the PV Unit cradle does not have any function in Pocket Sheet Sync.
- Remember that in order to synchronize a Microsoft Excel table, you first need to drag the relevant file to the Pocket Sheet Sync window with the mouse. Alternatively, you can use the add-on for Microsoft Excel, provided it has been installed.
- Make sure the Microsoft Excel tables you wish to synchronize have not been opened by Excel or any other program while synchronization is in progress.
- Make sure your Casio PV Unit supports the Pocket Sheet area. Pocket Sheet Sync can only be used in combination with PV Unit models that allow this area. If your PV Unit has the Add-in area, you can also download Pocket Sheet from the internet and install it to PV Unit later. For further details, consult your PV Unit manual.

**Question:** What does Pocket Sheet Sync do if both the Microsoft Excel table and the PV Unit table were changed at the last synchronization and **[Append]** was selected as an option to solve conflicts.

**Answer:** In such a case both changes are kept, as the Microsoft Excel file is copied and a new PV Unit table is automatically linked to the copy. The changes in the modified PV Unit table are synchronized against the original Microsoft Excel table.

Pocket Sheet Sync creates a new name for the copy of the Microsoft Excel file by adding a digit to the original file name: "NAME", for instance, becomes "NAME1".

**Question:** What does Pocket Sheet Sync do if either the Microsoft Excel table or the PV Unit table was deleted during synchronization?

**Answer:** If either the one or the other of the two tables involved in synchronization is deleted, while the other one continues to exist, you have a synchronization conflict (see section 2.3, Synchronization Settings). Depending on your setting for **[Confirm deletion of items]**, Pocket Sheet Sync will delete the link or the PV Unit table either automatically or upon a query.

The same procedure applies if a link is not fully synchronized, in other words if the option **[Update Table in Casio PV Unit only]** has been selected.

**Question:** What changes can I make in a PV Unit table if the option **[Update Table in Casio PV Unit only]** has been selected for the link?

**Answer:** You can change the table in PV Unit any way you like. However, if you make a change in Microsoft Excel, then this leads to a table update in PV Unit next time you synchronize, and all the changes you have made there will be overwritten.

If you delete the table in PV Unit, then the link is removed from Pocket Sheet Sync. However, the Microsoft Excel file continues to be available.

**Question:** Some of the cells in my Microsoft Excel table are not sent to PV Unit.

**Answer:** Pocket Sheet Sync can only transmit cells from coordinates if they are supported by PV Unit. This includes cells A1 to Z999. Moreover, PV Unit only allows tables up to a certain size. Once the maximum table size has been reached upon conversion, Pocket Sheet Sync ignores all further cells from the Excel file. If the option **[Update Table in Casio PV Unit only]** has been disabled for a link and changes are made in the PV Unit table, the cells previously not transmitted to PV Unit are deleted in the corresponding Excel table during the next synchronization.

**Question:** There are some cells from my Microsoft Excel table where the formatting in PV Unit does not match the original.

**Answer:** Pocket Sheet Sync can only send formatting information that is supported by PV Unit. If, therefore, a cell uses formatting that is not available in PV Unit, then it is either removed upon import or displayed slightly differently.

**Question:** Under what conditions does Pocket Sheet Sync regard a cell as "invalid" for PV Unit? What does Pocket Sheet Sync do in such a case?

**Answer:** Pocket Sheet Sync regards cells as invalid if they insert formulas that are not known by PV Unit, if they contain formulas longer than 256 characters or if they refer to cell ranges that are not supported by PV Unit because they would lead to error messages. If the option **[Update Table in Casio PV Unit only]** is enabled for a link, then cell contents are sent to PV Unit either as results of formulas or as error messages, depending on the option that has been set.

If the option **[Update Table in Casio PV Unit only]** has been disabled for a link, then invalid formulas are sent to PV Unit as they are. If a change is made in the PV Unit table and it becomes necessary to re-convert it to Excel, then Pocket Sheet Sync can restore the formula in Excel.

**Question:** Which functions used in formulas are accepted by Pocket Sheet Sync and are sent to PV Unit without any changes even if the option **[Update Table in Casio PV Unit only]** has been enabled?

**Answer:** Pocket Sheet Sync recognizes the following functions supported by the Casio PV Unit: ABS(), AVERAGE(), COUNT(), COUNTA(), EVEN(), INT(), MAX(), MIN(), MOD(), ODD(), ROUND(), SQRT() and SUM().

**Question:** Once synchronization has started, Pocket Sheet Sync takes a long time before it starts sending data to PV Unit.

**Answer:** The size of the table and the performance of your computer may affect the time it takes to convert data. This is because large amounts of Excel data need to be queried and converted.