Synchronizing your Psion with Microsoft Outlook

Note: All occurrences of **Revo** in this document also refer to **Revo Plus** unless otherwise specified. This document details the set-up and day-to-day use of PsiWin 2.3 to synchronize your Psion Series 3a, 3c, 3mx, 5, 5mx, 7, Siena or Revo Agenda and Data files or Contacts program (5mx/7/Revo) with Microsoft Outlook 97 or 98 on the PC. The document does assume some basic familiarity with the use of Windows 95, 98 or NT 4.0.

Software compatibility

The details for this document assume that you are using version 2.3 of PsiWin. To check which version of PsiWin you have, double-click the **My Psion** icon on your desktop, and select **About PsiWin 2.x** from the **Help** menu. If you have at least **Build 136** then you have version 2.3. If you have a previous version of PsiWin 2.x, you will find a section on earlier versions towards the end of this document.

You must also have a full local installation of Microsoft Outlook 97 or 98.

Creating new synchronizations

You can create multiple synchronizations on your PC should you have different Agenda or Data files, or Outlook folders that you wish to synchronize. See the section on creating multiple synchronizations towards the end of this document. You will need to define at least one synchronization.

Required information

Before creating your synchronization, you will need to note the locations of the files you wish to synchronize.

1. From the Series 3a, 3c, 3mx, 5 or Siena you may synchronize your Agenda or Data files, while from the Series 5mx, 7 or Revo you may also synchronize with the Contacts program. If you are synchronizing an Agenda or Data file from a Series 5, 5mx, 7 or Revo, open the files

    you wish to synchronize. Tap the filename at the top of the toolbar and you will see the **Open files / programs** dialog. Scroll through the list until you find your file(s) listed. Make a note of the path (in this example, **c:\Work\Agenda**).
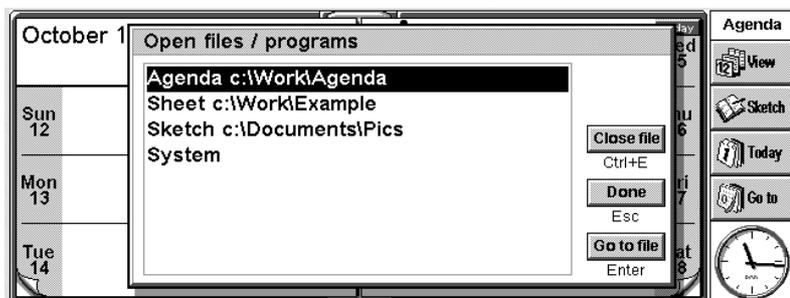
2. If you have a Series 3a, 3c, 3mx or Siena, highlight the file(s) that you wish to synchronize and press **Tab**. The top line of this dialog will tell you on which Disk the file is stored, in this example, **Internal**.
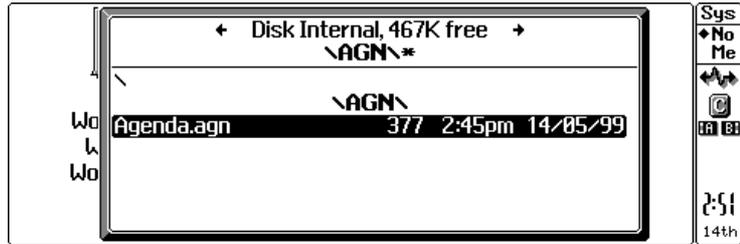
The fourth line tells you the path to the file (in this example, **\AGN**) and the highlighted line tells you the filename (in this example, **Agenda.agn**). So, the location of the file will be: **[Disk]:[Path to file][Filename]**, in this example, **M:\AGN\Agenda.agn**. Press **Esc** to remove this dialog. Note that if the file is on the Internal disk then **[Disk]** will be **M**. If it is on the **A** or **B** disks then **[Disk]** will be **A** or **B**.

Creating the synchronization

1. Make sure that your Psion is connected to the PC, then double-click on the **My Psion** icon. Assuming the machines have linked successfully, you will see several icons, including one labelled **Psion Synchronizer**. Double-click on this icon.

   In the **Psion Synchronizer** window, click the **New** button. This will launch the Psion Synchronizer Wizard, which will take you through the steps required to set up the synchronization. If you have never created a synchronization before, PsiWin will bypass this window and go straight to the Synchronization Wizard.
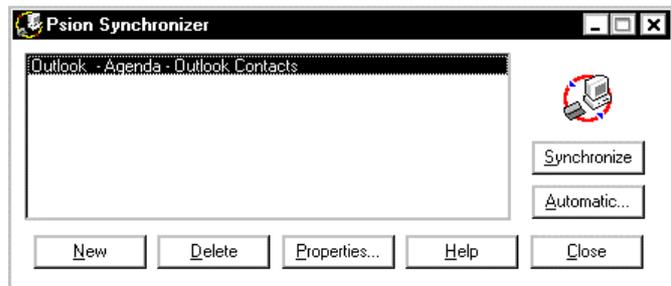
2. The welcome page of the Wizard asks you the PC Personal Information Manager (PIM) with which you wish to synchronize. Highlight the relevant option and click the **Next** button.
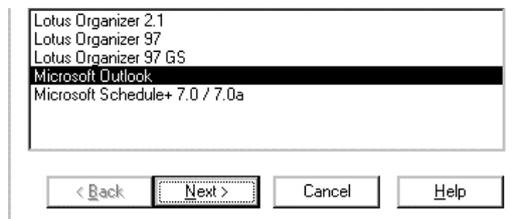
3. On the **Applications** page, you will need to enter the path(s) for the file(s) you wish to synchronize.

   In the **Psion** section, you will need to specify the Psion files with which you wish to synchronize. If you wish to synchronize an Agenda file, ensure that the **Synchronize My Agenda** box is ticked. You will then need to specify the Agenda file to be synchronized. You can either type in the path and filename you noted earlier or click the ⬚ button to browse the Psion's disks. If in doubt, use the browse button to find your file.
   If you wish to synchronize a Data file or the Contacts program (5mx/7/Revo), ensure that the **Synchronize My Contacts** box is ticked. The next step depends on whether you are synchronizing with a Series 5mx, 7 or Revo or a Series 3a, 3c, 3mx, 5 or Siena.
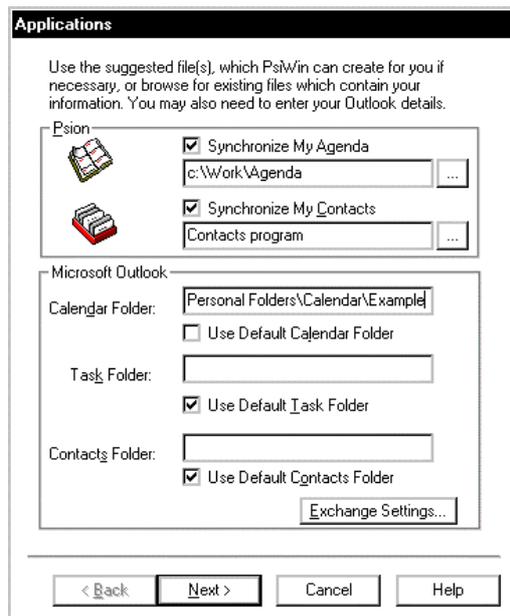
- **Series 3a, 3c, 3mx, 5 or Siena**

  Next, you need to specify the Data file to be synchronized. You can either type in the path and filename you noted earlier or click the ⬚ button to browse the Psion's disk(s). If in doubt, use the browse button to find your file.

- **Series 5mx, 7 or Revo**

  If you wish to synchronize with the Contacts program, you should leave the next box as **Contacts program**. If you wish to synchronize with a Data file, click the ⬚ button. Next, select **Data** and specify the Data file to be synchronized. You can either type in the path and filename you noted earlier or click the ⬚ button to browse the Psion's disk(s). If in doubt, use the browse button to find your file. Next, click the **OK** button.
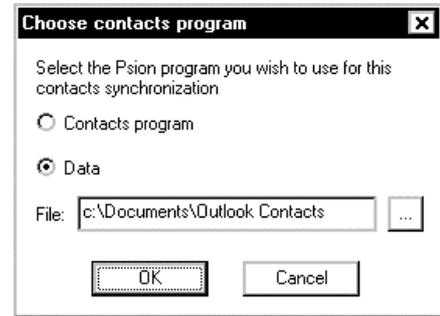
4. Next, you need to enter details for Microsoft Outlook. If you wish to synchronize the standard Outlook folders then leave all the **Use Default…** boxes ticked. If you wish to synchronize custom Outlook folders, you will need to untick the relevant **Use Default…** box and enter the folder path. You can find the folder path by looking at the **Folder List** in Outlook. If you do not have this shown, select **Folder List** from the **View** menu. Expand the list until you can see the folder you wish to synchronize. The path will be: the top level folder, then the subfolder that contains the folder(s) to synchronize, then the folder to synchronize. These should be separated by backslashes (\). If the name of your top level folder contains some text in square brackets, use
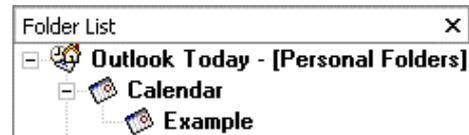
   this text instead of the top level folder name. In the example shown here, the path to the **Example** folder is **Personal Folders\Calendar\Example**. You should then enter this information into the **Applications** dialog of the Synchronization wizard. Untick the relevant **Use Default…** box, in this example, **Use Default Calendar Folder**, and type the path into the box (in this example the **Calendar Folder** box).
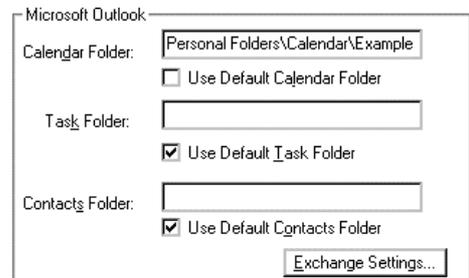
   Once this information has been entered, click on the **Next** button. Note that it is very important that this information is entered correctly – if it is not, the wrong files may be synchronized, or no synchronization will occur. However, if you do not have an existing Agenda or Database file on your Psion, the synchronizer can create them. This is especially useful for a Contacts database - if you specify a non-existent Psion Data file, the synchronizer will create a new one on the Psion that is optimised for use with your Outlook contacts. If you are synchronizing with a Series 5mx, 7 or Revo, the synchronization can only create a Data file if you have selected the option to synchronize a Data file.

5. Click on the **Exchange Settings…** button, enter a profile name and click the **OK** button if you wish to synchronize with an Outlook profile other than your PC's default.
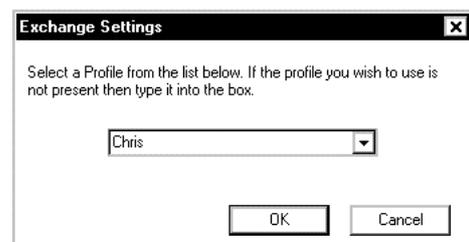
6. The next page allows you to specify which types of entry you wish to synchronize. You can untick particular entry types if you do not want them to be synchronized.
   Click the **Next** button when you have selected the entry types.

7. To specify the period of entries you wish to synchronize, click the **Set date range** button, select the period required and click the **OK** button.

   To specify how the synchronization will deal with entries outside of normal working hours, select the appropriate option from the **Agenda entries to synchronize** section. You can also change your work hours by clicking the **Set work hours** button, altering the settings as appropriate and clicking the **OK** button.

   Next, click on the **Advanced** button to set up the label mapping. Note that if you are synchronizing with the Contacts program, or have chosen not to synchronize a Data file, you may not be able to click this button. In this case, you should ignore step 8 below and click the **Next** button.

8. The **Contacts Synchronization** page shows a table, listing the labels for the Contacts folder in Outlook (or whichever folder you have specified for contacts information) in the **Contact information** column, and in the **Psion label** column you can match these to their equivalents (if any) in your Psion Data file. To match labels:

    i.   Find the Outlook label whose function is the same as one of your Psion Data file's labels, then click in the box next to it in the **Psion label** column.

    ii. An arrow ⏷ will appear to the right of this box. If you click on this, a drop-down list will appear, containing all the Psion labels that you have not matched. Select the label you wish to assign.

    iii. If you do not wish to synchronize with a particular Outlook label, you should select **<Ignore>** from the drop-down list
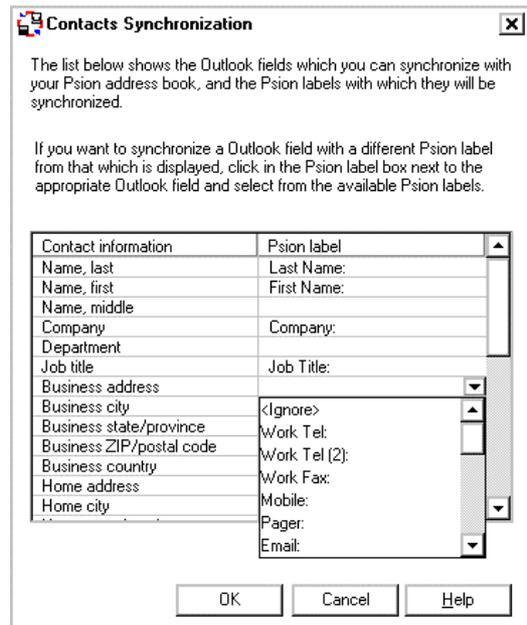
    Note that each Psion label can only be matched to one Outlook label.

9. When you have finished matching the labels, click the **OK** button and then the **Next** button.

10. The last page of the wizard is simply a confirmation screen. If you wish to start the synchronization process immediately, click on the **Synchronize Now** button, otherwise click on the **Finish** button to complete the set-up and save the synchronization.

    If this is the first time you have run the synchronization, you may see the **Contacts Synchronization** dialog described in Step 8 above. If there are any labels on the Psion that cannot be directly mapped, the synchronization will prompt you to do this by hand.

Using an existing synchronization

Once you have set up the synchronization as above, you can use it whenever you wish. To run an individual synchronization:

1. Connect your Psion and PC.
2. Double-click on the **My Psion** icon, and then double-click on the **Psion synchronizer** icon.
3. Click on the icon for the desired synchronization(s) so that they are highlighted.
4. Click on the **Synchronize** button.

Synchronizing with older versions of PsiWin 2

You can still synchronize with older versions of PsiWin 2. All versions older than 2.2 will only let you synchronize with a Series 5 and require that the files to be synchronized are closed. To do this, highlight the file(s) on the system screen of the Psion and press **Ctrl** + **E**. Also, ensure that Outlook is closed on the PC. Versions 2.0 and 2.01 do not work with Microsoft Outlook. Version 2.1 will not work with Outlook 98. The user interface of previous versions will look slightly different from the dialogs shown here, but all the information required is the same. Note that PsiWin 2.3 must be used to synchronize with a Series 5mx, 7 or Revo.

Multiple Synchronizations

It is possible to synchronize multiple Agenda and Data files or Outlook folders. To do this you will need to set up multiple synchronizations. To do this you may need to create extra Outlook folders. You can do this by selecting **New**, then **Folder…** from the **File** menu. Type in a name for the new folder, select the type of items to be stored in the folder (in this example, **Contact Items**), select the folder to create the new folder in and click the **OK** button.
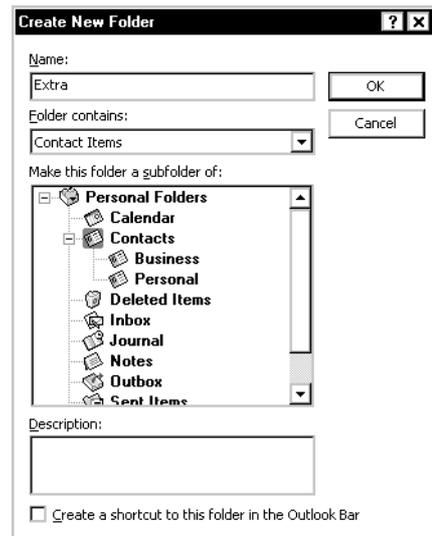
When you create the synchronization, enter the appropriate paths and filenames in the applications dialog.
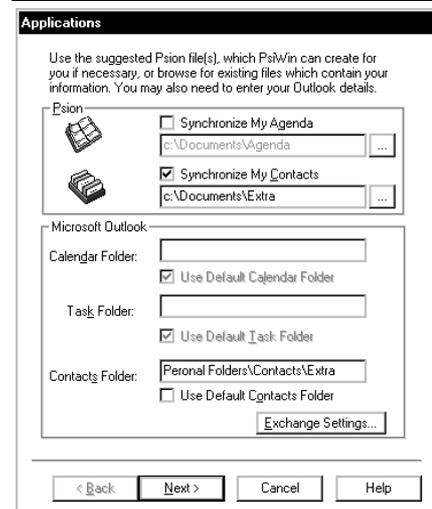
Note: You should never synchronize multiple Psion files with a single Outlook folder or multiple Outlook folders with a single Psion file as this will result in the multiple files being mixed together.