Psion Technical Support



Produced by

Psion Digital Limited Contacts: www.psion.com/international Knowledgebase: www.psion.com/support

Using Email synchronization with the Psion Series 5mx, 7 and Revo

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 Email Synchronization. Some knowledge of Windows 95/98/NT 4.0 is assumed, as is some knowledge of using Email on the Series 5mx/7/Revo.

Installing Email Synchronization

When installing Email Synchronization, your Psion should be connected to the PC to enable new features to be added to Email. On the PC, Email Synchronization will appear as extra items in the standard Psion Synchronizer.

Compatibility

Email Synchronization will work with the following software:

- Lotus cc:Mail 6 and 8. Note: the cc:Mail Post Office must be version 8.
- Outlook 97 and 98. Note: not Outlook Express or Outlook connected to an IMAP4 server.

Creating synchronizations

The steps required to create a synchronization differ depending on which PC email application is to be synchronized.

Outlook

- 1. Open PsiWin by double-clicking on the My Psion icon.
- 2. Double-click on the **Psion Synchronizer** icon. If you have previously set up any kind of synchronization task, you will see the **Psion Synchronizer** dialog. Click the **New** button to launch the **Psion Synchronizer Wizard**. If you have never set up a synchronization task before, you will see the welcome dialog for the Psion Synchronizer Wizard.
- 3. Make sure that **Email** is selected, then highlight the PC application to synchronize with (in this case, **Microsoft Outlook/Exchange**) and click the **Next** button.

Psion Synchronizer
Welcome to the
Psion Synchronizer Wizard
This wizard helps you create a new Synchronizer Task.
To begin, you need to select which type of task you want to set up. Select either "Agenda & Contacts" or "Email"
O <u>Ag</u> enda & Contacts ● <u>E</u> mail
The list below shows the PC programs that are supported for the task you have selected. Please select one.
Lotus co:Mail Microsoft Outlook/Exchange
< <u>Back</u> <u>Next</u> > Cancel <u>H</u> elp

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know your profile name, you should contact your Please select the Microsoft Exchange profile you wish to use for this synchronization Systems Administrator. Click the Next button. Profiles: Chris Dickins <u>N</u>ext> < <u>B</u>ack Cancel General 5. On the General page, type in an Account Name (this is the name under which the account will appear on Account Name the Psion), then click the Advanced button. You should use a different email account on the Psion for this email synchronization task. If this account doesn't already exist it will be created for you Account Name: Chris Outlook Advanced Click the 'Advanced' button to set options Advanced... such as date ranges, folders, attachments < <u>B</u>ack <u>N</u>ext> Cancel Г

EMail

6. On the Advanced Email Settings page, you can select whether to synchronize attachments and the maximum size for emails. You can also set the date range to synchronize over and which folders to synchronize. When you have finished, click the **OK** button.

On the Email page, click the 🖃 button and select your

Microsoft Exchange profile from the list. If you do not

4.

7. Click the Next button.

Advanced Email Settings
Attachments & Size
Synchronize attachments
Don't synchronize messages over 50 K (not including attachments)
Date range
From: 5 🔁 Day(s) 💌 in the past.
- Folders
Select which folders should be included in the synchronization
O Inbox only 💿 Inbox, Outbox, Drafts & Sent
OK Cancel <u>H</u> elp

-

Help

Help

 To save these settings without synchronizing, click the Finish button, otherwise click on the Synchronize Now button.

Synchronize						
Synchronization setup complete						
If you want to perform the synchronization now, press the Synchronize Now button. To save your settings without synchronizing, press the Finish button.						
< Back Finish Cancel Help						

cc:Mail

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- 3. Make sure that **Email** is selected, then highlight the PC application to synchronize with (in this case, **Lotus** cc:Mail) and click the Next button.
- 4. On the cc:Mail Setup page, enter your cc:Mail Login Name and your cc:Mail Password. Your P.O. Path (the path to your cc:Mail Post Office) should be automatically entered. If not, or if you wish to use another Post Office, you can either type in a different path or use the ____ button to browse to the Post Office. You should also enter your Internet Gateway. This is what you type into cc:Mail's To: field when you are sending email via the Internet. If you are unsure of any of these settings, you should speak to your Systems Administrator. When you have finished entering these settings, click the Next button.

Psion Synchronizer Wizar This wizard helps you create a new Synchronizer Task. To begin, you need to select which type of task you want to Select either "Agenda & Contacts" or "Email" Agenda & Contacts" or "Email" Genail The list below shows the PC programs that are supported for you have selected. Please select one. Lotus cciMeil Microsoft Dutlook/Exchange	r d o set up. or the tas
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Lotus ce:Mail Microsoft Outlook/Exchange	
< <u>B</u> ack <u>N</u> ext > Cancel	<u>H</u> elp
ail Setun	
Please enter your cc:Mail account details as follows:	
Log-in Name: Chris Dickins	
Password:	
P.O. Path: M:	
Internet Gateway: INTERNET	
The Internet gateway is what you enter into cc:Mail's "To field when you want to send email outside of your compa	c'' ny.
If you are unsure of any of these details, contact your sus	tem
administrator	

- 5. On the **General** page, type in an **Account Name** (this is the name under which the account will appear on the Psion), then click the **Advanced** button.
- General Account Name You should use a different email account on the Psion for this email synchronization task. If this account doesn't already exist it will be created for you Chris cc:Mail Account Name: Advanced Click the 'Advanced' button to set options Advanced... such as date ranges, folders, attachments etc. Cancel < <u>B</u>ack <u>N</u>ext> Help Advanced Email Setting Attachments & Size Synchronize attachments Don't synchronize messages over 50 拱 к (not including attachments) Date range 5 \exists <u>F</u>rom Day(s) 🔻 in the past. Eolders Select which folders should be included in the synchronization ⊙ Inbox, Outbox, Drafts & Sent O Inbox only ΟK Cancel <u>H</u>elp Synchronize Synchronization setup complete If you want to perform the synchronization now, press the Synchronize Now button. To save your settings without synchronizing, press the Finish button. Synchronize Now < <u>B</u>ack Finish Cancel Help
- 6. On the Advanced Email Settings page, you can select whether to synchronize attachments and the maximum size for emails. You can also set the date range to synchronize over and which folders to synchronize. When you have finished, click the **OK** button.
- 7. Click the **Next** button.

8. To save these settings without synchronizing, click the **Finish** button, otherwise click on the **Synchronize Now** button.

PCmails

Installing the Email Synchronization components on the Psion has the effect of creating several new menu options and a new message type. In addition to email, fax (not Revo) and SMS, there will now also be **PCmail**. PCmails can be manipulated in the same ways as emails and can also be synchronized with your PC email system.

If you have not already done so, you should perform the synchronization you set up earlier. This is in order to ensure that the **Account name** is passed to the Psion. It will also copy to the Psion any emails in your PC email system (PCmails) that fall within the ranges set on the **Advanced** page of the synchronization properties. Once this synchronization has been performed, you should be able to see the Account name in the **Folders** list in the Email program, marked with the PCmail account icon and PCmails in the Inbox, marked with the PCmail icon **Q**.

Note: If these emails are marked with a question mark icon **③**, the Email Synchronization components have not been installed on the Psion. In this case, you should reinstall Email Synchronization on the PC, making sure you have the Psion switched on and connected and that you have selected the option to **Install necessary files onto Psion**.

Using PCmails

Before describing the ways of manipulating PCmails, it should be noted that PCmails can only be sent by synchronizing with your PC email system, and that emails can only be sent from your Psion. It is, however, possible to convert between the two types of mail, as described later in this document.

You can reply to, or create, a PCmail in the same way as you would with an email.

To reply to an existing PCmail, highlight or open the PCmail to which you wish to reply and either click the **Reply/f'ward** button and select **Reply to Sender** or **Reply to all addressees**, or select **Reply to** then either **Sender** or **All addressees** from the **Message** menu.

File Edit	Message	View	Transfer	Tools	ected to Inte	rnet	Email
Folders	Create ne	w email	Ctrl+N		ct		New
💓 Local	Create ne	w fax	Shift+C	trl+F		26	🔊 Reply/
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Type in your reply and save to the Outbox in the normal way.

To create a new PCmail, either tap the **New** button and select **PCmail**, or select **Create new PCmail** from the **Message** menu. Enter the email address(es) of the recipient(s), type the text of your mail and save to the Outbox as normal. The next time you synchronize the PCmails in your Outbox will be transferred to your PC email system.

Converting PCmails and emails

If you wish to send a PCmail directly from your Psion, or an email through your PC email system it is possible to convert a PCmail to an email or vice versa.

 To send a PCmail directly from your Psion, highlight the PCmail you wish to send and select PCmail/Email converter from the Message menu. Make sure that the Email account line of the dialog shows the correct email account and tap OK. The PCmail has now been

🖻 🧑 Local\Inbox		57 messages Not connect		nternet	Email		
Folders	? To/From		Subject		New		
醚 Local	Local PCmail/Email converter						
Inbox	Direction Convert PCmail into an Email 01						
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converted to an email and can be sent from the Psion in the usual way. Note that it will be sent from the email account you have set up on the Psion and not your PC email account.

 To send an email through your PC email system, highlight the email you wish to send and select PCmail/Email converter from the Message menu. Make sure that the PC account line of the dialog shows the correct PCmail account and tap OK. The email has now been

C Local\Outbox 2 messages Not connected to Internet					
Folders	? To/From	▲ Subje	ct	Date	New
🕅 Local	PCmail/Email c	onverter		1999	
	Direction	Convert Ema	il into a PCmai	1999	Send Send
- S Outbo	PC account	Chris cc:mail	•		Moren Mailbox
- 🛞 Draft 🚽	Set the PC accou	int to synchronize the c	onverted PCmail wit	n	Close
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Chris cc	1				4:43
					Fri 23

converted to a PCmail and can be sent from your PC email system by synchronizing.

As an example, if you wished to take your work emails away from the office to work on replying to them, you would synchronize with your PC email system, write replies and save them to the Outbox. The next time you synchronized, the replies would be transferred to your PC email system for sending. If one of the replies was urgent and needed to be sent immediately from the Psion, you would need to convert it into an email, then send it in the normal manner. If you wished to reply to an email and have it sent from your PC email system, you would write your reply to the email, then convert the reply to a PCmail so that the next time you synchronized, the reply would be transferred to your PC email system for sending.

It should be noted that if a PCmail is moved to a different folder it will not be synchronized. Also, with cc:Mail, if a new PCmail is created on the Psion, or an existing email is converted to a PCmail, and is situated in the Inbox, because of the way cc:Mail deals with emails that it has not created, when synchronized the message will be placed in a **From Psion Inbox** folder. Once it is in this folder, it can be moved into the cc:Mail inbox.