Quick guide to PsiWin

Automatically connect to a Psion machine
PsiWin automatically searches for a connected Psion. If you prefer you can manually connect the Psion machine by changing the Connection properties.
To do this click the right mouse button on the Connection icon or the **My Psion** icon, and click **Properties**, then the Connections tab.
See also Setting Connections options

Upgrading to a Series 5 machine
Use the Upgrade to Series 5 machine program to transfer suitable files from your Series 3/3a/3c or Siena to your Series 5.

To start the Upgrade to Series 5 program connect your Series 3/3a/3c or Siena to the PC. Then, click the **Start** button on the Taskbar, point to **Programs**, point to **PsiWin** and click **Upgrade to Series 5**.

See also Upgrading files to Series 5 format

Exchanging files between the Series 5 and a PC
Double-click a file on your Series 5 from within Windows Explorer and it's automatically opened in the appropriate PC program. When the file is saved from within the PC program it is automatically converted back to Series 5 format and saved on the Series 5.

Drag and drop files between the Series 5 and PC drives or folders and automatically convert them to a suitable file format. Hold down the:

- Left mouse button as you drag the file to copy and convert the file.

- Right mouse button as you drag the file to display the menu options available. You can either copy, move, or copy and convert the file.

- Shift key and the left mouse button as you drag the file to move and convert the file.

Note: You can select a file format as the default conversion format for the selected file type, either in the Copy File dialog displayed as you drag and drop files, or on the Psion File Types tab of the **Psion Properties** dialog.

See also Managing Psion files

Backing up the Psion machine
Use Backup to copy all the Psion machine files onto a PC or network drive. You can choose to backup the Psion machine automatically, either on each connection or at other time intervals.

If you accidentally delete any files you can restore them from the last backup.

To start backing up, connect the Psion machine and click:

- The right mouse button on the **My Psion** icon and click **Backup**, or

- **Backup Psion** on the **Psion** menu, or

- The ![icon] button on the Toolbar.

See also Backing up a Psion machine

Keeping archives of old and deleted files
Keep up to six archive folders of deleted or older versions of files from previous backups so that you can refer back to them if necessary.
To retrieve older or deleted files connect the Psion and, in Explorer, click the File Archives icon to open the File Archives view. Click on the archive folder you want and highlight the file(s) you want to restore.
To restore file(s) from an archive folder click:

- **Restore Psion** on the **Backup** menu to restore all changed files.

- The right mouse button and click **Restore** to restore just the selected file(s).

- The button on the toolbar, to restore just the selected file(s).

See also <u>Keeping archives (older versions of files)</u>

Synchronizing agendas and address books

You can use the PsiWin Synchronizer to keep parallel copies of an agenda and a Data file (e.g. an address book), on a Series 5 and on a PC in either Lotus Organizer (2.1 and 97), Microsoft Schedule+ (7 and 7a) or Microsoft Outlook (97) and keep them up to date with each other. You can choose to synchronize your agendas automatically, either on each connection or at other time intervals.

To set up a new Agenda Synchronization connect your machine and double-click the Synchronize Psion icon on the Desktop. Then click the **New** button and follow the Synchronization wizard.

See also <u>Synchronizing Psion and PC files</u>

Printing files from a Series 5

Print files from the Series 5 to any printer connected to your PC or PC network.

To select the printer you want to use:

1. Connect your machine to the PC and set it to Print via the PC.

2. Right-click on the **My Psion** icon and point to Properties, then click the **Print Options** tab.

3. Select the printer you want to use from the list of available printers and click the **Set Printer** button.

You can also install support for True Type fonts on a Series 5 by highlighting the required fonts and clicking **Add** followed by **Install**.

See also <u>Printing</u>

Changing the setup of the Psion machine

Use the Properties option(s) to change the setup for the Psion currently connected to the PC.
The Properties dialog consists of six tabs; General, Connections, Backup, Psion File Types, Synchronization, and Print Options .

To open the Properties dialog right-click the **My Psion** icon, or the Connection icon on the Taskbar, and point to **Properties**.

You can also access the Properties pages by clicking on one of the PsiWin <u>icons</u> and then clicking:

- The right mouse button and pointing to **Properties**, or

- **Properties** on the **File** menu, or

- The button on the Toolbar.

See also <u>Changing the Psion machine properties</u>

Quick guide to PsiWin (footnote 1)

PsiWin icons

You can access the Properties dialog for the Series 5 from any of the icons below.

Select Properties from:

The Connection icon in the Taskbar.

The **My Psion** icon in Windows Explorer or on the Desktop.

A drive on a Psion in Windows Explorer to display the General tab providing information about the drive.

A folder on a Psion in Windows Explorer to display the General tab providing information about the folder.

A file on a Psion in Windows Explorer to display the General tab providing information about the file.

The Backup icon in either Windows Explorer or the Psion dialog to display the Backup and General tabs.

The File Archives icon in either Windows Explorer or the Psion dialog to display the Backup and General tabs.

The Synchronization Control Panel icon in either Windows Explorer or the Psion dialog to display the Synchronize tabs.

How to connect and disconnect a Psion

PsiWin can automatically detect when you connect a Psion to the PC. The Connection icon in the Taskbar shows when the Psion is connected.

- When a Psion is connected the Connection icon looks like this: 〜
- If the Psion has been disconnected the Connection icon looks like this: ↔

Note: If your Series 5 is set to automatically turn off after a set period of time, the connection to the PC will be broken and the link will close. To reconnect, right-click the Connection icon ↔ and click **Connect**. If you need to use the COM port for another program, or if you want to connect a different Psion machine, you can temporarily suspend the link to the Psion. You can also shut down the connection completely.
**To close the link to a Psion:**

- Right-click the Connection icon 〜 on the Taskbar and click **Close**.

Note: If you close the link to a Psion you can reconnect it by double-clicking the **My Psion** icon on the Desktop and selecting the **Connect** command from the Psion menu.

You can also disconnect a Psion from the PC and leave PsiWin open, ready to reconnect.

To disconnect a Psion:

- Right-click the Connection icon 〜 on the Taskbar and click **Disconnect** from the menu options.

Note: If you do not turn off the link on the Psion machine or unplug the cable, after a few seconds (as determined by the **Delay between searches** setting) PsiWin will reconnect to your Psion unless you have checked the **Manually connect, no auto searching** option. You can change these and other options by clicking **Properties** on the menu displayed when you right-click the **My Psion** icon. Refer to Setting Connections options for more information on this.

To reconnect a Psion to the PC:

- Right-click the Connection icon ↔ on the Taskbar and click **Connect**.

See also:

Setting Connections options

Quick guide to PsiWin

About PsiWin

About PsiWin

With PsiWin you can connect a Psion machine to a PC, and then use Windows Explorer to manage and exchange files on the Psion machine and the PC.

PsiWin detects when you connect a Psion machine to the PC and can automatically perform daily tasks such as backing up the Psion.

Note: The cable supplied with PsiWin is designed for your Series 5. Other machines may require a different cable.

Once you've installed PsiWin you can access it from:

- The **My Psion** icon on your desktop.

- Windows Explorer.

- The **My Psion** command on the Start menu.

You can use PsiWin to:

Connect the Psion machine to a PC.

Back up the Psion machine files to a PC.

Keep archives of any files that you have deleted or modified on your Psion since your last backup.

Transfer and upgrade Series 3/3a/3c or Siena files to a Series 5.

Synchronize your Series 5 and PC agenda and address books.

Exchange files between the Psion and PC.

Print the Series 5 files on the printer connected to your PC, whether it is directly connected or on a network.

Note: Updates to PsiWin will be available at Psion's discretion from:

- The Psion site on the World Wide Web at **http://www.psion.com**

- Psion customer services (please check the website first).

See also:

Quick guide to PsiWin

Differences from PsiWin 1.1

About PsiWin (footnote 1)

My Psion icon on the desktop

Double-click the **My Psion** icon on the desktop, or right-click it and click **Explore**, to view and manage the disks, folders and files on the Psion.

About PsiWin (footnote 2)

Windows Explorer
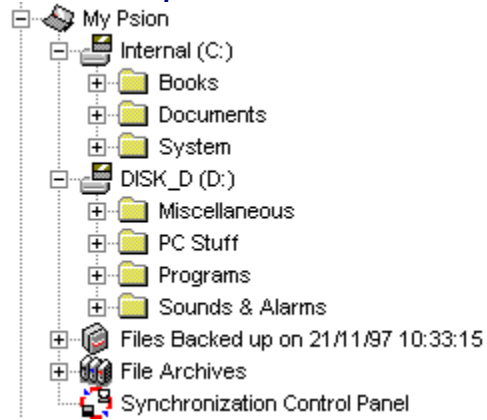
PsiWin integrates with Windows Explorer and adds the **My Psion** icon, from which you can:

- Browse the disks, folders and files on the Psion machine.
- Manage, convert, and back up your files, and synchronize your Psion machine and PC agendas.

Psion to PC file compatibility

PsiWin provides an in-built library of file converters to make your Series 5 files compatible with leading PC applications.

You can convert Series 5 Word files to these PC file formats:

- Word for Windows 2.0, 6.0, 95 and 97
- Word Perfect 5.1, 5.2, 6.0, 7.0 and 8.0
- Works for Windows 3.0 WP and 4.0 WP
- Ami Pro 3.0 and 3.1
- Rich Text Format
- Text for Windows (ANSI) and MS-DOS

You can convert Series 5 Sheet files to these PC file formats:

- Excel 4.0, 5.0, 95 and 97
- Lotus 123 WK1, WK3 and WK4
- Quattro Pro 5.0, 6.0, 7.0 and 8.0
- Works for Windows 3.0 SS and 4.0 SS

You can convert Series 5 Data files to these PC file formats:

- FoxPro 2.0, 2.5, 2.6 and 3.0
- Borland International dBASE III, IV and 5.0
- CSV (Windows Comma Separated Values)
- Access

Note: If your database labels contain accented characters, these may not be converted correctly and may appear in your converted file as _ (an underscore). If this happens, simply edit the labels in your database and overtype the _ symbols with the correct accented characters.

You can convert Series 5 Sketch files to these PC file formats:

- Windows Bitmap (.BMP)

You can convert Series 5 Record files to these PC file formats:

- Windows Wave (.WAV)

Note: PsiWin can convert Windows .WAV sound files to Series 5 format as long as they are monophonic (i.e. not stereo) and compressed using the PCM format. If your PC sound files are in a different format, you can use Windows' Sound Recorder to convert them to a format which the PsiWin converter can handle.

PsiWin cannot convert Series 5 sound files which have been recorded using ADPCM compression.

You can synchronize Series 5 Agenda files with these PC file formats:

- Lotus Organizer 2.1 and 97
- Microsoft Schedule+ 7 and 7a
- Microsoft Outlook 97

Note: Microsoft Internet Explorer 4 includes a special "cut-down" version of Outlook called Outlook Express. Outlook Express does not have the full time-management features of Outlook 97 and you cannot synchronize your Series 5 Agenda with it.

See also:

Psion to PC suite compatibility

Quick guide to PsiWin

Psion to PC suite compatibility

The Windows programs with which you can exchange Series 5 files are from a range of application suites.

Series 5 files are compatible with these suites:

- Microsoft Office
- Lotus SmartSuite
- Word Perfect Suite

See also:

Psion to PC file compatibility

Quick guide to PsiWin

Differences from PsiWin 1.1

PsiWin is a completely new program designed for computers running Windows 95 or NT4. It will not run on earlier versions of Windows or in a DOS environment. There is no equivalent to the RCom program, which allows you to connect to PCs running DOS.

The main differences from previous versions of PsiWin include:

- Seamless integration into Windows Explorer, PsiWin no longer appears as a separate program.

- Improved file management, providing the same functionality as Windows Explorer as well as drag-and-drop file conversion.

- Synchronization of Series 5 and PC Agendas and address books.

- Automatic detection of, and connection to, a Psion.

- Automatic communications port detection and setting of Baud rate on each connection.

- Automatic agenda synchronization and backup features.

- Automatic archiving of files that have been deleted or modified since the previous backup.

- Upgrade to Series 5 program for users of Series 3/3a/3c and Siena machines.

- Context-sensitive right mouse button menus.

All Psion file management operations can now be controlled from the PC. You can still access PC drives from a Series 3/3a/3c that is connected to the PC with PsiWin, but not from a Series 5.

All the features of earlier versions of Psion Manager have been retained for Series 3/3a/3c and Siena with the following exceptions:

- Series 3/3a/3c files cannot be directly converted to PC file formats.

    Tip: You can, however, convert a Series 3/3a/3c file to Series 5 machine format and then reconvert the new file to an appropriate PC file format.

- The Compress disk command has been removed because Series 5 programs automatically compress their files.

Note: The cable supplied with PsiWin is designed for your Series 5. Other machines may require a different cable.

See also:

About PsiWin

Converting files between different formats

Setting Connections options

Quick guide to PsiWin

Differences from PsiWin 1.1 (footnote 1)

Baud Rate

The speed at which electronic information travels, typically between two computers or between a computer and a printer, measured in bps (bits per second).

- Series 5 machines can communicate at Baud rates of up to 115200 bps.

Differences from PsiWin 1.1 (footnote 2)

Agenda Synchronization

You can use PsiWin Synchronizer to keep copies of your Agenda and address book, on a Series 5 and on a PC - in Lotus Organizer, Microsoft Schedule+ or Microsoft Outlook 97 - and keep them up to date with each other.

If you are using a PC scheduler with Groupware support on a network, other people will have access to your PC agenda and will be able to add and view entries.

Differences from PsiWin 1.1 (footnote 3)

Backup

PsiWin provides a simple backup procedure to ensure that all the files on the Psion are kept safe. You can setup automatic backups, and after the first backup, further backups copy only the files which have changed.

Differences from PsiWin 1.1 (footnote 4)

Archiving

PsiWin keeps any files which have changed or been deleted since the previous backup in 'Archive' folders.

If you should ever need to restore an older version of a file, or one which has since been deleted from the Psion, you may be able to retrieve it from one of the Archive folders in Windows Explorer.

Differences from PsiWin 1.1 (footnote 5)

Upgrading to Series 5

The Upgrade program guides you through the process of transferring suitable files from your
Series 3/3a/3c and Siena, converting them to Series 5 format, and copying them onto the Series 5.

Changing the Psion machine properties

You can use the Psion **Properties** dialog to set up the options relating to the Psion machine.

There is a property tab for each of these settings:

• General

• Backup

• Psion File Types

• Print Options

• Synchronization

• Connections

To open the Properties dialog:

• Right-click on the Connection icon ⌁ on the Taskbar and point to **Properties**, or

• Right-click on the **My Psion** icon on the Desktop and click **Properties**, or

• Click on the **My Psion** icon in Windows Explorer and select the **Properties** command from the **File** menu, or click the Properties button 🖻 on the Toolbar.

You can also access the Properties dialog for the Psion machine from any of the icons shown below:

Select Properties from:

⌁   The Connection icon.

◈   The **My Psion** icon.

▤   A drive on a Psion machine to display the General tab providing details about the drive.

▭   A folder on a Psion machine to display the General tab providing details about the folder.

◈   A file on a Psion machine to display the General tab providing details about the file.

▣   The Backup icon to display the Backup and General tabs.

▥   The Archive icon to display the Backup and General tabs.

▤   The Synchronization icon to display the Synchronization tab.

See also:

About PsiWin

Changing the Psion machine properties

How to uninstall PsiWin

Quick guide to PsiWin

Changing the Psion machine properties (footnote 1)

General properties

The General tab displays general information about how the Psion is set up. The exact information displayed depends on where you selected the **Properties** option from:

- If you click **Properties** from the **My Psion** icon or the Connection icon you can view owner information on the General tab.

- If you click **Properties** from a drive on the Psion you can view information about the selected drive.

- If you click **Properties** from a folder or file on the Psion you can view information about the selected folder or file.

- If you click **Properties** from either the Backup or Synchronization icon you can view information about the current setup of the selected area.

Changing the Psion machine properties (footnote 2)

Backup properties

You can use the Backup tab to specify:

- Which disks to back up.

- How often you want to back up.

- How many archives of old or deleted files you want to keep.

Changing the Psion machine properties (footnote 3)

Psion File Types properties

You can use the Psion File Types tab to view the list of Psion and PC file types available, and their standard conversion format.

Tip: You can change the standard conversion format for a selected file type by clicking the **Edit** button.

Changing the Psion machine properties (footnote 4)

Print Options properties

You can use the Print Options tab to:

- Select the Printer you want to use.

- Add/Remove fonts.

Changing the Psion machine properties (footnote 5)

Synchronization properties

You can use the Synchronization tab to specify the PC application with which you want to synchronize the Series 5 agenda, and to enable automatic synchronization.

Changing the Psion machine properties (footnote 6)

Connection properties

You can use the Connections tab to:

- Select the COM port you're using.
- Change the Baud rate.
- Change to manual connection instead of automatic connection.
- Access the drives on your PC from a Series 3/3a/3c.
- Synchronize the Psion and PC clocks.

How to uninstall PsiWin

If you no longer need PsiWin you can remove it from your PC. The uninstall process involves rebooting your PC, so you should close down any open programs before commencing uninstall.

Note: The uninstall program removes all files and folders which were added by the PsiWin installation program, but does not remove backed-up and archived files or synchronization data. Therefore, if you subsequently reinstall PsiWin you will be able to back up, restore, and synchronize using the same settings as before. If you do not want to keep this information you can delete all information connected with an individual owner, or with all owners. For further information, see Removing owner information with the Owner Manager.

- You can also manually delete the folder where the Psion files are kept (this is C:\Psion unless you have specified a different folder in the **General** Properties dialog).

To uninstall PsiWin:

1. Click the **Start** button on the Taskbar, point to **Settings**, and click on **Control Panel**.

2. Double-click the **Add/Remove Programs** icon and select PsiWin 2.1 from the list of installed programs.

3. Click the **Add/Remove** button and click **Yes** to confirm that you want to remove all the installed components (or click **No** to exit).

    The uninstall program commences and informs you that you need to restart your PC in order to complete the uninstallation process.

    Note: If you have installed Internet Explorer 4 and have customized your Desktop or Taskbar by creating any PsiWin Toolbars, you must remove them before continuing the uninstall process.

4. Click **OK** to continue, or **Cancel** to exit the uninstall program.

5. Click the **Start** button on the Taskbar and click on **Shut Down**.

6. Select **Restart the computer** and click **Yes** to confirm.

When your PC restarts, the uninstall program will proceed to uninstall PsiWin.

- During the uninstall procedure you are asked whether you want to remove some files which may also be used by other programs. As a general rule it is safe to click **Yes to All**. If you are in doubt, check the location of each file and:

    – Click **Yes** when asked if you want to delete a file which is in the PsiWin folder (unless you chose a different folder during installation, this is C:\Program Files\Psion\PsiWin).

    – Click **No** when asked if you want to delete a file which is in the Windows\System folder.

- When uninstallation is complete you may get a message informing you that some items could not be removed (see Note above).

See also:

Removing owner information with the Owner Manager

About PsiWin

Differences from PsiWin 1.1

Quick guide to PsiWin

Accessing Help

You can access PsiWin's Help at any point while you are working with PsiWin by:

- Clicking **Help Topics** on the **Help** menu, or
- Pressing **F1**, or
- Clicking the **Help** button in a dialog.
- Selecting a Psion drive and clicking the **Help** menu in Windows Explorer.

You can also access Help without starting PsiWin by clicking the **Start** button on the Taskbar, pointing to **Programs**, pointing to **PsiWin** and then pointing to **PsiWin Help**.

See also:

Navigating Help

Printing Help
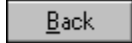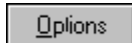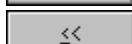
Quick guide to PsiWin

Navigating Help

The topics in the Help are listed on the Contents tab of the Help Topics window, and are divided into 'books' containing 'pages' of Help. You can:

- Open a book to display the pages of Help within it by double-clicking a ![book], or by highlighting a ![book] and clicking the **Open** button.

- Close a book by double-clicking a ![book], or by highlighting a ![book] and clicking the **Close** button.

- View a page of Help by double-clicking a ![?], or by highlighting a ![?] and clicking the **Display** button.

The Psion Help window contains the Help on the selected topic, and these buttons:

| Help Topics | Redisplays the Help Topics: Table of Contents window. |

| Back | Redisplays the last topic you viewed. |

| Options | Displays the Options menu. |

| >> | Displays the next page of Help in the current group of topics. |

| << | Displays the previous page of Help in the current group of topics. |

There are also jumps to other topics and pop-up windows within topics:

- Text which is green with a dotted underline displays a pop-up window providing extra information.

- Text which is green with solid underline is a Jump to another page of Help.

See also:

Printing Help

Searching for Help

Quick guide to PsiWin

Navigating Help (footnote 1)

Options menu

A̲nnotate...
C̲opy
P̲rint Topic...
F̲ont ▶
K̲eep Help on Top ▶
U̲se System Colors
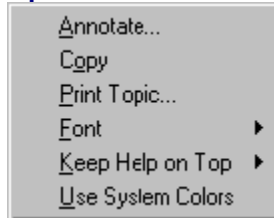
Navigating Help (footnote 2)

Pop-up window

This is an example of a pop-up window. Click anywhere on the page to close this window and return to the previous Help topic.

Searching for Help

If you can't find the topic you want on the Contents tab of the Help Topics window, you can search for information using one of these tabs:

- Index
- Find

To search the Index:

1. Click on the **Index** tab in the Table of Contents window.

2. Type the letters or word you want to search for. As you type, matching entries are displayed in the lower portion of the window.

3. Highlight the Index entry you want.

4. Click the **Display** button to either:

   – Display a list of topics about the selected entry on the Topics Found window. Highlight the topic you want and click the **Display** button to read the topic.

   – Open the one Help topic relating to the index entry on the PsiWin Help window.

To search using the Find tab:

1. Click on the **Find** tab in the Table of Contents window.

   The first time you use the Find tab you need to specify how extensive you want the search to be. The Find Setup Wizard is displayed when you click on the Find tab for the first time. This wizard guides you through the process of creating the list of words to search through.

2. Type the letters or word you want to search for. As you type, matching words are listed.

3. You can narrow the search by highlighting one of the matching words.

4. Highlight the topic you want in the lower portion of the window and click the **Display** button to read the topic.

See also:

Printing Help

Quick guide to PsiWin

Searching for Help (footnote 1)

Index tab

You can use the Index tab to base your search on the index entries for the Help file.

Searching for Help (footnote 2)

Find tab

You can use the Find tab to search for words or phrases used anywhere in the topics on the Table of Contents window.

Printing Help

To print out one or more topics in Help:

1. If necessary, click the **Help Topics** button to display the Table of Contents window.

2. Highlight the topic, or book of topics, you want to print.

3. Click the **Print** button.

4. Select the number of copies you want to print in the **Print** dialog.

   Note: You can select the printer you want to use by clicking the **Properties** button in the Print dialog.

5. Click the **OK** button to start printing.

Tip: You can print out the Help topic from the PsiWin Help window by clicking **Print Topic** from the **Options** button, or from the menu displayed when you click the right mouse button anywhere on the window.

Tip: You can print the information in a pop-up window by clicking the right mouse button inside the pop-up window to display the right mouse options available, and clicking **Print Topic** to display the Print window.

If you prefer, you can print out the whole of the Help text as a "User Manual". In order to do this you need to have Adobe Acrobat Reader installed on your PC (if you don't have Acrobat Reader, the installation program is included with PsiWin). Acrobat Reader is also needed to view much of the other documentation on the PsiWin CD-ROM.

- Adobe Acrobat Reader is a utility provided free by Adobe Systems, Incorporated, and is included with PsiWin 2. If you already have Acrobat Reader installed, or if you do not want to install it, you can delete the file ar32e30.exe from your PsiWin folder. If you subsequently want to install Acrobat Reader you can double-click on this file in the PsiWin folder on the PsiWin 2 CD-ROM.

Note: Once you've printed the manual you can uninstall Acrobat Reader if you want, using the **Add/Remove Programs** option in Windows Control Panel.

To install Acrobat Reader:

- Click the **Start** button on the Taskbar, point to **Programs**, point to **PsiWin** and then click on **Install Acrobat Reader**.

To print the User Manual:

1. Click the **Start** button on the Taskbar, point to **Programs**, point to **PsiWin** and then click on **User manual**.

2. In Acrobat Reader, click **Print** on the **File** menu.

Note: When you view the User Manual (or any of the other .PDF files included with PsiWin) in Acrobat Reader, you may find that the text isn't displayed clearly on screen. You can correct this in Acrobat Reader by pointing to **Preferences** and clicking **General** on the **File** menu. Then, deselect the **Smooth Text and Monochrome Images** check box and click **OK**.

See also:

Accessing Help

Quick guide to PsiWin

Printing Help (footnote 1)

Right mouse options

Copy
Print Topic...

Converting files between different formats

You can use PsiWin to exchange files between a Series 5 and a PC.

You can convert these file types:

- Word.
- Sheet.
- Data.
- Record and Voice Notes.
- Sketch.

- To convert an Agenda file and open it on a PC you need to use Agenda synchronization.

Notes on converting Word files:

If you use Microsoft Word's "Fast Saves" option you may find that your converted files contain extra text from previous versions of your files. For best results you should disable "Fast Saves" (on the **Save** tab of the **Tools-Options** menu command) before converting.

If you convert a PC word processor document containing a table to Series 5 Word, the table will appear as an inserted Sheet object. If any of the cells in the table contains a large amount of text this may be truncated, since Series 5 Sheet cells cannot contain more than 255 characters.

Notes on converting Sheet files:

If your PC Spreadsheet contains multiple Worksheets, these will all be combined into a single Series 5 Sheet file. Series 5 Sheet does not use Worksheets.

Notes on converting Record and Voice Notes files:

PsiWin can convert Windows .WAV sound files to Series 5 format as long as they are monophonic (i.e. not stereo) and compressed using the PCM format. If your PC sound files are in a different format, you can use Windows' Sound Recorder to convert them to a format which the PsiWin converter can handle.

PsiWin cannot convert Series 5 sound files which have been recorded using ADPCM compression.

Notes on converting Password-protected files:

You cannot convert password protected files (including password-protected memos in Agenda). If you want to copy a password protected file between a Series 5 and a PC you need to remove the password on the Series 5 before converting the file.

See also:

Using the Psion File Converter

How to convert files

Managing Psion files

How to upgrade to a Series 5

Quick guide to PsiWin

Converting files between different formats (footnote 1)

Agenda Synchronization

You can use the PsiWin Synchronizer to keep copies of your Agenda, on a Series 5 and on a PC (in Lotus Organizer, Microsoft Schedule+ or Microsoft Outlook), and keep them up to date with each other.

If you are using a PC scheduler with Groupware support on a network, other people will have access to your PC agenda and will be able to add and view entries.

How to convert files

You can convert files to and from Series 5 format, without having to have a Series 5 connected, using the Psion File Converter. You can also exchange files between the Series 5 and a PC and convert them, if desired, by dragging and dropping them between your Series 5 and PC in Windows Explorer.

There are several different options you can choose from when transferring files between the Series 5 and a PC.

You can:

- Copy and convert a file.

- Copy a file without converting.

- Move and convert a file.

- Move a file without converting.

- "Send" and convert a file to a Psion from within Windows Explorer using the Psion File Converter.

Tip: When you convert a file you can set up a default conversion for each different file type, so that PsiWin automatically converts files you drag between the Series 5 and the PC to the right format.

You can convert Series 5 files to any of the PC application file types listed, even if the application is not present on the PC.

See also:

Using the Psion File Converter

Copying and converting files

Copying without converting

Moving and converting files

Moving without converting

Sending PC files to a Psion

Upgrading files to Series 5 format

Quick guide to PsiWin

Using the Psion File Converter

You can convert files between Psion and PC formats without having to connect your Series 5. This can be useful if, for example, you have backed up your Series 5 files and want to work on them while your Series 5 is not connected.

To convert between Psion and PC formats:

1. Right-click the **My Psion** icon and click **Convert files**, or

   Click the **Start** button, point to **Programs**, point to **PsiWin 2.1**, and point to **Convert files**.

2. In the **From** box, click the browse button ⬚ and select the file you want to convert.

   PsiWin examines the file and suggests a file type and location for the converted file (it may take a few seconds for the converters to load).

3. If you want to change the location of the converted file, click the browse button ⬚ and select a new location.

   If you want to change the type of the converted file, click the arrow next to the drop-down list ⬚ and select a different type from those available.

4. Click **Convert Now** to convert the file.

See also:

Copying and converting files

Setting the default conversion format

Converting files between different formats

Quick guide to PsiWin

Copying and converting files

The first time you copy and convert a file between a Series 5 machine and a PC you need to specify the file type you want to convert it to.

Tip: You can select a default conversion format for all files of a certain type and choose not to display the Copy dialog again.

To copy and convert a file:

1. Highlight the file you want to copy and convert on the Series 5 or PC.

2. Drag the file to a folder on the PC, or on the Series 5.

    Tip: You can copy and convert a file by holding down the right mouse button as you drag the file and selecting **Copy here and Convert**.

3. The Copy dialog is displayed. Select the file type you want to convert to from the drop-down **Type** list. You can also:

    – Click the **Set as Default** button to make this the default conversion format for files of this type.

    – Select the **Don't show this dialog again** check box to always convert files of this type to the selected file type and not show the Copy dialog.

    Tip: If you opt not to show this dialog again you can change the default conversion using the Psion File Types tab on the Psion **Properties** dialog. To open the Psion Properties dialog click **Properties** on the menu displayed when you click the right mouse button on the **My Psion** icon.

    – Copy the file instead of converting it by clicking the **Copy Only** button.

    – Cancel the conversion by clicking the **Cancel** button.

4. Click on the **Convert** button to copy and convert the file.

Some formatting in converted files might be lost.

See also:

Converting files between different formats

Copying without converting

Moving and converting files

Quick guide to PsiWin

Copying without converting

You can copy files and folders between the Psion machine and a PC without converting them.

To copy without converting:

1. Highlight the file, or folder of files, you want to copy.

2. Hold down the right mouse button and drag the file to a folder on the PC or the Psion. As you drag the file the available menu options are displayed.

3. Click on the **Copy Here** option and the file is copied.

Tip: Alternatively, you can copy a file by dragging it while holding down the left mouse button, and clicking **Copy Only** in the Copy dialog.

See also:

Converting files between different formats

Copying and converting files

Moving and converting files

Quick guide to PsiWin

Copying without converting (footnote 1)

Copy here and Convert
Copy Here
Move Here

Cancel
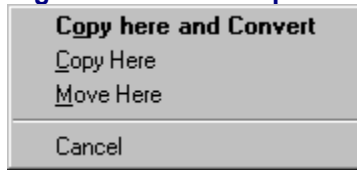
Moving and converting files

The first time you move a file(s) between a Series 5 machine and a PC you need to specify the file type you require.

Tip: You can select a file type to be the default conversion for all files of a certain type and choose not to display the Copy dialog again.

To move and convert a file:

1. Highlight the file(s) you want to move and convert, on the Series 5 or PC.

2. Hold down the Shift key and the left mouse button, and drag the file to a folder on the PC.

3. The **Move File** dialog is displayed. Select the file type you want to convert to from the drop-down list in the **Type** field. You can also:

   – Click the **Set as Default** button to make this the default conversion format for all files of this type.

   – Opt not to show the Move File dialog again and always convert files of this type to the file type selected by clicking the **Don't show this dialog again** check box.

   Tip: If you opt not to show this dialog again you can change the default conversion using the Psion File Types tab on the Psion Properties dialog. To open the Psion Properties dialog click Properties on the menu displayed when you click the right mouse button on the My Psion icon.

   – Move the file, instead of moving and converting it, by clicking the **Move Only** button.

   – Cancel the conversion by clicking the **Cancel** button.

4. Click on the **Convert** button to move and convert the file.

Some formatting in converted files might be lost.

See also:

Converting files between different formats

Copying and converting files

Moving without converting

Quick guide to PsiWin

Moving without converting

You can move file(s) and folders between the Psion machine and a PC without converting files.

To move without converting:

1. Highlight the file or folder of files you want to move.

2. Hold down the right mouse button and drag the file to a folder on the PC or the Psion. As you drag the file the available menu <u>options</u> are displayed.

3. Click on the **Move here** option.

See also:

<u>Converting files between different formats</u>

<u>Copying without converting</u>

<u>Moving and converting files</u>

<u>Quick guide to PsiWin</u>

Moving without converting (footnote 1)

Right-mouse menu options

Copy here and Convert
Copy Here
Move Here
Cancel
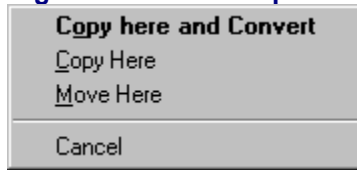
Converting Series 3/3a/3c and Siena files

You can convert the files on your Series 3/3a/3c or Siena machine to Series 5 file format. This is a one-way process; Series 5 files cannot be converted to Series 3/3a/3c or Siena format.

Series 3/3a/3c or Siena files can be converted by dragging and dropping them between the Series 3/3a/3c or Siena and the PC, in the same way that you copy and convert Series 5 files, and selecting the appropriate format to convert to.

Note: You cannot convert Psion Series 3/3a/3c files directly to PC application format. If you want to open a Series 3/3a/3a or Siena file on a PC you should first convert it to Series 5 format and then reconvert it to the PC format.

Note: You can automatically convert and transfer all suitable files from your Series 3/3a/3c and Siena to a Series 5 using the Upgrade program.

The Series 5 Data program does not allow you to create a new file (or edit the labels in an existing database) with two labels that are the same, whereas the Series 3/3a/3c and Siena databases do allow this. If your Series 3/3a/3c or Siena database contains two labels that are the same it will be correctly converted to Series 5 format and you will have a Series 5 Data file with two labels the same. However, if you were then to attempt to merge the contents of the converted data file into an existing Series 5 Data file - for example, in order to increase the field sizes - the merge would fail. For this reason, it is advisable to rename any duplicate labels in converted Data files.

Note: The cable supplied with PsiWin is designed for your Series 5. Other machines may require a different cable.

See also:

Converting files between different formats

Upgrading files to Series 5 format

Quick guide to PsiWin

Psion and PC file compatibility

You can convert your Series 5 files to any of the file types listed below, even if the PC application isn't currently installed on the PC. It just means that you can't open the file on the PC.

You can convert Series 5 Word files to:

- Word for Windows 2.0, 6.0, 95 and 97

- Word Perfect 5.1, 5.2, 6.0, 7.0 and 8.0

- Works for Windows 3.0 WP and 4.0 WP

- Ami Pro 3.0 and 3.1

- Rich Text Format

- Text for Windows (ANSI) and MS-DOS

You can convert Series 5 Sheet files to:

- Excel 4.0, 5.0, 95 and 97

- Lotus 123 WK1, WK3 and WK4

- Quattro Pro 5.0, 6.0, 7.0 and 8.0

- Works for Windows 3.0 SS and 4.0 SS

You can convert Series 5 Data files to:

- FoxPro 2.0, 2.5, 2.6 and 3.0

- Borland International dBASE III, IV and 5.0

- CSV (Windows Comma Separated Values)

- Access

Note: If your database labels contain accented characters (e.g. é), these may not be converted correctly and may appear in your converted file as _ (an underscore). If this happens, simply edit the labels in your database and overtype the _ symbols with the correct accented characters.

You can convert Series 5 Sketch files to these PC file formats:

- Windows Bitmap (.BMP)

You can convert Series 5 Record files to these PC file formats:

- Windows Wave (.WAV)

Note: PsiWin can convert Windows .WAV sound files to Series 5 format as long as they are monophonic (i.e. not stereo) and compressed using the PCM format. If your PC sound files are in a different format, you can use Windows' Sound Recorder to convert them to a format which the PsiWin converter can handle.

PsiWin cannot convert Series 5 sound files which have been recorded using ADPCM compression.

You can synchronize Series 5 Agenda files with:

- Lotus Organizer 2.1 and 97

- Microsoft Schedule+ 7 and 7a

- Microsoft Outlook 97

Note: Microsoft Internet Explorer 4 includes a special "cut-down" version of Outlook called Outlook Express. Outlook Express does not have the full time-management features of Outlook 97 and you cannot synchronize your Series 5 Agenda with it.

See also:

Converting files between different formats

Psion and PC application suite compatibility

Quick guide to PsiWin

Psion and PC application suite compatibility

The Windows programs with which you can exchange Series 5 files are from a range of application suites.

Series 5 files are compatible with these suites:

- Microsoft Office
- Lotus SmartSuite
- Word Perfect Suite

See also:

Converting files between different formats

Psion and PC file compatibility

Quick guide to PsiWin

Changing the file format for conversions

The first time you copy a file from the Series 5 to a PC you need to specify the file type you want to convert the file to.

You can also choose a default conversion format for the file type and select not to show the Copy or Move File dialog again. These conversion settings are specific to individual Series 5 machines, so different machines can have different default conversion formats. If at a later stage you want to change the default conversion, you can change the conversion file type for any Series 5 file types, or just the currently selected type.

Note: To change the default conversion format for the Series 5 you need to connect the machine. This is because more than one person can connect their Series 5 to the same PC, so the Series 5 needs to be connected to determine the existing conversion setup for that machine.

See also:

Converting files between different formats

Setting the default conversion format

Setting the default conversion for one file type

Quick guide to PsiWin

Setting the default conversion format

You can change the default conversion for any of the Series 5 file types by changing the general setup of the Series 5.

To change the default conversion for any Series 5 file type:

1. Connect the Series 5 to the PC.

2. Select the **Properties** option from either the **File** menu in Windows Explorer or from the <u>menu</u> displayed when you right-click on the **My Psion** icon.

3. Click on the Psion File Types tab in the Psion Properties dialog to display a list of all the Psion file types available.

   Tip: Click on one of the Registered file types to see which file type the file is currently converted to.

4. Click on the file type you want to change and click the **Edit** button.

5. Click on the file type to which you want to convert files of this type in the **Edit File Type** dialog.

6. Click on the **Set Default** button to make the selected file type the default conversion format.

7. You can choose not to show the Copy or Move File dialog while converting files by deselecting the **Display choice of converters** check box.

8. Click **Apply** to save the new default conversion format without closing the Edit File Type dialog, or click **OK** to save the new conversion format and return to the Psion Properties dialog.

See also:

<u>Converting files between different formats</u>

<u>Setting the default conversion for one file type</u>

<u>Quick guide to PsiWin</u>

Setting the default conversion format (footnote 1)

Right-click menu options
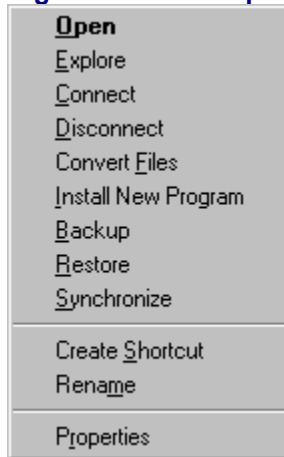
Setting the default conversion for one file type

You can change the default conversion for just the currently selected file type.

To change the default conversion for one Psion file type:

1. Connect the Psion to the PC.

2. Click on one of the files whose conversion format you want to change, on the Psion.

3. Select the **Properties** option from either the **File** menu in Windows Explorer or from the menu displayed when you click the right mouse button on the file.

    Tip: The current conversion format for the Psion file type is displayed on this dialog.

4. Click on the **Change** button in the Properties dialog.

5. Click on the file type to which you want to convert this type of file.

6. Click on the **Set Default** button to make the selected file type the default conversion format in the **Edit File Type** dialog.

7. Click **Apply** to save the new default conversion format without closing the Edit File Type dialog, or click **OK** to save the new conversion format and return to the Properties dialog for the selected file.

See also:

Converting files between different formats

Setting the default conversion format

Quick guide to PsiWin

Setting the default conversion for one file type (footnote 1)

Right-click menu options

Open
Explore
Connect
Disconnect
Convert Files
Install New Program
Backup
Restore
Synchronize

Create Shortcut
Rename
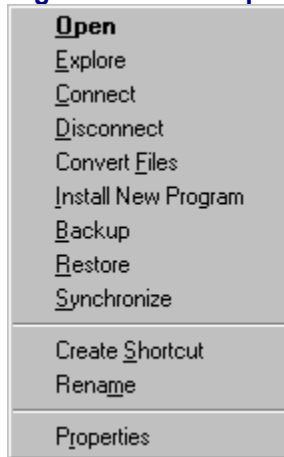
Properties

Solving file conversion problems

If you cannot convert a particular file, it may be because of one of the following reasons:

- PsiWin may not be able to convert files of this type.

  Check the **Psion File Types Properties** page (see Viewing Psion file types) and ensure that the file type is listed.

- The file may be corrupt.

  Try opening the file in the source program and saving it under a different name.

- The file may already be open in another program.

  Check, and close it if necessary.

- If it is a PC file, it may have the wrong filename extension.

  Try double-clicking the file in Windows Explorer to check that it can be opened by the program associated with that filename extension. If not, the extension may be incorrect.

- If it is a Word or Sheet file, it may be password-protected (if you receive Error message (86) this is almost certainly the case).

  Open the file in the source program, remove the password and try again.

If you convert a PC word processor document containing a table to Series 5 Word, the table will appear as an inserted Sheet object. If any of the cells in the table contains a large amount of text this may be truncated, since Series 5 Sheet cells cannot contain more than 255 characters.

See also:

Viewing Psion file types

Converting files between different formats

Quick guide to PsiWin

Opening Series 5 files in PC programs

You can open your Series 5 files on your PC in an appropriate PC program, edit them, and save them back onto your Series 5.

To open a Series 5 file in a PC application:

1. Double-click the Series 5 file in Windows Explorer.

    PsiWin creates a temporary copy of the file and opens the **Select Type of Conversion…** window.

2. Select a PC program from the drop-down list.

    If you will always want to open Psion files of the current type in this program, you can click **Don't show this dialog again**.

3. Click **Convert**.

    The temporary file is converted to the selected format and opened in the appropriate PC program.

When you select the **Save** command from the PC program's File menu, or exit the PC application, the file is automatically converted and saved back your Series 5 in its original format. If you have edited the file, a copy of it is saved back to the Series 5 with the word "modified" appended to its name. You can then check the new file against the original, if you wish, before you delete the original.

Some formatting in converted files may be lost. For this reason, a copy of the file is saved back to the Psion.

Note: If your Series 5 should switch itself off, or become disconnected, while you are working on one of its files, the "Current open files" dialog appears when you attempt to save the file. You are then given the option of reconnecting to the Psion or saving the file onto the PC.

See also:

Checking which Series 5 files are open on the PC

Converting files between different formats

Managing Psion files

Quick guide to PsiWin

Checking which Series 5 files are open on the PC

If you use your PC programs to view or edit your Series 5 files (see Opening Series 5 files in PC programs) you can check which Psion files are currently open on your PC.

You might like to do this if your Series 5 has become disconnected from your PC, or before disconnecting your Series 5. You can then save open files to your Series 5 in Psion file format, save them to your PC in PC file format, or delete the temporary files.

To view a list of all the Series 5 files currently open in a PC program:

1. Open Windows Explorer.

2. Left-click on the **My Psion** icon.

3. Select the **View open files** command from the Psion menu.

4. Select the **Only show modified files** option if you only want to see those files which have been changed since they were opened.

When you edit a Series 5 file in a PC program you are actually working on a copy of the file, stored in a temporary folder on the PC. When you have finished editing the file, a copy of it is saved back to the Series 5 with the word "modified" appended to its name and the temporary file is deleted.

If you want, you can save an open file to a different location. If the Series 5 should be disconnected before the file can be saved back, you can save the modified file to a different location in the same way.

To save an open Series 5 file back to the Series 5:

1. Ensure that the Series 5 is connected.

2. Highlight the desired file(s) and click the **Save to Psion** button.

To save an open Series 5 file to a PC:

- Highlight the desired file and click the **Save to PC** button.

  Note: you cannot select multiple open files to save to a PC; you must save each one individually.

If your Series 5 should become disconnected, the temporary file is not deleted and the next time you connect you are given the option of saving the modified file back to the Series 5. If you are sure you do not want to keep the modified version you can delete the temporary file.

To delete a temporary file:

- Highlight the file and click the **Delete** button.

See also:

Opening Series 5 files in PC programs

Quick guide to PsiWin

Managing Psion files

You can perform the same tasks with the Psion files in Windows Explorer as you can with files on the PC.

You can:

- Copy files by dragging them between folders.

- Move files by holding down the shift key as you drag the file.

- Cut and copy files, then paste them into a folder on your PC, converting them to a PC file type if required.

- Send a file to a Psion disk and automatically convert it to a Psion file type.

- Rename files or folders by clicking **Rename** on either the **File** menu, or the menu displayed when you click the right mouse button on a file or folder.

- Delete files of folders by pressing the **Del** key, or by clicking **Delete** on either the **File** menu or the menu displayed when you click the right mouse button on a file or folder.

If you delete a file (or folder) from the Series 5, the file does not go into the Windows Recycle bin and cannot be restored.

- Create a new folder by pointing to **New** and clicking **Folder** on the **File** menu.

You cannot search for a file on the Psion using the **Find** option.

Tip: Click the right mouse button to display a menu containing the options currently available and to change the setup for any tasks you've chosen to perform automatically by clicking the **Properties** option.

See also:

Converting files between different formats

Copying and converting files

Sending PC files to a Psion

Quick guide to PsiWin

Sending PC files to a Psion

You can quickly "send" any file, or group of files, to any connected Psion disk from within Windows Explorer. Files "sent" to a Psion are automatically converted to the appropriate Psion file types.

To send a file to a Psion:

1. Open Windows Explorer and browse to the desired file.

2. Right-click on the file.

3. Point to **Send to**, and then click either My Psion (C Drive) or My Psion (D Drive).

The file is converted to the default Psion format and copied to the root of the specified drive.

To send several files to a Psion:

1. Open Windows Explorer and browse to the folder containing the files.

2. Hold down the Shift key and left-click on each of the files you want to send to the Psion.

3. Right-click on any of the selected files, point to **Send to**, and then click either My Psion (C Drive) or My Psion (D Drive).

The files are converted to the default Psion formats and copied to the root of the specified drive.

See also:

Setting the default conversion format

Managing Psion files

Quick guide to PsiWin

Viewing disk information

You can see how much disk space you've used, and the amount still available, on any of the Psion disks.

To view disk information:

1. Open Windows Explorer and left-click on the **My Psion** icon.

2. In the right-hand pane, click on the disk for which you want to view disk information.

3. Select **Properties** from either the **File** menu or from the menu displayed when you right-click the mouse button.

    The Properties dialog is displayed, listing these details:

    – The amount of disk space used.

    – The amount of disk space free.

    – The total amount of disk space for the selected disk.

4. Click the **OK** button to close this dialog.

See also:

Understanding Psion machine and disk names

Viewing file and folder information

Quick guide to PsiWin

Viewing disk information (footnote 1)

Right-click menu options

Open
Explore

Backup
Restore

Format...

Create shortcut

Properties

Viewing file and folder information

You can view information about the selected file or folder on the Psion machine.

To view file or folder details:

1. Open Windows Explorer and left-click on the **My Psion** icon.

2. In the right-hand pane, click on the file or folder for which you want to view information.

3. Select **Properties** from either the **File** menu or from the menu displayed when you right-click the mouse button.

You can view these details about folders:

- Location of the folder.

- Size of the folder.

- Time and date on which the folder was last modified.

- Number of files in the folder.

You can view these details about files:

- Type of file and the format it converts to by default.

- Location of the file.

- Size of the file.

- Time and date on which the file was last modified.

See also:

Viewing disk information

Converting files between different formats

Quick guide to PsiWin

Viewing Psion file types

You can view the list of Psion file types available, and if necessary change the default conversion format for the files.

To view Psion file types:

1. Click on the **My Psion** icon in Windows Explorer.

2. On the **View** menu, click **Options** to display the Options dialog.

3. Click the **Psion File Types** tab to view the list of Psion file types.

4. If you want to change the default conversion format for any of the file types, click on the file type you want to change and then click the **Edit** button.

    Refer to Setting the default conversion format for more information.

5. Click **OK** to close the Options dialog.

See also:

Managing Psion files

Changing the Psion machine properties

Quick guide to PsiWin

Troubleshooting

If you encounter any problems while using PsiWin to manage your files and disks, check the following:

- The link on the Psion machine is correctly enabled.
- The Psion and PC are using the same Baud rate.
- The PC is searching the correct COM port(s).
- The Docking cable is connected to both the Psion and the PC.
- The file is not password protected.
- If you are converting a file, make sure the file type is supported.
- If you are copying or moving a file, make sure the destination disk is not full.

Tip: You can check the communication options between the Psion and PC on the **Communications** tab on the Psion Properties dialog. To access this dialog right-click on the **My Psion** icon, or the Connection icon on the Taskbar, and point to **Properties**.

See also:

Converting files between different formats

Setting Connections options

Quick guide to PsiWin

Identifying your Psion machine

You need to enter an owner name for each of the Psion machines that you connect to the PC with PsiWin.

Each time you connect Psion machine to your PC using PsiWin you should log on as a New Owner. PsiWin keeps backed-up files, synchronization information, and details of opened files, in folders named after the Owner you specify when you first connect the machine. If you connect two machines and enter identical owner information for both, backup and synchronization details may be incorrect or misleading.

The only time you should choose the "Select Existing Owner" option, when you connect a new machine, is if you want to restore the contents of one machine to another.

PsiWin uses information relating to your machine to identify it when you connect it to the PC:

- If you connect a Series 5 machine, the machine is identified by a unique identification number built into the machine which cannot be changed or deleted.

Note: You only need to enter the owner name once for a Series 5, and even if you change the owner information the machine is still recognised by its identification number.

- If you connect a Series 3/3a/3c or Siena, the machine is identified by the owner information that you have entered in its System screen.

Note: If you change the owner information on a Series 3/3a/3c or Siena between connection sessions you're prompted to select your owner name or enter a new name when you next connect.

It is important for PsiWin to distinguish between machines because you can:

- Choose to backup machines automatically, and PsiWin uses the machine's Owner Name for its backup settings.

- Enter different settings for each machine. For example, you can select the file format to which you want to automatically convert any files you drag between each Series 5 and the PC.

See also:

Understanding Psion machine and disk names

Using more than one Psion machine

Removing owner information with the Owner Manager

Quick guide to PsiWin

Using more than one Psion machine

More than one person can use PsiWin to manage their Psion files on the same PC.

PsiWin detects when you:

- Attach a Psion for the first time.

   When you first connect a Psion to the PC you need to enter an owner name.

- Change the owner details on a Series 3/3a/3c or Siena.

   If you change the owner details on a Series 3/3a/3c or Siena you need to either select your name from the list of existing owners, or enter new owner details.

Each time you connect Psion machine to your PC using PsiWin you should log on as a New Owner. PsiWin keeps backed-up files, synchronization information, and details of opened files, in folders named after the Owner you specify when you first connect the machine. If you connect two machines and enter identical owner information for both, backup and synchronization details may be incorrect or misleading.

The only time you should choose the "Select Existing Owner" option, when you connect a new machine, is if you want to restore the contents of one machine to another.

Note: PsiWin identifies Series 5 machine machines by a unique built-in identification number, so you only need to enter owner details the first time you connect a Series 5 machine.

See also:

How to restore files and folders

Understanding Psion machine and disk names

Connecting to a new Psion machine

Quick guide to PsiWin

Connecting to a new Psion machine

If PsiWin doesn't recognize the Psion that you have connected the New Psion dialog will be displayed.

To enter owner details:

1. Click on the **Create New Owner** radio button.

2. Click on the **OK** button.

3. Type your name in the "Welcome to PsiWin" dialog.

4. Click **OK** to confirm the new owner details.

You can now use PsiWin to browse and manage the files on the Psion.

If you select the "Select Existing Owner" option PsiWin may not be able to give correct information about backup dates, etc. It is therefore advisable to always create new owner details whenever connecting a Psion for the first time.

See also:

Using more than one Psion machine

Changing owner details for a Psion machine

Quick guide to PsiWin

Changing owner details for a Psion machine

If you have changed the owner details on a Series 3/3a/3c or Siena the New Psion dialog will be displayed the next time you connect the machine. You need to select a name from the list of existing owners, or alternatively create a new owner.

To select an existing owner:

1. Click the **Select Existing Owner** radio button.

2. Select your name from the list of owners.

3. Click **OK** to confirm the details.

To add a new owner:

1. Click the **Add new Owner** radio button.

2. Enter your name in the New Owner box.

3. Click **OK** to confirm the new details.

You can now use PsiWin to browse and manage the files on the Psion.

Note: Series 5 machines are identified by a unique built-in identification number, so you can change the owner details without re-entering your owner name in PsiWin.

See also:

Using more than one Psion machine

Connecting to a new Psion machine

Quick guide to PsiWin

Changing PsiWin's owner options

You can change the standard owner options settings for the Psion machine at any time.

To change the owner options:

1. Connect the Psion to the PC.

Note: You need to connect the Psion before changing the owner options because more than one person can connect to the same PC. PsiWin uses your owner name to identify the machine you have connected and display its current owner options.

2. Right-click on the **My Psion** icon, or on the connection icon on the Taskbar, and point to **Properties**.

3. Click on the **General** tab in the Psion Properties dialog. This page displays your owner information and you can choose:

    –   The folder on the PC in which all the Psion files are kept by clicking the **Browse** button.

    –   Whether the Copy dialog is displayed when you are copying and converting files between the Series 5 and the PC by selecting or deselecting the **Display choice of converters when copying from PC to Psion** check box.

4. Click the **Apply** button to confirm any changes without closing this dialog, or click the **OK** button to save any changes and close the dialog.

See also:

Changing the Psion machine properties

Using more than one Psion machine

Quick guide to PsiWin

Removing owner information with the Owner Manager

Each Psion machine that you connect to your PC using PsiWin is identified by its disk name, owner name, and/or internal serial number. If more than one person has connected their Psion machine to your PC you might, on occasion, like to tidy up the list of registered PsiWin owners and delete information relating to people who no longer connect to your PC.

Deleting an owner removes all information related to that person including backups and Synchronizer data.

To delete a registered owner:

1. Click the **Start** button, point to **Programs**, point to **PsiWin 2.1** and click **Owner Manager**.

2. Click on one of the current owners.

   To see more information about the owner and their machines, click **View Details**.

3. Click **Delete This Owner** to remove all information relating to the selected owner, or

   Click **Delete All Owners** to remove all information relating to all owners.

See also:

Viewing and removing Psion machine information

Using more than one Psion machine

Changing owner details for a Psion machine

Quick guide to PsiWin

Viewing and removing Psion machine information

You can use PsiWin to connect and manage as many different Psion machines as you like. If the same person connects more than one machine, you can review the details of each and, if necessary, delete machines which are no longer required.

Deleting a Psion machine removes all information related to that machine, including backups and Synchronizer data.

To view or delete a registered Psion machine:

1. Click the **Start** button, point to **Programs**, point to **PsiWin 2.1** and click **Owner Manager**.

2. Click on the appropriate owner and click the **View Details** button.

3. Click the arrow next to the **Supported machines** box.

4. Select a machine from the drop-down list of all the machines which the selected owner has connected using PsiWin.

   PsiWin displays a summary of information about the selected machine.

5. If desired, click the **Delete This Machine** button to remove all information relating to the selected machine, or

   Click **Delete All Machines** to remove all information relating to all machines.

6. Click **OK** to return to the Owner Manager.

See also:

Removing owner information with the Owner Manager

Using more than one Psion machine

Quick guide to PsiWin

Upgrading files to Series 5 format

Use the Upgrade to Series 5 program to convert and transfer files from your Series 3/3a/3c and Siena machine to your Series 5. The upgraded files are all transferred to a folder called S3 files on the Series 5.

Alternatively, you can manually copy and convert individual files from your Series 3/3a/3c or Siena.

Note: The Upgrade to Series 5 program also upgrades any files on Solid State Disks (SSDs) that are inserted in the machine when you choose to upgrade. If you don't want the files on SSDs to be upgraded, remove them before starting the Upgrade to Series 5 program.

The Upgrade to Series 5 program transfers and converts the following types of file from the Series 3/3a/3c and Siena to the Series 5:

	Word files
	Sheet files
	Agenda files
	Data files
	Record and Voice Notes files
	Sketch files

You need to remove the password from any password-protected files, or memos in Agenda, before upgrading, otherwise the Upgrade will not be able to convert them correctly.

Note: Unlike the Series 3/3a/3c and Siena, the Series 5 does not distinguish files by file type or filename extension. If you had two files with the same name but created in different programs on the Series 3/3a/3c or Siena, the Upgrade to Series 5 program will add a number to the file names so that you can distinguish between them on the Series 5.

If you have any add-on applications on your Series 3/3a/3c or Siena the Upgrade to Series 5 program creates backup copies on the PC, but won't copy them back to the Series 5 because you can't use them on the Series 5.

Note: The Upgrade to Series 5 program will however convert any Data and Word files used by add-on applications, so you might find some files on your Series 5 which you don't recognize after you've upgraded.

See also:

How to upgrade to a Series 5

How to upgrade a single file to Series 5 format

Converting Series 3/3a/3c and Siena files

Converting files between different formats

Quick guide to PsiWin

How to upgrade to a Series 5

The Upgrade to Series 5 program converts your Series 3/3a/3c and Siena files to Series 5 format and then transfers them to your Series 5.

Note: Password-protected files or Agenda memos won't be upgraded. You need to remove their passwords on the Series 3/3a/3c or Siena before starting the upgrade for them to be upgraded.

If you've used PsiWin with your Series 5 before upgrading Series 3/3a/3c or Siena files to Series 5 format, and have chosen to automatically backup your machine on the Backup tab of the Psion Properties dialog, you will need to turn this option off before upgrading to Series 5.

To start the upgrade to Series 5:

1. Click the **Start** button on the Taskbar, point to **Programs**, point to **PsiWin** and then click on **Upgrade to Series 5**.

2. Connect the Series 3/3a/3c or Siena you want to upgrade, ensure that the link is turned on and click the **Yes** button in the Upgrade to Series 5 dialog to start the upgrade.

    If this is the first time you've connected the Series 3/3a/3c or Siena, or if you've changed its owner details, the New Psion dialog is displayed.

    Note: The cable supplied with PsiWin is designed for your Series 5. Other machines may require a different cable.

    The files are copied to the PC and upgraded to Series 5 file formats, then the PsiWin Upgrade Connect dialog is displayed.

3. Disconnect the Series 3/3a/3c or Siena and ensure that its link is turned off.

4. Connect the Series 5, ensure the link is enabled correctly and click the **OK** button to start copying the files into a folder called S3 Files onto the Series 5.

    Note: If this is the first time you've connected the Series 5 the New **Psion** dialog is displayed.

5. Click the **OK** button to exit the Upgrade to Series 5 program.

Some formatting in upgraded Word and Sheet files might have changed during the upgrade. Jotter files on the Series 3c are converted to Data files before transfer to the Series 5, since the Series 5 does not have a Jotter program.

Note: PsiWin identifies individual Series 3/3a/3c and Siena machines by the owner information which has been entered in the System screen. If no information has been set, PsiWin will not be able to differentiate between machines and the upgrade(s) will not be successful. Therefore, if you want to upgrade several machines (of the same, or different, types), you must make sure that each machine has different owner information. You must also ensure that you log in to PsiWin as a new owner each time a different machine is connected.

See also:

How to upgrade a single file to Series 5 format

Upgrade problem

Converting Series 3/3a/3c and Siena files

Quick guide to PsiWin

How to upgrade to a Series 5 (footnote 1)

New Psion dialog

You can use the New Psion dialog to either:

- Create a new owner.

- Select an existing owner.

You need to enter an owner name for each Psion you connect to a PC because more than one owner can connect their Psion to the same PC. PsiWin identifies which machine is connected by the owner name.

How to upgrade to a Series 5 (footnote 2)

New Psion machine dialog

You can use the New Psion dialog to either:

- Create a new owner.
- Select an existing owner.

You need to enter an owner name for each Psion you connect to a PC because more than one person can connect their Psion to the same PC. PsiWin identifies which machine is connected by the owner name.

How to upgrade a single file to Series 5 format

If you do not want to upgrade all the files on your Series 3/3a/3c or Siena machine, or if you add a new file to a Series 3/3a/3c/Siena and later want to upgrade it, you can upgrade a single file to Series 5 file format.

To upgrade a single file to Series 5 format:

1. Connect your Series 3/3a/3c or Siena to the PC and ensure that the link is correctly enabled.

2. Drag the file you want to upgrade to a temporary folder on the PC. The file is copied to the PC and the Copy dialog is displayed.

3. Accept "Unknown" as the destination file format and click the **Copy** button.

4. Disconnect your Series 3/3a/3c, then connect your Series 5 to the PC and ensure that the link is turned on.

5. Hold down the left mouse button and drag the file to a folder on your Series 5. The Copy dialog is displayed.

6. Select the appropriate Series 5 file format from the Type drop-down list and click the **Convert** button. The file is converted and copied to the Series 5.

You can now open the file on your Series 5.

See also:

Converting Series 3/3a/3c and Siena files

Upgrade problem

Upgrading files to Series 5 format

Quick guide to PsiWin

Troubleshooting

The following error messages may be displayed during the Upgrade to Series 5 process.

Connection to the wrong machine

No Psion machine found

Psion machine not recognized

Upgrade problem

Upgrade not complete

No files upgraded

General upgrade error

Unrecognized files on your Series 5

Connection to the wrong machine

Message:

Your machine has connected to a Series 3/5, but PsiWin Upgrade was expecting to connect to a Series 5/3.

Problem:

The wrong machine is connected - you have either connected a:

- Series 3/3a/3c or Siena instead of a Series 5, or
- Series 5 instead of a Series 3/3a/3c or Siena.

Suggestions:

- Disconnect the current machine and connect the correct machine, or
- If the two machines are both connected at the same time, to different <u>COM</u> ports, ensure that PsiWin is connecting to the correct COM port by checking the settings on the Communications tab of the Psion Properties dialog.

Note: To open the Psion Properties dialog click the **Properties** option on the menu displayed when you click the right mouse button on the **My Psion** icon.

Connection to the wrong machine (footnote 1)

COM port

Your PC uses COM (communications) ports, also known as Serial ports, to exchange information with other devices which may be connected to it such as a Psion, a modem, or a serial mouse. Each COM port on your PC has a different number, typically between 1-4.

No Psion machine found

Message:

PsiWin Upgrade's connection to the Psion has been broken.

Problem:

The Upgrade to Series 5 machine program can't locate a Series 5 to connect to.

Suggestions:

You need to check that the:

- Link on the Series 5 machine has been correctly enabled.

- Docking cable is connected to both the Series 5 and PC.

- Baud rate is set to the correct rate - you can change this using the Communications tab of the Psion Properties dialog.

  When a Psion is connected to a COM port it automatically uses the maximum Baud rate that the connected Psion can use. If the Psion machine and PC are having difficulty communicating, you can lower the Baud rate on the Psion. If communication is still poor you can manually set a matching Baud rate for PsiWin, thereby disabling the Maximum attainable option.

Note: To open the Psion Properties dialog click the **Properties** option on the menu displayed when you click the right mouse button on the **My Psion** icon.

No Psion machine found (footnote 1)

Baud Rate

The speed at which electronic information travels, typically between two computers or between a computer and a printer, measured in bps (bits per second).

- Series 5 machines can communicate at Baud rates of up to 115200 bps.

Psion machine not recognized

Message:

The Psion you have connected to the PC has not been recognized.

Problem:

You have tried to connect a Psion machine which won't work with the Upgrade to Series 5 program.

Suggestion:

Ensure that the machine you're trying to upgrade is compatible with the Upgrade to Series 5 program. You can upgrade files from these machines:

- Series 3
- Series 3a
- Series 3c
- Siena

Upgrade problem

Message:

A problem with the Upgrade application has occurred.

Suggestion:

You need to uninstall and re-install PsiWin, then run the Upgrade to Series 5 program again. See How to uninstall PsiWin

Upgrade not complete

Message:

PsiWin Upgrade has been stopped before it could finish upgrading your files.

Problem:

You clicked on the **Stop** button during the upgrade process.

Suggestion:

Click the **OK** button and restart the Upgrade to Series 5 program, by clicking the **Start** button on the Taskbar, pointing to **Programs**, pointing to **PsiWin** and clicking on **Upgrade to Series 5**.

No files upgraded

Message:

PsiWin Upgrade has been unable to find any files to upgrade.

Problem:

The Upgrade program analyzed the files on your Series 3/3a/3c or Siena, but couldn't find any files which can be upgraded to Series 5.

Suggestion:

The Upgrade to Series 5 program can upgrade these file types:

- Word
- Sheet
- Agenda
- Data
- Jotter

Note: PsiWin converts Series 3c Jotter files to Data files on your Series 5.

If you have password protected any of the above file types on your Series 3/3a/3c or Siena they won't be upgraded. Remove all passwords from your Series 3/3a/3c or Siena files before upgrading.

General upgrade error

Message:

A general error has occurred in the Upgrade application. Error number n.

Problem:

The Upgrade to Series 5 program was unable to locate one of the files needed to complete the upgrade process.

Suggestion:

You need to uninstall PsiWin, then re-install PsiWin to restore the missing file. See <u>How to uninstall PsiWin</u>

Unrecognized files on your Series 5

Problem:

As a result of the Upgrade to Series 5, you might find that some Data and Word files which you don't recognise in the Series 3 Files folder on your Series 5.

This is because the Upgrade to Series 5 program copies Data and Word files used by the Series 3/3a/3c or Siena add-on applications over to your Series 5, but doesn't copy the applications themselves because they can't be used on your Series 5.

Suggestion:

You can delete files you don't recognize from your Series 5.

Tip: You can check the names of files that you think are used by add-on applications by looking inside the folder for the add-on application in the \apps directory on the appropriate disk on the Series 3/3a/3c or Siena.

Backing up and restoring files

Your Psion stores information very safely and securely, but it is not immune to damage, battery failure, and accidental deletion of files. PsiWin provides a simple but powerful backup procedure to ensure that your valuable Psion data remains safe.

Psion information that has been backed up to a PC, particularly if it is stored on a network, may be vulnerable to other users accessing it. You might prefer to keep your backups on a disk to which only you have access. See Changing PsiWin's owner options for information on changing backup locations.

- You can set up PsiWin to back up the Psion automatically, at regular intervals, to minimize data loss. After the first full backup of a Psion machine, all future backups are incremental to make them as fast as possible.

Backing up also creates Archive folders which can contain up to six previous versions of your files (including any which have been deleted or modified since the last backup), in case you ever need to refer back to an earlier version of a file.

- You can also back up more than one Psion machine.

- You can choose where the backup is stored, even on a network drive.

See also:

Backing up a Psion machine

Setting backup options

Backing up more than one Psion to a PC

How to restore files and folders

Quick guide to PsiWin

Backing up and restoring files (footnote 1)

Incremental Backup

An incremental backup copies only those files which have changed since the last time you backed up your Psion, making backups far quicker.

Backing up and restoring files (footnote 2)

Archive

PsiWin keeps up to six previous copies of backed-up files in File Archives folders. Should you ever need to restore an earlier version of a file to the Psion, simply drag and drop it from the Archive folder to the Psion.

Backing up a Psion machine

When you start a backup, PsiWin checks to see if you have previously backed up any of the currently selected disks.

Note: When you connect a Psion machine for the first time, PsiWin asks for owner details in order to identify it in future.

If this is the first time you have backed up the Psion, PsiWin performs a full backup, copying all the files on the Psion to a new folder on the PC. Subsequent backups of the same machine are always incremental and therefore much quicker.

To start a backup:

1. Ensure that the Psion is connected to the PC, the link is on, and the Link connection options are set correctly.

2. Right-click on the **My Psion** icon and click **Backup**.

    PsiWin displays the Psion Backup dialog.

3. Place a tick next to the disk(s) you want to back up.

4. Click the **Backup** button to start the backup.

PsiWin will close any open files or programs on the Psion, analyze differences between files on the selected disk and the previously backed up version of that disk (if applicable), then begin the backup procedure and inform you when it is completed.

See also:

Backing up a Psion machine

Backing up selected files and folders

Keeping archives (older versions of files)

Backing up more than one Psion to a PC

How to restore files and folders

Automatic backup

Quick guide to PsiWin

Backing up a Psion machine (footnote 1)

Incremental Backup

An incremental backup copies only those files which have changed since the last time you backed up your Psion, making backups far quicker.

Hidden and system files

Backup and Restore operations apply to all files, whatever their attributes. Hidden files are also backed up and restored without changing their attributes.

Backup and restore also stores information about the current system settings on the Psion machine including:

- Owner information.
- Home city.
- System screen preferences.
- System passwords.

Note: Individual file passwords are also kept intact.

See also:

Backing up and restoring files

Quick guide to PsiWin

Hidden and system files (footnote 1)

Hidden files

Some files and folders on the Series 5, including the System folder and any files you may have hidden yourself, are not visible from the System screen on the Series 5.

Backing up more than one Psion to a PC

You can back up more than one Psion machine to the PC using PsiWin. PsiWin automatically checks which Psion is connected and ensures that it is backed up to its individual location. Backup, archive and synchronization data for one machine will not interfere with that of another.

Note: If you intend to use PsiWin to back up Series 3/3a/3c or Siena machines you will need to ensure that each machine has different owner information, and that all disks have unique names.

See also:

Connecting to a new Psion machine

Understanding Psion machine and disk names

Backing up and restoring files

Quick guide to PsiWin

Backing up more than one Psion to a PC (footnote 1)

Synchronization

PsiWin can keep the Series 5 Agenda files up to date with Lotus Organizer, Microsoft Schedule+, or Microsoft Outlook files on your PC. When you connect, the files are compared with each other and any changes - additions, deletions, etc., - are reflected in both programs.

Backing up selected files and folders

If you don't want to back up all the files on the Psion you can select individual files, folders or disks to back up.

To back up a single file or folder:

1. Connect the Psion machine to the PC.

2. Open Windows Explorer.

3. Double-click the **My Psion** icon.

    PsiWin will attempt to connect to the Psion, then display the contents of its disks.

4. Right-click on the file or folder you want to back up and click **Backup**.

To back up a single disk:

1. Connect the Psion machine to the PC.

2. Open Windows Explorer.

3. Click next to the **My Psion** icon in the left-hand pane.

4. Right-click on the disk you want to restore and click **Backup**.

See also:

Backing up a Psion machine

How to restore files and folders

Quick guide to PsiWin

Setting backup options

You can choose which Psion disks to back up, how many file versions to keep, and where to store them, by clicking on the **Options** button in the **Backup** dialog.

You can change the Backup options at any other time by right-clicking on the **My Psion** icon, clicking **Properties** and selecting the Backup tab.

To choose which Psion disks to back up:

• Place a tick in the box next to the names of the relevant disks.

To change the number of old versions of files to keep in the archive folders:

• Select a number (between one and six) from the drop-down box.

Tip: If you will always want to back up the same disk(s) to the same locations, check the **Always use these settings. Don't show Backup dialog** box. If you later want to change this setting, you can deselect this option.

To change the folder where PsiWin keeps your backed up Psion files:

1. Select the **General** tab.

   The **Current folder for Psion files** is indicated.

2. Click the **Browse** button to select a new folder.

See also:

Backing up and restoring files

Automatic backup

Quick guide to PsiWin

Setting backup options (footnote 1)

Archive

PsiWin keeps up to six previous copies of backed-up files in File Archives folders. Should you ever need to restore an earlier version of a file to the Psion, simply drag and drop it from the Archive folder to the Psion.

Automatic backup

You can set PsiWin to automatically back up your Psion machine at regular intervals (when connected), and set how often you want this to happen. Automatic backups are performed minimized.

To back up the Psion machine automatically:

1. Right-click the **My Psion** icon and click **Properties**.

2. Select the **Backup** tab.

    Your Psion disks are listed in the **Psion Disk To Back Up** column.

3. Place a tick in the box next to each disk that you want to automatically back up.

4. Place a tick in the **Perform automatic backup** box to enable the radio buttons.

5. Select from the radio buttons to back up:

    – Each time connection is made.

    – Once per day, the first time you connect.

    – Once per week, the first time you connect.

    If you have not ticked the **Perform automatic backup** box, the radio buttons will remain dimmed.

6. Press **Apply** to save your options, or **OK** to save and close the dialog.

Tip: If you normally power the Series 5 machine with a mains adapter when you are connected to a PC, you can set the Automatic switch-off to "If no external power".

See also:

Backing up and restoring files

Keeping archives (older versions of files)

Quick guide to PsiWin

Automatic backup (footnote 1)

Minimized

While an automatic backup is in progress it appears as an icon on the Taskbar and the Backup Progress dialog is not displayed on the PC.

Automatic backup (footnote 2)

Radio buttons

Appear beside a list of items when you can only select one option at a time.

The selected option appears filled in.

How to restore files and folders

Should you accidentally delete a file or folder, you can restore the most recently backed-up version, or an earlier version (if you have chosen to keep archived versions of files).

To restore files or folders:

1. In Windows Explorer, click the **My Psion** icon

2. Double-click the **Backup** folder.

3. Right-click on the file, folder or disk you want to restore and click **Restore**.

To restore multiple files or folders:

1. In Windows Explorer, click the **My Psion** icon.

2. Double-click the **Backup** folder.

3. While holding down the Ctrl key, left-click on the files or folders you want to restore.

4. Right-click any of the highlighted files or folders and click **Restore**.

*   You can also restore files by dragging them from the PC backup folder to the Psion machine while holding down the Shift key.

In the unlikely event of you needing to reset the Psion machine, or if you've lost your data for any other reason, you can restore the entire disk by the same method.

When you select the **Restore** command, the **Psion Restore** dialog opens.

In the Psion Restore dialog you can set the following options:

*   The PC folder which contains the file set you want to restore.

*   The file set(s) in the current PC folder that you want to restore.

*   The backed-up Psion disk that you want to restore from.

*   Whether to format the Psion disk before restoring the files.

You should not format the Psion disk if it contains any files you want to keep. Formatting deletes all the information on a disk.

See also:

Backing up and restoring files

Understanding Psion machine and disk names

Formatting a Psion disk

Quick guide to PsiWin

Restoring an entire Psion disk

If you should ever lose all the information on a Psion (i.e. through battery failure or a hard reset), you can restore the entire contents of a Psion machine or disk.

You can also restore information that's been backed up from one Psion machine on to another machine (i.e. if you want to share your files with somebody else, or if you lose your Psion and have to replace it).

To restore an entire Psion disk:

1. Right-click the **My Psion** icon and click **Restore**.

2. Place a tick next to the disk(s) you want to restore.

3. Click the **Restore** button to begin the restore process.

You can also choose to reformat the disk before restoring.

When you restore files from one Series 5 machine to a different Series 5 machine, PsiWin detects the different serial number. When the New Owner dialog is displayed, select Existing Owner to proceed.

Note: If you should ever forget the system password for the Series 5 machine, first perform a hard reset of the Series 5. Then delete the file named **System.ini** in your PC Backup \system\ folder (this file contains your system password and owner information) and finally perform a full restore of the Series 5 machine C: disk.

See also:

Backing up and restoring files

Restoring missing files

Formatting a Psion disk

Quick guide to PsiWin

Restoring an entire Psion disk (footnote 1)

Formatting

Formatting removes all the files and folders stored on a disk. This operation cannot be undone.

Formatting a Psion disk

Before restoring the entire contents of a Psion disk you can format the disk to remove all the information, files and folders stored on it. This can help fix problems which may occur with the disk if it has become corrupted.

To format and restore a Psion disk:

1. Right-click on the **My Psion** icon and click **Restore**.

2. Place a tick next to the disk(s) you want to restore.

3. Place a tick in the box marked **Format Disk Before Restore**.

4. Press the **Restore** button to begin, or **Cancel** to abandon.

Formatting a disk removes all information from it and cannot be undone.

You can also format a Psion disk from within Windows Explorer.

To format a Psion disk from the Explorer view:

1. Open Windows Explorer.

2. In the left-hand pane, click on the **My Psion** icon..

3. In the right-hand pane, right-click the disk you want to format and point to **Format...**.

4. Press **Yes** to format the disk or **No** to abandon.

Formatting a disk removes all information from it and cannot be undone.

See also:

Understanding Psion machine and disk names

How to restore files and folders

Quick guide to PsiWin

Restoring missing files

If one of the files required to backup your Psion machine is deleted from the Psion, PsiWin restores the file when you next connect the Psion machine.

If a backup record is missing the **Psion connected** dialog is displayed.

Note: This dialog is only displayed if you've already backed up the Psion machine.

You can click:

- **Yes** to display the Psion Restore dialog, and restore all the previously backed up files along with the missing back up record to your Psion machine.

- **No** to restore just the missing backup record.

Note: The date when you last backed up your files to the PC is shown on this dialog.

See also:

Backing up and restoring files

Quick guide to PsiWin

Keeping archives (older versions of files)

The Backup folder contains an exact copy of all the files on the Psion as they were when the backup was performed.

Any files which have been changed (or deleted) since the previous backup are moved to a folder called Archive 1. If a file changes again before the next backup, the first version will be moved (during the backup) from the Archive 1 folder to a folder called Archive 2, and the more recently backed-up version will be put in the Archive 1 folder. Up to six versions of changes can be kept.

Note: Deleted files are not moved from the Archive folder by subsequent backups. If you regularly delete files after backing up, these deleted files will accumulate in the Archive 1 folder and you might like to clean them out periodically.

If you should ever need to restore an older version of a file, or one which has since been deleted from the Psion, you may be able to retrieve it from one of the Archive folders in Windows Explorer.

- If you have not backed up the Psion since deleting a file, it will be in the Backup folder.

To restore an older version of a file:

1. Highlight the file in the relevant Archive folder.

2. To restore the file to the same folder that it was in when modified or deleted, right-click on it and click **Restore**.

   PsiWin recreates any necessary folders to ensure that the file location is as it was when modified or deleted.

- To restore a file to a different location, drag it from the Archive folder to the folder you want on the Psion machine.

To change the number of previous versions of files kept in Archives:

1. Right-click on the **My Psion** icon and click **Properties**.

2. Select the **Backup** tab.

3. In the Archive options section, set the **Number of File Versions To Archive** to a number between 1 and 6.

Psion information that has been archived to a PC, particularly if it is stored on a network, may be vulnerable to other users accessing it. You might prefer to keep your backups and archives on a disk to which only you have access. See Changing PsiWin's owner options for information on specifying a backup folder.

See also:

Backing up a Psion machine

How to restore files and folders

Quick guide to PsiWin

General problems and suggestions

- If PsiWin cannot connect to the Psion machine, try selecting a slower <u>Baud</u> rate on the Psion.

- If, during a Backup process, PsiWin finds two disks with the same name, you will be asked to rename one of them before backing up.

- If the name on the Psion does not match the owner name of a backup file set, PsiWin will ask you to select an existing owner name or enter a new owner name before continuing backup.

See also:

<u>Understanding Psion machine and disk names</u>

<u>Setting Connections options</u>

<u>Quick guide to PsiWin</u>

General problems and suggestions (footnote 1)

Baud Rate

The speed at which electronic information travels, typically between two computers or between a computer and a printer, measured in bps (bits per second).

- Series 5 machines can communicate at Baud rates of up to 115200 bps.

Understanding Psion machine and disk names

PsiWin can automatically identify different Psion machines and disks.

- Series 5 machines have a built-in serial number which cannot be changed and enables PsiWin to identify individual machines. PsiWin will therefore be able to identify a machine, even after a hard reset, and restore the correct file set.

- Series 3 and Siena machines are identified by the owner information that is entered in the system screen.

- Internal and Memory Disks are identified by the names that have been set for them in the system screen.

Note: Each Psion disk name must be unique. If you have two disks with the same name, or a disk without a name, you must rename one of them from the system screen before you can back them up.

See also:

Using more than one Psion machine

Quick guide to PsiWin

Synchronizing Psion and PC files

You can use PsiWin's Synchronizer to co-ordinate your Series 5 Agenda and address book with those in your PC scheduler.

If you are using a PC scheduler with Groupware support on a network, other people will have access to your PC agenda and will be able to add and view entries. PsiWin's Synchronizer will keep your Series 5 Agenda up to date with your PC scheduler (including any entries which may have been entered by someone else) and inform you of any clashing or overlapping entries.

- PsiWin can synchronize with Microsoft Schedule+ 7 and 7a, Lotus Organizer 2.1 and 97, and Microsoft Outlook 97 formats.

Note: Microsoft Internet Explorer 4 includes a special "cut-down" version of Outlook called Outlook Express. Outlook Express does not have the full time-management features of Outlook 97 and you cannot synchronize your Series 5 Agenda with it.

You can synchronize a single Series 5 Agenda or Address book with:

- A single PC scheduler on a single PC.

- A single PC scheduler installed on a network.

- Multiple PC schedulers on different PCs (e.g. at home and at work). These might be the same type of scheduler, or different ones.

You can synchronize a number of different Series 5 Agenda or Address book files with:

- A network installation of a PC scheduler (e.g. several employees could synchronize their work Agendas with the same master scheduler).

- A single PC scheduler on a single PC (e.g. you may have two different Agenda files on your Series 5 which you want to keep separate).

- Multiple PC schedulers on different PCs (e.g. you may have a work Agenda synchronizing with a network installation of Organizer at the office, and a personal Agenda synchronizing with Schedule+ on your PC at home).

Each time you specify a new Series 5 Agenda or Address book to synchronize with a PC scheduler you need to set up a new **synchronization task** which stores details of the file types, names and locations, any passwords and network logon scripts, and the date when the files were last synchronized.

The **Synchronizer wizard** helps you set up as many different synchronization tasks as you need on your PC.

Wherever your PC Agendas are stored, the process of setting up the synchronization is the same. Once a synchronization task has been set up you need only double-click the relevant icon to start the synchronization process.

- You can also choose, during setup, to create a Desktop shortcut to a Synchronizer task. If you do create a shortcut, simply double-clicking on the icon will start the synchronization.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Creating and reviewing Synchronizer tasks

Synchronizing Address books

Selecting your PC scheduler

Creating and reviewing Synchronizer tasks

Before you can synchronize a Series 5 Agenda or Address book with a PC scheduler you must create a new "Synchronizer task". A Synchronizer task contains details of the Series 5 and PC Agendas and address books which are used in the synchronization, together with any special information relating to the files concerned. Once you have set up a Synchronizer task the details are stored on your PC and you can quickly and easily update all Synchronizer tasks for any Series 5.

You can have as many Synchronizer tasks as you like, each one containing details of a particular pair of agendas to synchronize. However only those tasks relating to the currently connected Series 5 appear in the main Synchronizer window.

To create a new Synchronizer task:

Either:

1. Double-click the **Synchronize Psion** icon on the desktop, then

2. Click the **New** button to start the wizard.

Or:

1. Double-click the **My Psion** on the Desktop.

2. Double-click the **Synchronization Control Panel** icon.

3. Click the **File** menu and point to **New**-**Synchronization**, or

   Right-click anywhere in the window and select **New**-**synchronization**.

To view or change settings for an existing Synchronizer task:

1. Double-click the **My Psion** on the Desktop.

2. Double-click the **Synchronization Control Panel** icon.

3. Right-click on the appropriate task and point to **Properties**.

See also:

Synchronizing Psion and PC files

The Psion Synchronizer window

Quick guide to PsiWin

The Psion Synchronizer window

You can check, modify, start and delete synchronizations, as well as creating new synchronization tasks, in the Psion Synchronizer window.

To open the Psion Synchronizer window:

• Double-click the Synchronize Psion icon on the Desktop.

To check or modify the settings for an existing task:

1. Highlight the desired task in the Psion Synchronizer window.

2. Click the **Properties** button.

3. Modify the settings, as desired, referring to Changing Synchronizer task settings.

To delete or rename an existing task:

• Click the **Delete** or **Rename** button, as appropriate.

To start an existing synchronization:

1. Check the box(es) next to the task(s) you want to start.

2. Click the **Synchronize** button.

To create a new synchronization task:

• Click the **New** button.

If you are sure that you will always want to update the same synchronization tasks for the current machine, you can select **Always use these settings. Don't show this dialog again**. In future, double-clicking the Psion Synchronizer icon on the Desktop will automatically update all the selected tasks for the currently connected machine (if you later need to re-enable this option, see Changing Synchronizer task settings).

See also:

Synchronizing Psion and PC files

Setting up a synchronization with the wizard

Quick guide to PsiWin

Setting up a synchronization with the wizard

The synchronization wizard helps you set up your Synchronizer tasks. It leads you through a series of Properties pages on which you can specify the Agenda files to use, the types of entries and date range to include, and other options.

If you want to change these settings later, right-click on the appropriate task icon and click Properties.

To start the Synchronization wizard:

1. Connect your Series 5 to the PC and double-click the **Synchronize Psion** icon on the Desktop.

   If this is the first time you have created a task the Synchronizer window will be empty.

2. Click the **New** button.

3. Enter the required information on each of the Properties pages which follow and click **Next** to continue or **Back** to return to a previous page.

The following sections describe how to change the settings on each of the pages.

Note: Please refer also to the online Help included with Lotus Organizer, Microsoft Schedule+, Microsoft Outlook and Microsoft Exchange.

See also:

Selecting your PC scheduler

Synchronizing Psion and PC files

Synchronizing Series 5 and PC files

Automatic synchronization

Deleting a newly-created PC Scheduler file

Quick guide to PsiWin

Selecting your PC scheduler

When you set up a new synchronization using the synchronization wizard, the first thing you must do is pick a PC scheduler to synchronize with (PsiWin can synchronize with Lotus Organizer, Microsoft Schedule, and Microsoft Outlook). Select one of these from the drop-down list of PC applications and click **OK** to continue.

Tip: If you will always be synchronizing with the same PC Scheduler you can tick "Always use this application. Don't show this dialog again", in which case you will not be asked to select a PC application the next time you set up a synchronization. If you do select this option and later want to use a different PC scheduler, see "Adding and removing support for a PC scheduler".

- If you are setting up a synchronization with **Organizer**, go to Selecting which Series 5 files and Organizer agendas to synchronize.

- If you are setting up a synchronization with **Schedule**+, go to Selecting which Series 5 files and Schedule+ agendas to synchronize.

- If you are setting up a synchronization with **Outlook**, go to Selecting which Series 5 files and Outlook agendas to synchronize.

Microsoft Internet Explorer 4 includes a special "cut-down" version of Outlook called Outlook Express. Outlook Express does not have the full time-management features of Outlook and you cannot synchronize your Series 5 Agenda with it.

See also:

Setting general Synchronizer options

Synchronizing Psion and PC files

Quick guide to PsiWin

Synchronizing a Series 5 Agenda with Lotus Organizer

If you have Lotus Organizer on your PC you can synchronize your Series 5 Agenda and address book with the appropriate sections in Organizer.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also

Selecting which Series 5 files and Organizer agendas to synchronize

Preparing an Organizer file for synchronization

Troubleshooting Organizer problems

Quick guide to PsiWin

Selecting which Series 5 files and Organizer agendas to synchronize

You can synchronize your Series 5 Agenda, your Series 5 Address book, or both, with Lotus Organizer. In order to do so you must specify, on the **Applications** Properties page, which files you want to use.

To include your Series 5 Agenda in the synchronization:

1. Select **Synchronize My Agenda**.

2. Click the ⬚ button and browse for the Series 5 Agenda file you want to use (if it is different from C:\ Documents\Agenda).

To include your Series 5 Addresses in the synchronization:

1. Select **Synchronize My Contacts**.

2. Click the ⬚ button and browse for the Series 5 Data file you want to use (if it is different from C:\ Documents\Data).

Synchronizing with Single PC or Network installations of Organizer

Lotus Organizer can be set up in a number of different ways, depending on whether or not it is used over a network and on how users are identified. You must select one of the four possible "scheduling environments" and specify information for each in order to configure the synchronizer to work with your particular setup of Organizer.

- Select **Local** if you have Organizer installed on a single machine which is not connected to a network, or if you are connected to a network but do not share your PC Agenda with other users. This option works directly with Organizer files and does not support any group scheduling features.

    If you select **Local** you must specify the name and location (on the PC) of the Organizer file you want to synchronize with (click the Browse button ⬚ if the suggested file is incorrect).

- Select **Single server** if you are using a group scheduling version of Organizer which is installed on a network and uses your network logon ID to access files.

    If you select **Single server** you must specify the name and location (on the PC) of the Organizer file you want to synchronize with (click the Browse button ⬚ if the suggested file is incorrect). You must also enter your network name and password on the **Account** tab.

- Select **Notes** if you are using a group scheduling version of Organizer which is installed on a network and uses your Lotus Notes account name to access files.

    If you select **Notes** you must specify the name and location (on the PC) of the Organizer file you want to synchronize with (click the Browse button ⬚ if the suggested file is incorrect). You must also enter your Lotus Notes account name and password on the **Account** tab.

- Select **cc:Mail** if you are using a group scheduling version of Organizer which is installed on a network and uses your cc:Mail account name to access files.

    If you select **cc:Mail** you must specify the name and location (on the PC) of the Organizer file you want to synchronize with (click the Browse button ⬚ if the suggested file is incorrect). You must also enter your cc:Mail name and password on the **Account** tab and the path of the cc:Mail post office on the **Post Office** tab.

Note: If you are using a group scheduling version of Organizer and do not know your File name, Account name, Post Office, or other information, contact your network administrator for details.

Click **Next** to continue.

See also:

Synchronizing Psion and PC files

Choosing which entry types to synchronize with Organizer

Choosing which entry types to synchronize with Organizer

Your Series 5 Agenda can contain several different types of entry. You can choose to include or exclude any of them from the synchronization, and specify which Organizer Section to copy entry types to and from, on the **Entry Types** Properties page. You can choose to synchronize:

- Day entries

- Anniversaries

- Events

- To-Do entries

  Note: All To-Do lists will be combined into a single Section of Organizer To-dos, and will then be grouped within that Section by category. Your Agenda To-dos will therefore remain discretely arranged.

- Contacts (only available if you have selected the "Synchronize my Contacts" option on the Applications Properties page).

For further information, please see About Organizer Sections

To include or exclude entry types from a synchronization:

1. Place a tick in the box(es) next to each of the entry types you want to include in the synchronization.

2. If you want to use other than the suggested Organizer sections, type a new name in the dialogs.

3. If you are including your Contacts in the synchronization and want to use other than the standard Organizer section ("Address"), type a new name in the **Contacts to synchronize** dialog.

Click **Next** to continue.

See also:

Synchronizing Psion and PC files

Synchronizing a Series 5 Agenda with Lotus Organizer

Selecting a date range to synchronize with Organizer

Quick guide to PsiWin

About Organizer Sections

Organizer stores your information classified into "sections", and each Series 5 entry type must be assigned a section to synchronize with.

* Day Entries, Anniversaries, Events and to-do's are automatically set up to Synchronize with Calendar, Anniversary, Planner and To-Do. If you are happy with these settings you do not need to change them.

Note: If you choose to synchronize a Series 5 entry type with a particular Organizer Section, then subsequently change the Section you want to synchronize with, all previously-synchronized entries will remain in the old Section, effectively orphaned until you manually edit them yourself or re-synchronize with that Section.

See also:

Synchronizing a Series 5 Agenda with Lotus Organizer

Selecting which Series 5 files and Organizer agendas to synchronize

Choosing which entry types to synchronize with Organizer

Quick guide to PsiWin

Selecting a date range to synchronize with Organizer

To specify a start date for the synchronization

In the **Synchronize entries** section of the **Psion to PC** Properties page, enter a number of days, weeks, or months in the From: boxes. All entries within the specified range will be synchronized.

All current and future entries in your Agenda are automatically included when you synchronize, but entries which are older than the specified start date are excluded. The suggested setting is to synchronize entries from 3 months in the past, but you might like to change this.

For example:

- If you use an Agenda file mainly as a planner for future events you could set this to 1 week in the past.

- If you have an Agenda file which you have been using for some time (e.g. which you have upgraded from a previous Psion machine), and in which you keep a record of things done, you could set this to 10 years in the past, just the first time you synchronize, in order to include all your existing entries.

When choosing a date, bear in mind:

- How often you synchronize the agenda. If you do not synchronize very often, you might like to increase the setting in order to avoid losing "orphaned" entries.

- How often you change entries in the "past". If you rarely change entries which are in the past, you don't need to check them each time you synchronize.

- How many items you have in your agenda. If you have a very large Agenda file which you synchronize frequently, you may find that the Synchronizer task is taking a long time, so you may wish to reduce the size of the date range (or exclude certain entry types).

See also:

Synchronizing a Series 5 Agenda with Lotus Organizer

Synchronizing private and work entries with Organizer

Quick guide to PsiWin

Synchronizing private and work entries with Organizer

When you set up a Synchronizer task you need to specify your "Work Days and Hours". Entries outside these times will be marked as "private" in Organizer and will not be visible to anyone else who has access to your Organizer agenda - e.g. over a network. This is useful if you have both personal and work-related information in your Series 5 Agenda.

However you may prefer to exclude private entries entirely or, if no-one else can access your Organizer agenda, you can include all entries regardless of their time.

To define Work Days and Hours:

1. On the **Psion to PC** Properties page, click the **Change** button.

2. Place a tick next to the days you want to treat as Work Days.

3. Enter start and finish times for your Work Hours.

To select which entries to synchronize:

On the **Psion to PC** Properties page, select from the following:

- All specified entries. If you select this option, all the Psion entry types you specified on the Entry types page (see above) will be synchronized, regardless of the time set for the entry.

- All specified entries, but make entries outside work hours private. Entries outside your normal work hours set in PsiWin will be synchronized with the PC but will be set to "Private" in Organizer.

- Only entries within your work hours. Entries outside your specified Work Hours will not be synchronized.

Click **Next** to continue.

See also:

Synchronizing a Series 5 Agenda with Lotus Organizer

Preparing an Organizer file for synchronization

Quick guide to PsiWin

Preparing an Organizer file for synchronization

You cannot synchronize with an Organizer file until it has been "initialized". To do this you must close the Organizer file after creating it (saving it will not achieve the desired result). Having once closed a file it can be reopened, and may remain open during synchronization.

If you want to be able to synchronize with an Organizer file while it is open you must ensure that you have checked the "multi user" option when saving it.

Please see Organizer on-line Help for further information about using Lotus Organizer.

See also:

Synchronizing a Series 5 Agenda with Lotus Organizer

Troubleshooting Organizer problems

Quick guide to PsiWin

Starting your new synchronization with Organizer

When you have finished setting up your new synchronization you can either synchronize your agendas right away, or you can save your settings and synchronize later. You can also create a shortcut to the new Synchronizer task on your Desktop.

To synchronize agendas:

• Click the **Synchronize** button.

To save settings and synchronize later:

• Click the **Finish** button and then close the dialog.

To create a shortcut on your Desktop:

• Select "Create a shortcut on my Desktop".

Double-click this icon to synchronize the associated agendas.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Synchronizing a Series 5 Agenda with Lotus Organizer

Synchronizing Series 5 and PC files

Creating a Desktop shortcut to a Synchronizer task

Quick guide to PsiWin

Troubleshooting Organizer problems

You can use PsiWin to synchronize your Series 5 Agenda with Lotus Organizer versions 2.1 and 97.

If you receive the error message "Unable to initialize API" when you attempt to synchronize with Organizer it is possible that you have an early version of Organizer 2.1, in which case you will need to install the upgrade included on the PsiWin CD-ROM.

Note: if you have installed PsiWin from floppy disks, or if you do not have access to the CD-ROM, the upgrade files are also available for download from the Psion site on the World Wide Web at **http://www.psion.com**

To check the version number of Organizer:

1. Open Windows Explorer.

2. On the View menu, click **Options** and select the **Show all files** option.

3. Open the folder where you installed Organizer.

   If you did not specify a different folder during installation, this will be C:\Org2\

4. Locate the file named **Tzportdb.dll**.

5. Right-click on this file to display the menu and click **Properties**.

6. On the **Version** tab, check the Version number.

   If the number is 2.10.75.3 then you need to install the upgrade from the CD-ROM.

To install the upgrade:

1. In the Organizer folder in Windows Explorer, rename the file **Tzportdb.dll** to Tzportdb.old.

2. Insert the PsiWin CD-ROM into your CD-ROM drive.

3. Browse to the folder \Extras\Org_up.

4. Copy the file **Tzportdb.dll** to your Organizer folder.

5. In the Organizer folder, right-click on the file **Tzxport.dll** and click **Properties**.

6. On the **Version** tab, check the Version number.

7. If the version number is 2.10.77.0, exit Explorer and reboot your machine.

   If the version number is less than 2.10.77.0 check the description. If the description is NOT **Lotus Organizer Transport Layer for Notes**, exit Explorer and reboot your machine. If the description IS Lotus Organizer Transport Layer for Notes, continue as follows:

8. In the Organizer folder, rename the file **Tzxport.dll** to Tzxport.old.

9. Browse to the \Extras\Org_up folder on the PsiWin CD-ROM.

10. Copy the file **Tzxport.dll** to your Organizer folder.

11. Exit Explorer and reboot your machine.

See also:

Synchronizing a Series 5 Agenda with Lotus Organizer

Preparing an Organizer file for synchronization

Quick guide to PsiWin

Synchronizing a Series 5 Agenda with Microsoft Schedule+

If you have Microsoft Schedule+ on your PC you can synchronize your Series 5 Agenda and address book with the appropriate folders in Schedule+

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Selecting which Series 5 files and Schedule+ agendas to synchronize

Selecting your PC scheduler

Quick guide to PsiWin

Selecting which Series 5 files and Schedule+ agendas to synchronize

You can synchronize your Series 5 Agenda, your Series 5 Address book, or both, with Schedule+. In order to do so you must specify, on the **Applications** Properties page, which files you want to use.

To include your Series 5 Agenda in the synchronization:

1.   Select **Synchronize My Agenda**.

2.   Click the ⬚ button and browse for the Series 5 Agenda file you want to use (if it is different from C:\ Documents\Agenda).

To include your Series 5 Addresses in the synchronization:

1.   Select **Synchronize My Contacts**.

2.   Click the ⬚ button and browse for the Series 5 Data file you want to use (if it is different from C:\ Documents\Data).

In the lower half of the **Applications** Properties page you must specify which file and profile to use. If you are the only person who uses the synchronizer, and have only one Schedule+ agenda, you can use the Default file name and profile; otherwise you must specify a specific file name and profile name to use.

Note: The default Schedule+ file is the file automatically created for you when you first run Schedule+. If you don't want to use this file you can create a different one to use.

To use the default Schedule+ file:

•   Click on the **Synchronize My Appointment Book** radio button.

If you do not have an existing Schedule+ file and click the "Synchronize My Appointment Book" radio button when starting a synchronization, Schedule+ will start up briefly and ask you to log on and name your default file.

To use another person's Schedule+ file:

•   Click on the **Synchronize Other's Appointment Book** radio button and type in the name of the other person.

Note: You can only select this option if you use the Groupware facility in Schedule+.

To use another Schedule+ file which you created:

•   Click on the **Synchronize Project Schedule** radio button and either type in the path and the name of the file, or click on the **Browse** button ⬚ to locate the file.

To specify a profile name:

1.   Click the **Exchange settings…** button.

2.   Select a profile from the drop-down list, or type in a new one.

If you are synchronizing with a network installation of Schedule+ and do not know your profile details, contact your system administrator.

See also:

Using a custom profile

Choosing which entry types to synchronize with Schedule+

Synchronizing Psion and PC files

Quick guide to PsiWin

Using a custom profile

If you use Schedule+, or a similar PC scheduler, your PC uses a "profile" to store information about your mailbox and other messaging settings.

If you are the only person who uses your PC scheduler and you are not connected to a network there may only be one profile, and you can use this (the default) when setting up a synchronization. If you have created a custom profile, or if there is more than one on your PC, you will need to tell the Synchronizer which one to use.

You might need to specify a custom profile if:

- More than one person uses Schedule+ on your PC.

- You share a network installation of Schedule+.

- You have more than one Schedule+ agenda.

- You want to synchronize with someone else's agenda.

You can select a custom profile when setting up a new Synchronizer task, or later on. The profile remains selected for that task unless you change it again.

To use a custom profile:

1. Select the **Agenda** Properties page.

2. Click the **Exchange Settings...** button.

3. Select a profile from the drop-down list, or type in a new one.

If you are synchronizing with a network installation of Schedule+ and do not know your profile details, contact your system administrator.

See also:

Synchronizing a Series 5 Agenda with Microsoft Schedule+

Choosing which entry types to synchronize with Schedule+

Quick guide to PsiWin

Choosing which entry types to synchronize with Schedule+

Your Series 5 Agenda can contain several different types of entry and you can choose to include or exclude any of them from the synchronization. You can synchronize the following Series 5 entry types with their Schedule+ equivalents:

Series 5 entry type	Schedule+ entry type
Day entries	Appointments
Anniversaries	Annual events
Events	Events
To-dos	Tasks

To include or exclude entry types from a synchronization:

- On the **Entry Types** Properties page, place a tick next to each of the entry types you want to include in the synchronization.

Click **Next** to continue.

See also:

Selecting a date range to synchronize with Schedule+

Synchronizing a Series 5 Agenda with Microsoft Schedule+

Quick guide to PsiWin

Selecting a date range to synchronize with Schedule+

To specify a start date for the synchronization

In the **Synchronize entries** section of the **Psion to PC** Properties page, enter a number of days, weeks, or months in the From: boxes. All entries within the specified range will be synchronized.

All current and future entries in your Agenda are automatically included when you synchronize, but entries which are older than the specified start date are excluded. The suggested setting is to synchronize entries from 3 months in the past, but you might like to change this.

For example:

- If you use an Agenda file mainly as a planner for future events you could set this to 1 week in the past.

- If you use an Agenda file as a record of events in your life you could set this to 100 years in the past, just the first time you synchronize, in order to include all your existing entries.

When choosing a date, bear in mind:

- How often you synchronize the agenda. If you do not synchronize very often, you might like to increase the setting in order to avoid losing "orphaned" entries.

- How often you change entries in the "past". If you rarely change entries which are in the past, you don't need to check them each time you synchronize.

- How many items you have in your agenda. If you have a very large Agenda file which you synchronize frequently, you may find that the Synchronizer task is taking a long time, so you may wish to reduce the size of the date range (or exclude certain entry types).

See also:

Synchronizing private and work entries with Schedule+

Synchronizing a Series 5 Agenda with Microsoft Schedule+

Quick guide to PsiWin

Synchronizing private and work entries with Schedule+

When you set up a Synchronizer task you need to specify your "Work Days and Hours". Entries outside these times will be marked as "private" in Schedule+ and will not be visible to anyone else who has access to your Schedule+ agenda - e.g. over a network. This is useful if you have both personal and work-related information in your Series 5 Agenda.

However you may prefer to exclude private entries entirely or, if no-one else can access you Schedule+ agenda, you can include all entries regardless of their time.

To define Work Days and Hours:

1. On the **Psion to PC** Properties page, click the **Change** button.

2. Place a tick next to the days you want to treat as Work Days.

3. Enter start and finish times for your Work Hours.

To select which entries to synchronize:

On the **Psion to PC** Properties page, select from the following:

- All specified entries. If you select this option, all the Psion entry types you specified on the Entry types page (see above) will be synchronized, regardless of the time set for the entry.

- All specified entries, but make entries outside work hours private. Entries outside your normal work hours set in PsiWin will be synchronized with the PC but will be set to "Private" in Schedule+.

- Only entries within your work hours. Entries outside your specified Work Hours will not be synchronized.

Click **Next** to continue.

See also:

Starting your new synchronization with Schedule+

Synchronizing a Series 5 Agenda with Microsoft Schedule+

Quick guide to PsiWin

Starting your new synchronization with Schedule+

When you have finished setting up your new synchronization you can either synchronize your agendas right away, or you can save your settings and synchronize later. You can also create a shortcut to the new Synchronizer task on your Desktop.

To synchronize agendas:

- Click the **Synchronize** button.

To save settings and synchronize later:

- Click the **Finish** button and then close the dialog.

To create a shortcut on your Desktop:

- Select "Create a shortcut on my Desktop".

  Double-click this icon to synchronize the associated agendas.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Synchronizing a Series 5 Agenda with Microsoft Schedule+

Changing Synchronizer task settings

Creating a Desktop shortcut to a Synchronizer task

Quick guide to PsiWin

Synchronizing a Series 5 Agenda with Microsoft Outlook

If you have Microsoft Outlook on your PC you can synchronize your Series 5 Agenda and address book with the appropriate sections in Outlook

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

Note: Microsoft Internet Explorer 4 includes a special "cut-down" version of Outlook called Outlook Express. Outlook Express does not have the full time-management features of Outlook 97 and you cannot synchronize your Series 5 Agenda with it.

See also:

Selecting which Series 5 files and Outlook agendas to synchronize

Selecting your PC scheduler

Synchronizing Psion and PC files

Quick guide to PsiWin

Selecting which Series 5 files and Outlook agendas to synchronize

You can synchronize your Series 5 Agenda, your Series 5 Address book, or both, with Outlook 97. In order to do so you must specify, on the **Applications** Properties page, which files you want to use.

To include your Series 5 Agenda in the synchronization:

1. Select **Synchronize My Agenda**.

2. Click the ⬚ button and browse for the Series 5 Agenda file you want to use (if it is different from C:\ Documents\Agenda).

To include your Series 5 Addresses in the synchronization:

1. Select **Synchronize My Contacts**.

2. Click the ⬚ button and browse for the Series 5 Data file you want to use (if it is different from C:\ Documents\Data).

Selecting Outlook folders

If you have never set up custom folders from within Outlook you can leave the Calendar, Task, and Contacts folders set to "Use Default Folder". If you have created custom folders from within Outlook, remove the tick from the appropriate box(es) and enter the names of the folders you want to use for your Task and Calendar entries.

• If you have more than one Outlook agenda, or if you want to synchronize with someone else's agenda, click the **Exchange Settings...** button and either select a profile from the drop-down list, or type in a new one.

See also:

Using a custom profile

Synchronizing a Series 5 Agenda with Lotus Organizer

Quick guide to PsiWin

Using a custom profile

If you use Outlook, or a similar PC scheduler, your PC uses a "profile" to store information about your mailbox and other messaging settings.

If you are the only person who uses your PC scheduler and you are not connected to a network there may only be one profile, and you can use this (the default) when setting up a synchronization. If you have created a custom profile, or if there is more than one on your PC, you will need to tell the Synchronizer which one to use.

You might need to specify a custom profile if:

- More than one person uses Outlook on your PC.

- You share a network installation of Outlook.

- You have more than one Outlook agenda.

- You want to synchronize with someone else's agenda.

You can select a custom profile when setting up a new Synchronizer task, or later on. The profile remains selected for that task unless you change it again.

To use a custom profile:

1. Select the **Agenda** Properties page.

2. Click the **Exchange Settings...** button.

3. Select a profile from the drop-down list, or type in a new one.

If you are synchronizing with a network installation of Outlook and do not know your profile details, contact your system administrator.

Note: Please see Outlook Help for further information, including the use of the **Options>>** button.

See also:

Synchronizing a Series 5 Agenda with Microsoft Outlook

Choosing which entry types to synchronize with Outlook

Quick guide to PsiWin

Choosing which entry types to synchronize with Outlook

Your Series 5 Agenda can contain several different types of entry and you can choose to include or exclude any of them from the synchronization. You can synchronize the following Series 5 entry types with their Outlook equivalents:

Series 5 entry type	Outlook entry type
Day entries	Appointments
Anniversaries	Annual events
Events	Events
To-dos	Tasks

To include or exclude entry types from a synchronization:

- On the **Entry Types** Properties page, place a tick next to each of the entry types you want to include in the synchronization and click **Next** to continue.

See also:

Selecting a date range to synchronize with Outlook

Synchronizing a Series 5 Agenda with Microsoft Outlook

Quick guide to PsiWin

Selecting a date range to synchronize with Outlook

To specify a start date for the synchronization

In the Synchronize entries section of the Psion to PC Properties page, enter a number of days, weeks, or months in the From: boxes. All entries within the specified range will be synchronized.

All current and future entries in your Agenda are automatically included when you synchronize, but entries which are older than the specified start date are excluded. The suggested setting is to synchronize entries from 3 months in the past, but you might like to change this.

For example:

- If you use an Agenda file mainly as a planner for future events you could set this to 1 week in the past.

- If you use an Agenda file as a record of events in your life you could set this to 100 years in the past, just the first time you synchronize, in order to include all your existing entries.

When choosing a date, bear in mind:

- How often you synchronize the agenda. If you do not synchronize very often, you might like to increase the setting in order to avoid losing "orphaned" entries.

- How often you change entries in the "past". If you rarely change entries which are in the past, you don't need to check them each time you synchronize.

- How many items you have in your agenda. If you have a very large Agenda file which you synchronize frequently, you may find that the Synchronizer task is taking a long time, so you may wish to reduce the size of the date range (or exclude certain entry types).

See also:

Synchronizing private and work entries with Organizer

Synchronizing a Series 5 Agenda with Microsoft Outlook

Quick guide to PsiWin

Synchronizing private and work entries with Outlook

When you set up a Synchronizer task you need to specify your "Work Days and Hours". Entries outside these times will be marked as "private" in Outlook and will not be visible to anyone else who has access to your Outlook agenda - e.g. over a network. This is useful if you have both personal and work-related information in your Series 5 Agenda.

However you may prefer to exclude private entries entirely or, if no-one else can access your Outlook agenda, you can include all entries regardless of their time.

To define Work Days and Hours:

1. On the **Psion to PC** Properties page, click the Change button.

2. Place a tick next to the days you want to treat as Work Days.

3. Enter start and finish times for your Work Hours.

To select which entries to synchronize:

On the **Psion to PC** Properties page, select from the following:

• All specified entries. If you select this option, all the Psion entry types you specified on the Entry types page (see above) will be synchronized, regardless of the time set for the entry.

• All specified entries, but make entries outside work hours private. Entries outside your normal work hours set in PsiWin will be synchronized with the PC but will be set to "Private" in Outlook.

• Only entries within your work hours. Entries outside your specified Work Hours will not be synchronized.

Click **Next** to continue.

See also:

Starting your new synchronization with Outlook

Synchronizing a Series 5 Agenda with Lotus Organizer

Quick guide to PsiWin

Starting your new synchronization with Outlook

When you have finished setting up your new synchronization you can either synchronize your agendas right away, or you can save your settings and synchronize later. You can also create a shortcut to the new Synchronizer task on your Desktop.

To synchronize agendas:

- Click the **Synchronize** button.

To save settings and synchronize later:

- Click the **Finish** button and then close the dialog.

To create a shortcut on your Desktop:

- Select "Create a shortcut on my Desktop".

    Double-click this icon to synchronize the associated agendas.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Synchronizing Series 5 and PC files

Creating and reviewing Synchronizer tasks

Creating a Desktop shortcut to a Synchronizer task

Quick guide to PsiWin

If a synchronization with Outlook appears to freeze

If your new synchronization appears to freeze at the "Opening databases…Logging on" stage it is possible that you have not yet specified the PC Profile that PsiWin should use.

When you set up a synchronization with Outlook a dialog appears asking you to choose a Profile to use. Occasionally, however, this dialog is hidden by the "New Synchronization" animation. If your synchronization appears to freeze, try minimizing all the open Windows on your Desktop (by clicking the Minimize button) to see if the "Select Profile" Window has been hidden. If so, choose a profile (if necessary) and click OK. Your synchronization should continue as normal.

Creating a Desktop shortcut to a Synchronizer task

When you have finished setting up a new Synchronizer task you can choose to create a shortcut on the Desktop. Selecting this option will put a new icon on your Desktop, initially called "Shortcut to new synchronization". Double-clicking on this icon will start the associated synchronization.

You can rename this icon by clicking once on the name and pressing the F2 key (press Enter when you have renamed it).

• You can also delete the icon, if you like, without affecting the actual synchronizer task.

See also:

Synchronizing Series 5 and PC files

Synchronizing Psion and PC files

Quick guide to PsiWin

Synchronizing Series 5 and PC files

You can start synchronization from the **My Psion** icon on the Desktop or in Windows Explorer. Each time you synchronize a Series 5 Agenda and/or address book with a PC Scheduler they are compared and both are updated to reflect changes in each other.

To synchronize Series 5 and PC files:

If you checked the "Create a shortcut icon on the Desktop" icon when setting up the synchronization, simply double-click this icon.

If you did not create a shortcut icon on the Desktop:

1. Double-click the **Synchronize Psion** icon.

   The Psion Synchronizer window opens, showing all the tasks you have set up.

2. Check the box next to each of the Synchronizer tasks you want to update.

3. Click the **Synchronize** button.

Tip: If your Agenda or address book are quite large and contain a lot of entries, the synchronization may take some time to complete. You might like to reduce the amount of time taken for future updates of the same files by reducing the range of entries included in the task. *See* Setting Psion to PC Properties.

When synchronization is complete, both files will be up-to-date with each other.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Synchronizing Psion and PC files

Automatic synchronization

Changing Synchronizer task settings

Selecting your PC scheduler

Quick guide to PsiWin

Viewing the log file for a synchronization

After you have synchronized your Series 5 and PC agendas for the first time, each subsequent synchronization creates a report log file on your PC detailing the changes that were made and any conflicts encountered. If any records were not synchronized correctly, the log file will tell you this. You can also have the log file copied on to the Series 5, if you wish.

Note: If you want the log file to be copied to your Series 5 you must first create a "C:\Logs\Synchro" folder (see below).

You might like to get into the habit of checking the log file after each synchronization.

To view the log file on the PC:

1. Double-click the **Synchronize Psion** icon on the Desktop.

2. Highlight the appropriate task and click the **Properties** button.

3. On the **Summary** Properties page, click the **View log** button.

To create a Logs folder on your Series 5:

1. Tap the **New Folder** button, or select the **Folder** command from the **File** - **Create new** menu, in the Series 5's System screen.

2. Name the folder **Logs** and then tap the **OK** button.

3. Open the Logs folder and create a new folder within it (as above) called **Synchro**.

To view the log file on the Series 5:

- Tap the icon named <Agenda>.srp in the C:\Logs\Synchro folder which you created.

  The log file opens in Series 5 Word format.

Note: If you have more than one Agenda on your Series 5 you must make sure they all have different names, otherwise they will all have the same log file.

See also:

Synchronizing Psion and PC files

Creating and reviewing Synchronizer tasks

Quick guide to PsiWin

Synchronizing all agendas on a Series 5

You can update all Synchronizer tasks for the currently connected Series 5 machine at the same time.

To synchronize all agendas on the current machine:

- Right-click the **My Psion** icon on the Desktop and click Synchronize.

You can also synchronize all tasks from within Windows Explorer by selecting the My Psion icon and clicking the Synchronize All icon on the Toolbar.

Note: If the Explorer Toolbar is not visible, you can enable it by clicking **Toolbar** on the **View** menu.

Do not attempt to disconnect your Series 5 during a synchronization, otherwise information may be lost. If you have enabled the "Auto switch off" feature on your Series 5 you should either disable it temporarily during a synchronization, or else increase the "Switch off after" setting so that sufficient time is allowed for the synchronization to complete before auto switch-off.

See also:

Automatic synchronization

Synchronizing Psion and PC files

Quick guide to PsiWin

Synchronizing Address books

You can use PsiWin to synchronize your Series 5 Address book with the Contacts in your PC scheduler.

Note: before you synchronize your Series 5 address book you should check to confirm that each of the labels contains the correct type of information - e.g. that your "Fax" label does not contain any information which belongs in the "Address" label. Doing so can help save time later, in the event that any information does not transfer across correctly.

To synchronize your Series 5 and PC address books

- Either:
  - Create a new synchronization (see <u>Setting up a synchronization with the wizard</u>) and ensure that you select the "Synchronize my Contacts" option in the **Applications** Properties page, or:
  - Edit an existing Synchronizer task (see <u>Changing Synchronizer task settings</u>) and select the "Synchronize my Contacts" option in the **Applications** Properties page.

When the contact synchronization is complete, the resulting file is copied back to your Series 5.

- If there has been any change to the label structure as a result of the synchronization, your original address book is copied into the synchronization folder on your PC (e.g. to C:\Psion\Username\ Synchro\) and renamed with a .bak extension - before you delete this old file you might like to check the new file..

Note: you may not be able to include all the information in your Contacts lists in the synchronization. PsiWin can synchronize up to 20 different Series 5 labels or PC scheduler "fields", but some PC schedulers may not contain all 20 of the available fields.

See also:

<u>Assigning unrecognized labels</u>

<u>Synchronizing Psion and PC files</u>

<u>Creating a new label on the Series 5</u>

<u>Creating and reviewing Synchronizer tasks</u>

Assigning unrecognized labels

When you set up a new Contacts synchronization, PsiWin looks at the labels that you have in your Series 5 database and compares them to the fields   in your PC scheduler. Those that match, or bear a very close resemblance, are automatically linked. If PsiWin finds a label in your Series 5 database that it does not recognize, you will be asked to select from the remaining fields   available in the Synchronizer.

Note: Some PC scheduler fields cannot be included in a synchronization.

To assign an unidentified label:

1   Click on any of the listed labels. An arrow appears, indicating a drop-down list of choices.

2   Click the arrow to display the unassigned fields in your PC scheduler.

3   Select from the unassigned fields, or click <ignore> if you do not want to include the information contained in the selected label in the synchronization.

To check which labels are already set up:

•   Click the **Advanced…** button. PsiWin displays a list of the fields in your scheduler which you can synchronize, and the Psion labels they are currently matched to.

Note: If you add a new label to your Series 5 address book after you have synchronized it, it will be included the next time you synchronize.

To change the assignment of an existing Psion label:

1   Click the **Advanced…** button to display the fields in your scheduler which you can synchronize and the Psion labels they are currently matched to.

2   Select the desired label.

3   Click the arrow to display the unassigned fields.

4   Select from the unassigned fields, or click <ignore> if you do not want to include the selected Psion label in the synchronization.

Note: Some PC schedulers cannot contain certain types of information. If you want to make sure that the contents of a particular Psion label are synchronized, you should check whether the PC scheduler contains the appropriate fields. If not, you should assign your Psion label to field which the PC scheduler does contain.

See also:

Changing Synchronizer task settings

Synchronizing Psion and PC files

Quick guide to PsiWin

Creating a new label on the Series 5

If you have information in your PC scheduler which does not relate to an existing Series 5 label, you can create a new label on your Series 5.

To create a new label on your Series 5:

1   On the Psion to PC Properties page, click the **Define...** button.

2   Click the information type which corresponds to the information in your PC scheduler.

3   Click the **Add new label to Psion** button.

4   Type a name for the new label, or accept the suggested name.

The new label is added to your Psion address book the next time you synchronize. It will be a "Text" label, 50 characters long.

See also:

Assigning unrecognized labels

Synchronizing Address books

Quick guide to PsiWin

Automatic synchronization

You can set PsiWin to automatically synchronize your Psion and PC schedulers at regular intervals (when connected), and set how often you want this to happen. Automatic synchronizations are performed minimized .

To synchronize your Psion and PC Agendas automatically:

1. Right-click the **My Psion** icon and point to **Properties**.

2. Select the **Synchronization** tab.

3. Place a tick in the **Perform automatic synchronization** box to enable the radio buttons.

4. Select from the radio buttons to synchronize:

    –   Each time connection is made.

    –   Once per day, the first time you connect.

    –   Once per week, the first time you connect.

    Note: if you have not ticked the Perform automatic synchronization box, the radio buttons will remain dimmed.

5. If you want to confirm which files will be used before the synchronization starts each time, place a tick in the **Show settings before synchronizing** box.

6. Press **Apply** to save your options, or OK to save and close the dialog.

Tip: If you normally power the Series 5 machine with a mains adapter when you are connected to a PC, you can set the Automatic switch-off to "If no external power".

See also:

Synchronizing Series 5 and PC files

Synchronizing Psion and PC files

Quick guide to PsiWin

Reviewing and editing Synchronizer tasks

You can view and change settings for Synchronizer tasks as well as create new tasks and delete old tasks, in the main Synchronization Control Panel.

To open the Synchronization Control Panel:

1. Double-click the **My Psion** icon.

2. Double-click the **Synchronization Control Panel** icon.

Tip: To list the details of all your Synchronizer tasks, click the **View** menu and click **Details**.

The Synchronization Control Panel lists your Synchronizer tasks in four columns:

• **Synchronization** lists the tasks which have already been set up on your PC.

• **Psion Agenda** lists the Psion Agenda files which were used for the Synchronizer tasks, and their locations on the Series 5.

• **Psion Data** lists the Psion Data (e.g. Address book) files which were used for the Synchronizer tasks, and their locations on the Series 5.

• **PC** lists the PC schedulers which were used for the Synchronizer tasks, and the file names (if applicable).

• **Last Synchronized Date** shows when each set of files was last synchronized.

To view or change settings for a Synchronizer task:

1. Right-click on the appropriate task and point to **Properties**.

   The Summary page displays information about your selected task.

2. Select the Applications, Psion to PC or File Types tabs.

3. Make any changes, as required, and click **OK** to confirm or **Cancel** to abandon changes.

See also:

Setting Applications Properties

Setting Psion to PC Properties

Setting Entry Types Properties

Changing Synchronizer task settings

Synchronizing Psion and PC files

Quick guide to PsiWin

Changing Synchronizer task settings

You can check your Synchronizer task settings, and change them if necessary, by viewing the Properties pages.

To review or change settings for Synchronizer tasks:

1. Double-click the **My Psion** icon to open the My Psion window.

2. Double-click the **Synchronizer** icon to open the main Synchronizer window.

3. Right-click the icon for the appropriate Synchronizer task and click **Properties**.

4. Edit the entries on the appropriate pages as required.

Please follow the links below for further information.

- Follow this link for information on <u>Setting Applications Properties</u>

- Follow this link for information on <u>Setting Psion to PC Properties</u>

- Follow this link for information on <u>Setting Entry Types Properties</u>

- Follow this link for information on <u>Summarizing Synchronizer properties</u>

See also:

<u>Synchronizing Psion and PC files</u>

<u>Automatic synchronization</u>

<u>Quick guide to PsiWin</u>

Setting Applications Properties

You can choose which Psion and PC files to synchronize, and enter other information related to your log-in and network (if appropriate) on the **Applications** Properties page. The exact information required varies between Organizer, Schedule+ and Outlook.

See also:

Selecting which Series 5 files and Organizer agendas to synchronize

Selecting which Series 5 files and Schedule+ agendas to synchronize

Selecting which Series 5 files and Outlook agendas to synchronize

Quick guide to PsiWin

Setting Psion to PC Properties

You can enter your work days and hours, include or exclude entries outside these hours, and specify a start date for synchronized entries, on the **Psion to PC** Properties page. For further details please follow the appropriate link below, depending on whether you are using Organizer, Schedule+ or Outlook.

See also:

Synchronizing private and work entries with Organizer

Synchronizing private and work entries with Schedule+

Synchronizing private and work entries with Outlook

Quick guide to PsiWin

Setting Entry Types Properties

You can choose which entry types to include in the synchronization and specify a destination section or folder (if appropriate) on the **Entry Types** Properties page. For further details please follow the appropriate link below, depending on whether you are using Organizer, Schedule+ or Outlook.

See also:

Choosing which entry types to synchronize with Organizer

Choosing which entry types to synchronize with Schedule+

Choosing which entry types to synchronize with Outlook

Quick guide to PsiWin

Summarizing Synchronizer properties

The **Summary** Properties page gives a brief overview of the details of the current synchronization task and also contains a button to start synchronization. If you have already synchronized the current task you can view a log file which details all the changes that were made by clicking the **View Log** button (*see* Viewing the log file for a synchronization).

For further details please follow the appropriate link below, depending on whether you are using Organizer, Schedule+ or Outlook.

See also:

Selecting which Series 5 files and Organizer agendas to synchronize

Synchronizing a Series 5 Agenda with Microsoft Schedule+

Starting your new synchronization with Outlook

Quick guide to PsiWin

Synchronizing a number of agendas

You can have as many different synchronized Agendas as you want, but you must set up a separate task for each one.

If you have more than one Agenda on your Series 5 you must make sure they all have different names, otherwise they will all have the same report log file (see <u>Viewing the log file for a synchronization</u>).

PsiWin can synchronize with Microsoft Schedule, Lotus Organizer, and Microsoft Outlook.

You can synchronize a Series 5 Agenda with:

• A single PC scheduler on a single PC.

• Multiple PC schedulers on different PCs (e.g. at home and at work). These might be the same type of scheduler, or different ones.

You can synchronize multiple Series 5 Agendas with:

• A network installation of a PC scheduler (e.g. several employees' work Agendas).

• A single PC scheduler on a single PC (e.g. two separate Agenda files on one Series 5).

• Multiple PC schedulers on different PCs (e.g. a work Agenda synchronizing with an office installation of Organizer, and a personal Agenda synchronizing with Outlook on your PC at home).

Note: If you have several Synchronizer tasks set up on the same PC you should ensure that each has a unique and descriptive name, e.g. "Maggie's Series 5 Work Agenda".

See also:

<u>Synchronizing Psion and PC files</u>

<u>Automatic synchronization</u>

<u>Synchronizing all agendas on a Series 5</u>

<u>Quick guide to PsiWin</u>

Setting general Synchronizer options

You can set PsiWin to automatically synchronize your Psion and PC schedulers at regular intervals (when connected), and set how often you want this to happen. Automatic synchronizations are performed minimized

To synchronize your Psion and PC Agendas automatically:

- Check the **Perform automatic synchronization** box and set the options as appropriate.

See Automatic synchronization for further information.

PsiWin can synchronize with Lotus Organizer, Microsoft Schedule+, and Microsoft Outlook. If you always use the same PC Scheduler you can remove the others from the list of supported applications.

To remove a PC scheduler from the list of supported applications:

1. Right-click on the **My Psion** icon and select Prope**r**ties.
2. Select the **Synchronization** tab.
3. In the centre portion of the window, which contains a list of all the PC applications you are currently using, select the scheduler you want to remove.
4. Click **Remove** to remove the selected scheduler from the list of applications you are currently using.

To add a PC scheduler to the list of supported PC applications:

1. Right-click the **My Psion** icon and select Properties.
2. Select the **Synchronization** tab.
3. In the upper portion of the window, which contains a list of all the PC applications you can use, select the scheduler you want to add.
4. Click **Select** to add the PC scheduler to the list of applications you are currently using.

Note: If you selected the "Always use this application. Don't show this dialog again" option when setting up a Synchronizer task with Outlook, and later decide you want to use a different scheduler, you can re-enable this dialog by the same method.

To enable automatic synchronization:

1. Right-click on the **My Psion** icon and select Prope**r**ties.
2. Select the **Synchronization** tab.
3. In the lower portion of the window, which contains a list of all the PC applications you are currently using, select the scheduler you want to remove.
4. Click **Remove** to remove the selected scheduler from the list of applications you are currently using.

See also:

If a synchronization with Outlook appears to freeze

Synchronizing Psion and PC files

Psion to PC file compatibility

Quick guide to PsiWin

Troubleshooting and error messages

A note about automatic switch off

If you have set the Psion to automatically switch off after a certain period of time, and also enabled the "back up each time connection is made" option, PsiWin will attempt to back up each time you reconnect. A similar problem may occur if the Psion automatically switches off during Agenda synchronization. When you reconnect PsiWin will start an automatic backup, interfering with the synchronization process. It is therefore not advisable to enable both the "Back up each time connection is made" option in PsiWin and the "Auto switch-off" option on the Psion.

Note: If you are having difficulty synchronizing to a remote PC this may be due to network problems. Please contact your network administrator for assistance.

- If you are unsuccessful in synchronizing your Series 5 Agenda with a new, empty PC file you may wish to delete the new file and try again. For further information see Deleting a newly-created PC Scheduler file

- If you experience problems synchronizing your Series 5 and PC agendas you can check the Synchronizer log file to review the changes which have been made. For further information see Viewing the log file for a synchronization.

- If incomplete information is transferred to your Series 5, the label definitions may be too small. For further information see Contacts not completely transferred to Series 5

The following error messages may also appear during Agenda synchronization:

Specified file does not exist

Synchronizer cannot access the required directory

Unable to open file

Synchronization has stopped

Last synchronization date mismatch

More than 20 deletions

Deleting a newly-created PC Scheduler file

If you create a new PC scheduler file to synchronize your Series 5 Agenda with, and have problems synchronizing successfully, you may want to delete the new file from your PC and start again. If you do not know what the file was called, or where to find it, you can follow these instructions.

If your PC Scheduler is installed on a network you should contact your system administrator for details on file names and locations.

To delete a newly-created Organizer or Schedule+ file

1. Open Windows Explorer and left-click on **My Computer**.

2. Press the F3 key.

3. In the **Find:All Files** dialog, select the **Name & Location** tab.

4. In the **Named**: box:

   – For Organizer, type ***.or?**

   – For Schedule+, type ***.sc? *.cal**

5. Select the **Date modified** tab.

6. Select **Find all files created or modified - during the past [1] day(s)** and click **Find now**.

7. Delete (or, if in doubt, rename) any files found by the search process.

For further information, see online Help for Organizer and Schedule+.

To delete a newly-created Outlook calendar

• Refer to Outlook Help for information on deleting your Calendar folder, then create a new one.

See also:

<u>Troubleshooting and error messages</u>

<u>Synchronizing Psion and PC files</u>

<u>Quick guide to PsiWin</u>

Specified file does not exist

Message:

The specified Series 5 file "<filename>" does not exist. Would you like to create it or use an existing file?

Problem:

You have tried to synchronize with a file which does not exist, or no longer exists, on the Series 5. You may have renamed or deleted the file, or you may have entered the file name incorrectly on the Synchronizer Properties page.

Suggestion:

Click **Create new file** to synchronize with a new file which will be created on your Series 5. You can choose a name and location for the new file.

Click **Use Existing file** to synchronize with a current file on your Series 5. You can browse the contents of your Psion disk(s) and select any existing file of the appropriate type.

Click **Cancel** to abandon the synchronization.

Unable to open file

Message:

Unable to open (*file name*).

Problem:

You may have tried to synchronize a Series 3/3a/3c Agenda file.

Suggestion:

PsiWin cannot synchronize Series 3/3a/3c Agenda files. Upgrade the file to Series 5 machine format and synchronize again.

If you are attempting to synchronize with Lotus Organizer:

Problem:

You may have tried to synchronize with an Organizer file which has not been "initialized", typically if you are creating a new file to synchronize with. To initialize an Organizer file you must close it after creating it (saving it will not achieve the desired result).

Suggestion:

Close the Organizer file you want to synchronize with.

Problem:

You may have tried to synchronize with an Organizer file which is currently open, and which has been saved using the "single user" option. You cannot Synchronize with an open Organizer file unless it has been saved using the multi-user option.

Suggestion:

Close the Organizer file you want to synchronize with or use the **Save as** command and specify multi-user.

Synchronization has stopped

Message:

The reason the Synchronizer has stopped is, (*file name*) could not be copied because it is in use by another application.

Problem:

This message appears if you try to synchronize an open Agenda file.

Suggestions:

Check that the Agenda is not open on the Series 5.

Check that you do not have the file open in another program, e.g. a text editor.

Last synchronization date mismatch

Message:

The last synchronization date recorded on the Psion does not match the date recorded on the PC. Do you wish to synchronize from scratch?

Problem:

Before the Synchronizer starts the synchronization process it compares the dates of the two files involved in the synchronization. If the synchronization date stored on the Series 5 is different from the date stored in the Synchronizer you will be given a warning message and asked to confirm that you want to proceed.

Suggestion:

Select **Yes** to continue or **No** to stop synchronization and change settings for one of the files.

More than 20 deletions

Message:

The Synchronizer has detected more than 20 deleted entries since you last synchronized. Do you want to continue with this synchronization and remove them from both Agendas??

Problem:

Before the Synchronizer starts the synchronization process, the number of deletions on the Psion and PC are checked. If the total is greater than 20 you will be given a warning message and asked to confirm that you want to proceed. This guards against accidental deletion of multiple entries, or accidental synchronization with a different Agenda file.

Suggestion:

If you see this message, the most likely explanation is that you have deliberately deleted several entries from one or other of your Agendas and/or address books. In this case you can click **Continue** to carry on with the synchronization and remove them from the other Agenda as well.

If you have accidentally deleted several entries from an Agenda and want to restore them, you should press **Cancel** and then set up a new synchronization using the same Psion and PC Agendas.

You may also see this message if you have attempted to set up a new synchronization by changing the file name specified on the synchronization Properties pages.

If you are uncertain you should press **Cancel**, to stop synchronization, and then check your Series 5 and PC agendas.

Synchronizer cannot access the required directory

If you are using Lotus Organizer and receive the error message "Synchronizer cannot access the required directory" you may have two or more conflicting versions of a required file (Orgapi.dll) on your PC.

To check for Orgapi.dll:

1. Open Windows Explorer.

2. Click the **My Computer** icon in the right-hand pane.

3. Press the F3 key to open the **Find:All Files** dialog.

4. In the **Named:** box, type Orgapi.dll and click the **Find Now** button.

5. Check the dates of the files (in the **Modified** column) and delete any found files which are older than 1/12/95.

6. Exit Explorer and reboot your machine.

Contacts not completely transferred to Series 5

If any of the fields in your PC scheduler contain more characters than the maximum number allowed in the equivalent label on your Series 5, you may find that some information is lost after synchronization.

Note: any entries which are truncated in this way will be recorded in the log file.

If this happens, you can create a new Data file on your Series 5, with larger labels, and re-synchronize with the new file.

See also:

Viewing the log file for a synchronization

Printing

You can print Series 5 files directly to any printer connected to your PC or network without converting them to PC file formats. You can also use TrueType fonts in Series 5 Word and Sheet files.

Note: You must have the appropriate TrueType fonts installed on your PC in order to use them.

See also:

Printing from the Series 5 via a PC

Using TrueType fonts with a Series 5

Quick guide to PsiWin

Printing from the Series 5 via a PC

You can connect your Series 5 to a PC or network and print to any connected printer, using TrueType fonts, without having to convert the file to a PC format.

To do this you need to indicate the printer you want to use and install support for any TrueType fonts you want to use on your Series 5.

To install Series 5 support for a Windows printer:

1. Ensure that your PC and Series 5 are connected and that none of your Word and Sheet files on the Series 5 are open.

2. Right-click the Connection icon on the Taskbar and click **Properties**.
3. Select the **Print Options** tab.
4. Select the printer you require from the drop-down list of all the printers installed on your PC.
5. Click the **Set Printer** button to indicate that this is the printer you want to use when printing from a Series 5.

   If you regularly use the same printer you can improve your results by ticking the **Optimize Driver for this printer** box. This adds "Printer via PC (Printer name)" to the list of printers in your Series 5 Print setup dialogs. You should select this printer when printing from your Series 5 via a PC.

Click **OK** to save any changes and close the dialog.

To print from the Series 5 to a Windows printer:

1. On the Series 5, ensure that the Remote link is on and open the program from which you want to print.

2. Select the **Print setup...** command from the **Printing** cascade on the **File** menu.

3. Tap the **Printer...** button and select **Printer via PC** from the **To** list.

   If you selected the "Optimize Driver for this printer" option when installing the printer (see above), the specific printer will appear in the **To** list. For best results select this option.

4. Tap the **OK** button to begin printing.

See also:

Using TrueType fonts with a Series 5

Removing TrueType font support from a Series 5

Quick guide to PsiWin

Using TrueType fonts with a Series 5

You can use your PC's TrueType fonts in your Series 5 files. This allows you to create documents on your Series 5 using these TrueType fonts and print them, via Windows, to any printer connected to your PC or network.

To do this you must install support for the desired TrueType fonts onto your Series 5.

To install TrueType font support on your Series 5:

1. Ensure that your PC and Series 5 are connected and that no files are open on the Series 5.

2. Right-click the Connection icon ∿ on the Taskbar and click **Properties**.
3. Select the **Print Options** tab.
4. In the left-hand portion of the window is a list of all the TrueType fonts installed on your PC. Left-click on each font you want to install and click the **Add** button to add it to the list of fonts which will be installed in the right-hand portion of the window.

Tip: You can see a sample of the selected font at the bottom of the page.

5. Repeat step 4 for each additional font, or click **Add all** to select all the available fonts.

6. Click the **Install** button to install support for the fonts to your Series 5.

7. Click **OK** to exit the Properties pages, and then disconnect your Series 5 from your PC.

Support for the selected fonts will be enabled the next time you connect your Series 5 to the PC.

The selected fonts will then appear on your Series 5 in the lists of available fonts in Word and Sheet whenever you select Printer via PC as your printer.

You cannot use TrueType fonts to print to a printer that is directly connected to your Series 5, you must print via a PC which has the fonts installed on it.

Note: You cannot use "special" fonts, for example Symbols, Wingdings, etc.

Note: Your Series 5 cannot display TrueType fonts on its screen. All text appears as one of the three standard screen fonts; Times New Roman, Arial, or Courier, but installed TrueType fonts will print correctly via a PC.

See also:

Removing TrueType font support from a Series 5

Printing

Quick guide to PsiWin

Removing TrueType font support from a Series 5

You can remove support for a TrueType font installed on your Series 5 if you decide you no longer want to use it.

To remove TrueType fonts from your Series 5:

1. Ensure that none of your Word and Sheet files on the Series 5 are open.

2. Right-click the Connection icon on the Taskbar and click **Properties**.

3. Select the **Print Options** tab.

   The right-hand portion of the window contains a list of the TrueType fonts which are installed on your Series 5.

4. Select the font you want to remove.

5. Click **Remove** to remove support for the selected font from your Series 5.

6. Click **Install** to delete support for the selected fonts, or

   Click **Defaults** to remove support for all but the standard Series 5 fonts (Arial, Courier, and Times New Roman).

Note: You must have at least one font installed on your Series 5.

See also:

Printing

Quick guide to PsiWin

Installing new software onto a Series 5

You can install new programs and software to your Series 5 using the EPOC Install program included with PsiWin, if the software is prepared for installation in a file with the extension .SIS.

To install new software on your Series 5:

1. Click the **Start** button, point to **Programs**, point to **PsiWin 2.1** and click **Install New Program**.

   EPOC Install starts. If this is the first time you have used EPOC Install, a few new files are copied to your Series 5.

   Note: The first time you use EPOC Install to install new software onto your Series 5, a new **Add/remove** icon is added to your Series 5 Control Panel (accessible via the **Tools** menu in the System screen). You can use this Add/remove icon to remove software from your Series 5.

2. Browse for the .SIS file containing the new software.

3. Double-click the .SIS file.

In future, once you have used EPOC Install for the first time, simply double-clicking on an .SIS file in Windows Explorer will automatically install the new software.

See also:

Removing software from a Series 5

About PsiWin

Quick guide to PsiWin

Removing software from a Series 5

If you have used EPOC Install to add new programs or software to your Series 5, you can automatically remove   all files related to the program from the Series 5 Control panel.

To remove software from a Series 5:

1. In the Series 5 System screen, press the **Control panel** button on the Toolbar or select the **Control panel** command from the **Tools** menu.

2. Tap the **Add/remove programs** icon.

3. Select the desired program and tap the **Remove** button.

See also:

Installing new software onto a Series 5

Quick guide to PsiWin

Setting Connections options

You can use PsiWin's advanced connections options to customize the way the Psion machine and PC communicate when they are connected and solve connection problems between the Psion and the PC.

You can use PsiWin's connections options to:

- Change the communications port used for the connection between the Psion and the PC.

  See Selecting which COM port to use

- Change the Baud rate used for the connection between the Psion and the PC.

  See Changing connection speed

- Disable automatic detection of an attached Psion.

  See Turning off automatic detection of an attached Psion

- Synchronize the Psion machine and PC clocks automatically on connection.

  See Synchronizing Psion and PC clocks

- Access your PC's drives directly from a Series 3/3a/3c.

  See Accessing your PC from a Series 3/3a/3c

See also:

How to connect and disconnect a Psion

Quick guide to PsiWin

## Setting Connections options (footnote 1)

Baud Rate

The speed at which electronic information travels, typically between two computers or between a computer and a printer, measured in bps (bits per second).

Series 5 machines can communicate at Baud rates of up to 115200 bps.

How to connect and disconnect a Psion

PsiWin can automatically detect when you connect a Psion to the PC. The Connection icon in the Taskbar shows when the Psion is connected.

- When a Psion is connected the Connection icon looks like this: ᴧᵥ
- If the Psion has been disconnected the Connection icon looks like this: ↦

Note: If your Series 5 is set to automatically turn off after a set period of time, the connection to the PC will be broken and the link will close. To reconnect, right-click the Connection icon ↦ and click **Connect**. If you need to use the COM port for another program, or if you want to connect a different Psion machine, you can temporarily suspend the link to the Psion. You can also shut down the connection completely.
**To close the link to a Psion:**

- Right-click the Connection icon ᴧᵥ on the Taskbar and click **Close**.

Note: If you close the link to a Psion you can reconnect it by double-clicking the **My Psion** icon on the Desktop and selecting the **Connect** command from the Psion menu..

You can also disconnect a Psion from the PC and leave PsiWin open, ready to reconnect.

To disconnect a Psion:

- Right-click the Connection icon ᴧᵥ on the Taskbar and click **Disconnect** from the menu options.

Note: If you do not turn off the link on the Psion machine or unplug the cable, after a few seconds (as determined by the **Delay between searches** setting) PsiWin will reconnect to your Psion unless you have checked the **Manually connect, no auto searching** option. You can change these and other options by clicking **Properties** on the menu displayed when you right-click the **My Psion** icon. Refer to Setting Connections options for more information on this.

To reconnect a Psion to the PC:

- Right-click the Connection icon ↦ on the Taskbar and click **Connect**.

See also:

Setting Connections options

Quick guide to PsiWin

About PsiWin

Accessing your PC from a Series 3/3a/3c

You can access your PC's drives directly from a Series 3/3a/3c by enabling two-way connection (this feature is initially disabled to improve Series 3 performance when connected).

You can use this feature to save Series 3 files to a PC in a different format, for example, to save a Data file as plain text, or a password-protected Word file as Rich Text.

Note: You cannot directly access your PC drives from a Series 5 machine.

To access a PC from your Series 3/3a/3c:

1. Right-click the **My Psion** icon and click **Properties**.

2. Select the **Connections** tab.

3. Place a tick in the **Allow Psion to see PC** box.

To save a Series 3/3a/3c file on the PC in a different format:

1. Connect the Series 3/3a/3c to the PC and open the file you want to save to the PC.

2. Select the **Save as** command from the application's **File** menu.

3. Type **REM** followed by two colons (REM::), then the drive letter and destination folder on the PC, then the desired file name, and finally the extension for the appropriate file type.

   i.e. **REM::C:\Psion\Files\Word.rtf**

4. Select the desired File type (Normal, Text, Data or Rich Text) and press Enter to save the file.

See also:

Setting Connections options

Upgrading files to Series 5 format

Quick guide to PsiWin

Selecting which COM port to use

Usually, it does not matter which COM port on your PC you use to connect your Psion. PsiWin checks each port in turn in order to find a connected Psion.

Some devices may be using the COM port in such a way that PsiWin is not able to establish a connection with a Psion. This may happen if you have certain modems or a serial mouse attached to your PC, and also if your PC has internal devices which can access the COM port (e.g. an internal modem).

If this happens, it may not be possible for PsiWin to connect, or the connection may be very slow. It is therefore a good idea to tell PsiWin to ignore some ports, so that conflicts with other devices do not occur.

To select which COM ports you want PsiWin to search:

1. Right-click the **My Psion** icon and click **Properties**.

2. Select the **Connections** tab.

3. Uncheck any boxes in the **Settings** dialog for the COM ports used by other devices. Make sure that you check the boxes for any ports that you might use to connect a Psion.

To make future connections quicker, PsiWin checks the COM ports in a particular order when you disconnect and then re-connect a Psion. First, PsiWin checks the port on which a Psion was last connected, and then it checks the other ports in the order of the list in the Connections page of the dialog.

To change the order in which PsiWin searches through COM ports:

- Highlight a port and use the up ▲ and down
▼ buttons to nudge the port up or down through the list.

See also:

Setting Connections options

Quick guide to PsiWin

Changing connection speed

When PsiWin finds a Psion connected to a COM port it automatically sets its speed to the same Baud rate as the connected Psion.

If the Psion and PC are having difficulty communicating, try lowering the Baud rate on the Psion. If communication is still poor you can manually set a matching Baud rate for PsiWin.

To manually set the Baud rate:

1.   Right-click the **My Psion** icon and click **Properties**.

2.   Select the **Connections** tab.

3.   Select the speed you require from the **Baud rate** drop-down list.

See also:

Setting Connections options

Quick guide to PsiWin

Changing connection speed (footnote 1)

Baud Rate

The speed at which electronic information travels, typically between two computers or between a computer and a printer, measured in bps (bits per second).

Series 5 machines can communicate at Baud rates of up to 115200 bps.

Turning off automatic detection of an attached Psion

PsiWin automatically searches the available communications ports for a connected Psion machine. If you are experiencing problems connecting, or if another program appears to be interfering with the connection process, you can turn off the auto detection mechanism.

To turn off the automatic detection of a connected Psion machine:

1. Right-click the **My Psion** icon and click **Properties**.

2. Select the **Connections** tab.

3. Check the **Manually connect, no auto detection** option.

See also:

Setting Connections options

Quick guide to PsiWin

Synchronizing Psion and PC clocks

Your Psion has a very accurate internal clock. However it can become inaccurate as a result of power failure or machine reset, and you can set PsiWin to automatically synchronize the internal clock with that of the PC each time you connect.

Tip: Selecting this option will also ensure that the Series 5 and PC Agendas are in accordance when you synchronize Agenda files.

Tip: If your PC automatically compensates for Summer and Winter times, selecting this option will also update the clock on the Psion when you connect.

To set automatic clock synchronization:

1. Right-click the **My Psion** icon and click **Properties**.

2. Select the **Connections** tab.

3. Place a tick in the **Synchronize PC and Psion clocks at connection** box.

See also:

Setting Connections options

Quick guide to PsiWin

Jump

This is an example of a jump to another window. Click the **Back** button to return to the previous Help topic.