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Synchronizing your Psion with Lotus Organizer

Note: All occurrences of **Revo** in this document also refer to **Revo Plus** unless otherwise specified. This document details the set-up and day-to-day use of PsiWin 2.x to synchronize your Psion Series 3a, 3c, 3mx, 5, 5mx, 7, Siena or Revo Agenda and Data files or Contacts program (5mx/7/Revo) with Lotus Organizer 2.1, 97 or 97GS on the PC. The document does assume some basic familiarity with the use of Windows 95, 98 or NT 4.0.

Software compatibility

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

You must also have a full installation of Lotus Organizer. While this document talks about Lotus Organizer 97 GS (PIM only installation), the synchronization set-up procedure is identical for Lotus Organizer 2.1 or 97. If you are using Organizer 97 GS as a PIM with Group Scheduling then see the section towards the end of this document. Lotus Organizer version 4.1 is the same as Organizer 97GS, so you should choose that option when creating the synchronization. Note that you cannot synchronize with Lotus Organizer version 2.0 or 2.01.

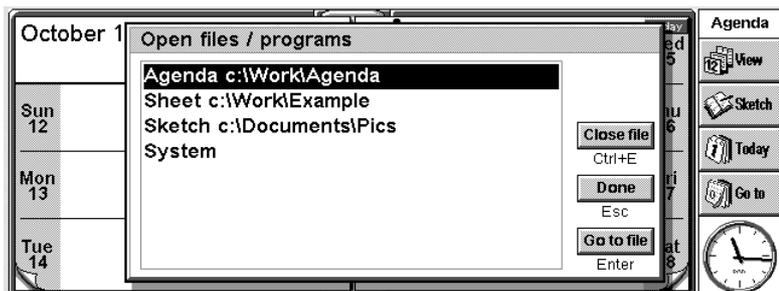
Creating new synchronizations

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

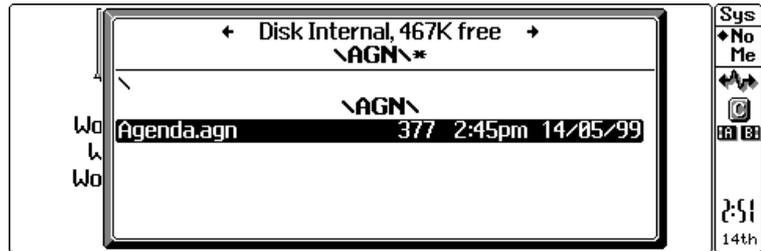
Required information

Before creating the synchronization, you will need to note the locations of the files you wish to synchronize. From the Series 3a, 3c, 3mx, 5 or Siena, you may synchronize your Agenda or Data files, while from the Series 5mx, 7 or Revo you may also synchronize with the Contacts program.

1. If you are synchronizing an Agenda or Data file from a Series 5, 5mx, 7 or Revo, open the file(s) you wish to synchronize. Tap the file name at the top of the toolbar and you will see the **Open files / programs** dialog. Scroll through the list until you find your file(s) listed. Make a note of the path (in this example, **c:\Work\Agenda**).

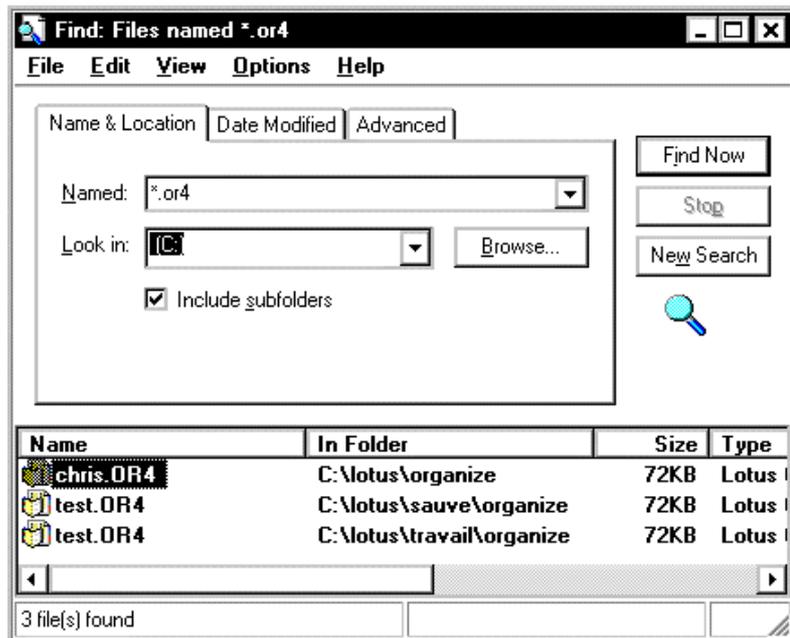


- If you have a Series 3a, 3c, 3mx or Siena, highlight the file(s) that you wish to synchronize and press **Tab**. The top line of this dialog will tell you on which Disk the file is stored, in this example, **Internal**.



The fourth line tells you the path to the file (in this example, \AGN\), and the highlighted line tells you the filename (in this example, **Agenda.agn**). So, the location of the file will be: **[Disk]:[Path to file][Filename]**, in this example, **M:\AGN\Agenda.agn**. Press **Esc** to remove this dialog. Note that if the file is on the Internal disk then **[Disk]** will be **M**. If it is on the **A** or **B** disks then **[Disk]** will be **A** or **B**.

- On the PC, click on the **Start** button and select **Find** then **Files or folders**. In the **Named** box type in ***.or2** if you have Organizer 2.1, ***.or3** if you have Organizer 97 or ***.or4** if you have Organizer 97 GS (PIM only). Make sure that it is looking in your C drive (or other drive if you keep your Organizer file(s) elsewhere) and that the **Include subfolders** box is ticked. You should now have a list of Organizer files. If you double-click on the vertical line to the right of **In folder**,



it will expand the view to include the whole path of the file. In the example above, the path and filename of the first file in the list would be **C:\lotus\organize\chris.or4**.

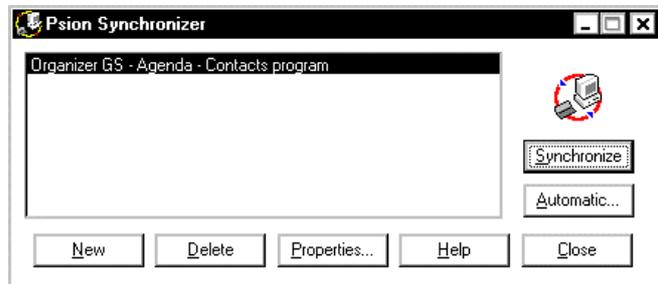
Note: If you have not previously created an Organizer file, this list will be empty. To create an Organizer file, open Lotus Organizer. Select **Save as** from the **File** menu. Give the file a name and click the **Save** button. You will then need to repeat step 3.

Creating the synchronization

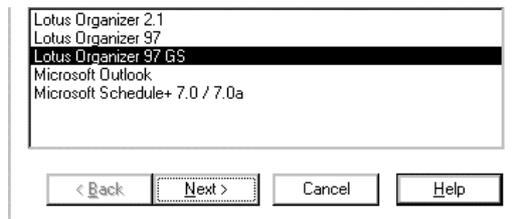
1. Make sure that your Psion is connected to the PC, then double-click on the **My Psion** icon. Assuming the machines have linked successfully, you will see several icons, including one labelled **Psion Synchronizer**. Double-click on this icon.



In the **Psion Synchronizer** window, click the **New** button. This will launch the Psion Synchronizer Wizard, which will take you through the steps required to set up the synchronization. If you have never created a synchronization before, PsiWin will bypass this window and go straight to the Synchronization Wizard.



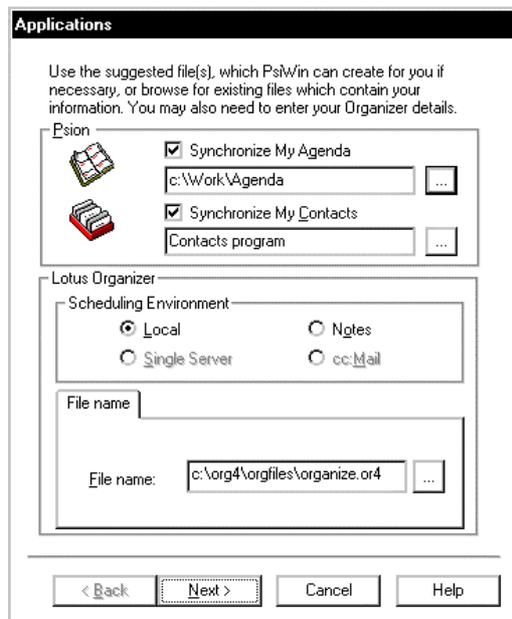
2. The welcome page of the Wizard asks you the PC Personal Information Manager (PIM) with which you wish to synchronize. Highlight the relevant option and click the **Next** button.



3. On the **Applications** page, you will need to enter the path(s) for the Agenda, Data and Organizer files you wish to synchronize.

In the **Psion** section, you will need to specify the Psion files with which you wish to synchronize. If you wish to synchronize an Agenda file, ensure that the **Synchronize My Agenda** box is ticked. You will then need to specify the Agenda file to be synchronized. You can either type in the path and filename you noted earlier or click the [...] button to browse the Psion's disk(s). If in doubt, use the browse button to find your file.

If you wish to synchronize a Data file or the Contacts program (5mx/7/Revo), ensure that the **Synchronize My Contacts** box is ticked. The next step depends whether you are synchronizing with a Series 5mx, 7 or Revo or a Series 3a, 3c, 3mx, 5 or Siena.

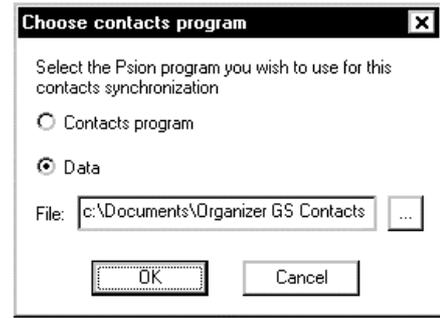


- **Series 3a, 3c, 3mx, 5 or Siena**

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

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

If you wish to synchronize with the Contacts program, you should leave the next box as **Contacts program**. If you wish to synchronize with a Data file, click the [...] button. Next, select **Data** and specify the Data file to be synchronized. You can either type in the path and filename you noted earlier or click the [...] button to browse the Psion's disk(s). If in doubt, use the browse button to find your file. Next, click the **OK** button.



The **Scheduling environment** section of the page can normally be ignored. However you will need to change this if your copy of Lotus Organizer has been specifically set up to connect with cc:Mail or Notes, or to work over a network. You should consult your Network Administrator if you believe this may be true in your case or, if you are using Organizer 97 GS as a PIM with Group Scheduling, see the section towards the end of this document.

4. Then you must specify your Lotus Organizer file. Again, you may either type in the file name (including its directory) or click the [...] button to browse for the file. In this example, we use **c:\lotus\organize\chris.or4**.



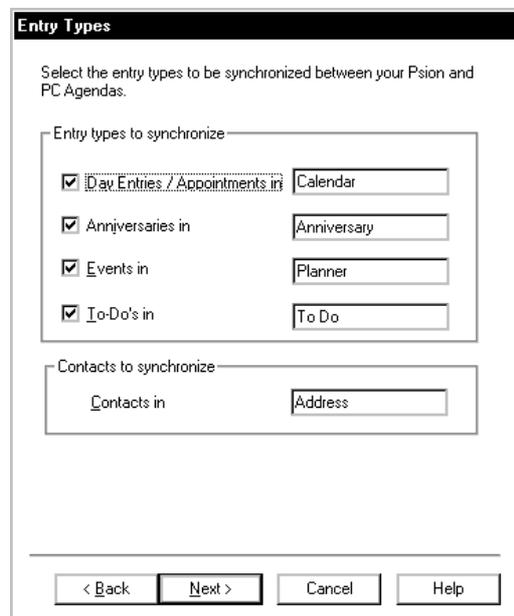
Once this information has been entered, click on the **Next** button. Note that it is very important that this information is entered correctly – if it is not, the wrong files may be synchronized, or no synchronization will occur. However, if you do not have an existing Agenda or Database file on your Psion, the synchronizer can create them. This is especially useful for a Contacts database - if you specify a non-existent Psion Data file, the synchronizer will create a new one on the Psion that is optimised for use with your Organizer contacts. If you are synchronizing with a Series 5mx, 7 or Revo, the synchronization can only create a Data file if you have selected the option to synchronize a Data file.

5. The next page allows you to specify which types of entry you wish to synchronize and the Organizer section they will appear in. You can untick particular entry types if you do not want them to be synchronized.

You will also need to check in your Lotus Organizer file whether the **Calendar**, **Anniversary**, **Planner** or **To-do** sections have been renamed. If any of these names have been changed in your Organizer file, you will need to edit the names in this dialog so that they match.

If the **Address** section in Lotus Organizer has been renamed, you will also need to specify its new name in this dialog.

When you have finished this, click the **Next** button.



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

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

Next, click on the **Advanced** button to set up the label mapping. Note that if you are synchronizing with the Contacts program on the Series 5mx, 7 or Revo, or have chosen not to synchronize a Data file, you may not be able to click this button. In this case you should ignore step 7 below and click the **Next** button.

7. The **Contacts Synchronization** page shows a table, listing the labels for the Address section in Organizer in the **Contact information** column, and in the **Psion label** column you can match these to their equivalents (if any) in your Psion Data file. To match labels:

- i. Find the Organizer label whose function is the same as one of your Psion Data file's labels, then click in the box next to it in the **Psion label** column.
- ii. An arrow will appear to the right of this box. If you click on this, a drop-down list will appear, containing all the Psion labels that you have not matched. Select the label you wish to assign.
- iii. If you do not wish to synchronize with a particular Organizer label, you should select **<Ignore>** from the drop-down list.

Contact information	Psion label
Last name	Last Name:
First name	First Name:
Company	Company:
Job title	Job Title:
Business street	
Business city	<Ignore>
Business state	Work Tel:
Business zip	Work Tel (2):
Business country	Work Fax:
Home street	Mobile:
Home city	Pager:
Home state	Email:
Home zip	

Note that each Psion label can only be matched to one Organizer label.

8. When you have finished matching the labels, click the **OK** button and then the **Next** button.
9. The last page of the wizard is simply a confirmation screen. If you wish to start the synchronization process immediately, click on the **Synchronize Now** button, otherwise click on the **Finish** button to complete the set-up and save the synchronization.

If this is the first time you have run the synchronization, you may see the **Contacts synchronization** dialog described in Step 7 above. If there are any labels on the Psion that cannot be directly mapped, the synchronization will prompt you to do this by hand.

Using an existing synchronization

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

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

Synchronizing with older versions of PsiWin 2

You can still synchronize with older versions of PsiWin 2. All versions older than 2.2 will only let you synchronize with a Series 5 and require that the files to be synchronized are closed. To do this, highlight the file(s) on the system screen of the Psion and press **Ctrl + E**. Also, ensure that Lotus Organizer is closed on the PC. Versions 2.0 and 2.01 will only let you synchronize your Psion Agenda and will not work with Lotus Organizer 97 GS. Version 2.1 will let you synchronize Agenda and Data, but will also not work with Organizer 97 GS. The user interface of previous versions will look slightly different from the dialogs shown here, but all the information required is the same. Note that PsiWin 2.3 must be used to synchronize with a Series 5mx, 7 or Revo.

Synchronizing with Organizer 97 GS as a PIM with Group Scheduling

When you use Organizer 97 GS as a PIM with Group scheduling it uses your Lotus Notes Calendar and Address book. Because of this, the set up process for the synchronization is slightly different.

1. Follow Steps 1 and 2 in the **Required information** section above.
2. Follow steps **1** and **2** in the **Creating the synchronization** section above.
3. Enter the details of your Agenda and Data files or select the Contacts program (Series 5mx only) as described in step **3** of the **Creating the synchronization** section above.
4. In the **Scheduling environment** section, select **Notes**. Next, enter the Notes server on which your Calendar file is stored. If the file is on a local disk, leave this field blank. Next, enter the filename. If the file is on a local disk, this should be the full path to the file, in this example **c:\notes\data\calendar.nsf**.

Note: If you do not have this information, contact your Network Administrator.

5. Click the **Account** tab.

6. Enter your Notes username and password.
7. Click the **Next** button.
8. Follow steps **5** onwards in the **Creating the synchronization** section above.

Applications

Use the suggested file(s), which PsiWin can create for you if necessary, or browse for existing files which contain your information. You may also need to enter your Organizer details.

Psion

Synchronize My Agenda
c:\Work\Agenda ...

Synchronize My Contacts
Contacts program ...

Lotus Organizer

Scheduling Environment

Local Notes cc:Mail

Notes Folder Account

Server: _____

File name: c:\notes\data\calendar.nsf

< Back Next > Cancel Help

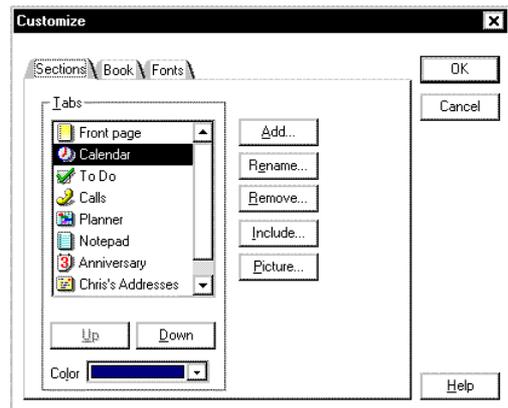
Notes Folder Account

User name: Chris Dickens/PSION_UK/PSION/GI

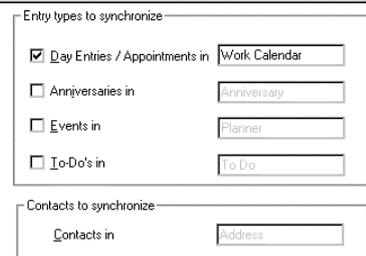
Password: *****

Multiple Synchronizations

It is possible to create multiple synchronizations to synchronize more than one Agenda or Data file or more than one Organizer Address section. To do this you may need to create extra Organizer sections. You can do this by selecting **Customize** from the **Section** menu. To add a new section click on the **Add** button. Select the type for the new section, type in a name, for example, Work Calendar, and click **OK** twice.



When you create the synchronization, enter the appropriate file paths and names. When you get to the **Entry types** dialog in step **5.** in the **Creating the synchronization** section above, put the name of the new Organizer section against the appropriate Psion section and uncheck the rest of the boxes. Click the **Next** button and carry on with the synchronization as described above.



Note: You should never synchronize multiple Psion files with a single Organizer section or multiple Organizer sections with a single Psion file as this will result in the multiple files being mixed together.