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

Note: All occurrences of **Revo** in this document also refer to **Revo Plus** unless otherwise specified. This document details the set up and day-to-day use of Email Synchronization. Some knowledge of Windows 95/98/NT 4.0 is assumed, as is some knowledge of using Email on the Series 5mx/7/Revo.

Installing Email Synchronization

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

Compatibility

Email Synchronization will work with the following software:

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

Creating synchronizations

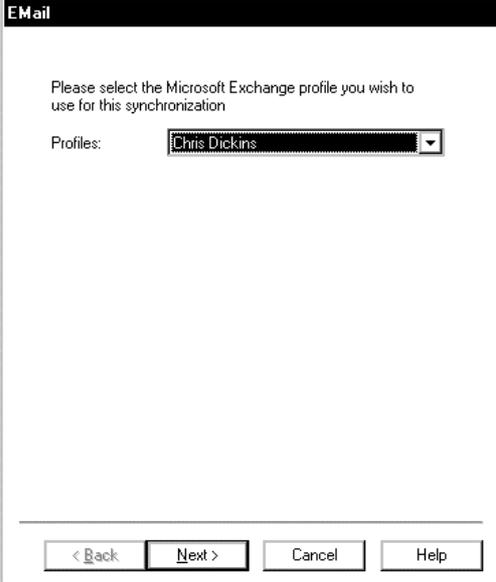
The steps required to create a synchronization differ depending on which PC email application is to be synchronized.

Outlook

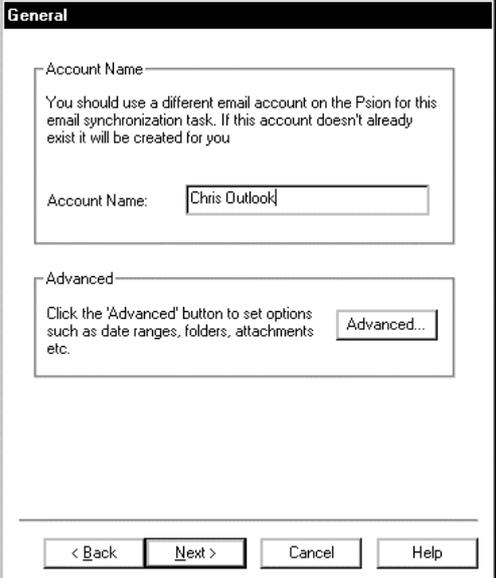
1. Open PsiWin by double-clicking on the **My Psion** icon.
2. Double-click on the **Psion Synchronizer** icon. If you have previously set up any kind of synchronization task, you will see the **Psion Synchronizer** dialog. Click the **New** button to launch the **Psion Synchronizer Wizard**. If you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



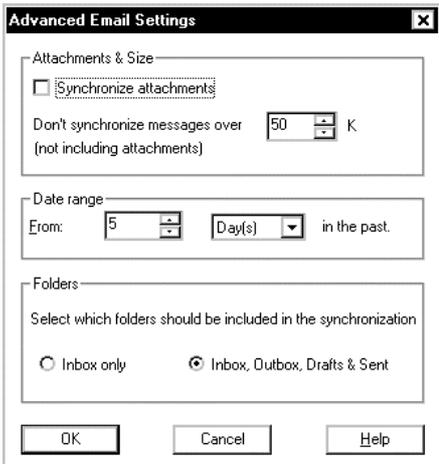
4. On the **Email** page, click the button and select your Microsoft Exchange profile from the list. If you do not know your profile name, you should contact your Systems Administrator. Click the **Next** button.



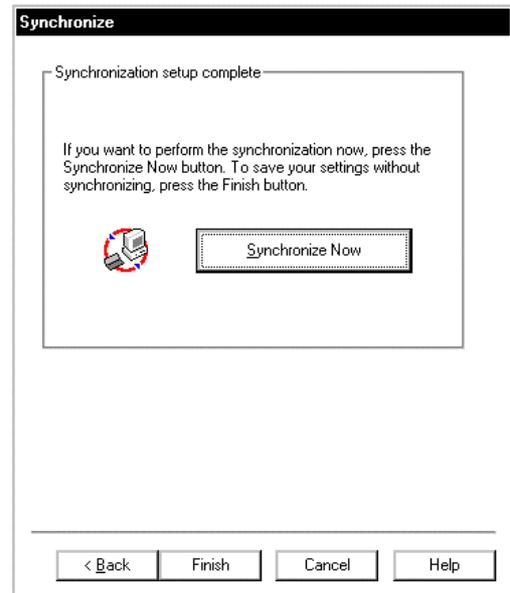
5. On the **General** page, type in an **Account Name** (this is the name under which the account will appear on the Psion), then click the **Advanced** button.



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



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

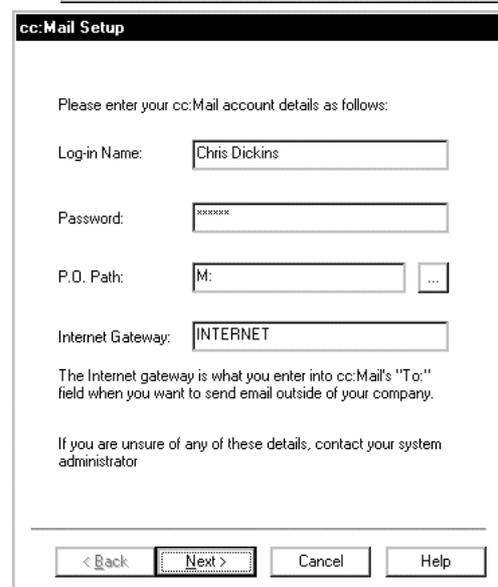


cc:Mail

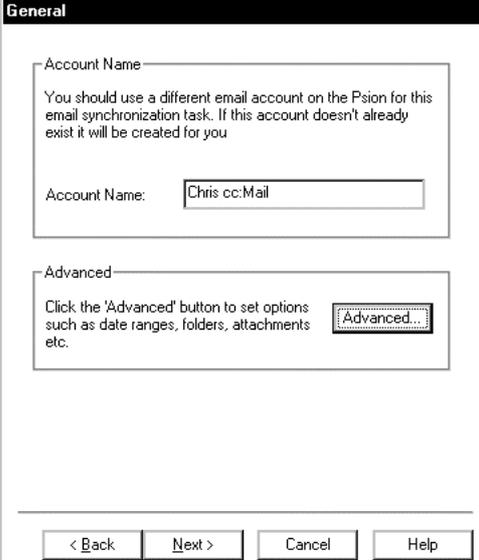
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- Make sure that **Email** is selected, then highlight the PC application to synchronize with (in this case, **Lotus cc:Mail**) and click the **Next** button.



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

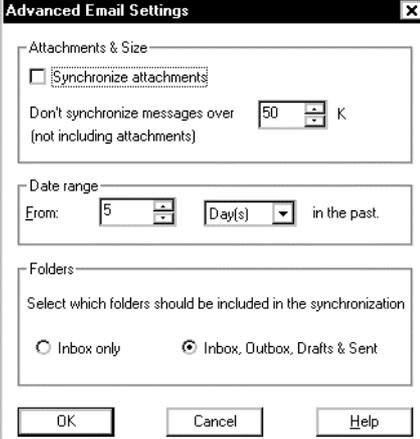


5. On the **General** page, type in an **Account Name** (this is the name under which the account will appear on the Psion), then click the **Advanced** button.



The screenshot shows the 'General' dialog box. At the top, there is a section titled 'Account Name' with a text box containing 'Chris cc:Mail'. Below this is a section titled 'Advanced' with a button labeled 'Advanced...'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

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



The screenshot shows the 'Advanced Email Settings' dialog box. It has three main sections: 'Attachments & Size' with a checkbox for 'Synchronize attachments' and a spinner set to '50 K'; 'Date range' with a 'From' spinner set to '5' and a dropdown set to 'Day(s) in the past'; and 'Folders' with radio buttons for 'Inbox only' and 'Inbox, Outbox, Drafts & Sent' (which is selected). At the bottom are 'OK', 'Cancel', and 'Help' buttons.

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



The screenshot shows the 'Synchronize' dialog box. It contains a message: 'Synchronization setup complete. If you want to perform the synchronization now, press the Synchronize Now button. To save your settings without synchronizing, press the Finish button.' Below the message is a button labeled 'Synchronize Now' next to a computer icon. At the bottom are four buttons: '< Back', 'Finish', 'Cancel', and 'Help'.

PCmails

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

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

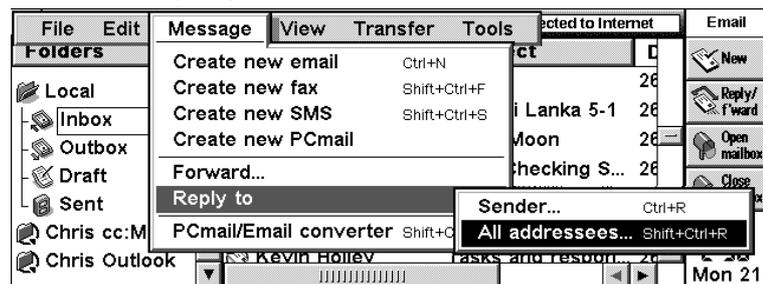
Note: If these emails are marked with a question mark icon, the Email Synchronization components have not been installed on the Psion. In this case, you should reinstall Email Synchronization on the PC, making sure you have the Psion switched on and connected and that you have selected the option to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

Using PCmails

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

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

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



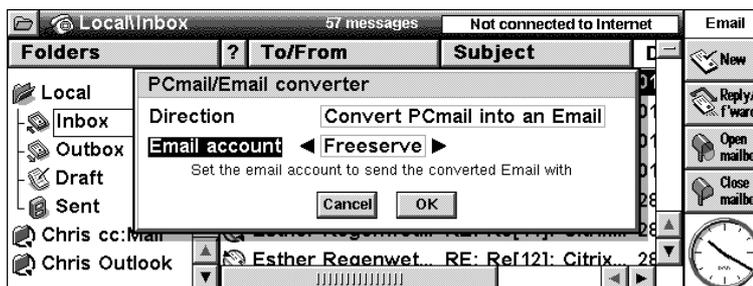
Type in your reply and save to the Outbox in the normal way.

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

Converting PCmails and emails

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

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



converted to an email and can be sent from the Psion in the usual way. Note that it will be sent from the email account you have set up on the Psion and not your PC email account.

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



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

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

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