

---

# CorporateSync 1.1.3 for Psion User's Guide



CorporateSync 1.1.3 for Psion User Guide  
June, 2000

#### Copyright Notice

© 2000 Corporate Software & Technologies Int Inc. (hereinafter "CS&T"). All Rights Reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means without the express written permission of CS&T.

#### Software License Notice

Your license agreement with CS&T, which is included with the product, governs your use of the software, and specifies the permitted and prohibited uses of the product. Any unauthorized duplication or use of CorporateSync, in whole or in part, in print, or any other storage and retrieval system, is forbidden.

#### Trademark Notices

CorporateSync and CorporateTime are trademarks of CS&T. Windows, Windows 95, Windows 98 and Windows NT are registered trademarks of Microsoft Corporation and its subsidiaries. Psion, Psion Series 3 and Psion Series 5, Psion Series 5mx and Revo are registered trademarks of Psion Computers PLC. Netscape and Netscape Communicator are registered trademarks of Netscape Communications Corp. All other products are trademarks or registered trademarks of their respective owners.

#### Development Notice

This software is under license to CS&T. CS&T does not make any express or implied warranties with regard to the software and materials offered or their salability or their fitness for any particular purpose. The software, materials, and documentation are made available solely on an "as is" basis, and the entire risk as to their quality, reliability, and performance is with the user. Should the software, material or documentation prove defective, the user (not CS&T or any other party) shall bear the entire cost of all necessary correction. CS&T shall not be liable for any incidental or consequential damages in connection with or arising out of the furnishing, use or performance of the software, material or documentation.

Corporate Software & Technologies Int. Inc.  
• e-mail: [info@cst.ca](mailto:info@cst.ca) • web site: [www.cst.ca](http://www.cst.ca)

3333 Graham Blvd.  
5th floor  
Montreal, Quebec  
H3R 3L5 Canada  
tel: (514) 733-8500  
fax: (514) 733-8878

---

# Contents

---

## **Chapter 1 • Introduction to CorporateSync 5**

System Requirements 5

Installing CorporateSync 6

Using the Psion Synchronizer 6

Limitations 6

Avoiding Problems 7

## **Chapter 2 • Using CorporateSync 9**

Synchronizing for the first time 9

## **Chapter 3 • Troubleshooting 11**

Connection Problems 11

I cannot get my hand-held to connect. 11

I cannot start synchronization. 11

It is taking too long to synchronize. 11

Entry Problems 12

Some hand-held Entries do not appear on the calendar server after synchronizing. 12

Some Entries do not appear on the hand-held after synchronizing. 12

I keep getting multiple copies of my Entries. 12

Changes I made to an Entry on my hand-held were not transferred to the calendar server. 12

When I use my hand-held to modify a Repeating Entry that was created on the calendar server, some of the changes are applied to all instances of the Entry, while others apply only to the instance I modified. 12

I am having trouble with Repeating Entries created on my hand-held. 13

I want to delete all Entries on my hand-held. 13

**Appendix A • Field Mapping 15**

Meetings 15

Day Events, Daily Notes & Holidays 16

Tasks 17

Address Books 18

**Appendix B • Netscape Address Books 23**

System Requirements: 23

Synchronizing for the first time 23

Field Mapping 24

Limitations 26

# 1

## Introduction to CorporateSync

CorporateSync allows you to transfer data between your calendar server and your Psion hand-held device.

### System Requirements

Hand-held:

- Psion Series 3, 5, 5mx, Revo or Sienna

Desktop System Requirements:

- PC running Windows 95/98 (16 MB RAM) or Windows NT 4.0 (24 MB RAM)
- Intel Pentium or compatible processor
- 3 MB Hard Disk Space (5 MB recommended) and 200 KB for each sync task
- PsiWin 2.2 or 2.3 installed
- CorporateTime/OpenTime 4.0 or greater required to synchronize Address Books

Server Requirements:

- Network access to a calendar server running CorporateTime/OpenTime Server 2.57, 2.60, 3.5x, 4.0, or 5.0 or Netscape Calendar server 3.5 or 4.0.

# Installing CorporateSync

To install this application, run the setup program provided with the distribution and follow the on-screen instructions:

- In the single file package, the setup program is the packaged ".exe" file.
- On the cd-rom or floppy disk, the setup program is called "setup.exe".
- Choose whether you want to install the Netscape Address Book Synchronization plug-in after installation. For information on synchronizing a Netscape Address Book, see Appendix 2.

Note: PsiWin must already be installed.

## Using the Psion Synchronizer

The Psion Synchronizer icon appears on your desktop when you install PsiWin.

- New: Lets you create a new synchronization task.
- Help: Opens the Help file
- Automatic: Allows you to synchronize automatically with your hand-held.
- Synchronize Now: Synchronizes your calendar application with your hand-held.
- Properties: Opens the Properties dialog box, allowing you to enter your synchronization settings for your current synchronization task.
- Close: Quits the Psion Synchronizer.

For more information, refer to your PsiWin documentation.

## Limitations

- Repeating Entries created on the calendar server are synchronized as separate instances on the Psion, and vice versa.
- Only the first Word object of a Day Entry or To-do is synchronized with the Details section of a calendar server Entry. All other objects are ignored.

- The location of a Day Entry on the Psion is marked in parentheses in the text field of your calendar server Entry. If you want your calendar server Entry location to synchronize properly with the Psion, this parenthesized phrase must appear at the end of the Text field.
- Synchronization of Psion Anniversaries is not supported.

## Avoiding Problems

- Choose Refresh All on the calendar server after synchronizing.
- Do not set your calendar server Entry Defaults to “Personal”. For a detailed explanation of Entry Default behaviour during synchronization, see the Field Mapping section.
- Do not modify, delete or add Entries to the calendar server during synchronization. This may result in loss of data.
- Do not disconnect the device while synchronizing. This may result in loss of data. Instead, cancel the synchronization, allowing the synchronization to shut down, and then disconnect the device.
- It is recommended that users have at least 200 KB of hard disk space per synchronization task for average use. Users with very large synchronization ranges or extremely busy schedules may require more disk space.
- Entries you do not own are marked with an asterisk. To avoid confusion, do not create Entries whose titles begin with an asterisk. As well, avoid editing or deleting Entries marked with an asterisk.
- If you are using a Psion Series 5, avoid changing the “Agenda Entries to synchronize” option on the Psion-to-PC page back and forth between “Only entries within your work hours” and other options. Choose an option when you create the synchronization task and avoid editing it afterwards.
- Only one Reminder set for any given Task will be synchronized. Psion To-dos cannot have more than one Alarm.



# 2

## Using CorporateSync

### Synchronizing for the first time

1. Make sure your device is connected and turned on.
2. Click the Psion Synchronizer on your desktop.
3. If the Psion Synchronizer Wizard does not automatically appear, click the New button to launch it.
4. Select "CorporateSync 1.1.3" from the PC Scheduler list. Choose an Agenda file on your Psion device. A default is provided.
5. Choose a contact file on your Psion device. A default is provided.
6. Enter your calendar server user name in the User Name field.  
Note: You do not have to enter your full name. Enter enough characters to distinguish yourself from all other users on your server.
7. Type in your password. Passwords are case sensitive.
8. Enter the calendar server name in the Server field. Enter the calendar server node number or node alias in the Node field.
9. Press Next to access the Entry Types page. Determine which types of Entries you want synchronized between your Psion device and your calendar server: Psion Day Entries become Calendar Server Meetings; Psion Events become Calendar Server Day Events & Daily Notes; Psion To-dos become Calendar Server Tasks.
10. Enter the name of the calendar server Address Book you wish to synchronize. If you do not wish to synchronize an Address Book, leave this field blank.
11. Press Next to access the Psion To PC page. Set or change the time range for synchronizing your Entries.
12. Choose how Entries inside and outside work hours are treated during synchronization. You can synch all specified Entries; all specified Entries while making Entries outside work hours private on the PC; or only Entries within work hours. For more information, see the "Avoiding Problems" section of the User Guide.
13. Your default work hours are listed. Click Change to edit your work hours.

14. Choose which Address Book Entry data fields to map to your Psion contact data fields. If your Psion contact file does not already exist, you cannot configure field mapping. However, if you attempt to synchronize anyway, the contact file is created with some default fields before synchronization; you will then be given the option to configure your field mapping.
15. If you wish to synch now, click Synchronize Now. If you wish to save your settings without synching, click Finish.
16. Automatically synchronize with your hand-held by choosing a task from the synchronization task list and clicking the Automatic button. Choose one of three options.

# 3

## Troubleshooting

This chapter explains how to work around problems users sometimes encounter while using the hand-held. When bulleted lists appear, your problem can be fixed using one, some or all of the possible solutions.

### Connection Problems

#### **I cannot get my hand-held to connect.**

- Make sure your Psion is running.
- Verify that your hand-held is properly connected to your PC.
- Make sure no other programs are using the same COM port as your hand-held when connecting using a serial port.

#### **I cannot start synchronization.**

- Verify the user name, password, server and node settings in the Application tab of the Synchronization Options dialog box.
- Make sure the calendar server you are connecting to is running properly.
- Make sure the user name or initials you entered distinguish you from everyone else on the system.
- Make sure the Address Book you have selected exists.

#### **It is taking too long to synchronize.**

Cut down the time it takes by narrowing the time period you want to synchronize on the Psion-to-PC tab of the Properties dialog box.

# Entry Problems

## **Some hand-held Entries do not appear on the calendar server after synchronizing.**

- Choose View menu > Refresh All on the calendar server.
- These Entries are outside the range defined in the Synchronization Options dialog box on your PC.

## **Some Entries do not appear on the hand-held after synchronizing.**

- These Entries are outside the range defined in the Synchronization Options dialog box on your PC.

## **I keep getting multiple copies of my Entries.**

- If the synchronization stops with an unexpected error, power loss, etc., it is possible that the next time you synchronize some Entries will be duplicated.
- If you are using a Psion Series 5, avoid changing the “Agenda Entries to synchronize” option back and forth between “Only Entries within your work hours” and other options.

## **Changes I made to an Entry on my hand-held were not transferred to the calendar server.**

- The Entry may be owned by another user. Any changes you make to an Entry you do not own are not transferred to the calendar server. Entries you do not own are marked with an asterisk (\*).

## **When I use my hand-held to modify a Repeating Entry that was created on the calendar server, some of the changes are applied to all instances of the Entry, while others apply only to the instance I modified.**

The Title, Location, Times and Reminder only change in the instance you modify. Deleting an Event on the hand-held will also only delete that one instance. To change these settings for all instances at once, you must use the calendar server. Notes and Access Levels will be modified for all instances of the Entry.

## **I am having trouble with Repeating Entries created on my hand-held.**

Repeating Entries created on the calendar server are synchronized to the Psion device as separate instances and vice versa.

### **I want to delete all Entries on my hand-held.**

- Delete them manually on an Entry-by-Entry basis.
- Delete the Agenda or data file on the Psion device. This deletes all Entries and To-dos contained in that Agenda, or all contacts in that data file.



**A****Field Mapping**

This section describes conversions that occur when transferring data between your calendar server and your hand-held's Agenda. Apart from special conversion rules applicable to specific fields, some general rules apply:

- Text fields are truncated to the maximum allowed length on the destination platform.
- Dates that are not within the representable range of dates on the destination are truncated to the nearest representable date.

Note: CorporateSync ignores fields not mentioned in the following sections.

**Meetings**

Converting a calendar server Meeting into a Psion Day Entry (or vice-versa):

Calendar Server	hand-held	Notes
Title	Text	If the Entry is not owned by the synchronizing user, it appears on the Psion device with an asterisk.
Location	(Location)	Meeting locations on the calendar server get put into parentheses in the Text field on the Psion.
Detail	Word Object in Text	The detail is copied to the hand-held Day Entry's note. Any attachments created on the Psion device must be included as Word documents; otherwise, any written text is transferred into the Meeting's title. Only the first word attachment is included.

Calendar Server	hand-held	Notes
Start date/Start time	Start date/Start time	Corresponds to the calendar server's start date and start time.
End date/End time	End date/End time	The calendar server does not permit a Meeting to have a duration less than 5 minutes or greater than 23 hours and 59 minutes. Any Psion Day Entry that does not fall within this range will be truncated to fit by the calendar server.
Tentative	Tentative	Tentative Meetings are treated normally.
Refused	Crossed-Out	A Day Entry on the Psion can be "crossed out", which corresponds to a Refused Calendar Server Entry.
Access Level	Public/Private	Private Day Entries on the Psion correspond to Personal Entries on the Calendar Server. Public Day Entries on the Psion correspond to the user's default security setting; however, if the default setting was "Personal," then the Event becomes "Confidential."
Repeat	Repeat	Repeating Entries are always transferred as separate instances.

## Day Events, Daily Notes & Holidays

Converting a calendar server Day Event, Daily Note or Holiday into a Psion Event (or vice-versa):

Calendar Server	Hand-held	Notes
Title	Text	If the Entry is not owned by the synchronizing user, it appears on the Psion device with an asterisk.
Detail	Word Object in Text	Word objects are ignored on the calendar server.
	Tentative	The "Tentative" status for Psion events is ignored.

Calendar Server	Hand-held	Notes
Access Level	Public/Private	Private Events on the Psion correspond to Personal Entries on the Calendar Server. Public Events on the Psion correspond to the user's default security setting; however, if the default setting was "Personal," then the Event becomes "Confidential."
Repeat	Repeat	Repeating Entries are always transferred as separate instances.

## Tasks

Converting a calendar server Task into a To-do item on the Psion (or vice-versa):

Calendar server	hand-held	Notes
Description	Text	
Detail	Word Object in Text	Any formatting (i.e. bolding or italics) on the device is ignored.
Start Date	Warning From	The "Warning From" field corresponds to the start date of the corresponding calendar server Task. For an un-dated to-do, this field is empty.
Due Date	Due Date	For an un-dated to-do, this field is empty.
Completed	Crossed Out	A Psion To-do can be "Crossed Out," which corresponds to a completed Task on the calendar server. Incomplete To-dos correspond to incomplete Tasks on the calendar server.
Priority	Priority	If a Psion To-do's Priority level falls between 1 and 9, it synchronizes normally on the calendar server. If the value is greater than 9, the value is readjusted to 9.
Reminder	Alarm	If there is more than one Reminder for a Task on the calendar server, only one Reminder for that Task is synchronized on the Psion device.

Calendar server	hand-held	Notes
Access level	Public/Private	Private Tasks on the Psion correspond to Personal Tasks on the Calendar Server. Public Tasks on the Psion correspond to the user's default security setting; however, if the default setting was "Personal," then the Task becomes "Confidential."

## Address Books

Converting a calendar server address book field into a Psion (5mx, Revo), or Psion (5 and lower) address book field.

\*Indicates unidirectional mapping from the calendar server.

\*\*To ensure the normal synchronization of telephone numbers from the Psion address book to the calendar server, the numbers should be entered in the following format. Entering country codes, area codes, "#", and extension numbers are optional.

Correct Format for Entering Telephone Numbers in Psion Address Fields		
1 800 234-5678 #001	1 800 234 5678 #001	1 (800) 234-5678 #001
1 (800) 234 5678 #001	1-(800)-234-5678 #001	1-(800)-234 5678 #001
234-5678	234 5678	234 5678 #001
514 234-5678	(514) 234-5678	(514)-234 5678 #001

Calendar server	Psion 5mx, Revo	Notes
First Name	First Name	First Name entries are treated normally.
Last Name	Last Name	Last Name entries are treated normally.
Mobile 1	**Mobile	Mobile 1 entries on the calendar server appear on the Psion device as Mobile.

Calendar server	Psion 5mx, Revo	Notes
Home 1	**Home tel	Home 1 entries on the calendar server appear on the Psion device as Home tel. Only 2 telephone numbers with the label Home tel can be mapped to the calendar server. Additional Home tel numbers in the Psion device may cause errors and prevent normal synchronization.
Home 2	**Home tel	Home 2 entries on the calendar server appear on the Psion device as Home tel. Only 2 telephone numbers with the label Home tel can be mapped to the calendar server. Additional Home tel numbers in the Psion device may cause errors and prevent normal synchronization.
Fax 2	**Home Fax	Fax 2 entries on the calendar server appear on the Psion device as Home Fax.
Home Address	Home Address	Home Address entries are treated normally.
Company	Company	Company entries are treated normally.
*Department	()	Department entries can be mapped to the Psion device. Two-way synchronization of the Department field is not supported.
*Industry Type	()	Industry Type entries can be mapped to the Psion device. Two-way synchronization of the Industry Type field is not supported.
Title	Job Title	Title entries on the calendar server appear on the Psion device as Job Title.
Mobile 2	**Work Mobile	Mobile 2 entries on the calendar server appear on the Psion device as Work Mobile.
Business 1	**Work tel	Business 1 entries on the calendar server appear on the Psion device as Work tel.
Business 2	**Work tel	Business 2 entries on the calendar server appear on the Psion device as Work tel.
Fax 1	**Work Fax	Fax 1 entries on the calendar server appear on the Psion device as Work Fax.
Pager	**Work Pager	Pager entries on the calendar server appear on the Psion device as Work Pager.
E-Mail 1	**Work email	E-mail 1 entries on the calendar server appear on the Psion device as Work email.

Calendar server	Psion 5mx, Revo	Notes
E-mail 2	**Work email	E-mail 2 entries on the calendar server appear on the Psion device as Work email.
Web Page 1	Web Page	Web Page 1 entries on the calendar server appear on the Psion device as Web Page.
Work Address	Work Address	Work Address entries are treated normally.
Birthday	Birthday	Birthday entries are treated normally.
Notes	Notes	Notes entries are treated normally.

Calendar server	Psion 5, Sienna and all Series 3	Notes
First Name	First Name	First Name entries are treated normally.
Last Name	Last Name	Last Name entries are treated normally.
Home 1	**Home tel	Home 1 entries on the calendar server appear on the Psion device as Home tel.
Home Address	Home Address	Home Address entries are treated normally.
Business 1	**Work tel	Business 1 entries on the calendar server appear on the Psion device as Work tel.
Fax 1	**Work Fax	Fax 1 entries on the calendar server appear on the Psion device as Work Fax.
Work Address	Work Address	Work Address entries are treated normally.
E-mail 1	E-mail	E-mail 1 entries on the calendar server appear on the Psion device as E-Mail.
Mobile 1	**Mobile	Mobile 1 entries on the calendar server appear on the Psion device as Mobile.
Company	Company	Company entries are treated normally.
Department	Dept	Department entries on the calendar server appear on the Psion device as Dept.
Title	Job Title	Title entries on the calendar server appear on the Psion device as Job Title.
Notes	Notes	Notes entries are treated normally.
Pager	**Pager	Pager entries are treated normally.

Calendar server	Psion 5, Sienna and all Series 3	Notes
Business 2	**Work tel (2)	Business 2 entries on the calendar server appear on the Psion device as Work tel (2).
Fax 2	**Home Fax	Fax 2 entries on the calendar server appear on the Psion device as Home Fax.
Email 2	E-Mail (2)	Email 2 entries on the calendar server appear on the Psion device as E-Mail (2).
Assistant (Name)	Assistant	Assistant (Name) entries on the calendar server appear on the Psion device as Assistant.
Office	Location	Office entries on the calendar server appear on the Psion device as Location.
Spouse	Spouse	Notes entries are treated normally.
User 1	**Custom (1)	User 1 entries on the calendar server appear on the Psion device as Custom (1).
User 2	**Custom (2)	User 2 entries on the calendar server appear on the Psion device as Custom (2).



# B

## Netscape Address Books

This section describes the steps necessary to synchronize your Psion contacts with a Netscape Address Book. If you did not install the plug-in when prompted during installation, please do so before beginning a synchronization task.

### System Requirements:

Hand-held:

- Psion Series 3, 5, 5mx, Revo or Sienna

Desktop System Requirements:

- PC running Windows 95/98 (16 MB RAM) or Windows NT 4.0 (24 MB RAM)
- Intel Pentium or compatible processor
- 3 MB Hard Disk Space (5 MB recommended) and 200 KB for each sync task
- PsiWin 2.2 or 2.3 installed
- Netscape Communicator 4.0 or greater

### Synchronizing for the first time

1. Make sure your device is connected and turned on.
2. Click the Psion Synchronizer on your desktop.
3. If the Psion Synchronizer Wizard does not automatically appear, click the New button to launch it.
4. Select "CorporateSync, Netscape Address Book" from the PC Scheduler list.
5. Choose a contact file on your Psion device. A default is provided.

6. Configure your user profile. Netscape Communicator launches and asks you to select a user profile on your machine. Choose one and click OK.
7. Enter the name of the Address Book you wish to synchronize.
8. Press Next to access the Psion To PC page.
9. Choose which Address Book Entry data fields to map to your Psion contact data fields. If your Psion contact file does not already exist, you cannot configure field mapping. However, if you attempt to synchronize anyway, the contact file is created with some default fields before synchronization; you will then be given the option to configure your field mapping.
10. Access the Information page for copyright information on the product.
11. If you wish to synch now, click Synchronize Now. If you wish to save your settings without synching, click Finish.

## Field Mapping

Converting a Netscape address book field into a Psion (5mx, Revo), or Psion (5 and lower) address book field.

\* To ensure the normal synchronization of telephone numbers from the Psion address book to the calendar server, the numbers should be entered in the following format. Entering country codes, area codes, “#”, and extension numbers are optional.

<b>Correct Format for Entering Telephone Numbers in Psion Address Fields</b>		
1 800 234-5678 #001	1 800 234 5678 #001	1 (800) 234-5678 #001
1 (800) 234 5678 #001	1-(800)-234-5678 #001	1-(800)-234 5678 #001
234-5678	234 5678	234 5678 #001
514 234-5678	(514) 234-5678	(514)-234 5678 #001

Netscape	Psion 5mx, Revo	Notes
First Name	First Name	First Name entries are treated normally.
Last Name	Last Name	Last Name entries are treated normally.
Home	Home tel	Home entries on the calendar server appear on the Psion device as Home tel.

Netscape	Psion 5mx, Revo	Notes
Organization	Company	Organization entries on the calendar server appear on the Psion device as Company
Title	Job Title	Title entries on the calendar server appear on the Psion device as Job Title.
Cellular	Work Mobile	Cellular entries on the calendar server appear on the Psion device as Work Mobile.
Work	Work tel	Work entries on the calendar server appear on the Psion device as Work tel.
Fax	Work Fax	Fax entries on the calendar server appear on the Psion device as Work Fax.
Pager	Work Pager	Pager entries on the calendar server appear on the Psion device as Work Pager.
E-mail	Work email	E-mail entries on the calendar server appear on the Psion device as Work email.
Address	Work Address	Address entries on the calendar server appear on the Psion device as Web Address.
Display Name	Last Name	Display Name entries on the calendar server appear on the Psion device as Last Name.
Notes	Notes	Notes entries are treated normally.

Netscape	Psion 5, Sienna and all Series 3	Notes
First Name	First Name	First Name entries are treated normally.
Last Name	Last Name	Last Name entries are treated normally.
Home	Home tel	Home entries on the calendar server appear on the Psion device as Home tel.
Work	Work tel	Work entries on the calendar server appear on the Psion device as Work tel.
Fax	Work Fax	Fax entries on the calendar server appear on the Psion device as Work Fax.
Address	Work Address	Address entries on the calendar server appear on the Psion device as Work Address.

Netscape	Psion 5, Sienna and all Series 3	Notes
E-mail	Work email	E-Mail entries on the calendar server appear on the Psion device as Work email.
Cellular	Work Mobile	Cellular entries on the calendar server appear on the Psion device as Work Mobile.
Organization	Company	Organization entries on the calendar server appear on the Psion device as Company.
Title	Job Title	Title entries on the calendar server appear on the Psion device as Job Title.
Notes	Notes	Notes entries are treated normally.
Pager	Work Pager	Pager entries on the calendar server appear on the Psion device as Work Pager.
Display Name	Display Name	Display Name entries are treated normally.
Nickname	Nickname	Nickname entries are treated normally.

## Limitations

- Netscape Communicator 4.5 may not properly recognize the Psion Address field.
- The Psion Display Name field may not transfer correctly.
- Psion Department, Notes and Details fields are currently unsupported.