



PSI Win

GETTING STARTED GUIDE

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INTRODUCTION

ABOUT THIS GUIDE

This guide gives you a quick introduction to PsiWin, and helps you to start using the program straight away. The guide shows you how to:

- ◆ connect your Psion to your PC.
- ◆ look at and copy files between your Psion and PC.
- ◆ make your first backup.
- ◆ find help on a particular subject.

PsiWin can be used for many more tasks, such as printing, archiving, installing programs on your Psion and synchronizing your Psion with a PC scheduler. The PsiWin on-line Help explains how to use all of the program's features. See later in this guide for tips on using the help system to quickly find the information you need.

► **NOTE:** This guide is available on the PsiWin CD ROM as an **Adobe Acrobat (PDF)** document which can be viewed using the supplied **Acrobat Reader** software. You can print this guide from **Acrobat Reader** by selecting **File** ⇒ **Print** from the Menubar.



INSTALLING PSIWIN

Insert the PsiWin CD ROM into your PC's CD ROM drive to start the Installation Wizard. Follow the instructions in the Installation Wizard to install PsiWin or additional programs from the CD ROM.

Run the PsiWin setup file if you need to start the Installation Wizard manually, e.g. if you wish to install PsiWin from a networked CD ROM drive. To do this, select the **Run** option from the **Start** menu. Select **Browse** to enter the path to the file **Setup.exe** on the PsiWin CD ROM.

► **NOTE:** If you can't install PsiWin from the CD ROM, visit our web site at **www.pSION.com** for more information, or contact your nearest Psion distributor from the included list.



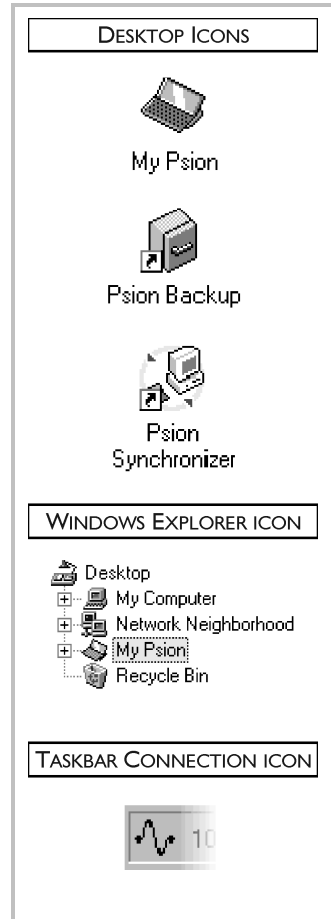
WHERE CAN I FIND PSIWIN?

FINDING PSIWIN

PsiWin installs a number of menu items, shortcuts and icons in your Windows environment.

- ◆ You can access all of PsiWin's features as well as the on-line Help and this user guide from the **Start** menu, by selecting **Start ⇒ Programs ⇒ PsiWin 2.x**.
- ◆ The **My Psion** icon on your Desktop is similar to the **My Computer** icon. Double-click on **My Psion** to display the files on your Psion. Right-click on the **My Psion** icon to display a menu of PsiWin options.
 - ▶ **TIP:** You can change various PsiWin settings by right-clicking on **My Psion** and selecting **Properties**.
 - ▶ **NOTE:** The **My Psion** icon is also displayed in **Windows Explorer** with **My Computer**.
- ◆ The **Psion Backup** icon on your Desktop is used to back up files on your Psion to your PC. See the section on backing up your Psion later in this guide.
- ◆ The **Psion Synchronizer** icon on your Desktop is used to synchronize your Psion with PC schedulers such as Microsoft Outlook or Lotus Organizer.
- ◆ The **Connection icon** placed on the Taskbar (next to the clock) shows when your Psion is connected to the PC. You can right-click on the **Connection icon** to display a menu of PsiWin options.

There is often more than one way to access a particular feature in PsiWin, e.g. via the **My Psion** icon, the MenuBar, or by right-clicking on an icon or file. This guide describes only the most straightforward methods of using PsiWin to help you get started. See the on-line Help for more information about other ways of using PsiWin, and setting up PsiWin to suit the way you work.

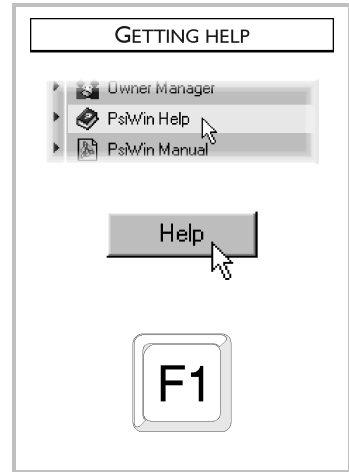


WHERE CAN I FIND MORE HELP?

PsiWin includes comprehensive on-line Help which describes all of the application's features and functionality. Please consult the on-line Help for further information or guidance on using PsiWin.

You can display the help topics by:



- ◆ Selecting **Start** ⇒ **Programs** ⇒ **PsiWin 2.x** ⇒ **PsiWin Help**.
- ◆ Selecting the **My Psion** icon in Explorer and pressing the **F1** key.
- ◆ Double-clicking on **My Psion** and selecting **Help** ⇒ **Help Topics** from the Menubar.




TIP: You can display help for a particular task or dialog by pressing the **F1** key or clicking on the **Help** button.

TIPS ON USING PSIWIN HELP

From the **Help Topics** window, you can find the information you require as follows:

- ◆ From the **Contents** page you can select a topic from a structured list, e.g. how to perform a particular task, or troubleshooting information about how to solve a problem. To find the topic you want, double-click on the topic folders [] to find the general area of interest, and then choose the topic [] you want to display.
- ◆ From the **Index** page you can find the topic you want by entering any word linked to the subject, such as 'backup' to find topics containing information about how to back up your Psion.
- ◆ From the **Find** page you can search for an exact word or phrase contained within a topic, such as 'serial port' to find all the topics in the on-line Help containing this phrase.

► **TIP:** To provide further assistance, help topics may also include a **Related Topics** button [] providing links to other help topics covering similar subjects.

CONNECTING THE CABLE

As your Psion can communicate with various devices, you need to make sure that the communications link setting on your Psion is set correctly to communicate with your PC using PsiWin.

- ◆ Move to the System screen. Select the option to set the communications link (or **Remote link**), and select the serial cable setting. This varies between different types of Psion, so refer to your user manual if you need further information.

The cable is used by your Psion and PC to communicate. To connect the cable:

1. Locate the **COM** port (or **serial** port) on your PC, usually found at the rear of your computer. Insert the larger connector on the cable into the port on your PC.
2. Locate the serial port on your Psion and insert the smaller connector into the port.

► **NOTE:** If you have difficulty connecting the cable to your Psion, you may be attempting to insert the connector upside down. You should not have to apply force when inserting the connector into the port on your Psion.

► **FURTHER HELP:** See the on-line Help for more details on how to connect your PC and Psion, and troubleshooting information to help you solve any problems.

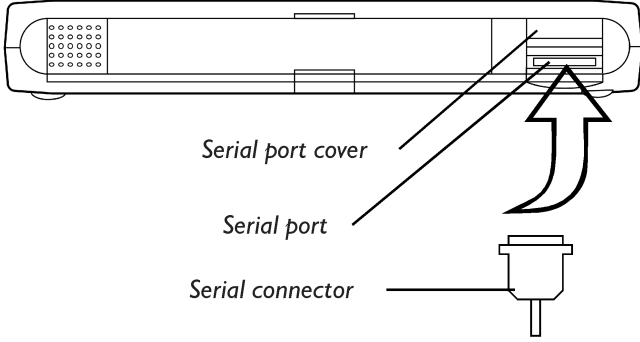
SELECTING A COM PORT

PsiWin will search all your PC's COM (or serial) ports to detect your Psion. When using peripherals such as modems (including internal modems) which use other COM ports on your PC, it is a good idea to set up PsiWin so that it does not search these ports. To do this:

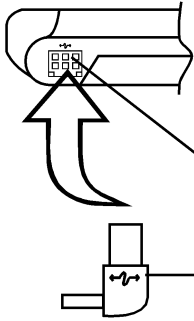
1. Right-click on **My Psion** and select **Properties** from the menu.
2. Move to the **Connections** screen on the **My Psion Properties** dialog.
3. In the **Settings** list, uncheck any boxes for COM ports used by other devices. Make sure that you check the boxes for any ports you might use to connect a Psion.

► **FURTHER HELP:** See the on-line Help for more information on selecting which COM port to use.

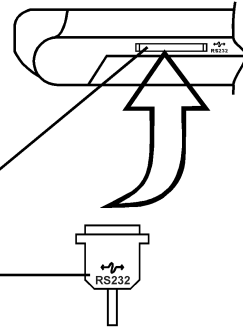
SERIES 5



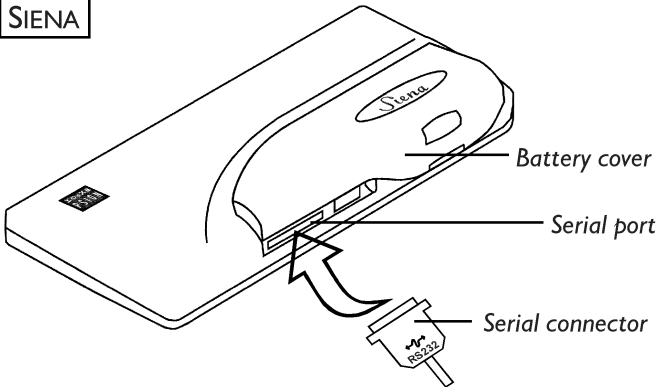
SERIES 3a



SERIES 3c / 3mx



SIENA



CONNECTING WITH PsiWIN

When you have connected the cable, PsiWin will automatically establish a connection between your PC and Psion. You can tell if your Psion is connected by glancing at the **Connection icon** on the Taskbar (next to the clock).



Your PC is connected to the Psion. When a connection is made, the icon will appear as a curved line, which changes to a 'moving' curved line when the PC and Psion are communicating.



Your PC has not detected the Psion. This icon is displayed if the Psion is not connected, has been switched off, or if you have selected the **Disconnect** option from the **My Psion** or **Connection icon** menus.

► **FURTHER HELP:** See the on-line Help for more information on how to connect and disconnect a Psion.

CONNECTING FOR THE FIRST TIME

When you connect to your PC for the first time, you will be asked to enter a name to identify your Psion.

1. A dialog will appear saying that a new Psion has been detected. Select the option to add a name for your Psion and then select **OK**.
2. Enter a name for your Psion and select **OK**.

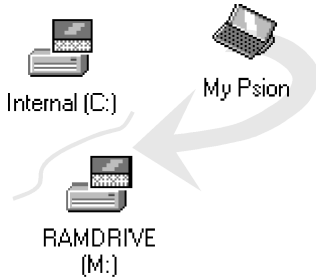
► **IMPORTANT:** You must choose a different name for each Psion you connect to your PC. PsiWin uses the name you enter to identify information and backup files specific to each Psion.

► **NOTE:** For Psion Series 3mx/3c/3a and Siena computers, PsiWin recognises the computer which has been connected by checking the **owner information** you have entered on the Psion. If you connect more than one Series 3mx/3c/3a or Siena to your PC, make sure that each Psion contains different owner information.

► **FURTHER HELP:** See the on-line Help for more information about connecting to your PC when using more than one Psion.

LOOKING AT FILES ON YOUR PSION

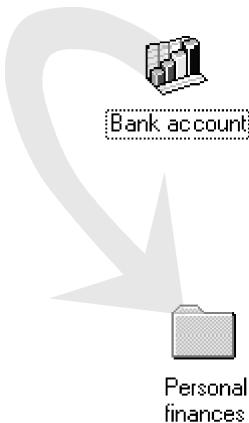
Using **My Psion** and **Windows Explorer**, you can open, move, copy and delete files stored on your Psion from your PC.



- ◆ Double-click on the **My Psion** icon on your Desktop. The **My Psion** window opens, displaying icons for your Psion's internal drive(s) and other PsiWin features and settings.
- ◆ Double-click on a drive icon to display the files and folders on the drive.

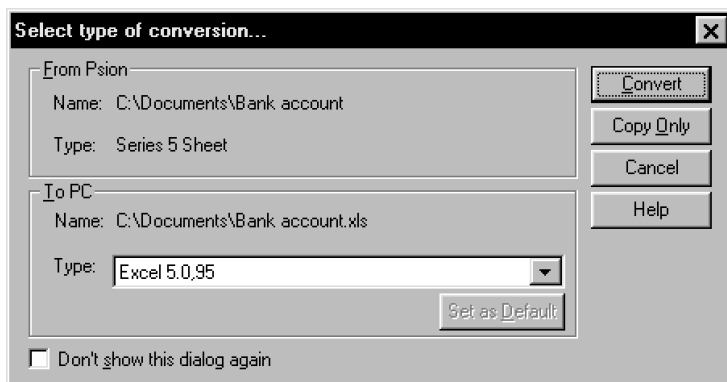
HOW TO COPY A FILE

Using **Windows Explorer**, you can copy files between your PC and Psion in the same way you would copy files to a floppy disk, or another PC on a network. PsiWin can convert files as they are copied so that you can open them on the other computer straight away.



1. Select **Programs** ⇒ **Windows Explorer** from the **Start** menu to open **Windows Explorer**.
2. Double-click on **My Psion** to display your Psion's internal drive(s). Double-click on a drive icon to display its contents, then browse for the file you wish to copy.
3. Click on the file you wish to copy and select **Edit** ⇒ **Copy** from the Menubar.
4. Open the folder on your PC where you wish to copy the file and select **Edit** ⇒ **Paste** from the Menubar.
▶ **TIP:** You can also copy the file by clicking on the file icon and dragging it to the folder on your PC.

- As PsiWin copies the file, a dialog box appears in which you can select the type of file you wish to use on the other computer.



- The dialog suggests a suitable file type for the converted file, e.g. **Excel 5.0/95** for a Psion **Sheet** file, or **Word 6.0/95** for a Psion **Word** file. Select an alternative type if you use a different file type on your PC.
- Select the **Convert** button to copy the file from your Psion to the PC and automatically convert it into the chosen file type.
 - **TIP:** You can select the **Help** button for more detailed help on the features of this dialog box.

You can use **Windows Explorer** to manage files and folders stored on your Psion in the same way as you can on your PC's drives.

► **WARNING:** When you delete a file on your Psion from your PC it is permanently removed from the Psion's drive. The file cannot be retrieved from the Windows Recycle Bin, which only stores files deleted from your PC's drives.

► **FURTHER HELP:** See the on-line Help for more information on how to manage files, folders and disks.

OPENING PSION FILES FROM YOUR PC

You can open a file on your Psion using a PC application without first having to copy it to your PC drive. You can edit the file on your PC and then save it back to your Psion when you have finished.

1. To open a file from **Windows Explorer**, double-click on the file icon or press **Enter**. A dialog box appears in which you can select the type of file you wish to use on your PC.
2. Select the file type suitable for the application you will use to edit the file on your PC.
3. Click on the **Convert** button to copy the file and convert it to the chosen PC file type. PsiWin opens the converted file using the PC application associated with the file type, e.g. **Paint** for a **Bitmap Image (*.bmp)** file, or **Notepad** for a **Text (*.txt)** file.

When you save the file within the PC application, PsiWin saves the edited file back to your Psion. A dialog box appears which allows you to select the file type for the edited file. Select the appropriate file type for your Psion, and then select **Convert** to copy the file back to your Psion. PsiWin makes a backup copy of the original file which is renamed with a **'.bak'** suffix, e.g. a file named **'Document'** is backed up as **'Document.bak'**.

► **TIP:** Don't delete the backup version of the file from your Psion until you are sure you want to use the edited version instead.

► **FURTHER HELP:** See the on-line Help for more information on how to open Psion files on your PC.

PERFORMING YOUR FIRST BACKUP

You can use PsiWin to back up all the files stored on your Psion to your PC. Keeping backups of your Psion files on your PC means that you have a separate copy of all your work which can be restored to your Psion. For example, you can restore backed up files to your Psion if you accidentally delete a file, wish to revert back to an older version of a file, or need to restore files if you forget to change the batteries.

To make a backup:

1. Double-click on the **Psion Backup** icon on the Desktop.
2. In the **Psion Backup** dialog, select the drive(s) on your Psion you wish to back up.
3. Click **Back Up** to start backing up the files on your Psion. PsiWin displays a progress window showing how long the backup will take and will inform you when it has completed.

► **FURTHER HELP:** See the on-line Help for more information on how to back up and restore your Psion files.

SCHEDULING REGULAR BACKUPS

You can set PsiWin to make automatic backups at regular intervals so you do not need to remember to back up your Psion. It is a good idea to schedule automatic backups because it means you will always have up to date copies of your Psion's files. To do this:

1. Right-click on **My Psion** and select **Properties**.
2. Move to the **Backup** tab.
3. Click on **Perform automatic backup** and select how often you wish to backup your Psion.

► **FURTHER HELP:** See the on-line Help for more information on how to schedule regular automatic backups.

WHAT IS SYNCHRONIZATION?

You can use synchronization to manage information which you wish to keep up to date on both your PC and Psion, such as agenda appointments or an address book. When you synchronize, PsiWin checks the information in your PC scheduler with the matching Agenda or Data file on your Psion, and then updates the files on both your PC and Psion to include the new information. Some examples of synchronization are:

- ◆ if you add a new appointment in your Psion Agenda, the date, time and notes for the entry will be copied to your PC scheduler.
- ◆ if you change a phone number in your PC scheduler, it will be amended in your Psion's address book.
- ◆ if you enter overlapping appointments in your PC and Psion agendas, PsiWin will warn you of the conflict.

Many people will just use one synchronization task to keep their Psion information in step with their PC information. Synchronization tasks can be used in a number of other ways, for example:

- ◆ You and other colleagues could synchronize their work Agendas with the same master scheduler on a networked PC.
- ◆ 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.

► **FURTHER HELP:** See the on-line Help for more information on how to synchronize your Psion with a PC scheduler.