PSION

Produced by
Psion Computers PLC

Troubleshooting PsiWin 2.3 Synchronization Problems

This document discusses various problems that may be encountered when synchronizing Psion Agenda and Data files or the Contacts program (Series 5mx and netBook only) with Microsoft Outlook 97/98, Microsoft Schedule+ 7.0/7.0a/7.5 or Lotus Organizer 2.1/97/97GS. Some familiarity with these applications, Windows 95/98/NT 4.0 and your Psion is assumed. You will also need a full installation of your PC PIM.

This document should be used in conjunction with the appropriate guide to setting up a synchronization.

## Setting up your synchronization correctly

The majority of synchronization problems are caused by an incorrect synchronization set up. Please make sure you have read the appropriate **Synchronizing your Psion with…** support document first. These explain the correct way to set up a synchronization.

General things to try if you experience synchronization problems

By far the most common cause of a synchronization failing, apart from the wrong files being chosen in the set up, is corruption or spurious entries in one of the files. To test whether this is the case, synchronize a new Psion Agenda and/or Data file with a new Outlook profile, Schedule+ file or Organizer file. If this synchronization works then the problem is with one of the original files. A process of elimination, by synchronizing one file at a time with blank files, should highlight which file is at fault. If the synchronization with new files does not work, look through the list of common problems later in this document to see if the particular problem is listed. If not, it is likely that either PsiWin or your PC PIM is not installed properly (for example, with Outlook 98 you will need a full installation for synchronization to work). See the **Uninstalling and Installing PsiWin 2.x** support document or contact the supplier or manufacturer of your PC PIM.

1. The first thing to try is to delete your Machine details. When PsiWin 2.3 connects to a machine for the first time it asks you to enter a name for that machine. This will register details about your Psion on your PC. Sometimes this information can become corrupt.
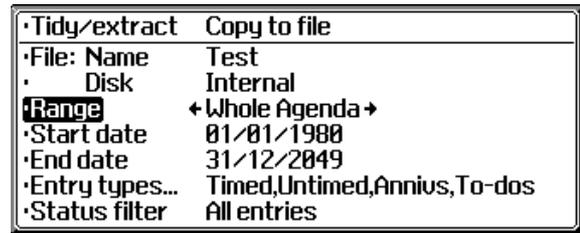
   To delete this information, click the **Start** button and select **Programs**, then **PsiWin 2.3**, and then **Machine Manager**. This will present you with a list of current registered machines. Highlight your machine and click **Delete This Owner**, or just click the **Remove details of selected machine** button. The next time you connect your Psion you will be asked to give it a name. At this point you should type in something different from the machine name you have just deleted.
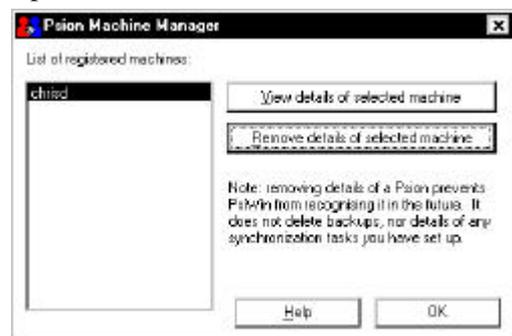
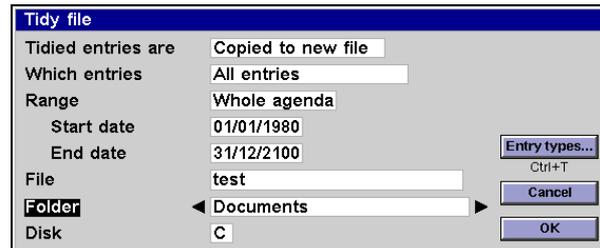   After doing this you should make a new backup and recreate any synchronizations.

2. If this doesn't solve the problem, you should try a Tidy/extract (Series 3 range) or a Tidy/archive (Series 5 range and netBook) operation on your Agenda file or a Merging in operation on your Data file.

To perform a Tidy/extract operation on your Series 3 range Agenda, open the file and press **Psion** + **T**. Change the **Tidy/extract** line to **Copy to file**, enter a file name (in this example, **Test**) and the disk to create this file on. Then, select **Whole Agenda** on the **Range** line, and **All entries** on the **Status filter** line.

```
·Tidy/extract   Copy to file
·File: Name      Test
·        Disk    Internal
·Range           ←Whole Agenda→
·Start date       01/01/1980
·End date         31/12/2049
·Entry types...   Timed,Untimed,Annivs,To-dos
·Status filter    All entries
```

Then press **Enter**. This will extract all the information from your Agenda into a new file (in this example, **Test**). Note that this is *not* the same as copying the file.

To perform a Tidy/archive operation on your Series 5 range or netBook Agenda, open the file, and select **More**, then **Tidy/archive** from the **File** menu. Change the **Tidied entries are** line to **Copied to new file**. Select **All entries** on the **Which entries** line and change the **Range** line to **Whole agenda**.

```
Tidy file
Tidied entries are    Copied to new file
Which entries          All entries
Range                  Whole agenda
    Start date         01/01/1980
    End date           31/12/2100      Entry types...
File                   test                Ctrl+T
Folder               ◄ Documents ►      Cancel
Disk                   C                  OK
```
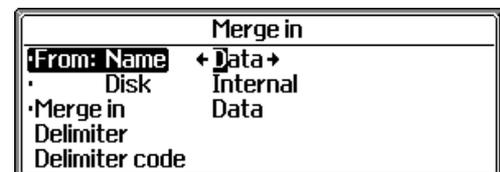
Enter a file name (in this example, **Test**) and select a folder and disk to create the file in. Then tap the **OK** button or press **Enter**. This will extract all the information from your Agenda into a new file (in this example, **Test**). Note that this is *not* the same as copying the file.

To perform a Merge in operation on your Series 3 range Data file, open the file and press **Psion** + **N**. Enter a name for the new file (in this example, **Test**) and press **Enter**. This will automatically launch the new file.

```
        Create new file
·File: Name    Test|
·        Disk    Internal
```

In this new file, press **Psion** + **M**. In the **Merge in** dialog change the **Disk** line to the disk on which your original Data file is kept, and select the filename on the **From: Name** line. Change the **Merge in** line to **Data**. Then press **Enter**.

```
                Merge in
·From: Name    ← Data →
·        Disk    Internal
·Merge in        Data
Delimiter
Delimiter code
```

To perform a Merge in operation on your Series 5 range or netBook Data file, open the file and press **Ctrl** + **N**. Enter a name for the new file (in this example, **Test**), select the folder to create it in and press **Enter**. This will automatically launch the new file.

```
New file
Name      test
Folder    Documents
Disk      C
       Browse...   Cancel   OK
          Ctrl+B
```
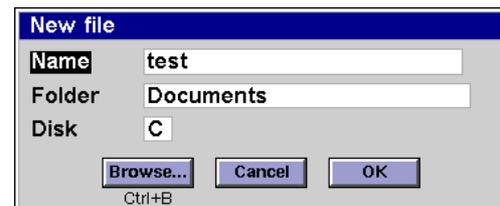
In this new file, press **Shift** + **Ctrl** + **I**. In the **Merge in** dialog, change the **Disk** and **Folder** lines to the disk and folder on which your original Data file is kept, and select the filename on the **Name** line. Then press **Enter**.

```
Merge in
Merge in  ◄ Entries        ►
File        Chris
Folder      Documents
Disk        C
          Cancel   OK
```

3. Once these steps have been performed, set up a new synchronization or synchronizations to use the newly created files.

4. If you still have no success, the next step is to export your PC PIM's file or folders as text and re-import them into a new file or new folders. See the relevant section below for information on how to do this with Microsoft Outlook, Schedule+ 7.x and Lotus Organizer.

Outlook

i. Create a new folder to receive the information that you are about to export. To do this:
    In Outlook, select **New**, then **Folder** from the **File** menu. Type in a name for this folder (in this example, **Test**), select which type of information this folder is going to contain (this should be the same as the folder you are exporting, in this example, **Appointment Items**) and select the top level folder in the list of folders (in this example, **Personal Folders**). Then click the **OK** button.
    The new folder will appear in the folder view in Outlook (if you have this showing).

ii. Next, select **Import and Export** from the **File** menu.

iii. Select **Export to a file** and click the **Next** button.

iv. Select the folder you wish to export (in this case **Calendar**). And click the **Next** button.

v. Select **Comma Separated Values (Windows)** and click the **Next** button.

vi. Type in a name for the export file (in this example, **Calendar.txt**) and click the **Next** button. Then click the **Finish** button.

vii. To import the file into a new folder, again select **Import and Export** from the **File** menu.

viii. Select **Import from Schedule+ or another program or file** and click the **Next** button.

ix. Select **Comma Separated Values (Windows)** and click the **Next** button.

x. Type in the name you gave the export file (in this example, **Calendar.txt**) and click the **Next** button.

xi. Select the folder that you created earlier (in this example, **Test**) and click the **Next** button. Then click the **Finish** button.

xii. Set up a synchronization to use the new folder.

    It may also be necessary to set up a new Outlook profile and import the data into this. See the relevant section later in this document for information about creating a new Outlook profile.
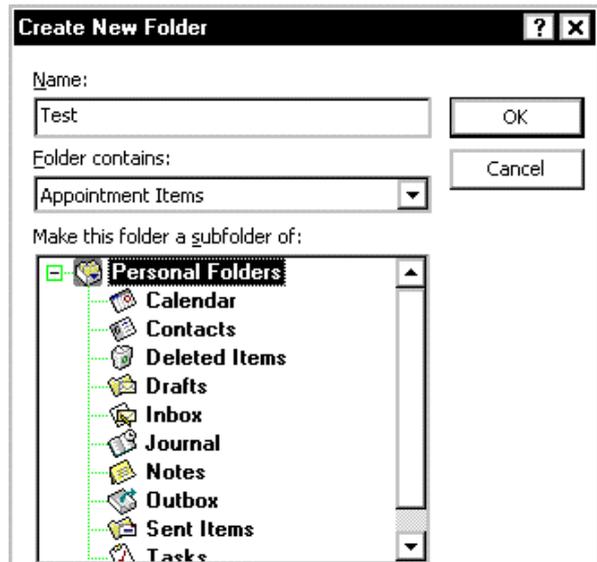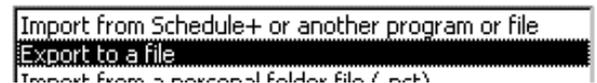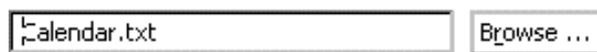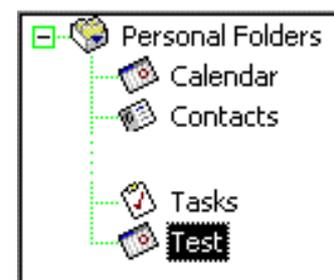

Schedule+ 7.x

i. Create a new Schedule+ file. To do this:
Select **New** from the **File** menu. Then type in a name for the new file, for
example, **Test**, then click the **Save** button.

ii. To export your data to a text file, open the original Schedule+ file, and
select **Export**, then **Text** from the **File** menu.

iii. Select the type of items you wish to export (in this example,
Appointments) and click the **Next** button.

iv. Select the date range you wish to export and click the **Next**
button.

v. In the next two dialogs accept the defaults by clicking the **Next**
button twice.

vi. Click the **Add All** button to export all the
fields and then click the **Next** button.

vii. Type in a name for the export file, or
accept the default, and click the **Finish**
button.

viii. To import, first open the new Schedule
file you created earlier by selecting **Open**,
then **Archive or Project Schedule** from
the **File** menu.

ix. In this file, select **Import**, then **Text** from the **File** menu.

x. Type in the path and name of the export file. If you accepted the default when exporting, this
will already be entered. Then click the **Next** button.

xi. Accept the defaults in the next two dialogs
by clicking the **Next** button twice.

xii. Select the type of data in the export file (in
this example, **Appointments) and** then
click the **Next** button.

xiii. On the final screen, you need to map the
fields between the two Schedule+ files.
Opposite each field, to its right it will say
IGNORE THIS FIELD. Click on this and
a down arrow ⏷ will appear. Click on this
and a list of field types will appear. Select
the type that corresponds to the field on the
left. Do this for all the fields and click the
Finish button.

xiv. Set up a new synchronization to use the new Schedule file.


Organizer

i.   Create a new section to receive the
     information that you are about to export.
     To do this:
     In Organizer, select **Customize** from the
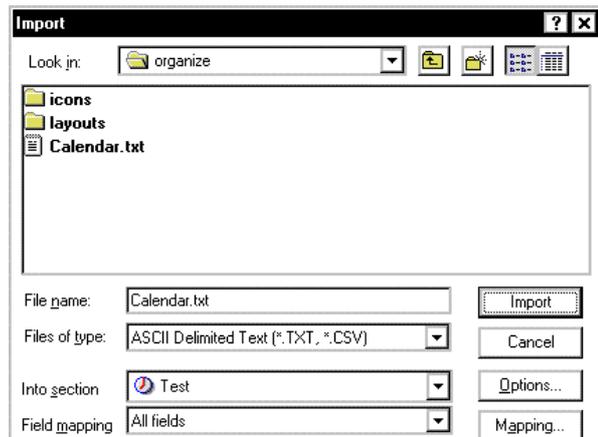   **Section** menu.

ii. Click the **Add** button.
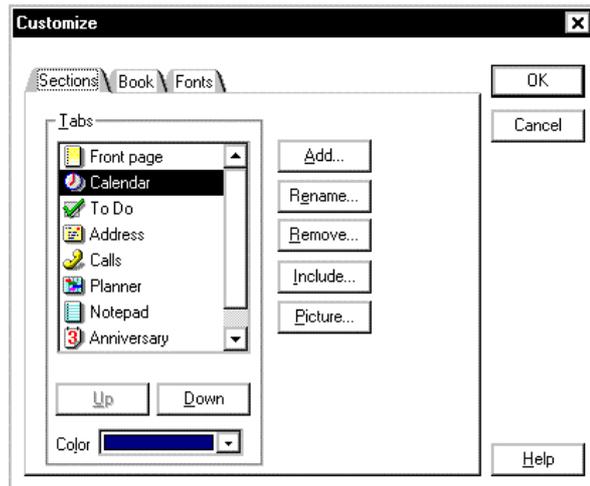
iii. On the **Section type** line, select the type of section you
     would like to add (in this example, **Calendar**) and type in
     the name you wish to use for this section (in this example,
     Test). Then click the **OK** button.
     The new section will appear as a tab in the main view in
     Organizer.
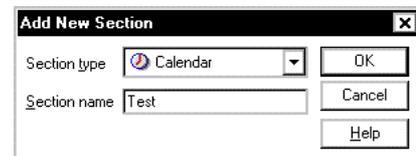
iv. To export a section, select **Export** from
     the **File** menu. On the **From section** line,
     select the section that you wish to export
     (in this example, **Calendar**), select **ASCII
     Delimited Text** on the **Files of type** line
     and type in a file name (in this example,
     Calendar.txt). Then click the **Export**
     button.
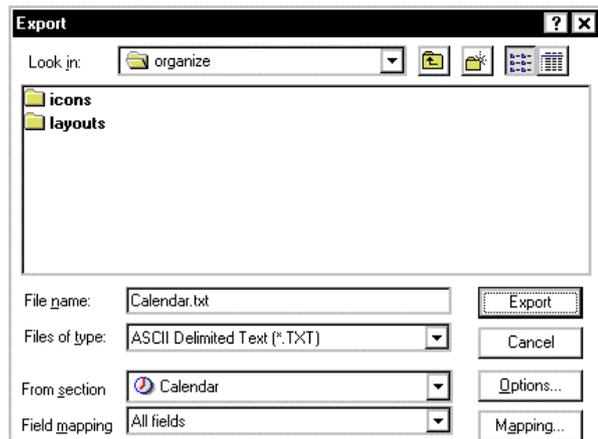
v.   To import the information, select **Import**
     from the **File** menu. On the **Into section**
     line, select the section you created earlier,
     select **ASCII Delimited Text** on the **Files
     of type** line, and select the file you
     exported to earlier (in this example,
     Calendar.txt). Then click the **Import**
     button.

vi. Set up a new synchronization to use the
     new section.

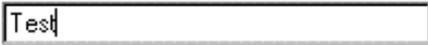   It may also be necessary to import the
     data into a new Organizer file.

     To create a new Organizer file, select **New** from the **File** menu, type in a name for the file and
     then click the **OK** button.

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5. Check your PC PIM for spurious entries. These include:

- Repeating entries with only one occurrence.
- Alarmed entries with a reminder set for before 1980.
- Entries with a carriage return at the end of the subject line.
- In Outlook, entries with a 'crossed swords' symbol. Double-click on the symbol to resolve the problem.

Creating a new Outlook Profile

This should only be attempted if you have a non-networked copy of Outlook. If you use Outlook on a network that is running Exchange, you should contact your Network Administrator.

To create a new Outlook profile:

i. Click the **Start** button, select **Settings**, then **Control Panel**. Double-click the **Mail and Fax** icon (**Mail** icon if you have Outlook 98).

ii. In the **Properties** dialog, click the **Show profiles** button. This will show a list of all the Outlook profiles on the PC. Then click the **Add** button.

iii. Select **Manually configure information services** and click the **Next** button.

iv. Type in a profile name (in this example, **Test**) and click the **Next** button.

v. In the **Properties** dialog click the **Add** button to add an information service to the new profile.

vi. Highlight **Personal Folders** and click the **OK** button.
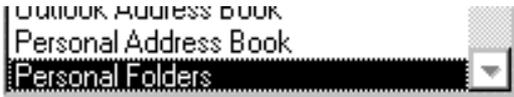
vii. Type in a name for the Outlook file (in this example, **Test.pst**) and click the **Open** button.

viii. Select **No encryption** and click the **OK** button.

ix. Click the **OK** button again and then the **Finish** button. Click the **Close** button to exit the Wizard.

x. Open Outlook, and select **Options** from the **Tools** menu. On the **General** page, select **Prompt for a profile to be used** and click the **OK** button.
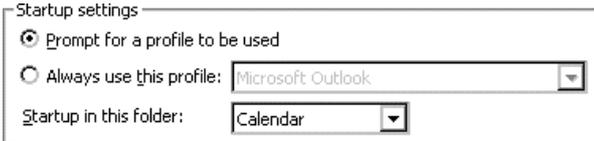
The next time you start Outlook you will be asked which profile you wish to use.

Other problems

This section describes solutions to other problems that can occur with a synchronization.

Microsoft Outlook: Failed to open Outlook

This error message can appear just after the start of the synchronization process. There can be two reasons for this message appearing.
The first is that your Outlook profile has been incorrectly entered.
To check this, first make sure you have your profile name.
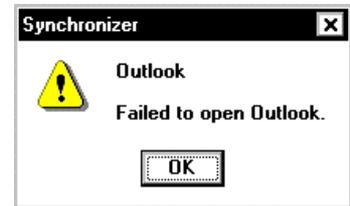
You can find this in Outlook by selecting **Options** from the **Tools** menu. On the **General** page, if **Always use this profile** is selected your profile name will be in the text box next to it. If **Prompt for a profile to be used** is selected, your profile name is the one you select when you start up Outlook. Follow the **Synchronizing your Psion with Microsoft Outlook** support document to ensure that this information has been entered correctly in the synchronization properties.

The second reason is that the path to the Outlook folder(s) you are synchronizing has been incorrectly specified. To check the path to the folder, make sure you can see the **Folder view** in Outlook. To show it, select **Folder view** from the **View** menu.
In the example shown here, if you were trying to synchronize the **Example** folder, the path would be:

   Program Files\Contacts\Example
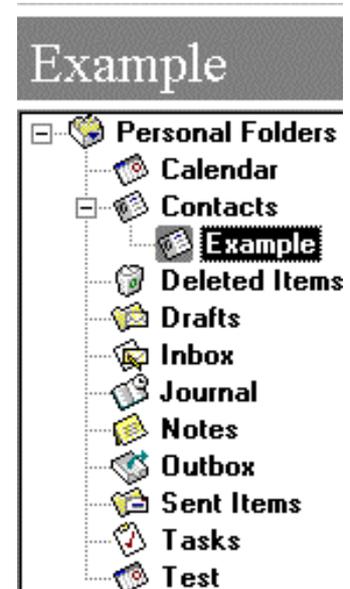
If you have a top level folder that looks like

   Mailbox – [Chris Dickins] or

   Outlook Today – [Chris Dickins]

then the path would be:

   Chris Dickins\Contacts\Example

Follow the **Synchronizing your Psion with Microsoft Outlook** support document to ensure that this information has been entered correctly in the synchronization properties.

Microsoft Outlook: Failed to open Custom form, Outlook will open an Outlook form instead

This error message is due to conflicting entries. Find the Outlook entries that have a 'crossed swords' symbol. Double-click this symbol to resolve the conflict and the problem should be solved.

Lotus Organizer 2.1: Synchronizer cannot access required directory

This is due to the incorrect version of a particular file being loaded (the Organizer API).

To find this file, click the **Start** button, select **Find,** then **Files or folders**. On the **Named:** line, type **orgapi.dll** and make sure that the **Look in:** line is set to your C drive (or whichever drive the Organizer files were installed to). Then click the **Find now** button. You should get a list of two copies of the file. Right-click on each in turn and select **Properties**. One of the files should have a **Modified** date of 7th November 1995. Right-click again on the file with this date and select **Delete**. Then confirm the deletion and restart the PC. All should now be well.
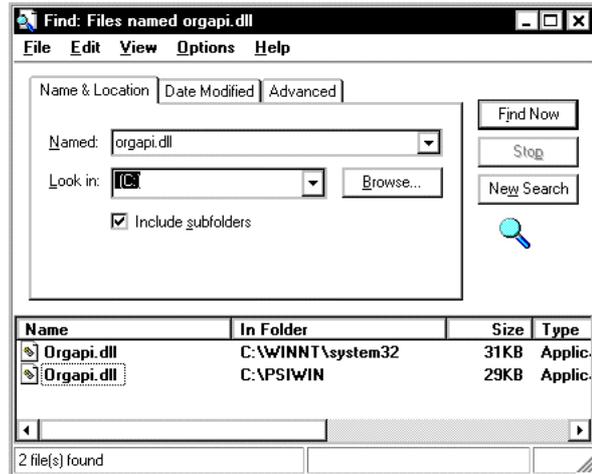
Lotus Organizer: Cannot find xxxxxxx (section name)

This error message is due to the section name being incorrectly entered in the synchronization properties. Open Organizer and check the name of the relevant section. Then enter the section name in the synchronization properties (the **Synchronizing your Psion with Lotus Organizer** support document shows you how to do this).

Lotus Organizer: Unable to open xxxxxxx (section name)

This is due to a problem in Organizer where, if you rename a section, Organizer will sometimes not recognise the change. The solution here is to rename the section back to its original name and change the synchronization properties to reflect this.

To do this, right-click on the relevant section's tab. Select **Rename**, type the original name on the **New name** line, then click the **OK** button. Follow the **Synchronizing your Psion with Lotus Organizer** support document and enter this information in the synchronization properties