



Intellisync Mobile Suite Client Guide

Windows OS Mobile Platform
Pocket PC Device

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Nokia Contact Information

Corporate Headquarters

Web Site	http://www.nokia.com
Telephone	1-888-477-4566 <i>or</i> 1-650-625-2000
Fax	1-650-691-2170
Mail Address	Nokia Inc. 313 Fairchild Drive Mountain View, California 94043-2215 USA

Regional Contact Information

Americas	Nokia Inc. 313 Fairchild Drive Mountain View, CA 94043-2215 USA	Tel: 1-877-997-9199 Outside USA and Canada: +1 512-437-7089 email: info.ipnetworking_americas@nokia.com
Europe, Middle East, and Africa	Nokia House, Summit Avenue Southwood, Farnborough Hampshire GU14 ONG UK	Tel: UK: +44 161 601 8908 Tel: France: +33 170 708 166 email: info.ipnetworking_emea@nokia.com
Asia-Pacific	438B Alexandra Road #07-00 Alexandra Technopark Singapore 119968	Tel: +65 6588 3364 email: info.ipnetworking_apac@nokia.com

Nokia Customer Support

Web Site:	https://support.nokia.com/		
Email:	tac.support@nokia.com		
Americas		Europe	
Voice:	1-888-361-5030 or 1-613-271-6721	Voice:	+44 (0) 125-286-8900
Fax:	1-613-271-8782	Fax:	+44 (0) 125-286-5666
Asia-Pacific			
Voice:	+65-67232999		
Fax:	+65-67232897		

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1 Setting Up Your Device

This chapter contains the information for installing Intellisync Mobile Suite Wireless Email on your device.

Options for installing Intellisync Mobile Suite

To install the Intellisync Mobile Suite software on your device, you have the following options for downloading the installation file to your device

- Access the installation Web site using your device and download the installation file wirelessly

Advantages

- This option is more convenient than physically connecting your phone to your computer.
- Your first synchronization session occurs wirelessly.

Disadvantages

- You may incur charges from your carrier when you send an SMS message and download the installation file.
- The download could take several minutes, during which time you will not be able to make or receive phone calls.
- You must synchronize wirelessly; you cannot initiate a synchronization session using a cradle or USB cable.

- Access the installation Web site using your PC and download the installation file through a USB cable or cradle

Advantages

- This option eliminates potential carrier charges.

Disadvantages

- Connecting your phone to your PC may not always be convenient.

Review [“Setting up ActiveSync”](#) on page 8 for pre-installation instructions, and then continue to [“Starting the installation process”](#) on page 8, which allows you to choose the installation method that best suits your needs.

Setting up ActiveSync

To install and synchronize your device using the cradle, you must have Microsoft ActiveSync 4.x or later already installed on your PC.

To configure Intellisync Settings for ActiveSync, complete the following steps:

1. Open ActiveSync on your PC.
2. From the **File** menu, choose **Connection Settings**. The Connection Settings dialog box appears.
3. From the Computer Connected list, select **Automatic**.
4. Click **OK**.

The next time you connect your device to the USB cable or cradle, these settings transfer to the device to synchronize correctly.

Starting the installation process

To start the installation process, complete the following steps:

1. Go to the URL provided by your system administrator. The Intellisync Mobile Suite Login page appears.
2. Enter your user name and password, and then click **Login**.
3. On the left navigation bar, click **Settings**. The Settings page appears.
4. Click **Add Sync Device**. The device selection page appears.
5. Select the Pocket PC option, and then click **Next**. The Install Software page appears.

To receive the installation file over the air, continue to [“Downloading the installation file wirelessly to your device”](#) on page 9. To download the installation file to your computer and install through a USB cable or cradle, see [“Downloading the installation file to a computer”](#) on page 9.

Downloading the installation file wirelessly to your device

Installing Intellisync Mobile Suite software wirelessly allows you to initiate the installation process over the air and eliminate the need for synchronization with a computer. Complete the following steps to install Intellisync Mobile Suite wirelessly.

1. Select the **Carrier and Phone Number** option.
2. Select your wireless carrier from the list.

Note

If your carrier is not listed, select the Email Address option, enter the Internet e-mail address of your mobile phone, and then click Send Message. Continue to step 4.

3. Type the phone number of your device without parentheses or dashes, and then click **Send Message**.

A Web page appears with notification that a text message was sent to your device. Verify that you received the text message on your device.

4. Open the text message on your device.
5. Select the link in the text message for the Intellisync Mobile Suite installation file.
6. Select the Install Software link. The Download dialog box appears.
7. Select the “Open file after download” check box, and then select Yes. The client download status bar appears at the top of the screen.

When the download completes, Intellisync Mobile Suite software loads to your device. After the software installation completes, your device prompts you to enter your user name and password to start your first synchronization.

Downloading the installation file to a computer

Downloading the Intellisync Mobile Suite installation file to your computer allows you to initiate the installation process by using ActiveSync. Complete the following steps to download the installation file to your computer.

1. Connect your device to your USB cable or cradle.
2. Using Intellisync Mobile Suite on the Web, select **Install to PC**. The Install Software page appears.
3. Select the Install Software link. A file download dialog box appears.
4. Select **Run** to start the download process.
5. On the Intellisync Mobile Suite Installation screen, select **Install**. The installation process begins.

ActiveSync downloads the installation files to your device. When the download completes, Intellisync Mobile Suite software loads to your device. After the software installation

completes, your device prompts you to enter your user name and password to start your first synchronization.

Completing an initial synchronization on your device

When Intellisync Mobile Suite installs on your device, a dialog box appears for you to enter your user name and password. After entering this information, a screen appears with the initial synchronization session options:

Refresh. This option replaces the data on your device with data from your company's server.

Merge. This option combines data from your company's server with the data on your device. Selecting the Merge option may cause duplicate entries.

When the synchronization session completes, Intellisync Mobile Suite main screen displays the status of the synchronized items.

Using Intellisync Mobile Suite on the Web, click **Next** on the Install Software page. The Settings page appears.

Your Pocket PC device appears in the device name list. Intellisync Mobile Suite is successfully installed on your device.

2 Using Your Synchronization Settings

This chapter provides information on how to use the synchronization settings available with Intellisync Mobile Suite.

Synchronizing your device

Intellisync Mobile Suite synchronizes your e-mail messages and PIM information on your device with your company's server. You can synchronize in two ways: wirelessly or through the cradle using ActiveSync.

Synchronizing wirelessly

To synchronize your device wirelessly, complete the following steps:

1. Select the **Intellisync** icon on your device. The Intellisync Mobile Suite main screen appears.
2. Select the **Sync** icon. The Sync Process dialog box appears.

When the synchronization session completes, Intellisync Mobile Suite main screen displays the status of the synchronized items.

Synchronizing using ActiveSync

To synchronize your device through the cradle, complete the following steps:

1. Connect your device to the USB cable or cradle.
2. Open ActiveSync on your PC.
3. From the **File** menu, choose **Synchronize**.

When the synchronization session completes, the ActiveSync main screen displays the status of the synchronized items.

Customizing your synchronization settings

If your administrator allows you to change your default synchronization settings, you can configure Intellisync Mobile Suite to suit your individual requirements.

Modifying What to Sync settings

You can modify settings to manage your synchronization sessions. Complete the following steps to navigate to the What to Sync screen:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **What to Sync**. The What to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable synchronization SyncMail folders (Inbox, Outbox, Sent, and Drafts) and PIM information (Calendar, Contacts, Tasks, Notes, and Travel Info).
4. Select **OK** to return to the Settings screen.

Modifying Mail - Inbox, Sent, and Drafts settings

Complete the following steps to modify each mailbox (Inbox, Sent Items, and Drafts) setting:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **What to Sync**. The What to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Truncate after.** Enter the maximum number of characters to display for e-mail messages.
 - Sync Attachments.** Enable or disable attachments for e-mail messages.
 - Remove Older Than.** Enter the number of days to retain e-mail messages on your device. Based on your permissions, your administrator may have disabled this setting.
 - Max attachment size.** Enter the maximum size for attachments.
 - Sync only certain types of files.** Enter valid attachment types.
 - Overwrite Inbox with server information.** Enable setting to overwrite any device data with data from your company's server.
4. Select **OK** to return to the What to Sync screen, and then select **OK** to return to the Settings screen.

Modifying When to Sync settings

When to Sync settings allows you to select synchronization settings. To set up these options, follow these steps:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:

Push. Automatically synchronizes e-mail messages and PIM information.

Timed Interval. Select an interval from the list. This indicates the frequency with which you want synchronization to occur.

Limit sync to. Select the daily or weekday setting for synchronization.

Not Before. Enter the time when synchronization will not occur before this time.

Not After. Enter the time when synchronization will not occur after this time.

Disable if battery is less than. Enter a percentage of battery life at which you want to disable synchronization.

4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:

Use Network push. Select this check box to automatically initiate a network connection.

Use SMS push. Select this check box to automatically initiate a network connection when the device is powered off.

Allow screen-off during sync. Select this check box to power off during a synchronization session.

Note

If your device loses its network connection when powered off, clear this check box.

5. Select **OK** to return to the When to Sync screen, and then select **OK** to return to the Settings screen.

Guidelines for setting up Push options using your device

Use the following guidelines for setup and management of Push options. Because everyone has different levels of e-mail activity, settings for each person may vary. These guidelines help you determine the optimum setup for your conditions.

- Because your device synchronizes more often when you use the Push option, your device is powered-on more often. Adjust the power settings on your device to minimize battery drain.
- You may want to disable synchronization when battery power is below 20 percent.
- SMS-based Push relies on SMS messaging. Many service providers and carriers use a different billing structure for SMS messages. If you go over your allotted number of SMS messages within a billing period, you (or your company) may be charged additional fees. Check with your system administrator, department manager, or service provider to find out about SMS messaging restrictions.

Modifying notification settings

You can change the notification settings to manage your synchronization sessions.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **Notification**. The Notification screen appears.
3. Select or clear the Notify when data received check box to enable or disable sounds and alerts
4. Click **Notification Settings**. The Sounds and Notification screen appears.
5. Select an event from the list, and then select the **Play Sound** and/or **Vibrate** check boxes.

Modifying connection settings

You can modify the connection settings to manage your synchronization sessions.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **Connection**. The Connection screen appears.
3. Modify the following settings as necessary:
 - User name.** Enter a valid user name to access the server.
 - Server name.** Enter the server address.
 - Connection.** Select to keep connection active or disconnect if not needed.
 - Modem management.** Select the connection type for the server.

Modifying Intellisync Settings for ActiveSync

You can modify your Intellisync Mobile Suite settings for ActiveSync to manage the settings for synchronizing with your computer.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **ActiveSync Setup**. The ActiveSync Setup screen appears.
3. Choose from the following options:

Enabled. When the device is connected to a computer, ActiveSync will automatically start a synchronization session.

Note

If you have other applications that use ActiveSync, you may corrupt your data or have duplicate entries on your device.

Ask Each Time. When the device is connected to a computer, a message appears asking if ActiveSync should perform a synchronization session. This is the default setting.

Disabled. When the device is connected to a computer, ActiveSync will not start a synchronization session.

