



# Intellisync Mobile Suite Client Guide

Symbian UIQ Platform

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# 1 Setting Up 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.
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- 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.
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Continue to [“Starting the installation process”](#) on page 6, which allows you to choose the installation method that best suits your needs.

## 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 Symbian OS-Based Mobile Phone option, and choose your device from the list. Click **Next**. The Install Software page appears.

To receive the installation file over the air, continue to [“Downloading the installation file wirelessly on your device.”](#) 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 7.

## Downloading the installation file wirelessly on 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. Open the text message on your device.
2. Select the link in the text message for the installation file.
3. Select the Install Software link. The Download dialog box appears. Select **Yes** to continue the process.

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### Note

You may receive a message about installation security. Select Yes to continue with the installation.

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4. An installation dialog box appears. Select **Yes** to install the software, and then select **Install**.
5. Intellisync Mobile Suite installs to your device. After a successful installation, a dialog box appears. Select **Done** to complete the process.



## Downloading the installation file to a computer

Choosing to download the Intellisync Mobile Suite installation file to your computer allows you to initiate the installation process using your PC and either a cradle or USB cable. 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**.
6. Choose Symbian UIQ from the list, and then click **OK**.

The installation process begins. When the download completes, Intellisync Mobile Suite software loads to your device.

## Completing an initial synchronization on your device

After Intellisync Mobile Suite software installs on your device, complete the following steps for an initial synchronization on your device:

1. Select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Click the **Settings** icon, and then select **Connection**. The Connection screen appears.
3. Using the key pad, enter the following settings:

**User Name.** Enter a valid user name to access the server.

**Password.** Enter the password to access the server.

**Phone number.** Enter the phone number of your device.

**Server address.** Enter the server name.

**Connection.** Choose the connection type.

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### Note

Contact your system administrator for appropriate values before you enter or modify any connection settings.

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4. Select **OK**, and then **Back** to return to the Intellisync Mobile Suite main menu.

## Synchronizing wirelessly

On your device, select the **Sync** icon. The Sync Process dialog box appears.

The synchronization session process begins. When the synchronization session is complete, the dialog box closes.

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### Note

The initial synchronization may take a few minutes. Do not use your phone during an initial synchronization.

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## Synchronizing using a cradle or USB cable

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

1. Connect your device to the USB cable or cradle.
2. From your PC, open the software for your device and select the **Synchronize** icon.  
When the synchronization session completes, the ActiveSync main screen displays the status of the synchronized items.
3. Using Intellisync Mobile Suite on the Web, click **Next** on the Install Software page. The Settings page appears.

Your 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 or USB cable.

### 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 a cradle or USB cable

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

1. Connect your device to a cradle or USB cable.
2. From your PC, open the software for your device and select the **Synchronize** icon.

## Modifying 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.

### Using 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 Settings link next to the corresponding check box, and change the following items as necessary:
  - Truncate at.** Enter the maximum number of characters to display for e-mail messages.
  - Sync Attachments.** Enable or disable attachments for e-mail messages.
  - Max.** Enter the maximum size for attachments.
  - Only these types of files.** Enter valid attachment types.
  - Device Cleanup - remove email 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.
4. Press **Done** to the return to the What to Sync screen.

## Using 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. Using the keyboard and the **Change** command button modify the following settings as necessary:

**Enable Push.** Enable or disable automatic synchronization of e-mail messages and PIM information.

**Timed Interval.** Enable or disable a timed interval synchronization of e-mail messages and PIM information.

**Disabled When.** Select the battery level at which you want to disable Push and Timed Interval synchronization.

**Allow.** Select the daily or weekday setting for Push and Timed Interval synchronization.

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

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

**Interval.** Select the time interval for synchronization sessions.

**Disabled When.** Select the battery level at which you want to disable Push and Timed Interval synchronization.

**Each time device connects.** Enable or disable a synchronization session every time you make a connection.

4. Press the **Done** to return to the Intellisync Mobile Suite main menu.

## 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.

## Using notification settings

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

1. Using your device, select the **Intellisync** icon, and then press the **Open** command button. The Intellisync Mobile Suite main menu appears.
2. From the **Options** menu, choose **Settings**, and then select **Notification**. The When to Sync screen appears.
3. Select a notification sound if applicable.
4. Enable or disable a notification vibrate or notification message.
5. Press **Done** to return to the Intellisync Mobile Suite main menu.

## Using connection settings

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

1. Using your device, select the **Intellisync** icon, and then press the **Open** command button. The Intellisync Mobile Suite main menu appears.
2. From the **Options** menu, choose **Settings**, and then select **Connection**. The Connection Settings screen appears.
3. Using the keyboard, modify the following settings as necessary:
  - User Name.** Enter a valid user name to access the server.
  - Password.** Enter the password to access the server.
  - Server name.** Enter the server address.
  - Connection.** Select the connection type for the server.

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### Note

Contact your system administrator for appropriate values before you modify any connection settings.

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4. Press **Done** to return to the Intellisync Mobile Suite main menu.