

NOKIA

Intellisync Mobile Suite Client Guide

Palm OS 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.

- 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.

Continue to [“Starting the Installation Process”](#) on page 8, which allows you to choose the installation method that best suits your needs.

Starting the Installation Process

To start the installation process from either your PC or device, 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 click Login.
3. On the left navigation bar, click Settings. The Settings page appears.
4. Select Add Sync Device. The device selection page appears.
5. Select Palm OS-Based Handheld and select Next. The Install Software page appears.

To receive the installation file over the air, continue to [“Downloading the Installation File Wirelessly to 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 9.

Downloading the Installation File Wirelessly to Your Device

To download the Intellisync Mobile Suite installation file wirelessly to your device, complete the following steps:

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 email 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 has been sent to your device. Verify that you received a text message on your device.
4. Select Go To Msg on your device. The text message you sent appears.
5. Open the text message on your device. A prompt appears, “Install/Select this link to install: <URL>.”
6. Select the installation URL link in the text message. The option to Install Software appears.
7. Select the Install Software link. The Download dialog box appears with a message, “Do you want to download?”
8. Select Yes. The Internet link downloads the installation file to the device.
9. Select Save and open. The Transfer dialog box appears with the message, “Do you want to accept into Applications folder?”
10. Select Yes. Intellisync Mobile Suite downloads the installation file to your device.

After downloading the installation file, you must initiate your first synchronization session. Continue to [“Completing an Initial Synchronization on Your Device”](#) on page 9.

Note

If you download the installation file to your device wirelessly, you cannot initiate a synchronization using a cradle or USB cable. To synchronize using Palm HotSync, you must download the installation file to your computer. Refer to the next section.

Downloading the Installation File to a Computer

To download the Intellisync Mobile Suite installation file to your computer, complete the following steps:

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. Hotsync downloads the installation files to your device.

After downloading the software, you must initiate your first synchronization session. Continue to [“Completing an Initial Synchronization on Your Device”](#) on page 9.

Completing an Initial Synchronization on Your Device

After the downloading the installation file, you must initiate your first synchronization session. You can start your initial synchronization in two ways: wirelessly or by connecting to a cradle or USB cable and using Palm HotSync.

Synchronizing Wirelessly

To start your first synchronization session on your device, complete the following steps:

1. Select the Intellisync icon. The Intellisync Mobile Suite main menu appears.
2. Select the Sync icon.

Note

A screen may prompt you to scribble on the screen to create a random number for encryption. Use your stylus to scribble on the screen until the installation begins.

Intellisync Mobile Suite is successfully installed on your device.

Synchronizing using Palm HotSync

To start your first synchronization session on your computer, complete the following steps:

1. Connect your device to the USB cable or cradle.
2. Select the HotSync icon on your device.

When the initial synchronization session starts, a dialog box appears with the initial synchronization session options:

Refresh. Replaces the data on your device with data from your company's server.

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

Note

A screen may prompt you to scribble on the screen to create a random number for encryption. Use your stylus to scribble on the screen until the installation begins.

3. Enter your password. The Intellisync Mobile Suite synchronizes the device with the PC, and then the Intellisync Mobile Suite main menu displays the status of the synchronized items.
4. On the Install Software Web page, click Next. The Configure Account screen appears.
Your Palm OS device appears in the Device Name list. Intellisync Mobile Suite is successfully installed on your device.

2 Using Your Synchronization Settings

Synchronizing Your Device

Intellisync Mobile Suite synchronizes your email messages and PIM information on your device with your company's server. To synchronize your device, 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.

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.

Selecting What To Synchronize

You can select specific items to synchronize during your synchronization sessions. Complete the following steps:

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, Memos, and Travel Info).
4. Select OK to return to the Settings screen.

Specifying What To Sync Conditions for Mail

Complete the following steps to specify conditions for synchronizing mail Inbox, Sent Items, and Drafts email messages:

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. Choose Settings next to the email item (Inbox, Outbox, Sent, or Drafts).
4. 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 email messages.

Sync Attachments. Enable or disable attachments for email messages. Based on your permissions, your administrator may have disabled this setting.

Remove Older Than. Enter the number of days to retain email messages on your device. Based on your permissions, your administrator may have disabled this setting.

Max Attachment Size. Enter the maximum size for attachments.

Only Certain Types of Files. Enter valid attachment types.

Overwrite with Server Data. Enable setting to overwrite any device data with data from your company's server.

5. Select OK to return to the What To Sync screen, and then select OK to return to the Settings screen.

Specifying What To Sync Conditions for PIM

Complete the following steps to specify conditions for synchronizing contacts, tasks, memos, and calendar information.:

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 next to the PIM item (Contacts, Tasks, Memos, or Calendar).
4. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:

Share database with another conduit (slower). ??? Enable setting to merge information with another groupware server. ???

Overwrite with server data. Enable setting to overwrite any device data with data from your company's server.

5. Select OK to return to the What To Sync screen, and then select OK to return to the Settings screen.

Selecting When To Synchronize

When To Sync settings allows you to select synchronization settings. To set up these options, complete the following 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 email messages and PIM information.
 - Timed Interval.** Select an interval from the list to indicate 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.
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 email 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.

Setting up Notification

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 Notifications. The Notification screen appears.
3. Select or clear the following check boxes as necessary:
 - Notify when data received.** Enable or disable sounds and alerts.
 - Vibrate.** Enable or disable the device to vibrate when notification received.
 - Tones.** Enable or disable to use a tone when the device receives new data.
 - Volume.** Select a volume level for the tone.
 - Show Alert.** Enable or disable to show an alert when the device receives new data.

Setting up Security

You can prevent an unauthorized person from synchronizing your device by enforcing a password every time your device is locked, turned off, or in sleep mode.

For more information, see [Chapter 4, “Using Security with Your Device.”](#)

Setting up Connection

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 HotSync if you synchronize via a cradle or USB cable. Select Network if you synchronize wirelessly. To select your option for each synchronization, select Ask Each time.
 - Connection Management.** Select the connection type for the server; for example, whether to leave the connection active or hang up if not needed.
 - Detailed Progress Screen.** Select this check box to display detailed information during synchronization.

Note

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

4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:
 - Use Proxy Server**. Select this check box to use a proxy server.
 - Address**. Enter the address of the proxy server.
 - Port**. Enter the port of the proxy server.
 - Bypass for Local Addresses**. Select this check box to bypass proxy server with a local address.
 - Username**. Enter the username of the local address.
 - Password**. Enter the password of the local address.
 - Enable Other Sync Apps**. Select this check box to use other sync conduits such as Outlook or Palm Desktop.
5. Select OK to return to the Connection settings screen.

3 Using SyncMail

Using SyncMail






With Intellisync SyncMail, you can view and manage your email messages. When you install Intellisync Mobile Suite to your device, SyncMail acts as the primary email client.



Palm Mail and other Palm Mail-compatible clients do not work in conjunction with SyncMail.

Viewing Email Messages

You can quickly view your email messages, meeting requests, and attachments. To view your email messages, select the SyncMail icon. The Email screen appears.

For each email message, SyncMail provides the following icons to identify the message type:

Icon	Function
	Complete message.
	Truncated message. A truncated message appears when it is larger than the size restrictions in Mailbox settings. By selecting this icon, you can mark the email message to download the full text during the next synchronization session. The icon then changes to the Message Marked for Download icon.
	Message selected for download. The email message downloads during the next synchronization session.
	Meeting request.
	Attachment included.

Icon	Function
	Attachment(s) removed. An attachment is removed when it is larger than the size restrictions in Mailbox settings or does not match the file types listed in Attachment settings. By selecting this icon, you can mark the attachment to download during the next synchronization session. The icon then changes to the Attachment(s) Selected for Download icon.
	Attachment(s) selected for download. The attachment(s) downloads during the next synchronization session.






When you select on the icon located next to each email message, you can select from a list of the following options:

Email Message Option	Function
Delete	Moves the email message to the Deleted folder. SyncMail deletes all email messages in the Deleted folder during the next synchronization session. These email messages are removed from your device and your company's server. Note: You can also delete email messages by pressing the Backspace button on your device.
Move To	Moves the email message to a folder of your choice.
Mark Read	Marks the email message as read.
Reply	Opens the Reply Email screen for you to enter a reply message to the sender.
Reply to All	Opens the Reply Email screen for you to enter a reply message to the sender and all other recipients of the email message.
Forward	Opens the Forward Email screen for you to forward the email message.
Get Message	Marks the email message to download the full text during the next synchronization session. This option displays the Message Marked for Download icon next to the email message.
Get Attachment(s)	Marks the email message to download the full attachment(s) during the next synchronization session. This option displays the Attachment(s) Selected for Download icon next to the email message.

Reading Your Email Messages




To read your email messages on your device, select the message header. A screen appears with the body of the email message.

To reply to an email message, use the following icons at the bottom of the screen:

Icon	Function
	Delete message.
	Reply to sender.
	Reply to all.
	Forward.
	Create a new email message.

Responding to Meeting Requests

When you select a meeting request, you respond by using the following icons located at the bottom of the screen:

Icon	Function
	Accept meeting request.
	Decline meeting request.
	Make tentative meeting request.

When you select an icon, a screen appears with a reply message with your meeting request response. Select Send to respond to the meeting request. The email message is sent to the Outbox folder and transmitted to the sender during the next synchronization session.

Viewing Attachments

If your email message has an attachment, select the attachment name to view it.

SyncMail provides QuickWord and QuickSheet to view attachments. QuickWord supports document and text attachment types. QuickSheet supports spreadsheet and Comma-Separated Values (CSV) files. Other attachment types are supported if you install the appropriate viewers. These viewers must support Multipurpose Internet Mail Extension (MIME) files.

Creating Email Messages

You can create email messages on your device using SyncMail. To create an email message, complete the following steps:



1. Using your device, select the SyncMail icon. The Email screen appears.
2. Select the New Email icon at the bottom of the screen. The New Message screen appears.
3. Enter an email address in the To: field.

Note

You may enter several email addresses by separating them with a semi-colon.

4. Enter text in the optional Subj: field.
5. Enter your message in the email body.
6. Select the **Save** icon. Your email message is sent to the Outbox folder and transmitted during the next synchronization session.

When creating an email message, you can also use the following icons at the bottom of the screen:

Icon	Function
	Ready Text. Select from a list pre-formatted text for quick responses for email messages.
	Save message to Outbox. This email message will be sent with the next synchronization.

Creating Meeting Requests

You can create meeting requests on your device using SyncMail. To create a meeting request, complete the following steps:

1. Using your device, select the SyncMail icon. The Email screen appears.
2. Select the New Meeting Request icon. The Create Meeting screen appears.
3. Enter an email address in the To: field.

Note

You may enter several email addresses by separating them with a semi-colon.

4. Enter the necessary information for the meeting request.
5. Select OK. Your meeting request is sent to the Outbox folder and transmitted during the next synchronization session.

Managing Email Preferences

You can configure SyncMail to suit your individual email requirements regarding general settings and standard email folders. The types of SyncMail preferences include the following:

- General.** These settings affect the general functionality of your email messages.
- Inbox.** These settings affect the way you manage email messages in the Inbox folder.
- Outbox.** These settings affect the way you manage email messages in the Outbox folder.
- Drafts.** These settings affect the way you manage your email messages in the Drafts folder.
- Sent.** These settings affect the way you manage email messages in the Sent folder.
- Deleted.** These settings affect the way you manage email messages in the Deleted folder.

Setting General Preferences

SyncMail general preferences allow you to select settings for your email messages. To set up these preferences, complete the following steps:

1. Using your device, select the SyncMail icon. The Email screen appears.
2. From the Options menu, select Preferences. The Preferences screen appears.
3. Select the General tab, and modify the following fields as necessary:
 - When replying, include body leading text.** Select this check box to enter leading text before the body of each reply email message.
 - Include signature.** Select this check box to enter a custom signature for each email message.
4. Select OK to return to the Email screen.

Setting Standard Email Folder Preferences

The SyncMail preferences allow you to select settings for email messages located in the standard email folders (Inbox, Outbox, Drafts, Sent, and Deleted). To set up these preferences, complete the following steps:

1. Using your device, select the SyncMail icon. The Email screen appears.
2. From the Options menu, select Preferences. The Preferences screen appears.
3. Select the appropriate tab (Inbox, Outbox, Drafts, Sent or Deleted).
4. Modify the following fields as necessary:
 - Show Date/Time.** Select this check box to display the date and time of email messages.
 - Show Size.** Select this check box to display the size of email messages.
 - Show Multi-Select.** Select this check box to select multiple email messages. This preference displays a check box beside each email message for multiple selections.
 - Header.** Select the amount of header information to show for each email message.
 - After Deleting a Message.** Select from the list what to display after deleting an email message.
5. Select Sync Settings. The Mailbox Settings screen appears. These are the same mailbox settings that are available on the What To Sync settings screen.

4 Using Security with Your Device

Nokia Intellisync Mobile Suite provides additional security features that your system administrator delivers through profiles or that you can set up on your device.

This chapter provides information about how to add such security features as

- locking your device
- enforcing a password after your device is locked, turned off, or in sleep mode
- automatically deleting your personal information when your device is lost or stolen

Locking Your Device

The Power-on-Password security feature allows you to enforce a password every time your device is locked, turned off, or in sleep mode. The first time you synchronize your device after the system administrator enables this feature, a prompt appears on your device to create a password. Complete the following steps to create the power-on password:

1. On your device, enter a password in the Password field.
2. Re-enter the password in the Confirm Password field.
3. Save your changes.

Assigning a Power-on Password

Even if the Power-on-Password security feature is disabled, you can create a password on your own. Complete the following steps to change a power-on password:

1. Using your device, select the Intellisync icon.
2. Select the Security icon.
3. Select the Unassigned field.
4. Enter a new password, and choose OK.
5. Enter the new password again, and choose OK.
6. Do one of the following:
 - To return to the Intellisync Mobile Suite main screen, select Done.
 - To set the password and turn off the device, select Lock & Turn Off.

Changing a Power-on Password

You may change your password any time once your administrator has power-on password enabled. Complete the following steps to change a power-on password:

1. Using your device, select the Intellisync icon.
2. Select the Security icon.
3. Select the Assigned field.
4. Enter your current password, and choose OK
5. Enter a new password, and choose OK.
6. Enter the new password again, and choose OK.
7. Do one of the following:
 - To return to the Intellisync Mobile Suite main screen, select Done.
 - To set the password and turn off the device, select Lock & Turn Off.

Forgetting Your Password

If you forget your password, contact the system administrator.

Power-on-Password Character Settings

Your system administrator can set up the password to meet one of the following restrictions:

Type	Restrictions
4 numeric characters	Exactly 4 characters; numbers only
4 alphanumeric characters	Exactly 4 characters; numbers and (case-sensitive) letters only
5 to 40 alphanumeric characters	From 5 to 40 characters; numbers and (case-sensitive) letters only
8 to 40 multi-characters	From 8 to 40 characters; must include at least one of each of the following: <ul style="list-style-type: none">• lowercase letter (case-sensitive)• uppercase letter (case-sensitive)• numerical digit• any of the following characters: - () ! ? . : / +

Power-on-Password Idle Time Settings

Your system administrator can also configure your device to lock automatically after it is idle for a specified time. The choices of idle time intervals before displaying the password screen include the following:

Option	Description
0 minutes	Only locks when <ul style="list-style-type: none">• you power off the device manually or• the device is configured to turn off automatically to save power
1 minute	Displays the Power-on-Password screen after this time interval passes.
5 minutes	
15 minutes	
30 minutes	
1 hour	
90 minutes	
2 hours	
12 hours	
24 hours	

Outbound Phone Call Settings

Your system administrator can set up the device so that a person can make some outbound phone calls on your device within certain restrictions when your device is locked. For example, the person may be able to make one or both of the following types of phone calls:

- exact phone numbers (such as numbers where you can be reached if the phone is found)
- phone calls with a certain number of digits (such as 3-digit emergency phone calls only)

Protecting Your Data

Theft Loss protection ensures that personal information on your device is protected from unauthorized use if lost or stolen.

To activate Theft Loss Protection,

1. From the PIM server console tree, select Settings.
2. Select your device name.
3. Choose Theft-Loss Protection.
4. Select an option, and choose **OK**. Based on your company's product license, possible options may include all or some of the following:
 - Erase only PIM data (contacts, tasks, notes, and calendar appointments) and email from the device
 - Hard Reset the device, deleting all user data and files
 - Lock the device (providing and confirming a password for unlocking the device)

Note

The Erase Data and Hard Reset options cannot be undone.

Your system administrator can also invoke these Theft Loss Protection features, and can also configure the device to delete specified files from your device if lost or stolen.

Theft Loss Protection options remain effective until you or your system administrator resets the options.
