Using the Outlook-Sync Plug-in

Installing the Plug-in

After installing the Outlook-Sync plug-in on a Microsoft Windows computer running Microsoft Outlook, you can quickly synchronize a range of PIM data between Microsoft Outlook and our sync servers. This data includes contacts, calendar events, and tasks, and notes.

1. Log in to your computer as a user with "Administrator" privileges.

2. Locate and double-click the installer file icon.

3. Work through the installer wizard that appears on-screen. You can accept the default settings for both the Install Location and the Start Menu folder.

4. When the License Agreement window appears, click the "I Agree" checkbox and then click Next.

5. When the final Setup Wizard window appears, make sure the "Run Outlook-Sync Plug-in" checkbox is checked, and then click Finish. The Outlook-Sync Plug-in window will appear. The next step is to prepare the plug-in for network connections, as detailed in the next section.

Preparing the Plug-In for Sync Server Connections

Each Outlook user should complete the following steps, since the Outlook Plug-in will remember each user's specific settings. You do not need to have "Administrator" privileges to perform any of the following procedures.

1. In Outlook, select Outlook-Sync | Sync Menu.

2. After the Outlook Plug-in window appears, choose Tools | Options.

3. Click the Sync button, located in the left-hand column.

4. In this window, you can do the following (**Note**: See the help topic, "Customizing Synchronization Settings" for full details):

   - Choose the data types you want to synchronize and customize specific synchronization settings, unique to each Outlook category

   - Set a regularly scheduled synchronization of your Outlook data

   - Activate encryption of synchronized data

   - Prevent synchronization when Outlook is not open

5. To enter your account and server information, click the Account button in the left-hand column.

6. Enter the following information in the spaces provided:

   Location: The server address should be *http://sync.emailsrvr.com/funambol/ds*

   Username: Delete any text in this field and type your full email address.

**Password**: Delete any text (asterisks) in this field and type your password for the email address you entered above.

7. Click OK to save and apply your settings. Your Outlook plug-in is ready for use. You can close the Sync window, if you prefer, or leave it open and start an immediate synchronization.

Using the Outlook Plug-in

Once the Outlook plug-in has been installed and set up, the Outlook user can take advantage of the plug-in. You do not need to have "Administrator" rights at this point.

In Outlook, select Outlook-Sync | Sync All, or click the Outlook-Sync button, located in the Outlook-Sync toolbar. After the synchronization is complete, the Outlook Plug-in window appears, displaying whether the synchronization was successful.

For each category, look for a checkmark to indicate that the synchronization was successful. If the synchronization was not successful, an alert triangle will appear, in which case you may need to review your server connection settings and re-initiate the synchronization.
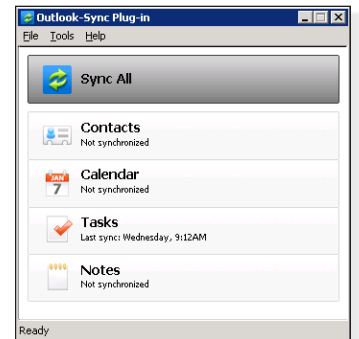
About the Plug-In

The Outlook-Sync plug-in is based on Funambol's Outlook Plug-in version 6.0.14. The source code is available on our website. The plug-in is designed to work with our Funambol Data Synchronization Server and the extensions we have added. The plug-in is not guaranteed to work as intended when used with servers hosted by other providers.

### Requirements for Plug-In Use

- The Outlook-Sync plug-in can be installed on a computer (desktop or laptop) running Microsoft Windows XP or Vista, and may be used with Outlook 2002 (XP), 2003, or 2007.

- You will need access enabled by your domain administrator.

- You will need your email login and password.

- Installation must be done by a user with "Administrator" privileges. After installation, any Outlook user with access to the computer can use the Outlook plug-in.

Customizing Synchronization Settings

In the Outlook-Sync | Options window, you can customize your synchronization options and schedule regular synchronizations.

Synchronization Option Details

1. In Outlook, select Outlook-Sync | Options.

2. Click the Sync icon, located in the left-hand column.

3. To specify synchronization details for a selected item, click the Details button.

4. In the Sync Direction section, you can select from three options:
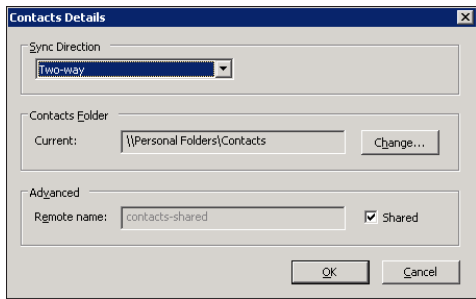
- **Two way**—Activates a two-way synchronization between your Outlook/PC and the sync server. New or changed information in one source will be added to the other—in both directions. Nothing is lost.

- **One way: Server-Outlook**—Activates a one-way synchronization, from the sync server to Outlook. Any new or revised information stored on the sync server will be copied to Outlook.

- **One way: Outlook-Server**—Activates a one-way synchronization, from Outlook to the sync server. Any new or revised information stored in Outlook will be copied to the sync server.

5. To change the root source folder for a specified Outlook item, click the Change button. When the Browse dialog box appears, locate and select the correct folder.

6. Review the Advanced options, but make no changes unless instructed to do so by support staff, or unless you are extremely familiar with DS server operations. (The default settings are acceptable for most users.) **Note:** The time frame feature is currently disabled.

7. When you are finished with the synchronization details for an Outlook item, click OK to save and apply any changes.

Security Settings

1. In Outlook, select Outlook-Sync | Options.

2. Click the Sync icon, located in the left-hand column.

   - To turn on automatic synchronization, click the Synchronize every checkbox and then select an interval.

   - To enable encryption, click the Enable encryption checkbox. The Outlook-Sync plug-in (when active) automatically applies industry-standard encryption/decryption to all data exchanges between Outlook and the sync server. The security/encryption option adds another layer of protection against theft and abuse, but it also slightly slows the speed of synchronization. We recommend, however, that you check the box to enable this option.

   - If you only want to synchronize when Outlook is open, click the Only sync when Outlook is open checkbox. Otherwise, Sync will attempt to sync regardless of Outlook being open or closed. Note: When this option is turned on, and automatic synchronization is also enabled, you might not be alerted when the plug-in is unable to "attach" to Outlook during a scheduled synchronization.

3. Click OK to save and apply your settings.

Reviewing a Log of Recent Synchronization Activity

You can view a log of the most recent synchronization sessions.

1. In Outlook, select Outlook-Sync | Sync Menu.

2. After the Outlook Plug-in window appears, choose Tools | Logging.

3. Click the View Log button. A Windows Notepad text window appears, detailing all the tasks attempted in the most recent synchronization.

4. When you're finished reviewing the contents of the log, close the Notepad window.

Tip: To customize your log settings, see the help section, "Customizing Plug-in Log Settings."

Customizing Plug-in Log Settings

Outlook-Sync offers three levels of logging activity, which can be helpful in debugging errors or problems. To review and change the log settings, follow these steps.

1. In Outlook, select Outlook-Sync | Sync Menu.

2. After the Outlook Plug-in window appears, choose Tools | Logging.

3. Choose from the following three Log Level options:
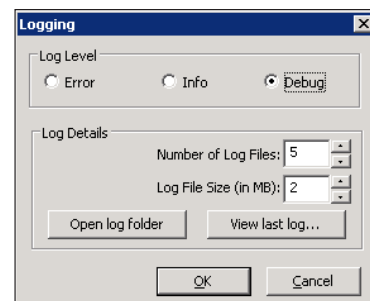
Error: Logs errors only.

**Info**: Reports basic synchronization activity, including errors.

Debug: Reports more information, which is helpful in diagnosing the cause of problems or errors.

4. Specify the maximum number of log files you want to store, as well as a maximum file size for the log file.

5. When you're finished, click OK to save and apply the settings.

Extra: Recovering Lost Data

If, for any reason, all contacts, calendar, tasks, or notes information has been deleted from Outlook or the server, you can restore what has been previously synchronized by following these steps

1. In Outlook, select Outlook-Sync | Sync Menu.

2. After the Outlook Plug-in window appears, choose Tools | Recover.

3. Determine the direction in which you want the data to be copied. Be careful to choose the correct direction for recovery.
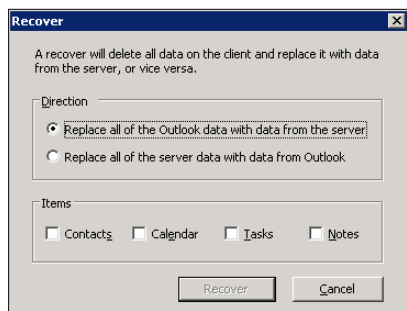

Note: When you choose the first option ("Replace all of the Outlook data with data from the server"), we suggest that you delete all shared data from Outlook first (such as shared calendars and company directory), and then perform the recovery. This ensures that your data will be updated properly.

4. Click the checkbox next to each category you want to recover. Depending on your use of Outlook, the options you've previously set up, innate sync limitations, and the differences in storage capabilities of the sync server and Outlook, data may not necessarily be recovered in every category, and some fields of some data items may not be restored.

5. Click the Recover button to start the process. The Recover dialog box closes, and status messages appear in each of the buttons listed in the main plug-in window. When the recovery is complete, the status bar will display "Sync ended."

Extra: About Shared Data

Our sync server allows synchronization of shared data. In particular, we offer the ability to synchronize shared calendars. All calendars listed in your Shared Calendars list will be included in the synchronization, even if the check box is not checked.

To disable shared calendars or shared contacts, select Tools | Options, click the Sync button, and then click the Details button for Calendar or Contacts, respectively.
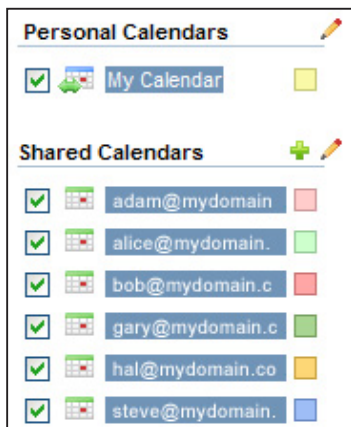
Extra: Checking for Updates

The Outlook-Sync plug-in is able to check for new versions. In order to check for new version, perform the following operations.

1. In Outlook, select Outlook-Sync | Sync Menu.

2. After the Outlook Plug-in window appears, choose Help | Check for Updates.

3. A window will be displayed with the current version of the plug-in as well as the new version, if available. If a new version is available, you may click the link provided to download the installer.

Alert: Read the new manual after installation and check for any special instructions regarding the upgrade.

Extra: Uninstalling the Outlook-Sync Plug-in

IMPORTANT: During the uninstall process, you can choose to retain or delete all plug-in users' local files and settings. Retaining the settings will speed up your use of any new installations of the plug-in.

1. Click Start and choose Settings | Control Panel | Add/Remove Programs.

2. When the Add/Remove Programs window appears, locate and select the Outlook-Sync Plug-in and then click Remove.

3. A confirmation dialog box appears. To proceed, click Yes.

4. Indicate whether or not you want to store a copy of the plug-in's user and connection settings. If you intend to re-install the Outlook-Sync Plug-in on this computer, these saved settings will be automatically applied during the re-install process.

5. Click Uninstall to start the removal of the plug-in.

6. When the plug-in is successfully removed, another confirmation dialog box appears. Click OK. You can now close the Add/Remove Programs window.