



# GUIDE

# USER

FUNAMBOL

## Setting Up and Using the Funambol Outlook Plug-in v6.5

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## Introduction

The Funambol V6 Outlook plug-in lets you quickly synchronize a range of “Personal Information Manager” data between Microsoft Outlook and an Internet-accessible Funambol DS server. This data (including contacts, calendar events, tasks, and notes) is available to all your other Funambol-ready mobile devices or computers, including other copies of Outlook that you use.

The plug-in can be installed on any computer running a qualifying version of Outlook on the appropriate version of Microsoft Windows (both listed below in “Requirements”). You can directly install the package from the remote website, or install it after you download the installer to your computer.

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## Requirements for Plug-In Use

- The Funambol 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.
- Installation must be done by a user with “Administrator” privileges on this PC. After installation, any Outlook user with access to this computer can take advantage of the Funambol Outlook plug-in. (Note that each user’s synchronized data is privacy-protected, and not available to other users.)
- You need either the Funambol Portal login entries (user name and password) or the user name and password for an existing user account on a Funambol server
- You’ll need the location or URL of the Funambol server or Portal used to store your personal information.

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## Installing the Funambol Plug-in

### • Downloading the Plug-in Installer

The Outlook plug-in can be installed directly from the remote website, or installed after you download the installer to your computer. If you have not already obtained the Outlook plug-in installer, you can do so by following these steps:

If an older version (earlier than version 6.x) of the plug-in is installed on your computer you must uninstall that plug-in (as described in “Extra: Uninstalling the Funambol Outlook Plug-in” on page 10). If, however, you are installing a more recent upgrade of an existing version 6 plug-in (such as a beta version), run the installer, as it will effectively upgrade your current version.

- 1** Start a browser and connect to the Funambol web site:  
<http://www.funambol.com/>
- 2** When the Funambol homepage appears, click the **Open Source** tab.
- 3** In the Open Source tab menu bar, click **Downloads**.
- 4** Review the “PIM-only Client Software” download options, and click the latest “Outlook Stable” package link to start the download.

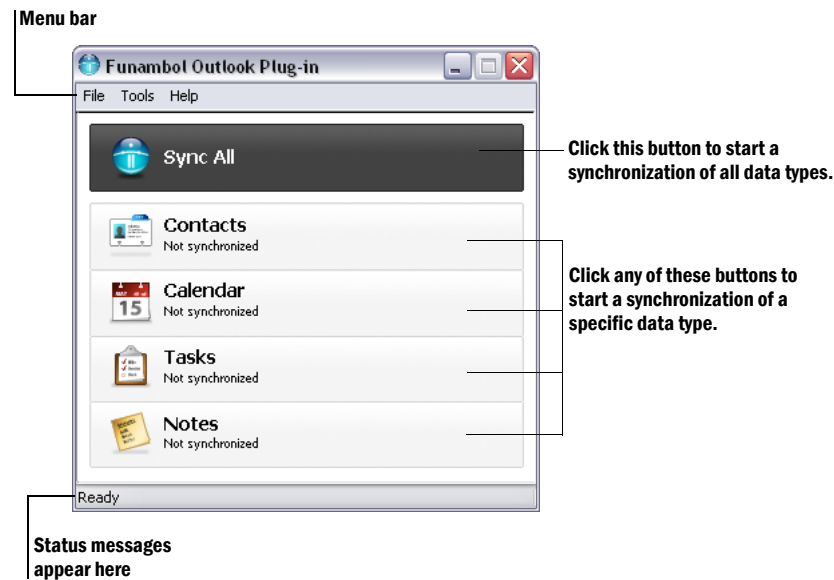
- 5 When the Download a File user registration page appears, fill in the required information and click **Submit and Continue** to proceed.
  - Or, click **No Thanks!** to skip registration and proceed with the download.
- 6 When the Download a File page reappears, click the package link to start the download.
  - This file is approximately 2.9 MB in size.
- 7 Proceed with downloading the installer to your computer.

### • Getting Started

As noted previously in “Requirements”, you must have logged into your computer as a user with “Administrator” privileges.

- 1 Locate and double-click the installer file icon.
- 2 Work through the installer wizard that appears on-screen.
  - You can accept the default settings for both *Install Location* and *Start Menu* folder.
- 3 When the License Agreement window appears, click the checkbox by **I Agree** and then click the now-active **Next** button.
- 4 When the final Completing Funambol Setup Wizard appears, make sure the **Run Outlook Plug-in** checkbox is checked, then click **Finish**.

The Funambol Outlook Plug-in window appears.



You now prepare the plug-in for network connections, as detailed in the next section.

### • Preparing the Plug-In for Funambol Server Connections

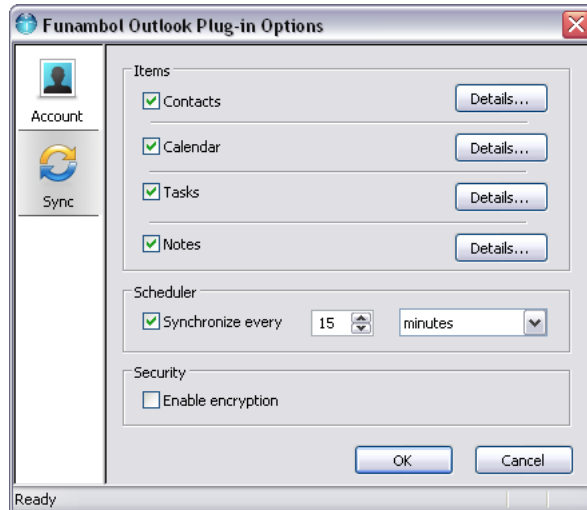
The following applies to any and all users of Microsoft Outlook on this computer. Follow this procedure to prepare Outlook (through the plug-in) for a connection to the Funambol server, so that synchronization can occur. Each user must do this, as the Outlook Plug-in will remember every user’s specific settings (and keep each user’s data privacy-protected).

NOTE: You do **not** have to be a user with “Administrator” privileges to perform any of the following procedures.

**1** [-If you have not already started the plug-in-] click **Start** and choose **Programs | Funambol | Outlook Plug-in | Funambol Outlook Plug-in**.

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

The Sync (synchronization) options appear in the Plug-in Options dialog box..



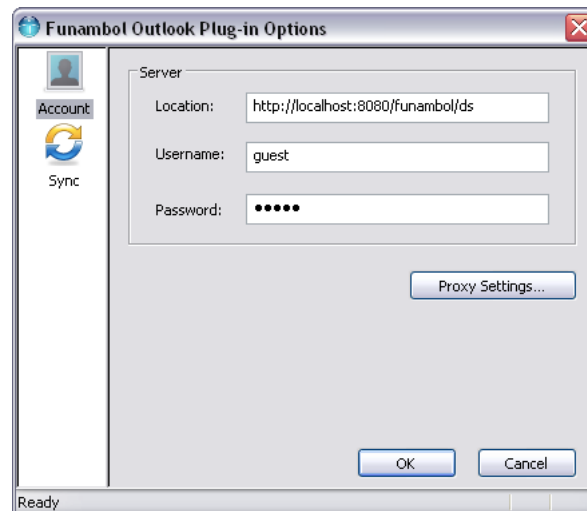
**3** Use this set of options to customize the following:

- Choose the data types you want to synchronize
- Customize specific synchronization settings, unique to each Outlook category
- Set a regularly scheduled synchronization of your Outlook data
- Activate encryption of synchronized data (requires server setup)

**TIP:** For full details, see “Extra: Customizing Synchronization Settings” on page 6.

**4** Click the **Account** button in the left-hand column.

The Account options appear in the Plug-in Options dialog box.



**5** Make the following Server entries

**Location—** Delete the placeholder text in this field and type the URL or location of the Funambol Portal or Funambol server.

**Username—** Delete the text in this field and type the Funambol user name. (This is the user name you created [1] when you first registered with a Funambol Portal, or [2] when you first set up a user account on a Funambol server.)

**Password—** Delete any text (asterisks) in this field and type your Funambol password.

**6** If you need to make proxy server entries, click **Proxy Settings** to open the dialog box. (You can assume you don't need to, unless network/IT support staff notify you.)

**7** Click **OK** to save the plug-in option entries and apply them.

Your Outlook plug-in is ready for use. You can close the window, if you prefer, or leave it open and start an immediate synchronization.

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## Using the Outlook Plug-in

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

To use the Funambol Outlook Plug-in for an actual two-way data synchronization, follow these steps:

- 1** Start Microsoft Outlook.
- 2** Look for a **Funambol** menu (left) in the main Outlook menu bar, or a Funambol tool "palette" (right):

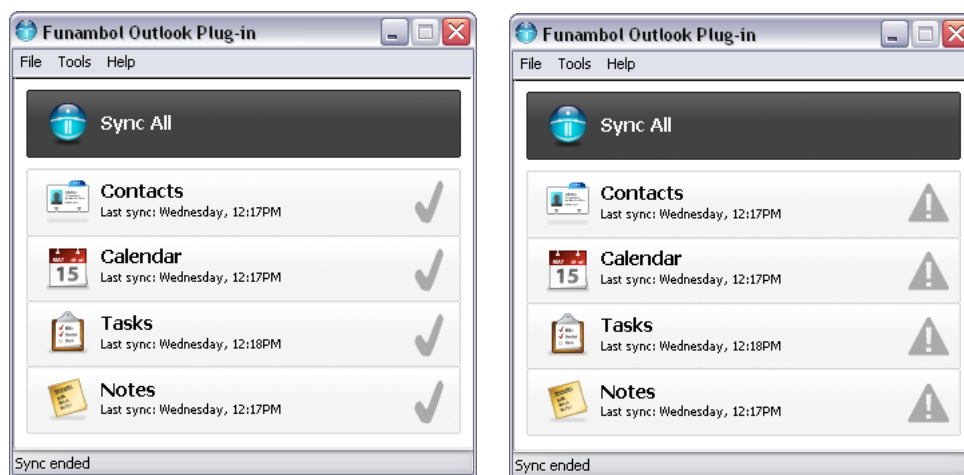


- 3** Either choose **Funambol | Synch All** or click **Synch All** (in the tool palette).

After the synchronization is made (whether successful or not), the Outlook plug-in window appears. You have two options:

- Look in the status bar of the window for a report on the synchronization ("successful" or "failed"), or...

- Look in each category for a “checkmark” (left) if successful, or an alert triangle (right) if failed.



- 4 When the synchronization is complete, you can exit the plug-in window.

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## **Extra: Reviewing a Log of Recent Synchronization Activity**

If for any reason you want to review what happened in the most recent synchronization, you can open a log of the most recent synchronization by following these steps:

- 1 After starting the Outlook plug-in, choose **Tools | Logging**.
- 2 When the Logging dialog box appears, click **View Log**.

A Windows Notepad text window appears, detailing all the tasks attempted in the most recent synchronization.

**ALERT:** Some information about synchronization failures will be recorded, but in a form that only an IT professional might understand.

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

**Tip:** Funambol offers plug-in log settings that you can customize according to your preferences. See “Extra: Customizing Plug-in Log Settings” on page 9 for more information.

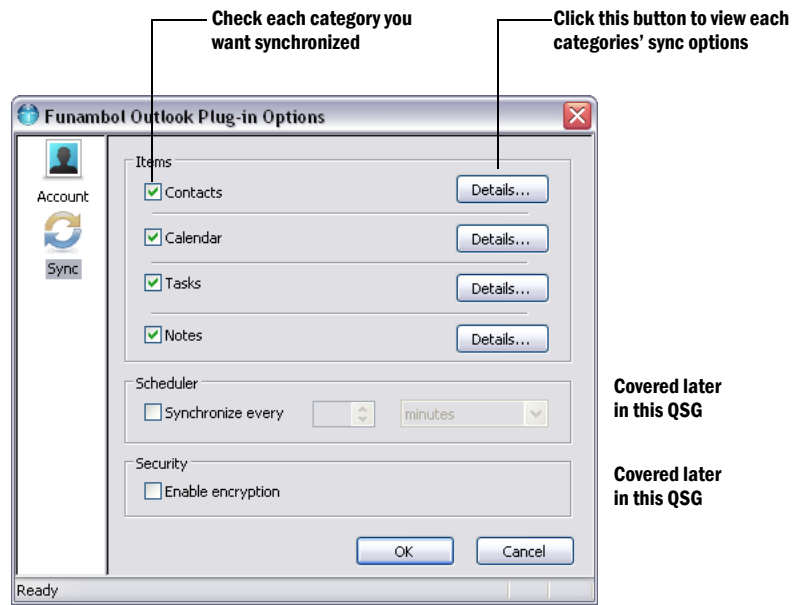
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## **Extra: Customizing Synchronization Settings**

To review and customize all of the user-customizable synchronization options for the Outlook plug-in, follow these steps:

- 1 Start Outlook.
- 2 Open the **Funambol** menu and choose **Options**.
  - Or, choose **Start | Programs | Funambol | Outlook Plug-in | Funambol Outlook Plug-in**, and when the Outlook Plug-in window appears, choose **Tools | Options**.

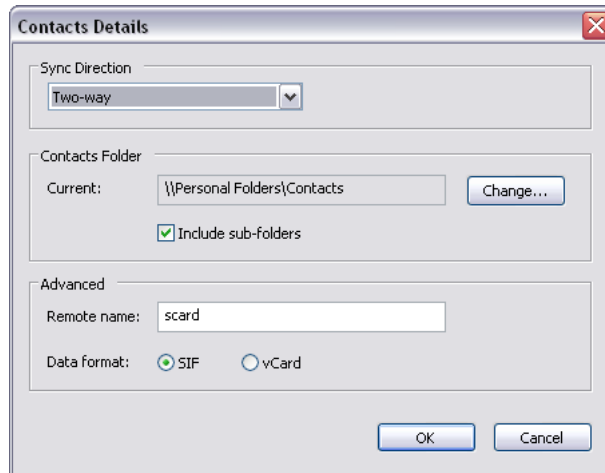
- When the Plug-in Options dialog box first appears, the **Sync** options are displayed.



- Click the checkbox by each type of Outlook data (“items”) you want to synchronize.

#### • Synchronization Option Details

- Click **Details** by each checked Outlook type (“item”).  
The [Item Name] Details dialog box appears, as shown here.



- Open the **Sync Direction** menu and review the following options:

#### **Two way**

Activates a two-way synchronization (between Outlook/PC and Funambol 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 one-way synchronization, from Funambol server to Outlook. Any new or revised information stored on the Funambol server will be copied to Outlook.

### One way: Outlook-Server

Activates one-way synchronization, from Outlook to Funambol server. Any new or revised information stored in Outlook will be copied to the Funambol server

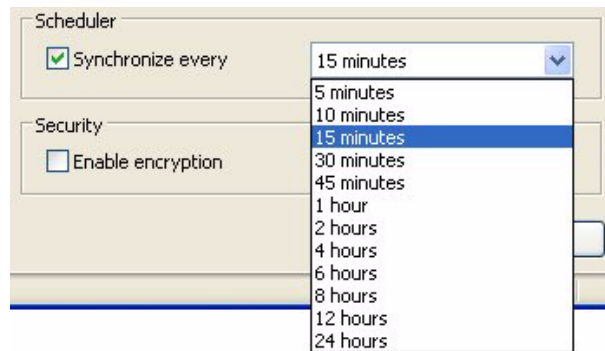
- 3 To change the source folder for a specified Outlook item, click **Change** to open a Browse dialog box that you can use to find and select the correct folder.
- 4 Subfolders in the source folder are synchronized (“included”) by default.
- 5 Review the Advanced options, but make no changes unless 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..

When reviewing the [Calendar] Details options, check the following: [1] if “vcalendar” is the Data Format selection, then [2] the Remote Name field must display “event”—not “scal” or “cal”.

- 6 When you are finished with the synchronization details for an Outlook item, click **OK** to save and apply any changes.
- 7 Repeat this series of steps to review and customize the Details for each Outlook item.

### • Scheduling Regular Synchronizations

The Plug-in Options dialog box assists you in scheduling regular synchronizations of your Outlook items. Assuming you have an always-on Internet connection and Outlook is continually active, take advantage of the following Scheduler options:



- 1 Click the checkbox to activate the synchronization schedule.
- 2 Pick a time interval from the drop down menu.
- 3 Click **OK** to save your settings and apply them.

If (1) your network connection is “always on”, (2) and Outlook is communicating automatically with the Funambol server, then (3) this synchronization schedule will be active.

### • About the Security/Encryption option

The Outlook plug-in (when active) automatically applies industry-standard encryption/decryption to all data exchanges between Outlook and the Funambol server. This protects your data from theft and abuse, but it also slightly slows the speed of synchronization. Note that encryption must have been previously activated on your Funambol server in order for this option to work.



- **When you are finished with Options and Details**

- 1** Review every item's details, and when finished, click **OK** to apply your changes and close the [Item] Details dialog box. These changes go into effect immediately.
- 2** When you are finished with the synchronization details for all Outlook items, and are finished, click **OK** to apply any changes and close the Plug-in Options dialog box.

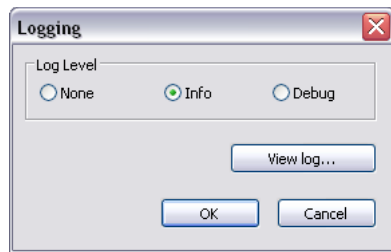
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## **Extra: Customizing Plug-in Log Settings**

Funambol offers three levels of logging activity, which can be helpful in debugging errors or problems. To review and change the options, follow these steps.

- 1** After starting the plug-in, choose **Tools | Logging**.

The Logging Options dialog box appears.



- 2** Choose from the following three **Log Level** options:
  - None** Deactivates all synchronization logging.
  - Info** Reports the basic synchronization activity, including errors.
  - Debug** Reports more information, which is helpful in diagnosing the cause of problems or errors.
- 3** When you're finished, click **OK** to save and apply the settings.

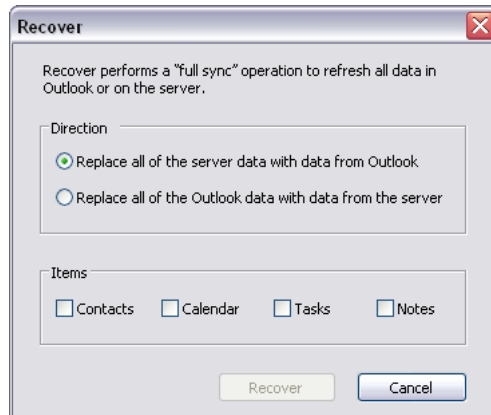
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## **Extra: Recovering Lost Data**

If, for any reason, all Outlook contacts, task, notes or calendar information has been lost on your computer/laptop, you can restore what has been previously synchronized by following these steps:

- 1** After opening the plug-in window, choose **Tools | Recover**.

The Recover dialog box appears.



- 2 Determine the direction in which you want the data to be copied.  
**ALERT!** Be careful to choose the correct direction for recovery.
- 3 Click the checkboxes by the data categories you want to recover.
  - Recoverable data includes contacts, calendar, tasks and notes. Depending upon your use of Outlook, the options you've previously set up, and innate Funambol limitations, not all data will be recovered in every category.
- 4 Click the now-active **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".

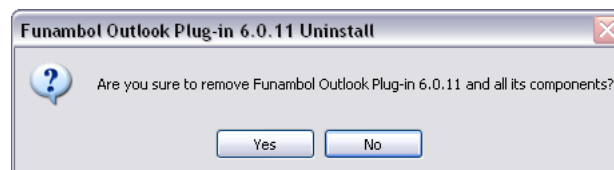
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## **Extra: Uninstalling the Funambol Outlook Plug-in**

**IMPORTANT:** During the uninstallation 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 windows appears, locate and select the plug-in as listed in this window, and click **Remove**.

A confirmation dialog box appears.



- 3 To proceed, click **Yes**.

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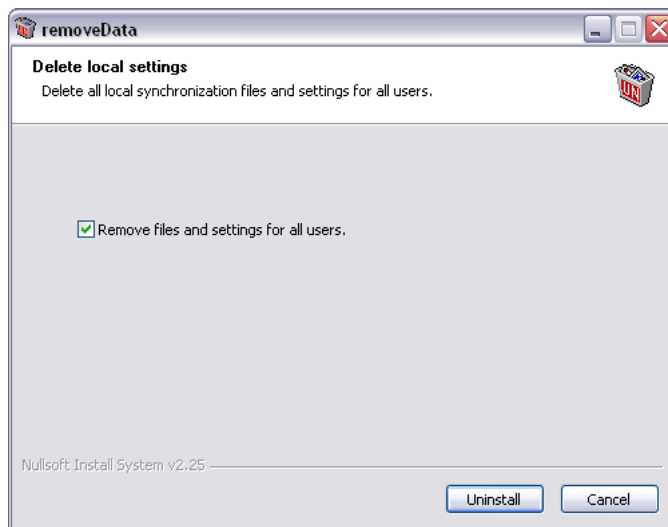
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## Technical Support

If you would like updated and expanded information about the plug-in, or, if you are having problems, you can get to a variety of support resources linked to this site:

[www.funambol.com/services/overview.html](http://www.funambol.com/services/overview.html)

An additional window appears.



- 4 To store a copy of all your current plug-in user and connection settings on this PC, clear (uncheck) the checkbox in this window. The next time a Funambol Outlook plug-in is installed, these saved settings will be automatically applied.
- 5 Click **Uninstall** to start the removal of the plug-in.  
When the plug-in is successfully removed, another confirmation dialog box appears.
- 6 Click **OK**. You can now close the Add/Remove Programs window.