

GUIDE

USER

FUNAMBOL

Setting Up and Using the Funambol Windows Mobile Plug-in v6.0

(For use in both Pocket PCs and Smartphones)

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Introduction

The Funambol Windows Mobile Plug-in enables you to quickly synchronize a variety of data between a Microsoft Windows mobile device and the Funambol server. This includes wireless providers, Internet service providers, corporate enterprises, and in certain circumstances, your home system. The Funambol plug-in synchronizes contacts, calendar, email, notes, tasks, etc. with native applications on your Windows Mobile device.

The Funambol Windows Mobile Plug-in can be installed on a Windows Mobile device in two ways:

- “Over The Air” (OTA) wireless installation onto the device from a Funambol Portal
- Computer to device connection, using Microsoft ActiveSync

Requirements for PC-to-Device Installation

To install the plug-in with a computer-to-device connection, the following requirements must be met:

- Your PC must be running Windows 2000, XP or Vista
- Your PC must have Microsoft ActiveSync 4.5 or later installed
- Your mobile device (PocketPC or smartphone) must be running Windows Mobile version 5.0

Option 1— Completing an OTA Installation

If you have not yet attempted an “over the air” installation, follow these steps:

- 1** Register as a new user with your carrier's Portal or with a Funambol Portal—if you have not already done so.
- 2** Make sure you register your mobile device with the Portal.
- 3** When registration is complete, the Portal will send a link to your device via a server-to-device SMS communication.
- 4** Click the link to enable the device to start a download of installer files that will automatically run, setting up your plug-in.

You can now follow the steps detailed in “*Setting up the Plug-in*” on page 7.

Option 2— Completing a PC-to-Device Installation

This installation process involves a sequence of tasks in order to set up the Funambol synchronization software on your Windows Mobile wireless device.

Downloading the Plug-in Installer

To obtain the Funambol plug-in package for use in a PC-to-device installation, follow these steps:

- 1 Start a browser and connect to this web site:
www.funambol.com
- 2 When the Funambol home page appears, click the **Open Source** tab.
- 3 In the Open Source tab menu bar, click **Downloads**.
- 4 Review the download options, and click the latest “Windows Mobile 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.
- 7 Proceed with downloading the installer to your computer.
 - This file is approximately 600 Kb in size.

[-1-] Getting started with installation

As noted previously, the installation of Funambol software on your device would best be accomplished with Microsoft ActiveSync 4.5 or later—as detailed in the following steps.

- 1 Connect the Windows Mobile device to your Windows laptop/PC, using the cable provided by the device manufacturer.
- 2 Turn on the device, if it is not already running.
- 3 Microsoft Windows will “discover” the device. If Microsoft ActiveSync does not automatically start after device discovery, start it at this time.

After ActiveSync recognizes the device, a Synchronization Setup Wizard appears and the Welcome screen appears.



FIGURE 0-1

- 4 You have two options:

- Continue this procedure and register the device with ActiveSync.
- Click **Cancel**. This completely bypasses the ActiveSync synchronization setup, but does not prevent you from completing the plug-in installation. Proceed to “[2-] Continuing with installation” on page 6 to complete the installation.

NOTE: If this mobile device was previously linked via ActiveSync to another PC, the following wizard pane will appear.

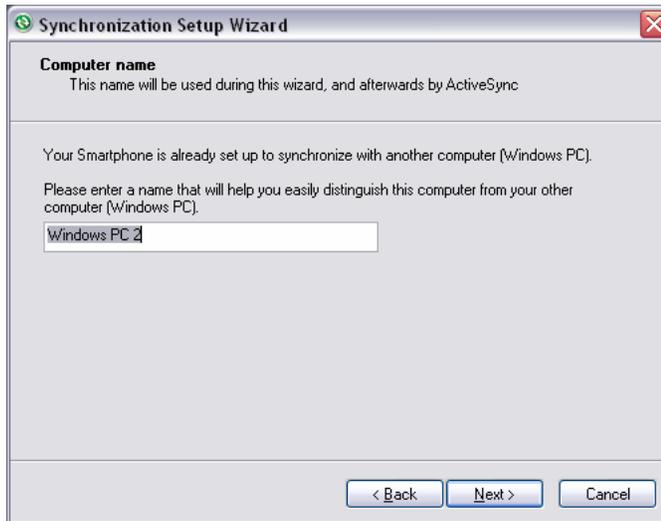


FIGURE 0-2

- Delete the placeholder text in the text field and type a short, descriptive name for this PC—to distinguish it from the previously ActiveSync’ed PC.
- Click **Next** to proceed.

A set of Synchronization Options are displayed in the Wizard, as shown here.



FIGURE 0-3

Every checked item (Contacts, E-mail, etc.) will be automatically synchronized between your Windows Mobile device and Microsoft Outlook on this PC. This will occur as soon as you finish this setup.

- To skip this sync, clear all the checkboxes.

- 5 Click **Next**.
- 6 When the Completing Synchronization wizard screen appears, click **Finish**.



FIGURE 0-4

A status dialog box appears, then closes.



FIGURE 0-5

The main ActiveSync window appears, listing your newly registered mobile device.



FIGURE 0-6

A synchronization of previously checked items automatically starts, unless you cleared all the options in the wizard..



FIGURE 0-7

When this initial synchronization is complete, ActiveSync will display a “Synchronized” message.

This completes the linking of your device to ActiveSync, and you can proceed with the actual plug-in installation through this connection..

From now on, every time you connect your device to this PC, ActiveSync will automatically discover it, recognize it, and reopen the ActiveSync window, ready for use.

[2-] Continuing with installation

- 1 Locate and run the “funambol-windowsmobile-plugin-6.0.x.exe” installer that you previously downloaded to your laptop/PC.
- 2 When the installation is complete, this dialog box appears.

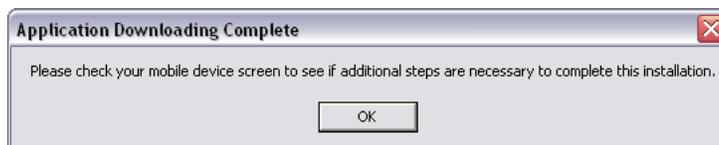


FIGURE 0-8

- 3 Click **OK**.
When the installation is complete, a Funambol Download Complete message appears on-screen in the WinMobile device.
- 4 Press **OK** to close the message.
- 5 On the laptop/PC, exit Active Sync.
- 6 Safely disconnect the Windows Mobile device from your PC.

When the installation is finished, the device’s WinMobile desktop appears.

You can now set up and use the Funambol plug-in on your mobile device, to synchronize all your email and PIM data with the Funambol Portal server. This is detailed in the following sections.

Setting up the Plug-in

Having successfully installed the plug-in on your device, you can start it and prepare it for synchronizations by following these steps:

- 1 On the mobile device, press the **Start** softkey.
- 2 When the Start screen appears (listing the available applications), locate and select **Funambol**.
 - If “Funambol” is not listed in the initial Start screen, press the **More** softkey (which replaces Start) to locate and select **Funambol** in this screen of additional applications.
- 3 Select the **Funambol** icon.

After a brief pre-loading pause, the *Funambol plug-in* screen appears.

Setting up your account

To enter your Funambol account information, follow these steps:

- 1 Select **Menu | Account**.
The Account screen appears.
- 2 Delete the placeholder texts and type the following information in these fields:
 - Server location** The URL of the Funambol Portal or Funambol server.
 - Username** Your Funambol user name
 - Password** The password used to access your account at this source.
- 3 Press the **Save** softkey.
The next step is to review and customize a basic set of synchronization settings.

Reviewing basic synchronization settings

By default, only the Contacts and Calendar data categories are selected for synchronization. To select other data categories (Email, Tasks or Briefcase) for synchronization, follow these steps:

- 1 With the Funambol Plug-in window open, select **Menu | Sync Settings**.
The Sync Settings screen appears.
- 2 Click the check box next to each of the data categories you want to synchronize. (Or, clear the checkmark from any categories you do not want to sync.
 - You can customize these options further by clicking the Details link, that opens a screen detailed fully in “*Extra: Customizing Synchronization Settings*” on page 9.
- 3 Press **Save**..

* For Tasks, Notes, or Briefcase, your Funambol server or Funambol Portal must support the selected data category. For Email synchronization, your email service settings must be defined in your Funambol server account or on the Funambol Portal.
IMPORTANT— The Funambol plug-in does not synchronize Notes data, when used to sync the PIM data on a Smartphone. (This option is available only on PocketPCs running the plug-in.)

Your Windows Mobile device is ready for an initial synchronization, as detailed in the following section.

Using the Plug-in to Synchronize Data

At this point, your Windows Mobile device is ready for a full synchronization, that is performed the first time. As a result, whatever is on the phone is copied to the server and whatever's on the server is copied to the phone.

- 1 With the Funambol Plug-in screen in view, press **Sync All**.
 - A Funambol mini- icon appears in the title bar
 - A moving status icon and status messages appear in each category while synchronization is in progress

The first time you attempt a synchronization, the server will request a full sync.

- 2 Press **Yes** to proceed.
 - You can interrupt the synchronization by pressing **Stop** (which replaces Sync All). A message appears, asking you to confirm that you want to stop the synchronization.
 - Click **OK** or **Cancel**.

When synchronization is complete, the status messages for each category will display "Last (*synchronized*)" plus the date and time of this most-recent sync..

- 3 At this point, you can view the results, review the log file, or exit the plug-in.

IMPORTANT REMINDER: Funambol will distribute the newly synchronized contacts, events, tasks, etc. to their respective Windows Mobile applications, and will list new email in Messages. You can open them from the Windows desktop, after a successful synchronization.
- 4 TIP: After this initial sync, the Funambol icon is added to the quickstart bar atop the main Windows Mobile desktop. To start a sync, select this icon to open the Funambol plug-in.

Extra: Scheduling Automatic Synchronizations

If you want to schedule Funambol data synchronizations at pre-set intervals, follows these steps: (Note that an always-on connection is required, plus a "data plan" with your wireless carrier.)

- 1 Select **Menu | Sync Settings | Advanced**.
- 2 Use the following options to set up an automatic synchronization:

Scheduler	Specify a time interval at which to synchronize, such as every 15 minutes, every 30 minutes, or every 2 hours.
Cradle	When checked, makes the synchronization dependent on a wired connection to a PC.
Security	When checked, enables content encryption using the 3DES algorithm. (Contact your wireless carrier to verify that encryption is active on the Funambol server, or this option will be bypassed.)
- 3 Select **Save**.

Extra: Manually Synchronizing Selected Data Categories

If you prefer to synchronize a single data category at a time, you can do so by following these steps:

- 1 In the Funambol plug-in screen, select a single data category.
- 2 Press the Center button (in the five-way navigator). (Do not press Sync All.)

When synchronization is complete, the selected data category displays the day and time when synchronization was complete.

Extra: Cancelling an In-Progress Synchronization

- 1 To interrupt a synchronization in progress, press the **Stop** softkey.
A Confirm screen asks you to confirm that you want to stop the synchronization.
- 2 Click **Yes** if you do intend to stop the synchronizaiotn.
The main Funambol screen reports “Last sync cancelled” for all selected categories.

Extra: Customizing Synchronization Settings

To review all of the synchronization options for each plug-in category (Email, Contacts, Calendar, Tasks, Notes and Briefcase), follow these steps:

- 1 Start the Funambol plug-in.
- 2 Choose **Menu | Sync Settings**.
- 3 In the Sync Settings window, click the checkbox by each type of data you want to synchronize.
- 4 To the right of each category, click the Details link to open a [category-specific] screen with specific options.
 - Some screens feature additional options, accessible through an “Advanced” link.

The following options are available for selected categories, and allow you to customize your Funambol synchronizations in the following ways::

Setting	Option	Description
Download: (Time Period)	Email	Choose the time period-specific filter for all incoming email.
Download: (Data Per Email)	Email	Choose the amount of data per message (in KB) that is downloaded such as 2, 5, or 10 KB. The maximum size for an email (including attachments) is 500 KB

Setting	Option	Description
Download: (Attachments)	Email	If checked, email attachments are downloaded. This includes files up to 500K in size
Advanced: Remote Name	Email* Contacts* Calendar* Tasks* Notes* Briefcase*	Displays the name (URI) of the synchronization source for the option. ALERT: Do not change this entry unless directed to do so by your Funambol administrator directs you to do so, or unless you have advanced knowledge of the Funambol system.
Advanced: Display Name	Email	Displays the name that is associated with the email account
Advanced: Email Address	Email	Displays your email address.
Sync Direction	Contacts Calendar Tasks Notes Briefcase	Allows you to determine the direction of synchronization for each option. Two-way – two-way fast synchronization of local and remote data. Server to Phone Only – updates local data with data from the server (no local modifications sent to server). Phone to Server Only – updates data on the server with local data (no server modifications sent to device).
Advanced: Data Format	Contacts Calendar Tasks	Displays the data format for each option. ALERT: Do not change this entry unless directed to do so by your Funambol administrator directs you to do so, or unless you have advanced knowledge of the Funambol system.
Local Folder to Sync	Notes Briefcase	[-Read-only-] Displays the local folder on the device that is synchronized with the server. Data in the displayed folder is synchronized; data in subdirectories of the displayed folder are not synchronized.
(Choose)	Notes Briefcase	Opens the Choose [Option] Folder window, in which you can select a local folder on the device.

- 5 Most options offer choices that are accessible through arrow-key presses:
 - Press Up or Down arrows to scroll through the options on a screen.
 - Press Left or Right arrows to toggle the choices in a selected option
 - Press the Center button to open a screen listing all the choices for an option.
- 6 Review the other plug-in options, then click **OK** to save and apply any changes.

Activating email notifications

If your wireless carrier is offering a feature called “email push”, your phone, with a data plan, is able to receive new email as soon as it appears in your Inbox. If this feature is active, you can customize the Funambol plug-in on your mobile device to receive new unread messages (or new contacts or events). The key option is “notifications”, which if active, allow your device to update you about new email or entries.

- 1 Open the Menu and choose **Tools | Notifications**.

The following settings are displayed in the Notifications screen:

Setting	Description
Suppress all notifications	<p>Specifies whether you will receive notifications of new email or new PIM data from your wireless carrier.</p> <p>If checked, synchronization is not performed since no notifications are sent.</p> <p>If not checked, when new data is ready at the data source, the Funambol plug-in is notified. In either case, when you change this setting, an alert appears, asking you to confirm your setting selection.</p>
Confirmation	<p>Specifies the type of confirmation.</p> <p>Always perform a sync – when notification comes from the server, the sync starts automatically.</p> <p>Ask me to confirm sync – when notification comes from the server, a pop-up window requests confirmation. If confirmation is not given within 10 seconds, the synchronization is cancelled.</p>

- 2 Press **Save** so apply the settings; press **Cancel** to close the screen without changes.

* Some mobile operators may block notifications, thereby invalidating the settings and disabling email push. You will still be able to start all your synchronizations manually at any time.

Extra: Recovering Lost Data

If, for any reason, all your Windows Mobile contacts, task, notes or calendar information has been lost, you can restore that data from the Funambol Portal server following these steps:

- 1 After starting the plug-in, press **Menu** and choose **Tools | Recover**.
The Recover screen appears.
- 2 Under **Recover all items in**, click the checkboxes by the data categories you want to recover.
 - ALERT: Depending upon the options you’ve previously set up, and built-in Funambol limitations, not all data will be recovered in every category.
- 3 Under **Direction**, determine the direction in which you want the data to be copied.

ALERT! Be careful to choose the correct direction for recovery. All data on the destination device will be erased by this operation.

- 4 Click the now-active **Recover** button to start the process.
- 5 When the Confirm message appears, click **Yes** to proceed.

The recovery proceeds as a one-way synchronization, and status messages appear in each of the categories listed in the main Email Client window.

When the recovery is complete, the selected categories will note “Last (Synchronized):” with the date and time.

Extra: Customizing Log Settings

Funambol offers three levels of logging activity that you can choose from by following these steps.

- 1 After starting the plug-in, press **Menu** and choose **Tools | Logging**.
- 2 When the Logging screen appears, choose from the following three options:

Error	Records only the activities that result in errors.
Info	Records all synchronization activity
Debug	Records all activity, including problems

 - If you select **Info** or **Debug**, the log file only records data from the most recent synchronization.
- 3 When you're finished, click **Save** to apply any changes.

Extra: Viewing the Most Recent Log File

- 1 After starting the plug-in, press **Menu** and choose **Tools | Logging**.
- 2 When the Logging screen appears, press the **View** softkey.

The latest log appears in the Windows File Viewer.
- 3 You will need to use the **Pan** and **Zoom** functions to read the log contents.
- 4 When you are finished, exit the File Viewer.

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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

Uninstalling the Funambol Plug-in from the Device

If necessary, you can uninstall the Funambol Plug-in from your Windows Mobile device using Microsoft ActiveSync by following these steps.

- 1** Connect the mobile device to your Windows computer with the manufacturer-provided cable.
After Windows recognizes the device, the ActiveSync Synchronization Setup wizard window appears.
- 2** Click **Cancel**.
- 3** Open the ActiveSync window.
- 4** If a previous version of the plug-in is present on the device, choose **Tools | Add/Remove Programs**.
The Add/Remove Programs windows appears.
- 5** Select the previous version of the plug-in as listed in this window, and click **Remove**.
- 6** When a verification dialog box appears, click **OK**.
- 7** When uninstallation is complete, a message appears..