

# Using Sync for Outlook®

## Installing Sync for Outlook

Sync for Outlook synchronizes a range of PIM data between Outlook and our sync servers. This data includes contacts, calendar events, tasks, and notes.

1. Log into 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, select the “I Agree” check box and then click **Next**.
5. When the final Setup Wizard window appears, make sure the “Run Sync for Outlook” check box is selected, and then click **Finish**. The Sync for Outlook window will appear.

## Configuring Sync for Outlook

Each user should complete the following steps. You do not need to have “Administrator” privileges to perform any of the following procedures.

1. In Outlook, select **Sync for Outlook | Sync Menu**.
2. After the Sync for Outlook 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 Sync 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`

**Email:** Enter your entire email address (e.g., `myname@mydomain.com`).

**Password:** Enter the password for your email account.
7. Click the **OK** button.

## Using Sync for Outlook

Once Sync for Outlook has been installed, you do not need to have “Administrator” rights to use it.

In Outlook, select **Sync for Outlook | Sync All**, or click the **Sync for Outlook** button, located in the Sync for Outlook toolbar. After the synchronization is complete, the Sync for Outlook 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 Sync for Outlook

Sync for Outlook is based on Funambol's Outlook Sync Client version 6.5. The source code is available on our website. Sync for Outlook is designed to work with our Funambol Data Synchronization Server and the extensions we have added. Sync for Outlook is not guaranteed to work as intended when used with servers hosted by other providers.

## Requirements for Use

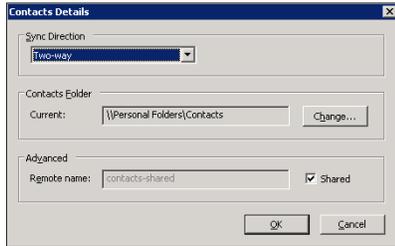
- Sync for Outlook can be installed on a computer (desktop or laptop) running Microsoft Windows XP or Vista, and may be used with Outlook 2002 (XP), 2003, or 2007.
- You will need access enabled by your domain administrator.
- You will need your email login and password.
- Installation must be done by a user with “Administrator” privileges. After installation, any Outlook user with access to the computer can use Sync for Outlook.

## Customizing Sync Settings

In the [Sync for Outlook | Options](#) window, you can customize your options and schedule regular synchronizations.

### Synchronization Option Details

1. In Outlook, select [Sync for Outlook | 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, 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 [Sync for Outlook | Options](#).
2. Click the [Sync](#) icon, located in the left-hand column.
  - To turn on automatic synchronization, select the [Synchronize every](#) check box and then select an interval.
  - To enable encryption, select the [Enable encryption](#) check box. Sync for Outlook (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 select the check box to enable this option.

- If you only want to synchronize when Outlook is open, select the [Only sync when Outlook is open](#) check box. 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 sync client 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.

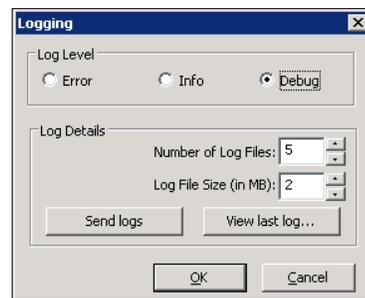
1. In Outlook, select [Sync for Outlook | Sync Menu](#).
2. After the Sync for Outlook window appears, choose [Tools | Logging](#).
3. Click the [View Log](#) button. A Windows Notepad text window appears, detailing all the tasks attempted in the most recent synchronization.
4. When you're finished reviewing the contents of the log, close the Notepad window.

**Tip:** To customize your log settings, see the help section, “Customizing Log Settings.”

### Customizing Log Settings

Sync for Outlook 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 [Sync for Outlook | Sync Menu](#).
2. After the Sync for Outlook 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.

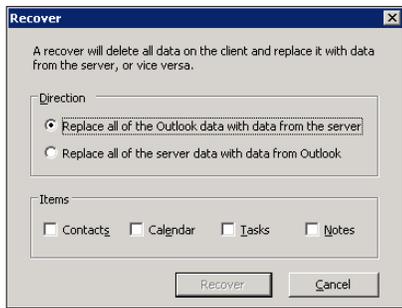
**Debug:** Reports more information, which is helpful in diagnosing the cause of problems or errors.

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 [Sync for Outlook](#) | [Sync Menu](#).
2. After the Sync for Outlook 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.



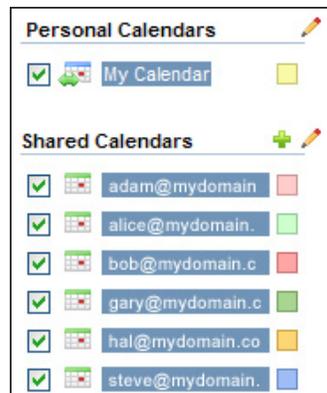
**Note:** When you choose the first option (“Replace all of the Outlook data with data from the server”), we suggest that you delete all shared data from Outlook first (such as shared calendars and company directory), and then perform the recovery. This ensures that your data will be updated properly.

4. Select the check box 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 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 selected.

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

Sync for Outlook is able to check for new versions. In order to check for a new version, perform the following operations.

1. In Outlook, select [Sync for Outlook](#) | [Sync Menu](#).
2. After the Sync for Outlook window appears, choose [Help](#) | [Check for Updates](#).
3. A window will be displayed with the current version 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 Sync for Outlook

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

1. Click [Start](#) and choose [Settings](#) | [Control Panel](#) | [Add/Remove Programs](#).
2. When the Add/Remove Programs window appears, locate and select [Sync for Outlook](#) 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 user and connection settings. If you intend to re-install Sync for Outlook on this computer, these saved settings will be automatically applied during the re-install process.
5. Click [Uninstall](#) to start removal.
6. When Sync for Outlook is successfully removed, another confirmation dialog box appears. Click [OK](#). You can now close the Add/Remove Programs window.

## Extra: Sending Sync Logs

If an error occurs during sync, or you are having problems with the sync client, you can send the logs directly to our support team. After the error, select [Tools](#) > [Logging](#) and press the [Send Logs](#) button. You will be prompted with further instructions for contacting support.