USER GUIDE

Setting Up and Using the Funambol Windows Mobile Sync Client v7.1

(For use in both Pocket PCs and Smartphones)

Contents

"Introduction" 2
"Requirements for PC-to-Device Installation" 2
"Completing an OTA Installation" 2
"Completing a PC-to-Device Installation" 2
"Setting up the Sync Client" 5
"Using the Sync Client to Synchronize Data" 6
"Advanced Settings" 7
"Manually Synchronizing Selected Data Categories" 7
"Canceling an In-Progress Synchronization" 7
"Customizing Synchronization Settings" 7
"Cleanup" 9
"Information" 9
"Customizing Log Settings" 9
"Viewing the Most Recent Log File" 10
"Uninstalling the Funambol Sync Client from the Device" 10

FUNAMBOL

Introduction

The Funambol Windows Mobile Sync Client enables you to quickly synchronize a variety of data between a Microsoft Windows Mobile device and the Funambol server. The data may reside at wireless providers, Internet service providers, corporate enterprises, and in certain circumstances, your home system. The Funambol Sync Client synchronizes contacts, calendar, email, notes, tasks and briefcase with native applications on your Windows Mobile device.

The Funambol Windows Mobile Sync Client 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 sync client 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; if running Windows Vista, you must have WM Device Center installed.
- Your mobile device (Pocket PC or Smartphone) must be running Windows Mobile version 5.0 or later

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 sync client.

   You can now follow the steps detailed in *"Setting up the Sync Client"* on page 5.

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 Installer

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

1. Start a browser and connect to the Funambol website:

   www.funambol.com

2. When the Funambol home page appears, click the **Open Source** tab.
3. In the Open Source tab menu bar, click **Funambol Downloads**.
4. Move to **Client Software** and click the desired "Windows Mobile" package link (for Smartphone or Pocket PC) to start the download.
5. When the Download a File user registration page appears, fill in the required information and click **Submit** to proceed.
   - Or, click **No Thanks!** to skip registration and proceed with the download.
6. Click the package link to start the download.
7. Proceed with downloading the installer to your computer.
   - This file is approximately 770 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:

- [Recommended] Click **Cancel**. This completely bypasses the ActiveSync synchronization setup, but does not prevent you from completing the sync client installation. Proceed to *"[-2-] Continuing with installation"* on page 4 to complete the installation.
- To continue with the procedure and register the device with ActiveSync, uncheck all the items and click **Continue**.

A status dialog box appears, then closes.

FIGURE 0-2

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

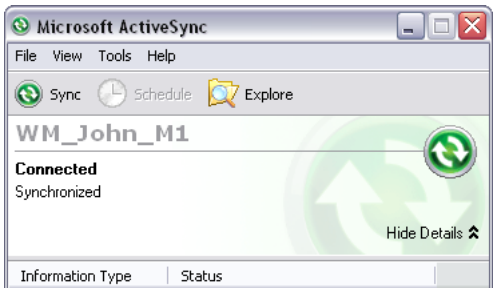

FIGURE 0-3

[-2-] Continuing with installation

1 Locate and run the "funambol-pocketpc-sync-client-7.x.x.exe" installer that you previously downloaded to your laptop/PC.

2 When the installation is complete, this dialog box appears.

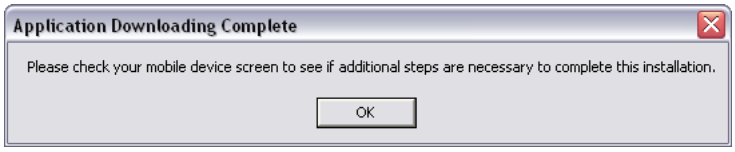

FIGURE 0-4

3 Click **OK**.

When the installation is complete, a Funambol Download Complete message appears on-screen in the Windows Mobile device.

4 Press **OK** to close the message.

5 Safely disconnect the Windows Mobile device from your PC.

When the installation is finished, you will be prompted to enter your username and password as described in *"Setting up your account"* on page 5.

You can now set up and use the Funambol Sync Client 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 Sync Client

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

(**Note:** make sure to have an active internet connection; please refer to your device's manual to set it up.)

1. On the mobile device, press the **Start** softkey.
2. When the Start screen appears (listing the available applications), locate **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 and start the application.

   After a brief pre-loading pause, the **Funambol Sync Client** screen appears.

Setting up your account

At the first execution of the application after installation, you will be prompted to enter your Funambol account information:

- **Server location** The URL of the Funambol Portal or Funambol server; by default, this is set to the MyFunambol portal sync URL: `http://my.funambol.com/sync`
- **Username** Your Funambol user name.
- **Password** The password used to access your account at this source.

The next step is to review and customize a basic set of synchronization settings.

Click **Save**.

The sync client will now connect to the server to check your credentials. Once authenticated, you will be automatically taken to the sync client's main screen.

Note: if no connection is available or the username/password you have specified are invalid, you will not be able to use the client.

Reviewing basic synchronization settings

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

1. With the Funambol Sync Client window open, select **Menu** | **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 Email options or PIM options links, that open screens detailed fully in *"Customizing Synchronization Settings"* on page 7.
   - You can customize the preferred synchronization method by clicking the Sync Method link. The available options are:

Push service	This is the default service that allows new emails and updates to PIM data (contacts, calendar entries, tasks) to be automatically pushed to the user's handset.
Manual synchronization	Each synchronization must be manually launched by the user by selecting **Sync All** or any specific data category from the sync client interface.
Scheduled synchronization	Specify a time interval at which to synchronize, such as every 15 minutes, every 30 minutes, or every 2 hours.

3 Press **Save**.

> * For Tasks, Notes, or Briefcase, your Funambol server or Funambol Portal must support the selected data category (**Note:** the myFunambol portal supports all of them). For Email synchronization, your email service settings must be defined in your Funambol server account or on the Funambol Portal.
>
> **Important**— The Funambol Sync Client does not synchronize Notes data, when used to sync the PIM data on a Smartphone. (This option is available only on Pocket PCs running the client.)

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

Using the Sync Client to Synchronize Data

At this point, your Windows Mobile device is ready for synchronization.

Since this is the first time the data is synchronized with the server, a full synchronization will occur: whatever data is present on the phone is copied to the server and whatever is on the server is copied to the phone.

1 With the Funambol Sync Client 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 sync client.

Tip: After the initial sync, the Funambol icon is added to the quickstart bar on you Windows Mobile device. To start a sync, select this icon to open the Funambol Sync Client.

Advanced Settings

From the main Funambol screen:

1. Select **Menu** | **Settings** and then **Menu** | **Advanced**.
2. The following options are available:

   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.)

   Remote Name — Displays the name (URI) of the synchronization source for the option. **Alert**: Do not change this entry unless your Funambol administrator directs you to do so, or unless you have advanced knowledge of the Funambol system.

   Data Format — Displays the data format for each option. **Alert**: Do not change this entry unless your Funambol administrator directs you to do so, or unless you have advanced knowledge of the Funambol system.
3. Select **Save**.

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 main Funambol 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 completed.

Canceling 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 synchronization.

   The main Funambol screen reports “Last sync canceled” for all selected categories.

Customizing Synchronization Settings

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

1. Start the Funambol Sync Client.

2 Choose **Menu** | **Settings**.

3 In the Sync Settings window, click the checkbox by each type of data you want to synchronize.

4 Click the **Email options** or **PIM options** link to open a category-specific screen with specific options.

- Some screens feature additional options, accessible through an **Advanced Settings** 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
Download: (Attachments)	Email	If checked, email attachments are downloaded. This includes files up to 500 kB in size
Advanced Settings: Display Name	Email	Displays the name that is associated with the email account
Advanced Settings: Email Address	Email	Displays your email address.
Sync Direction	PIM	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).
Notes/Briefcase local folder to sync	PIM	Displays the local folder on the device that is synchronized with the server. The displayed folder's contents will be synchronized. Please note that data stored in subdirectories of the displayed folder or files larger than 2 MB will not be synchronized. **Note:** the Notes sync feature is only available on Pocket PC devices.
(Choose)	PIM	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 sync client options, then click **Save** to save and apply any changes.

Cleanup

If, for any reason, you wish to erase all data (email, contacts, tasks, notes, briefcase or calendar information) from your Windows Mobile device, follow these steps:

1 After starting the sync client, press **Menu** and choose **Cleanup**.

The Sync Cleanup screen appears.

2 Under **Erase all items in**, click the checkboxes by the data categories you want to recover.

Alert! All data on the device will be erased by this operation.

3 Click the now-active **Cleanup** button to start the process.

4 When the Confirm message appears, click **Yes** to proceed.

Note: After completing a cleanup, the following synchronization will be a full sync.

Information

It is possible to view information about the Funambol Sync Client and the Windows Mobile device:

1 After starting the sync client, press **Menu** and choose **About Funambol** to view information about the installed version of the client.

2 From the About screen, select **Menu** | **Device Info** to view information about the Windows Mobile device you are using.

Customizing Log Settings

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

1 After starting the sync client, press **Menu** and choose **About Funambol**. From the About screen, select **Menu** | **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.

Viewing the Most Recent Log File

1 After starting the sync client, press **Menu** and choose **About**. From the About screen, select **Menu** | **Logging** and then **Menu** | **View**.

The latest log appears in the Windows File Viewer.

2 You will need to use the **Pan** and **Zoom** functions to read the log contents.

3 When you are finished, exit the File Viewer.

You can also send the latest log to the staff at Funambol by selecting **Menu** | **Logging** and then **Menu** | **Send Log**, so that it can be analyzed in case of need.

Uninstalling the Funambol Sync Client from the Device

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

Note: emails downloaded by the Funambol Sync Client will be deleted; contacts, calendar events and notes will not be deleted.

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 sync client is present on the device, choose **Tools** | **Add/Remove Programs**.

The Add/Remove Programs windows appears.

5 Select the previous version of the client 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.

You may also uninstall the Funambol Sync Client directly from your device.

Legal Information

Contents copyright © 2006, 2007, 2008, 2009 Funambol, Inc. All rights reserved.

The information contained in this publication is subject to US and international copyright laws and treaties. Except as permitted by law, no part of this document may be reproduced or transmitted by any process or means without the prior written consent of Funambol, Inc.

Funambol, Inc. has taken care in preparation of this publication, but makes no expressed or implied warranty of any kind.

Funambol, Inc. does not guarantee that any information contained herein is and will remain accurate or that use of the information will ensure correct and faultless operation of the relevant software, service or equipment.

Funambol, Inc., its agents and employees shall not be held liable for any loss or damage whatsoever resulting from reliance on the information contained herein.

Funambol and Sync4j are trademarks and registered trademarks of Funambol, Inc.

All other products mentioned herein may be trademarks of their respective companies.

Published by Funambol, Inc.

643 Bair Island Road, Suite 305

Redwood City, CA 94063

ED: 06222007 vABC

Technical Support

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

http://www.funambol.com/support