Setting Up and Using the Funambol Windows Mobile Plug-in v6.5

(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 and tasks 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 (Pocket PC or Smartphone) must be running Windows Mobile version 5.0 or later

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 4.

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 the Funambol Portal (ask your service provider for the URL, if necessary).

2. When the Portal's home page appears, log in using your username and password.

3. Click the **Download** tab.

4. Choose the desired version of the plug-in (Power PC or Smartphone).

5. Proceed with downloading the installer to your computer.

   • This file is approximately 750 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 4 to complete the installation.
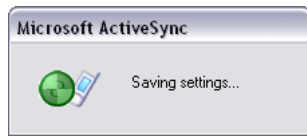
A status dialog box appears, then closes.

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

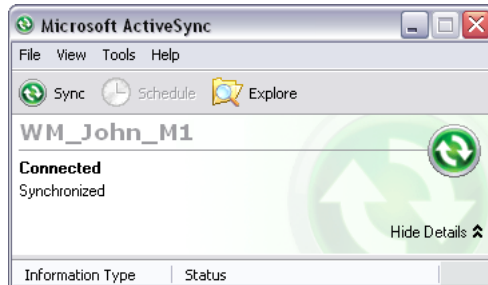## [-2-] Continuing with installation

1   Locate and run the "funambol-windowsmobile-plugin-6.5.x.exe" installer that you previously downloaded to your laptop/PC.

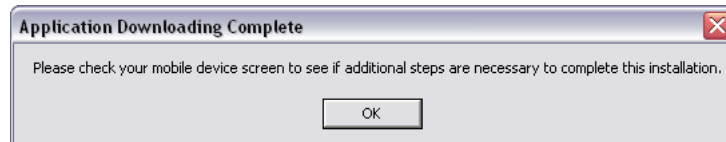**2**   When the installation is complete, this dialog box appears.

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, 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 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

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.

Reviewing basic synchronization settings

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

1 With the Funambol Plug-in 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 *"Extra: 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** from the plug-in 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, 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.

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 is 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: 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 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 synchronization.

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), follow these steps:

1   Start the Funambol plug-in.

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 500K 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.

Setting	Option	Description
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).

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 **Save** to save and apply any changes.

Extra: Cleanup

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

1   After starting the plug-in, 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.

Extra: Information

It is possible to view information about the Funambol plug-in and the Windows Mobile device:

1   After starting the plug-in, press **Menu** and choose **About Funambol** to view information aboout the installed version of the plug-in.

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

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 **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.

Extra: Viewing the Most Recent Log File

1   After starting the plug-in, 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 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**.

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:

http://www.funambol.com/support

7 When uninstallation is complete, a message appears.