

TrueSync[®] **Training**



Starfish
Smart Connected Solutions

Overview of TrueSync and Outlook

- What is Outlook?
- Different versions of Outlook
- How to choose Outlook synchronization during installation
- What you see during TrueSync setup
- How to back up your Outlook data
- Folders vs. Categories
- Exchange server
- Expression Services
- Issues to be aware of (“gotcha’s”)

What is Outlook?

- Outlook is a PIM (Personal Information Manager)
It will manage your:
 - Contacts
 - Calendar
 - Tasks (ToDo items)
 - Memos
 - It also handles e-mail and journal entries, but we don't synchronize those
-



Different versions of Outlook

There are several “flavors” of Outlook:

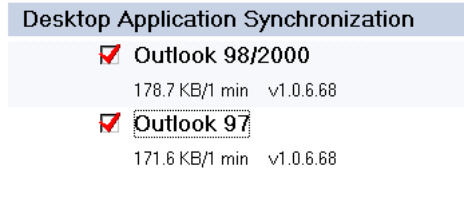
- Outlook 97
- Outlook 98
- Outlook 2000
- Outlook XP (also known as Outlook 2002 and less commonly Outlook 10)

There is also a product that comes with all versions of Windows called “Outlook Express”. It is a limited “email and address book only” version. We do not synchronize with Outlook Express.



How to choose Outlook synchronization during installation

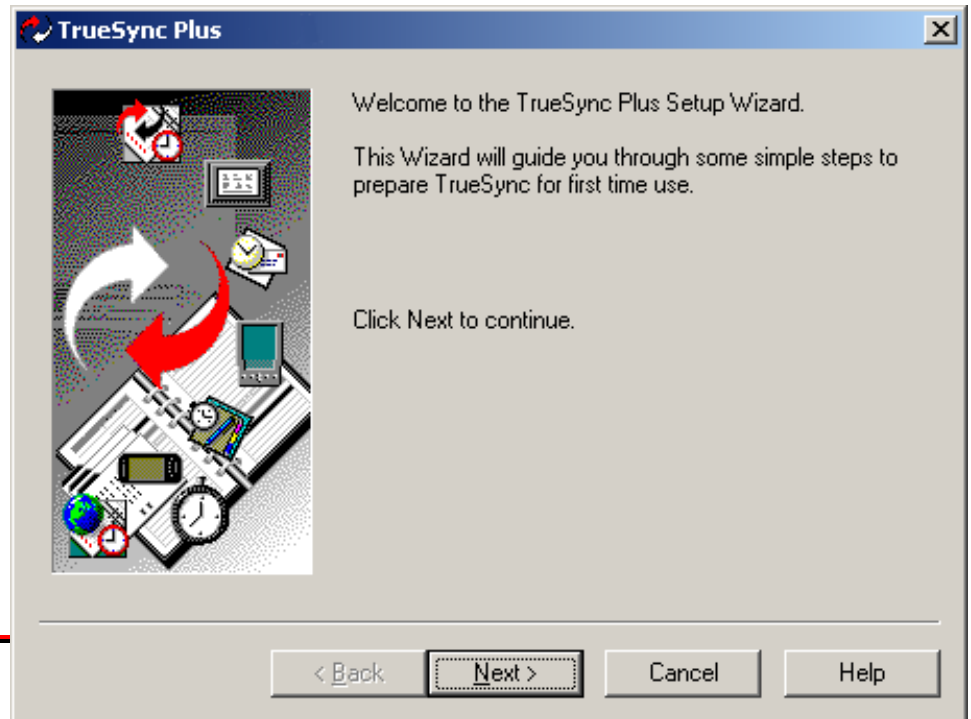
- When the Starfish Installer runs, you will see the choices for Outlook synchronization. Select the version of Outlook you will be using. Then press the “>>” button to complete installation.



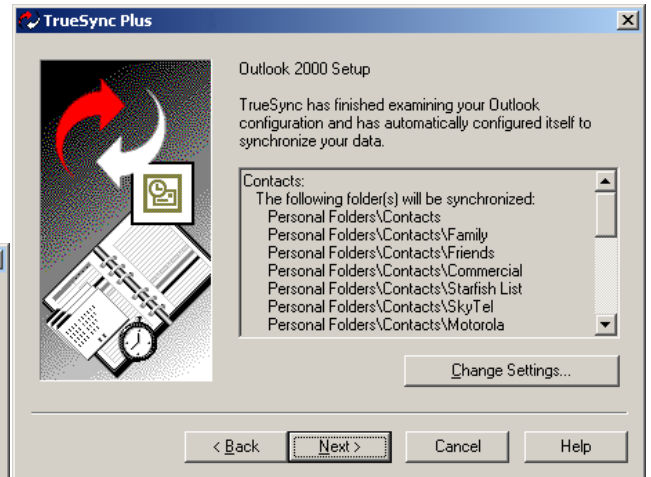
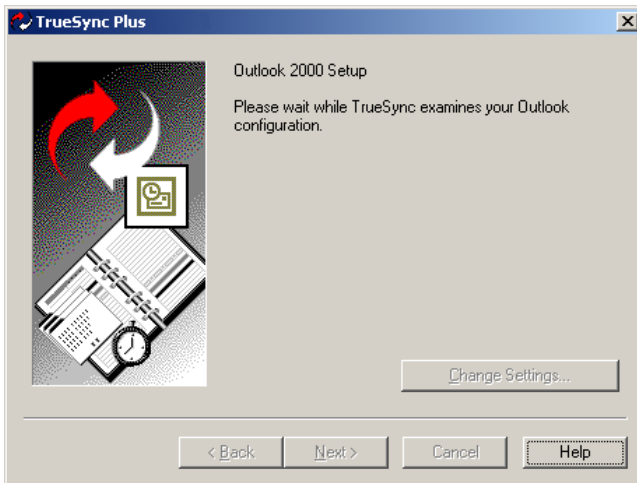
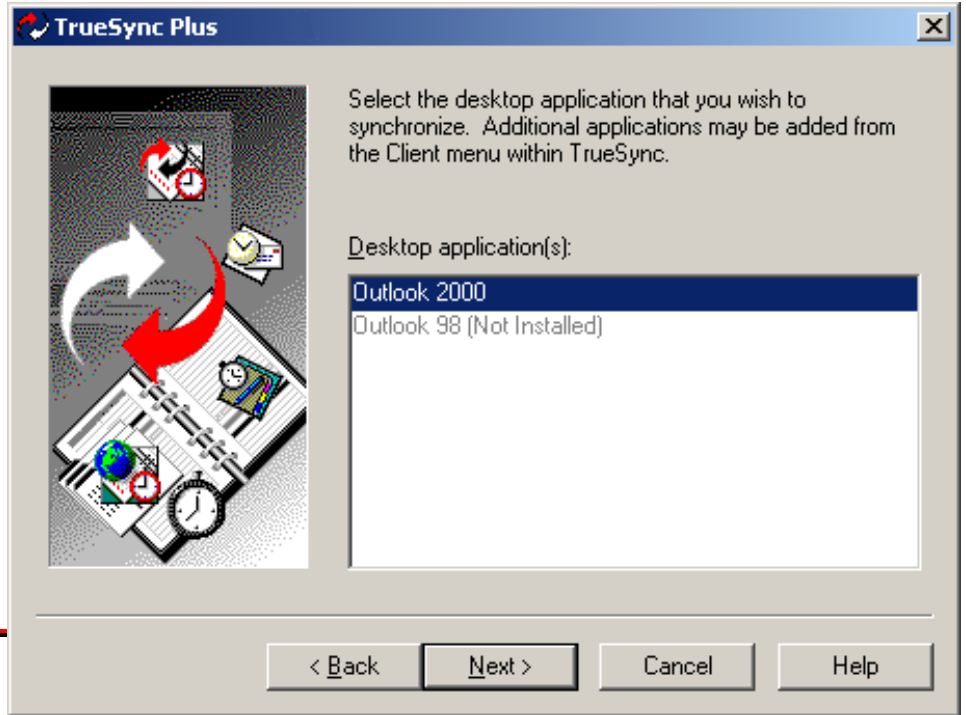
- Note that future versions of TrueSync will have a single choice for Outlook, which will not reference any version numbers. This should reduce confusion for the end user.



What you see during TrueSync setup



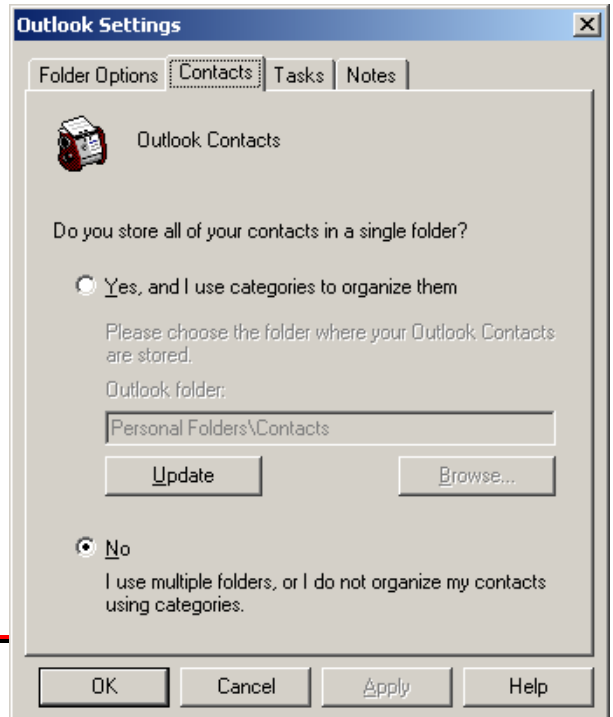
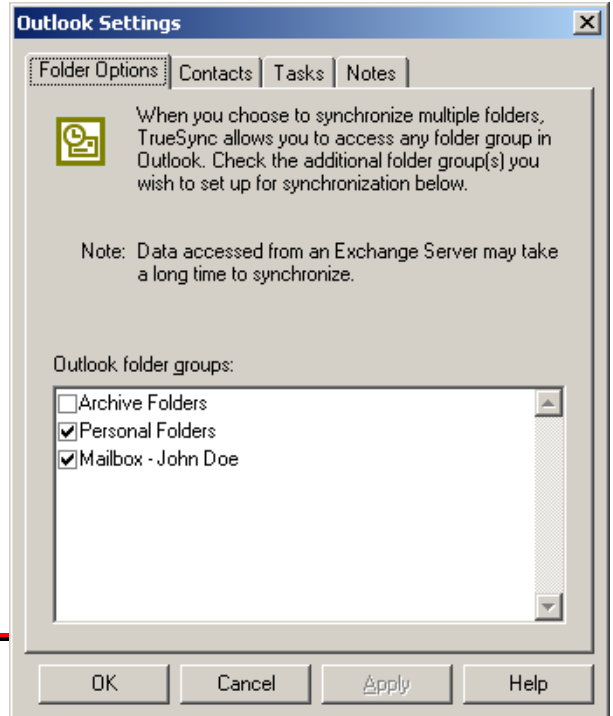
What you see during TrueSync setup



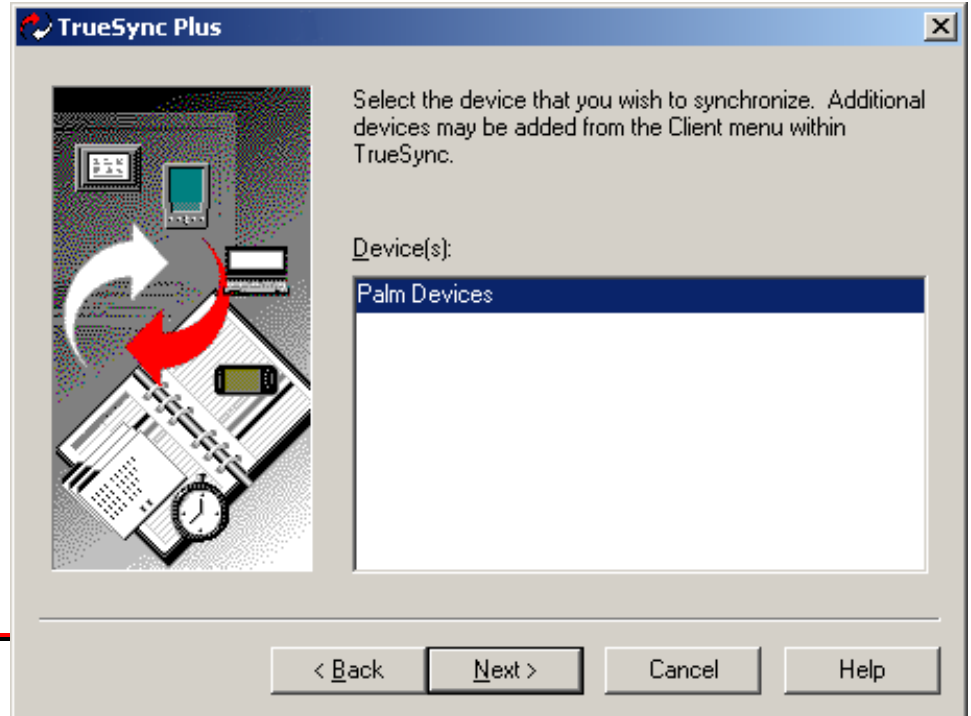
What you see during TrueSync setup



What you see during TrueSync setup



What you see during TrueSync setup



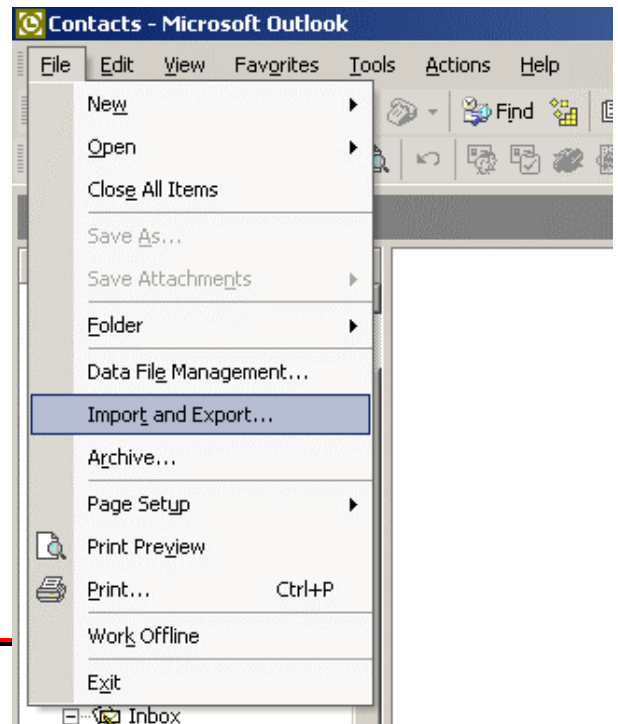
How to back up your Outlook data

- Before starting a sync you should back up your data in Outlook. This way, the user can restore their data to Outlook if they are not satisfied with the results of their sync.

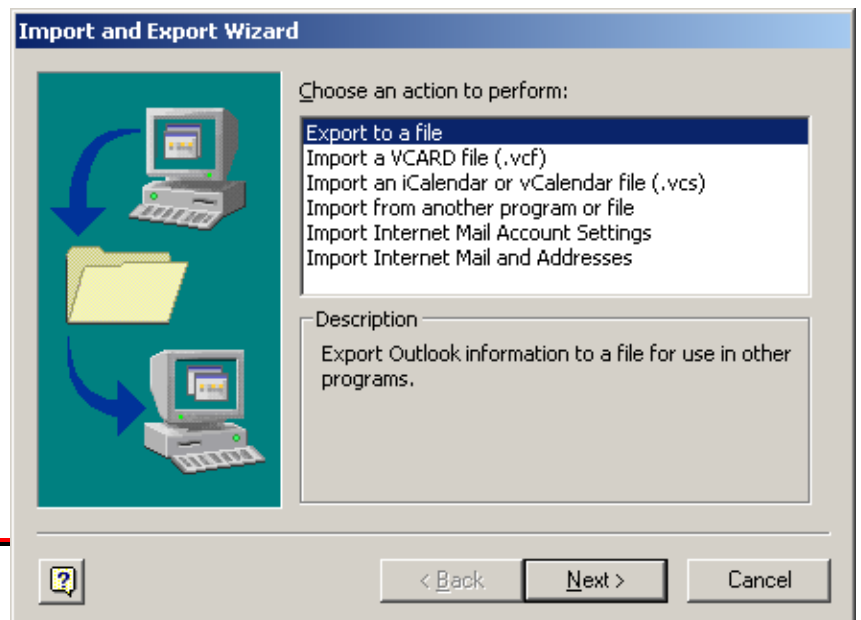


How to back up your Outlook data

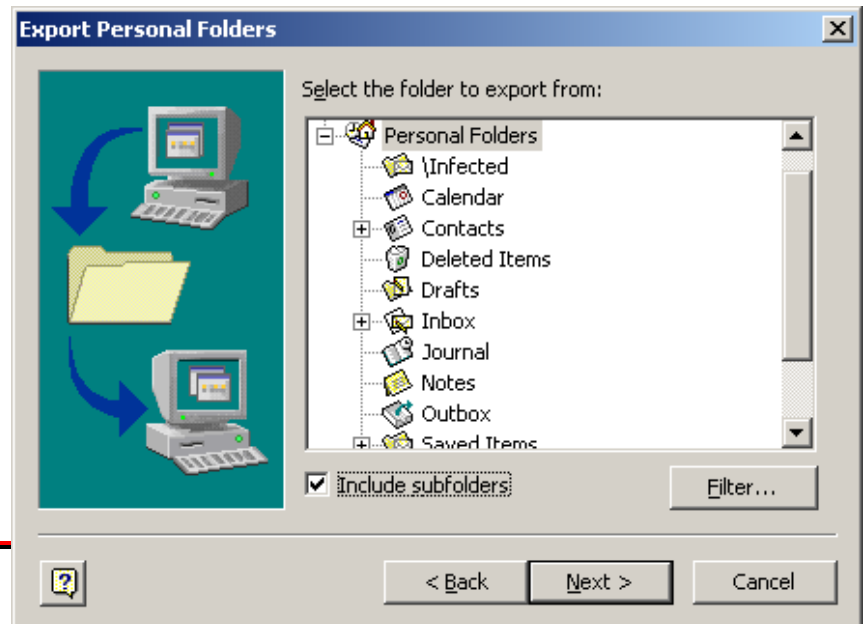
- Each version of Outlook appears somewhat different, but the basic instructions are the same.
- Go to the “File” menu in Outlook and select “Import & Export”



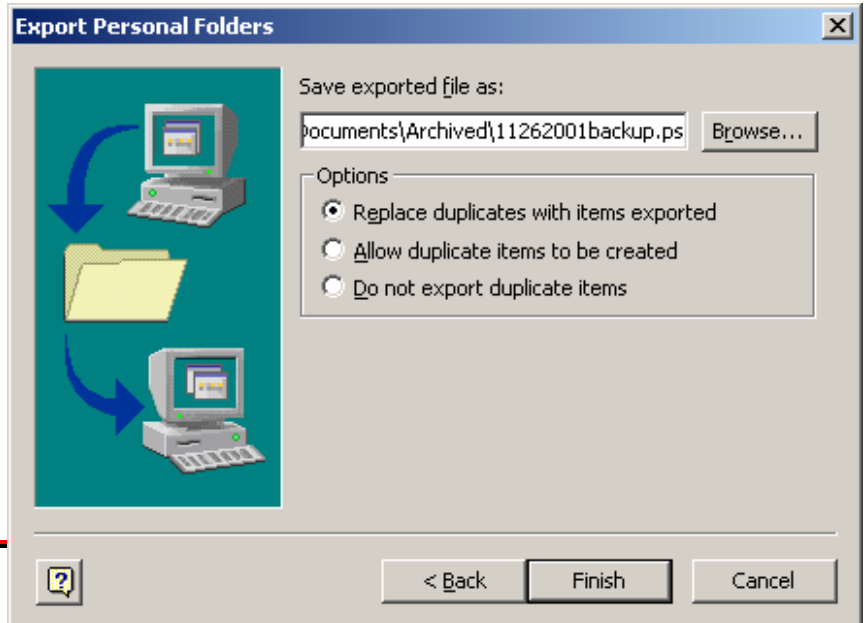
How to back up your Outlook data



How to back up your Outlook data



How to back up your Outlook data

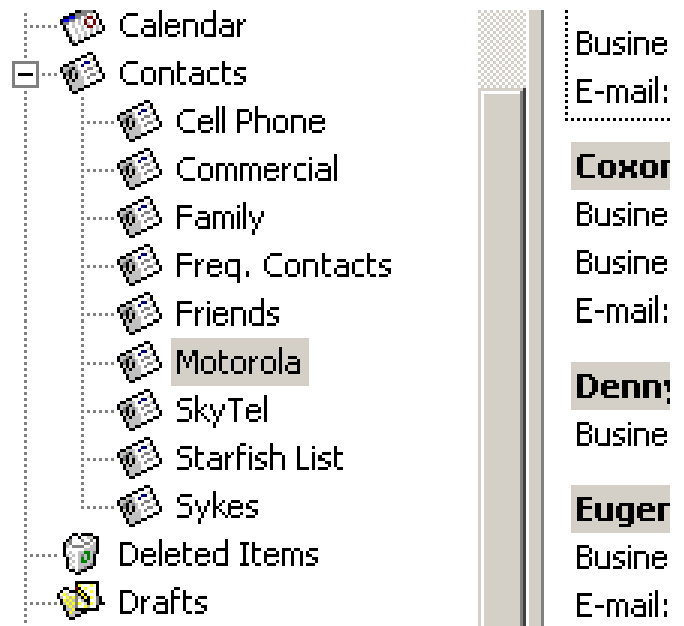


Folders vs. Categories

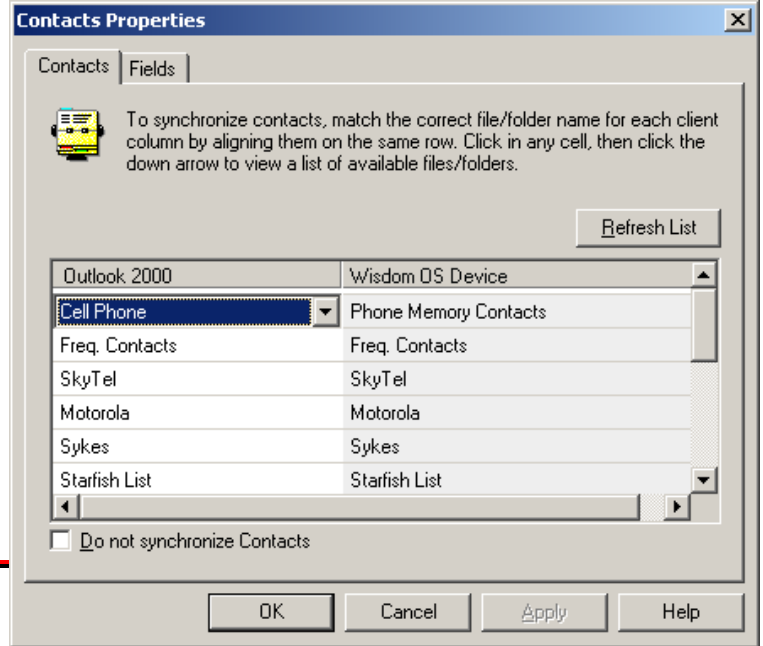
- This is probably one of the most confusing issues you will deal with when working with Outlook and TrueSync.
- Outlook records have a field at the bottom called “Categories”. Some users (not many) use this field to manage their data. Other users separate their data into discrete folders within Outlook.
- The next few slides will show you both of these methods of data management.



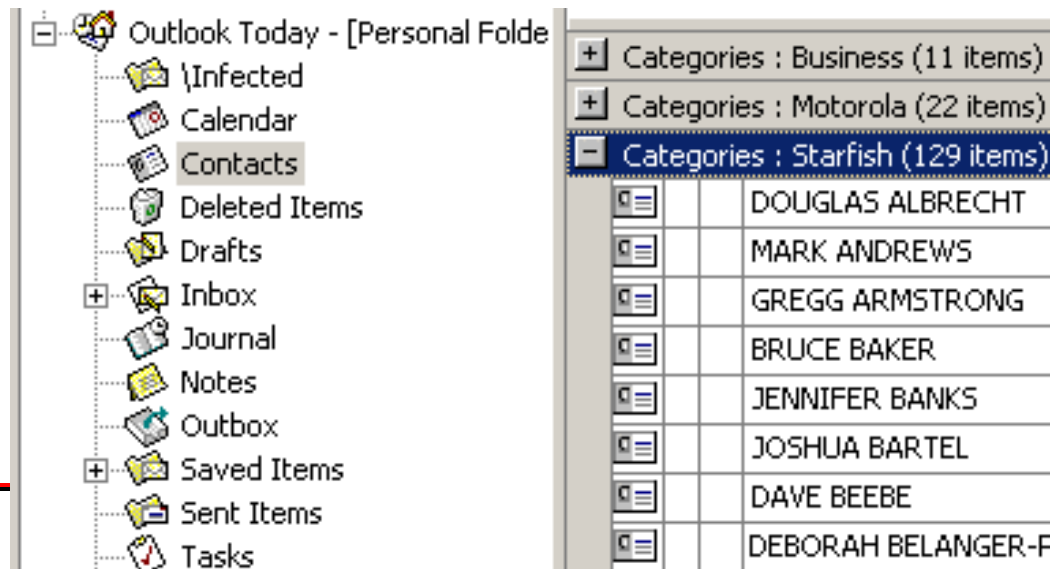
Folders vs. Categories



Folders vs. Categories



Folders vs. Categories



Folders vs. Categories

Categories... Motorola



Categories [?] [X]

Item(s) belong to these categories:

Motorola Add to List

Available categories:

- Business
- Competition
- Favorites
- Gifts
- Goals/Objectives
- Holiday
- Holiday Cards
- Hot Contacts
- Ideas
- International
- Key Customer
- Miscellaneous
- Motorola
- Personal

OK Cancel Master Category List...

Folders vs. Categories

Contacts Properties [X]

Contacts | Fields

To synchronize contacts, match the correct file/folder name for each client column by aligning them on the same row. Click in any cell, then click the down arrow to view a list of available files/folders.

Refresh List

Outlook 2000	Wisdom OS Device
Business	Business <add>
Motorola	Motorola
Starfish	Starfish List
Unfiled	<unmapped>
<unmapped>	Commercial
<unmapped>	Contacts

Do not synchronize Contacts

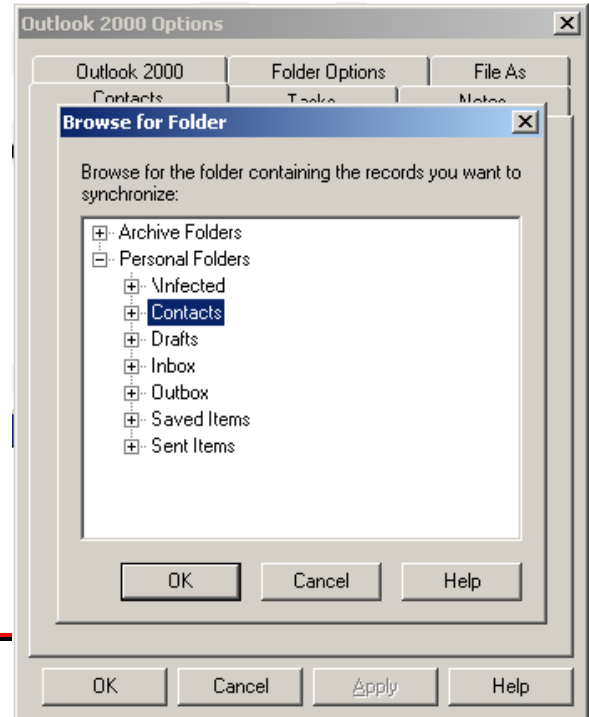
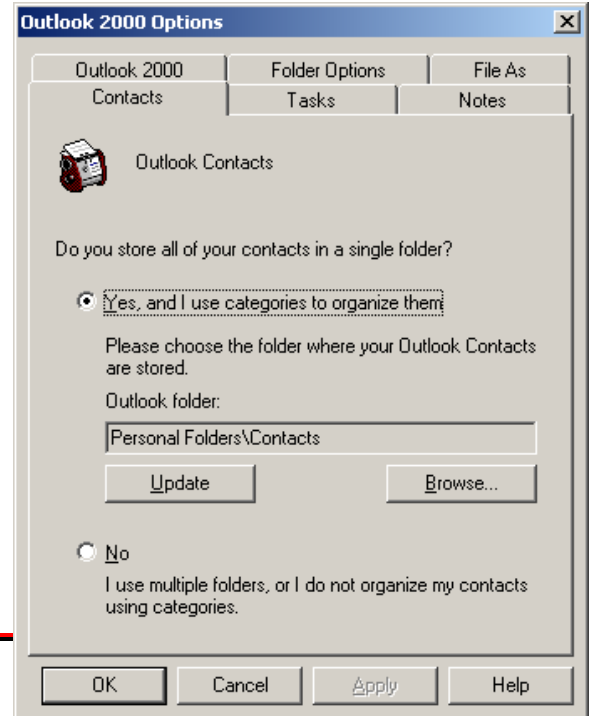
OK Cancel Apply Help



Folders vs. Categories



Folders vs. Categories



Folders vs. Categories

- Clicking “OK” will bring up a dialog advising you to map your categories, since the previous mapping is no longer valid. Clicking the Contacts button on the TrueSync toolbar will allow you to map your categories.
- Since Outlook permits the user to apply more than one category to a contact record, when that record is synced to a client, it may appear multiple times on that client. This is because the client may handle categories more like separate folders, so TrueSync has to put a copy of the contact into each category. This can lead to calls from users complaining about “duplication” of records on their device. Most devices have an “All” category selection which they default to. Users may not be aware of this, and assume that TrueSync has duplicated their data.

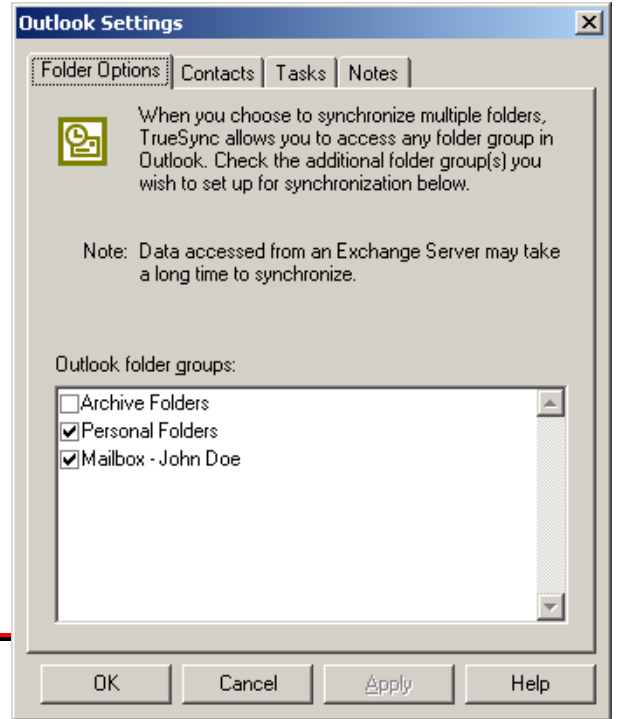


Exchange server

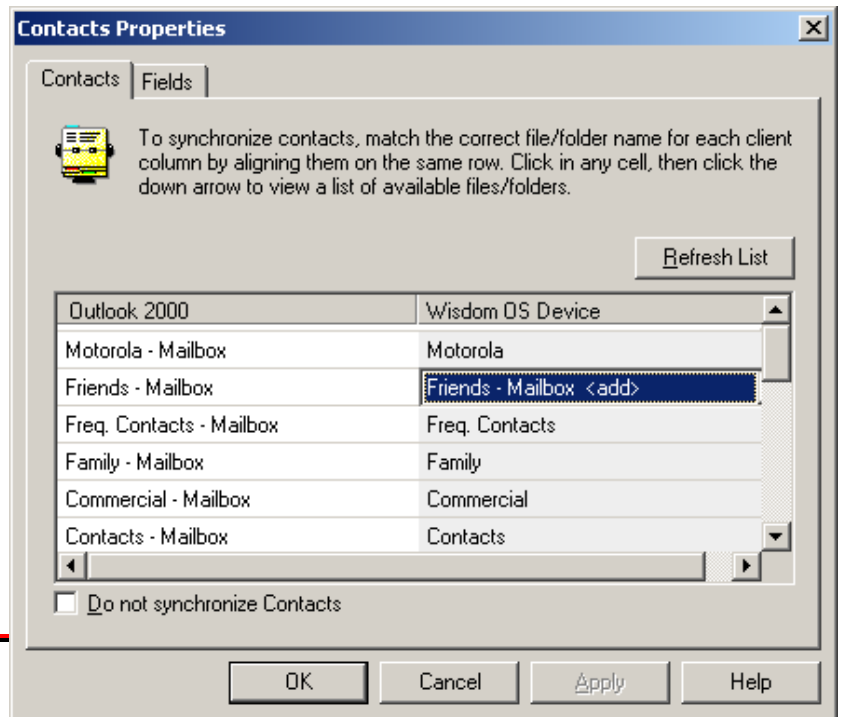
- In addition to syncing with the user’s Personal Folders file on their local hard drive, TrueSync allows them to sync with their data on an Exchange server.
- Exchange servers are a way for large companies to keep their data in a single repository, accessible to anyone with sufficient permissions. This way, there can be a company “master” contact list that everyone has access to, plus they can have their own individual accounts on the server with their own private data. TrueSync will allow the user to sync with both of these.



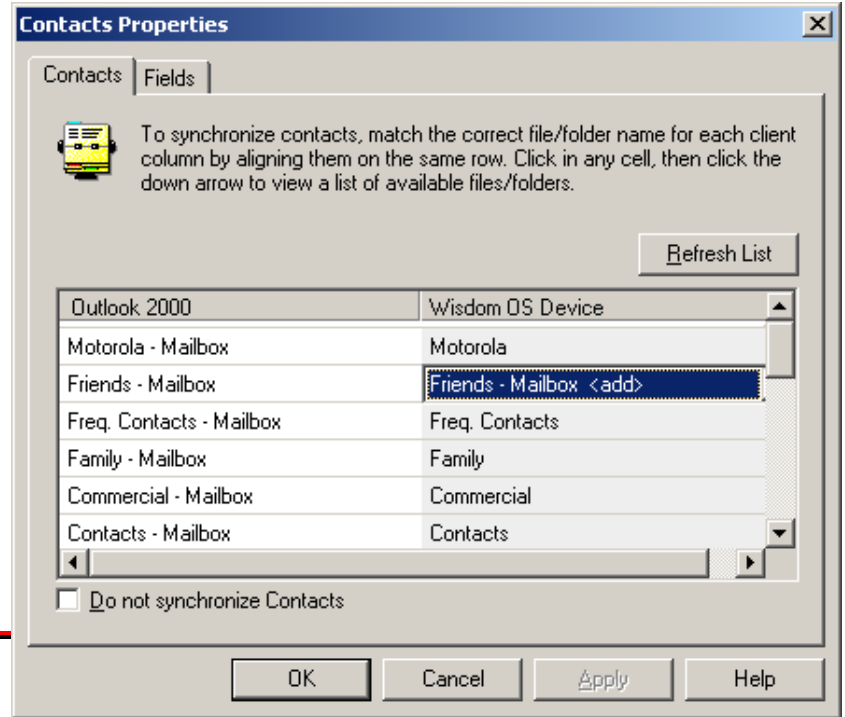
Exchange server



Exchange server



Exchange server



Expression Services

Starting with Outlook 98, Microsoft introduced a feature called “Expression Services”. This is a module that allows other programs to work with data within Outlook. It gets installed during the Full installation. It’s not installed during Minimal and Standard installations.

When Outlook 2000 came out, however, Expression Services was *built into* Outlook and was no longer a separately installable component.

This information is important because...



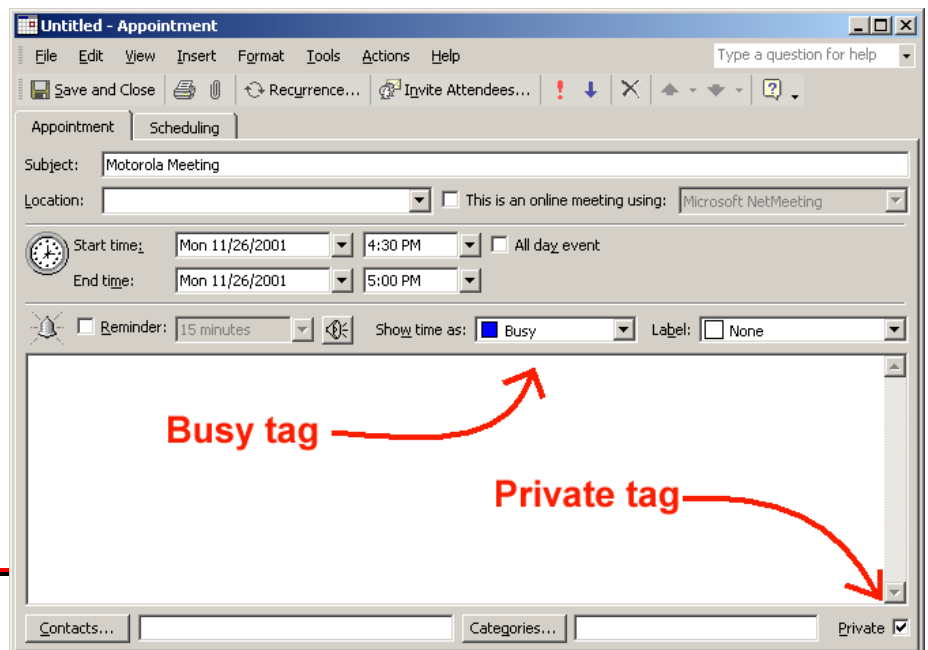
Issues to be aware of - “Gotcha’s!”

Exchange Server issues:

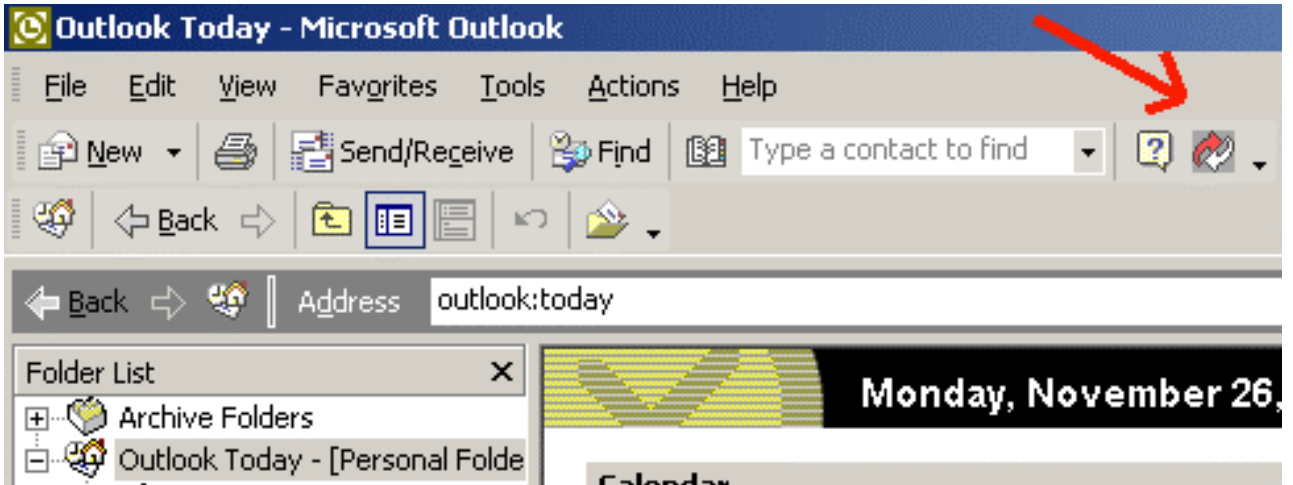
- Sync can sometimes be slow, due to network traffic
- Users may have trouble syncing “shared” folders
- If users have added custom categories to their contacts on the Exchange server, but haven’t added them to their Master Category List on their desktop, TrueSync won’t see those categories.
- Users may see strange text in their email address fields



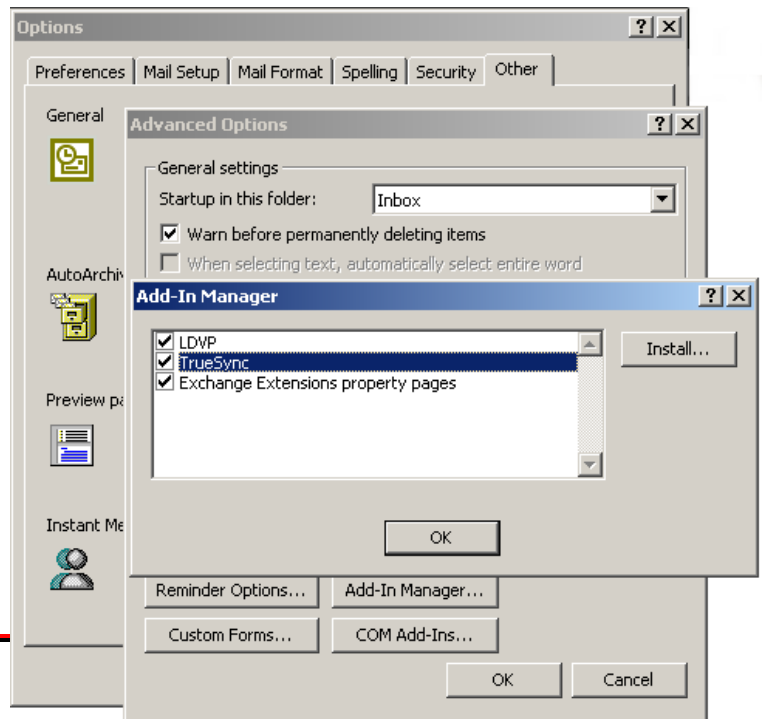
Gotchas!



Gotchas!



Gotchas!

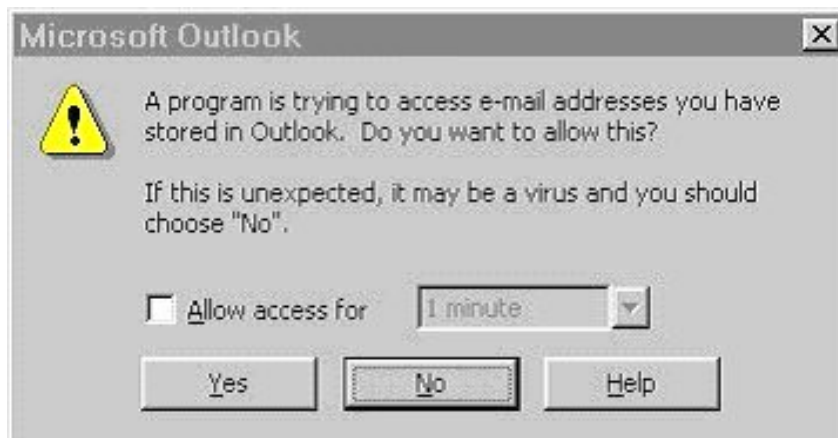


Gotchas!

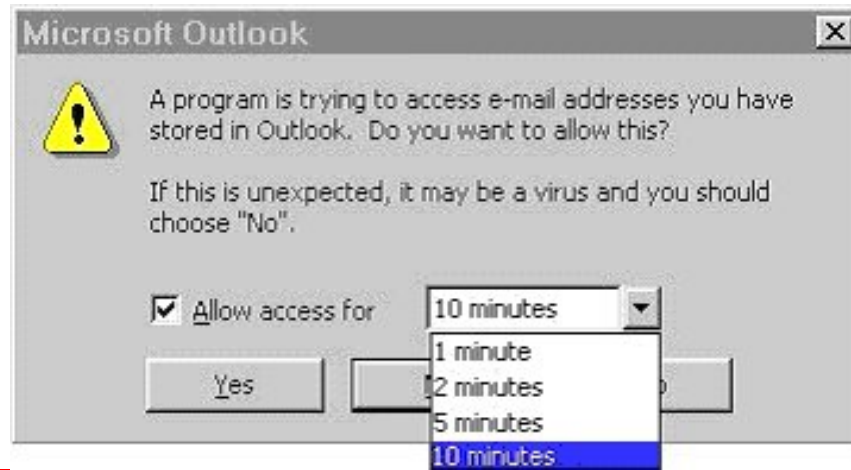
The Outlook E-mail Security Update



Gotchas!



Gotchas!



Getting more help with TrueSync & Outlook

Due to Outlook's flexibility and level of complexity, there will probably be times when you run into issues that are not covered here. You can get more help by going to the Starfish Support site at: <http://www.starfish.com/motorola>

