

SmartOffice[®]

Training

Course Companion



Microsoft[®] Outlook[®] Synchronization

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Course Companion Guides

SmartOffice Course Companion Guides serve as printable companion documents to our online training movies. Course Companion Guides cover the same material offered in the movies and present the material in the same order as presented in the movie. The Course Companion Guide should be used as a reference to principles taught in the training movies and are not intended as a replacement.

Microsoft® Outlook® Synchronization

The Microsoft Outlook Synchronization course demonstrates installation of the synchronization utility, defining the synchronization options in the sync setup, and performing a successful synchronization.

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System Requirements

- Microsoft® Outlook® version 2000 or later must be installed.
- The SmartOffice administrator must assign the Outlook Sync User role to the user.

Installation

To install the Microsoft® Outlook® Synchronization Utility -

- Select **Installation** in the **Main Menu**.
- Select **Outlook Interface (Synchronization)**.
- Select **Yes** in the **Outlook Interface (Synchronization)** installation confirmation screen.



Figure 1: Outlook Interface (Synchronization) installation confirmation screen

- A **File Download** confirmation screen will appear.
- Select **Open** to install the synchronization utility.

The Outlook Sync Utility can be installed directly from within SmartOffice. The installation does not need to be saved locally before running.

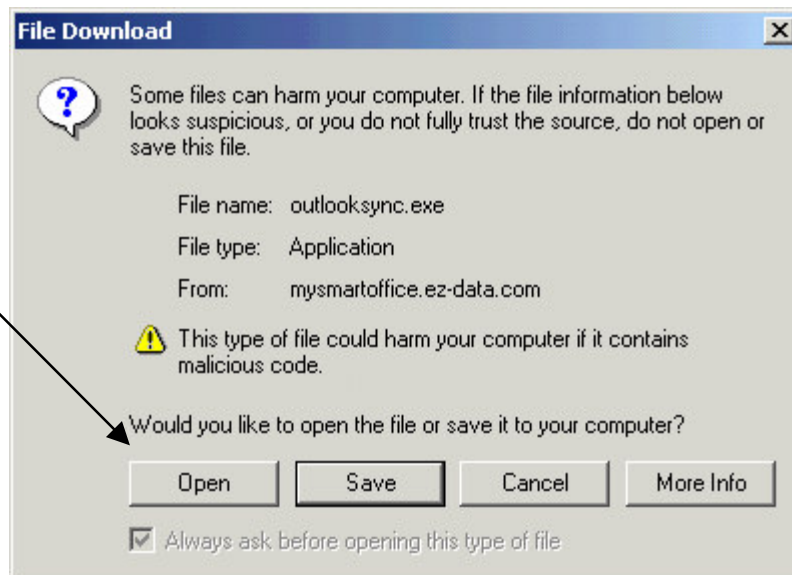


Figure 2: The File Download confirmation screen

- The **InstallShield Wizard** will begin the installation process.
- Select **Next** in the **OutlookSync Setup** screen.

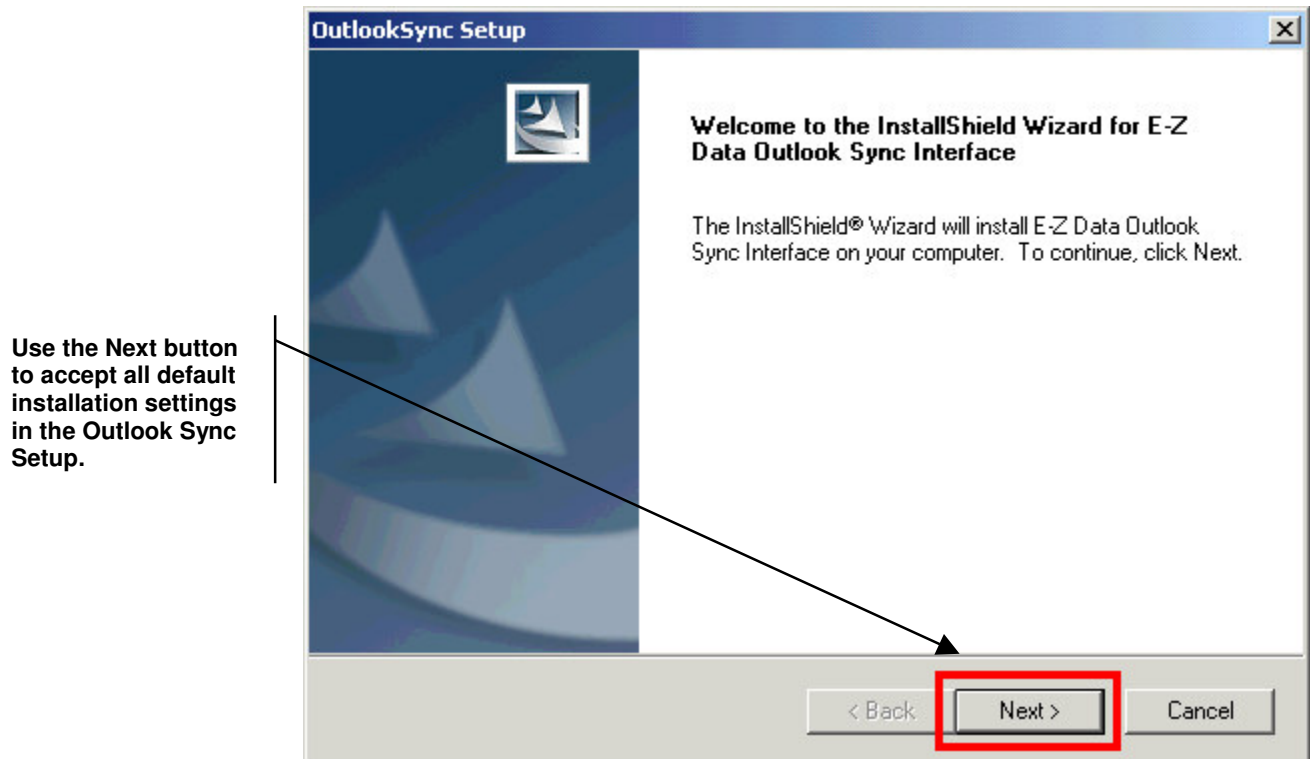


Figure 3: The Outlook Sync Setup screen

- Continue to select the **Next** button during the setup to accept all default settings during installation.
- When the installation is complete, click **Finish** in the final **OutlookSync Setup** screen to complete the installation.

Outlook Sync Setup

- Select **Synchronization** in the **Main Menu**.
- Select **Outlook Sync Setup** to open the **Outlook Contact/Activity Sync Setup Wizard**.
- Select **Next** in the first **Outlook Contact/Activity Sync Setup Wizard** screen.

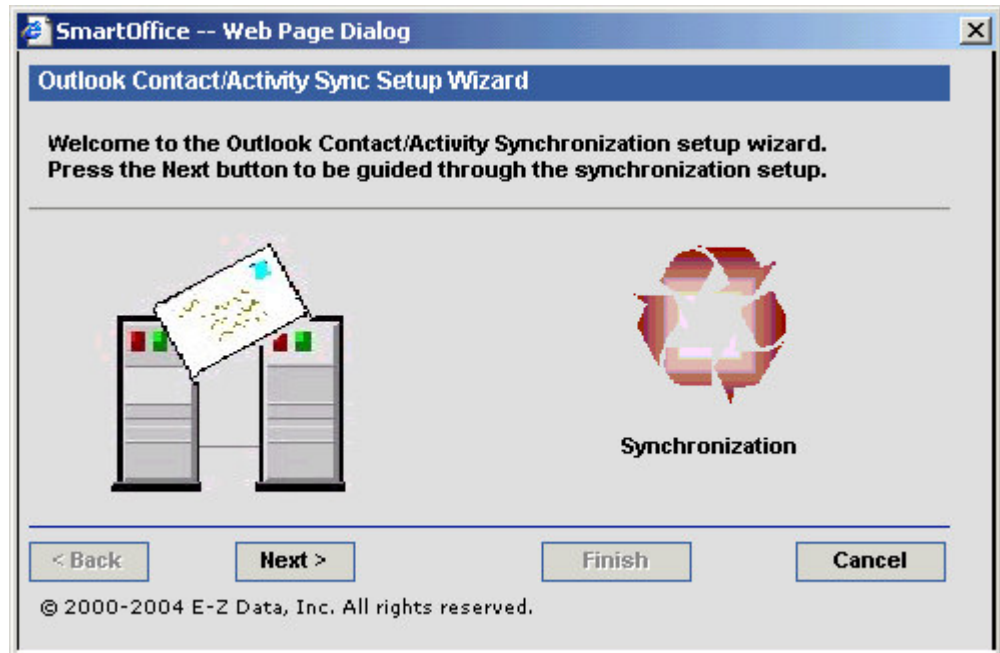


Figure 4: The Outlook Contact/Activity Sync Setup Wizard screen

- Select SmartOffice contacts for synchronization with Outlook in the **Contact Selection** screen of the **Outlook Contact/Activity Sync Setup Wizard**.

*Note: Records identified as Private in Outlook will not sync with SmartOffice unless the **Synchronize Private Records** option in the **Contact Selection** screen is selected.*

Use the options in the Contact Selection section to select contacts for synchronization.

All Contacts: All contacts in SmartOffice will sync with Outlook.

Selected Contacts: Only SmartOffice contacts defined by a Set or Filter will sync with Outlook.

Synchronize Private Record(s): Records identified as private will be included in sync.

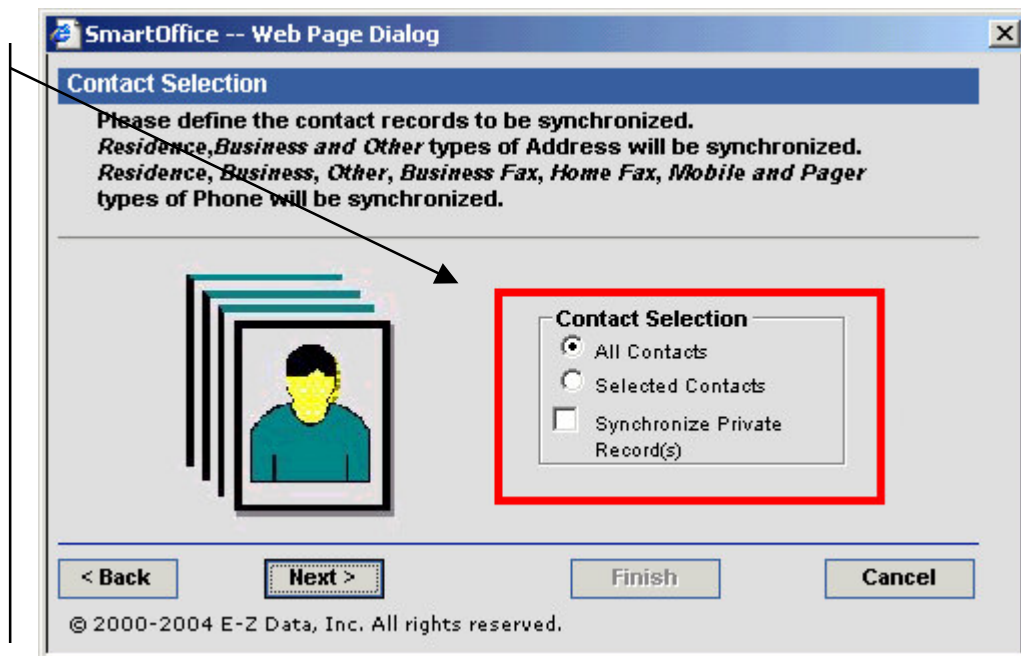


Figure 5: The Contact Selection screen of the Contact/Activity Sync Setup Wizard screen

- If the **All contacts** option is selected, click **Next**.
- If the **Selected Contacts** option is selected in the **Contact Selection** section, use the following steps to define contacts for synchronization –
 - With the **Selected Contacts** option selected, click **Next**.
 - When the **Filter/Set Selection** screen opens, select either the **Filter** or **Set** option. The hypertext field prompt will be determined by option selection.

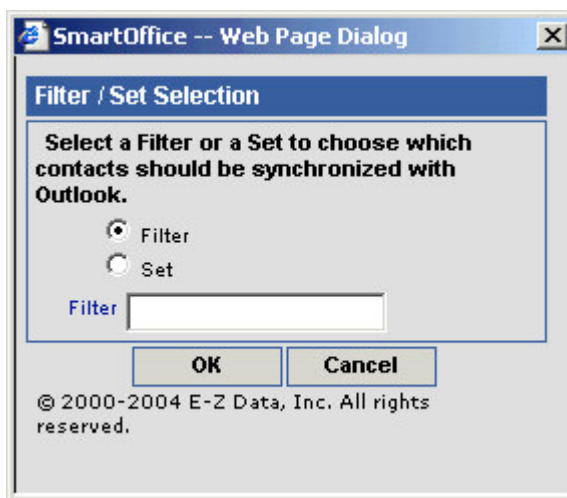


Figure 6: The Filter/Set Selection screen

- Click the hypertext field prompt to search for the desired SmartOffice filter or set – or – enter the name of desired filter or set in the **Filter/Set** selection field and click **OK**.
- Define the range of activities to be synchronized (in SmartOffice and Outlook) in the **Activity Selection** screen.

Use the Next and Previous fields to define the range of activities for synchronization. The range can include both next *and* previous days or Next days only or Previous days only.

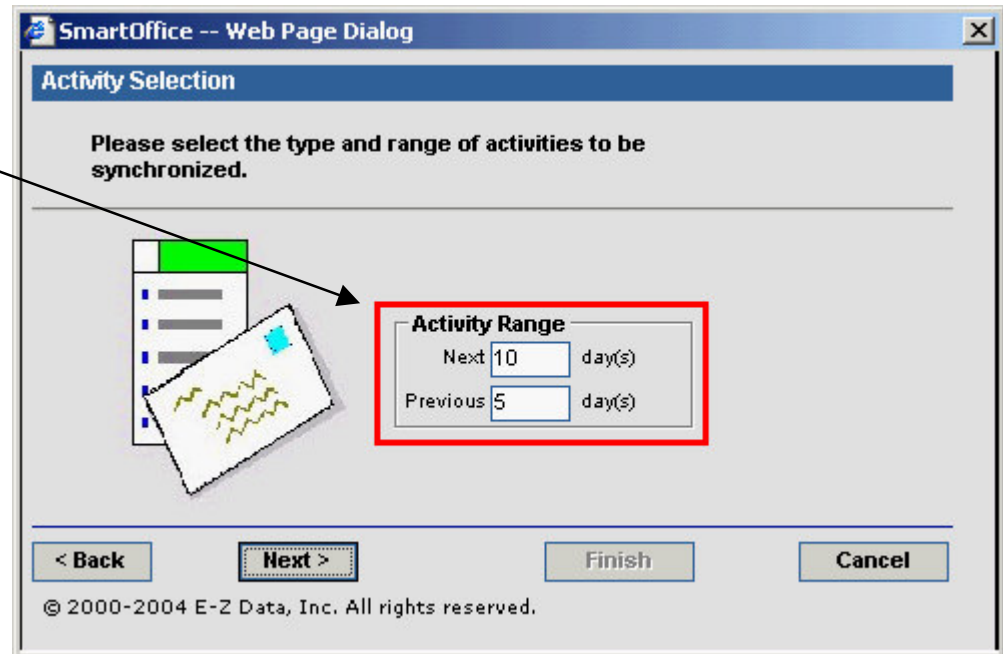


Figure 7: The Activity Selection screen

- Define the way the synchronization utility will handle record deletions in SmartOffice and/or Outlook between synchronizations in the **Confirmation** screen.

Deletion Options -
Ignore Record Deletions: Remove contacts deleted from Outlook or SmartOffice without notification.
Confirm Record Deletions: The synchronization utility will prompt a confirmation before removal of contacts from deleted in Outlook or SmartOffice between synchronizations.

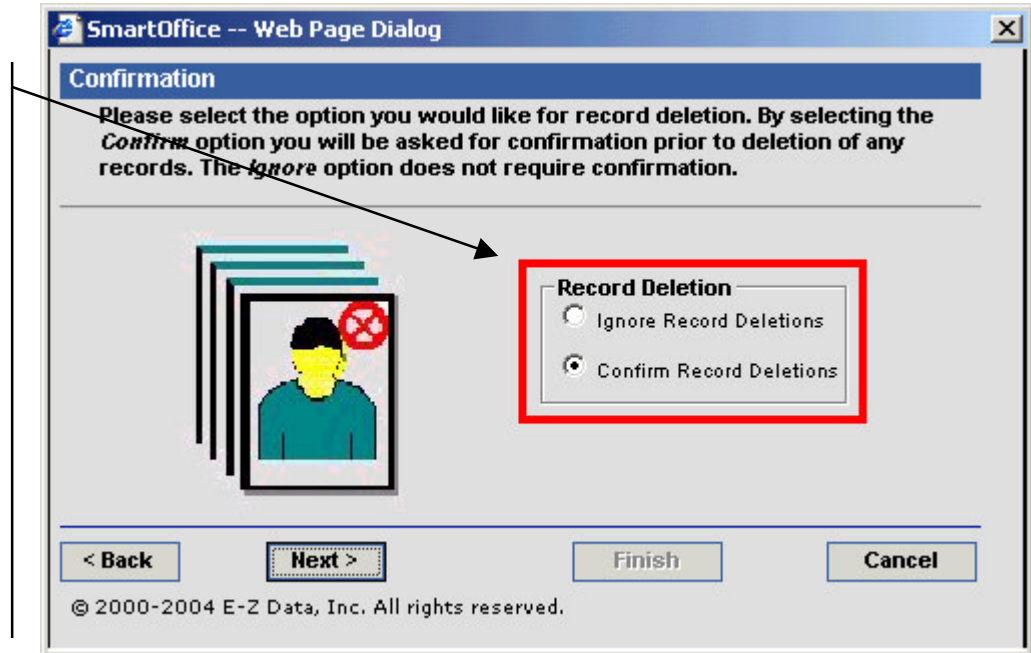


Figure 8: The Confirmation screen

- Define the way the synchronization utility deals with conflicts between applications using the options in the **Conflict Resolution** screen.

A synchronization conflict is a difference in data entered into each application between synchronizations. For example, a new work phone number has been added for a contact in Outlook and a new fax number for the same contact has been added to SmartOffice. The synchronization utility will register that the same record has been altered in different ways in each application. The options in the **Conflict Resolutions** screen allow you to determine how the synchronization utility will deal with conflicts when they occur:

- **Notify when conflict occurs** displays conflicted records with the changes completed in both Outlook and SmartOffice. The data to be inserted into the un-modified record while synchronizing can be selected by double-clicking on the data.
- **Prefer Remote Database (SmartOffice)** overwrites Outlook records with corresponding SmartOffice records when a conflict occurs.
- **Prefer Local Database (MS Outlook)** overwrites SmartOffice records with corresponding Outlook records when a conflict occurs.

Only one Conflict Resolution option can be selected but the Conflict Resolution option can be reset before synchronization in the Outlook Contact/Activity Sync Setup Wizard before synchronization.

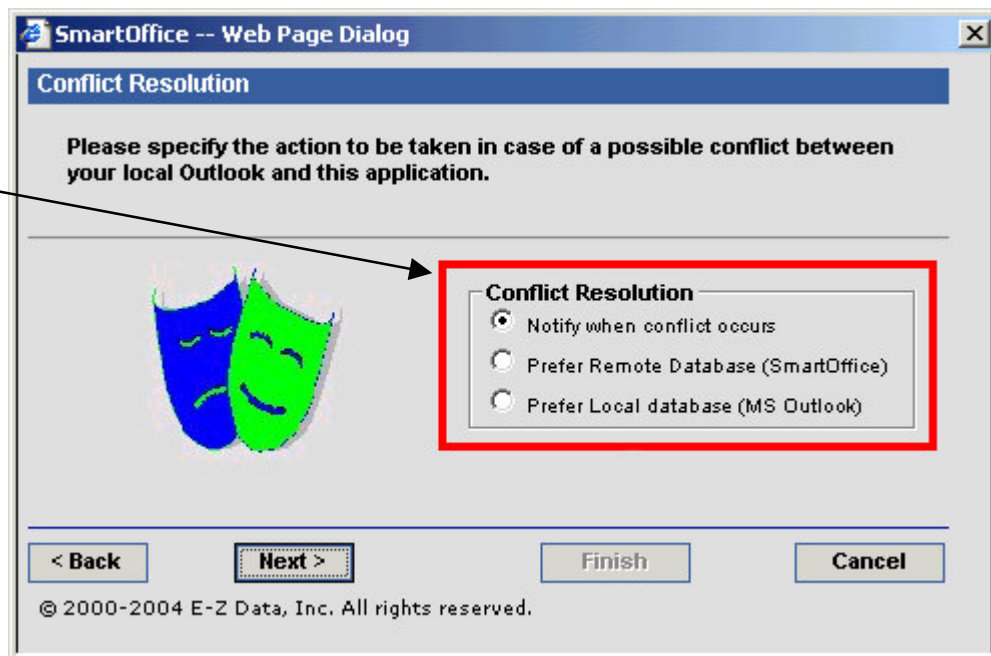


Figure 9: The Conflict Resolution screen

- Define how the synchronization utility will handle potential duplicate records during synchronization in the **Duplicate Records Resolution** screen.

Note: Only potential duplicate contact records will be identified during synchronization. Potential duplicate activity records will not be identified.

Ignore Duplicate Records: Disregard any duplicate records found.

Notify Duplicate Records: A dialog box will inform the user that duplicate records were found. The user can then decide to create or ignore the record.

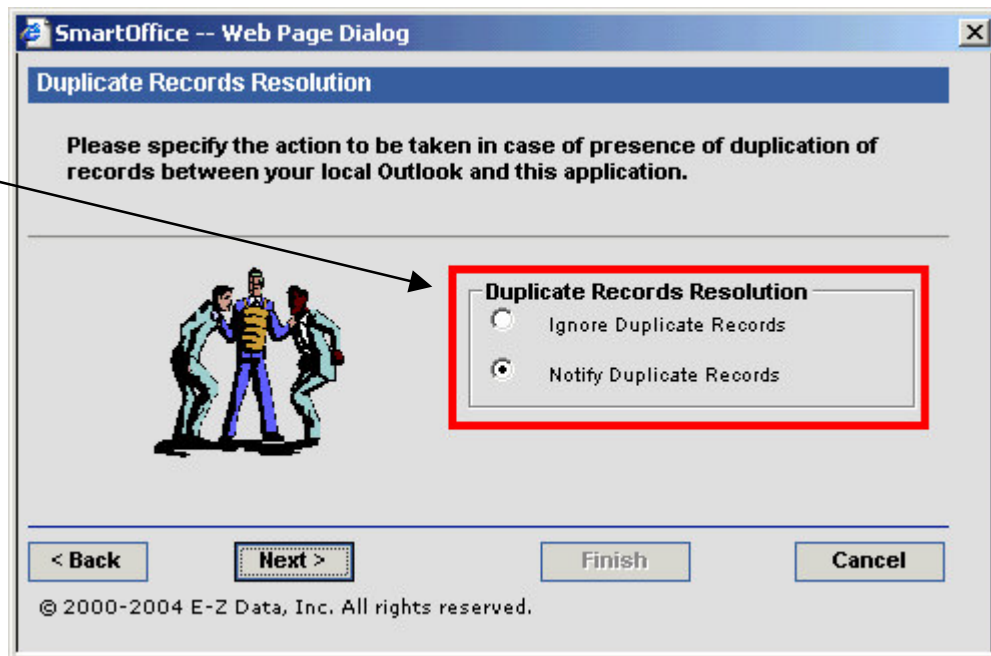


Figure 10: The Duplicate Records Resolution screen

- Confirm selected synchronization options in the **Outlook Download Description** screen.

For the first SmartOffice - Outlook sync, select Yes in the Initial Synchronization section. The option will automatically switch to No for subsequent synchronizations.

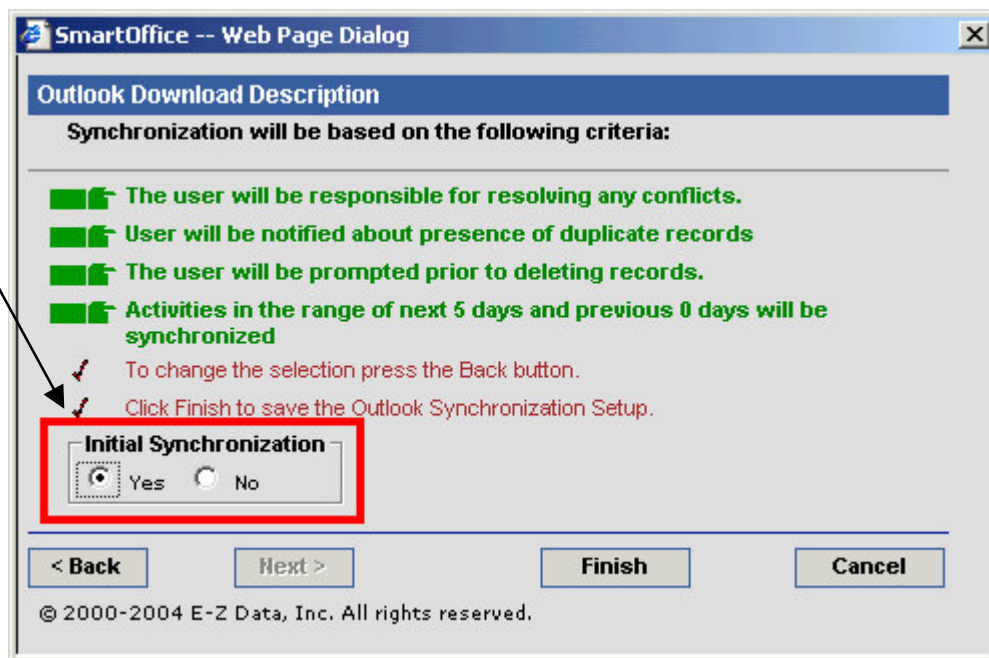
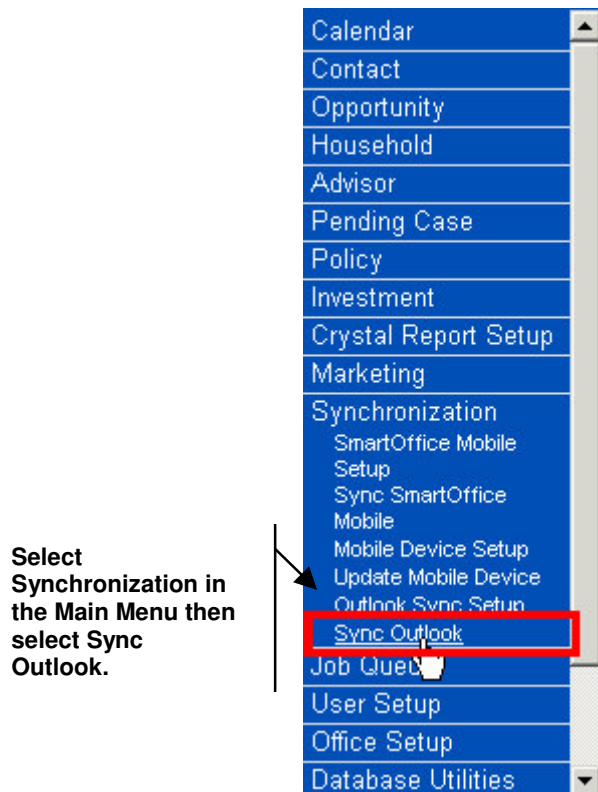


Figure 11: The Outlook Download Description screen

- After confirming synchronization options and setting the **Initial Synchronization** option, click **Finish** to complete the **Outlook Contact/Activity Sync Setup**.

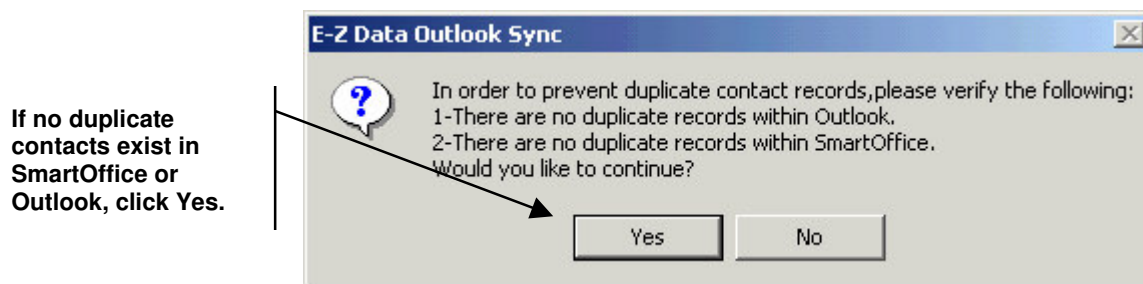
Initial Synchronization



Select Synchronization in the Main Menu then select Sync Outlook.

Figure 12: The Sync Outlook option in the Synchronization menu.

The Synchronization Utility will display an **Outlook Sync** confirmation screen regarding potential duplicates in SmartOffice and/or Outlook.



If no duplicate contacts exist in SmartOffice or Outlook, click Yes.

Figure 13: The Outlook Sync No-Duplicates Confirmation screen.

The Synchronization Utility will open the **Contact Folder Selection** screen. If multiple contact folders exist in Outlook, select the folder to be used to sync SmartOffice contacts. Only one folder can be selected for synchronization.

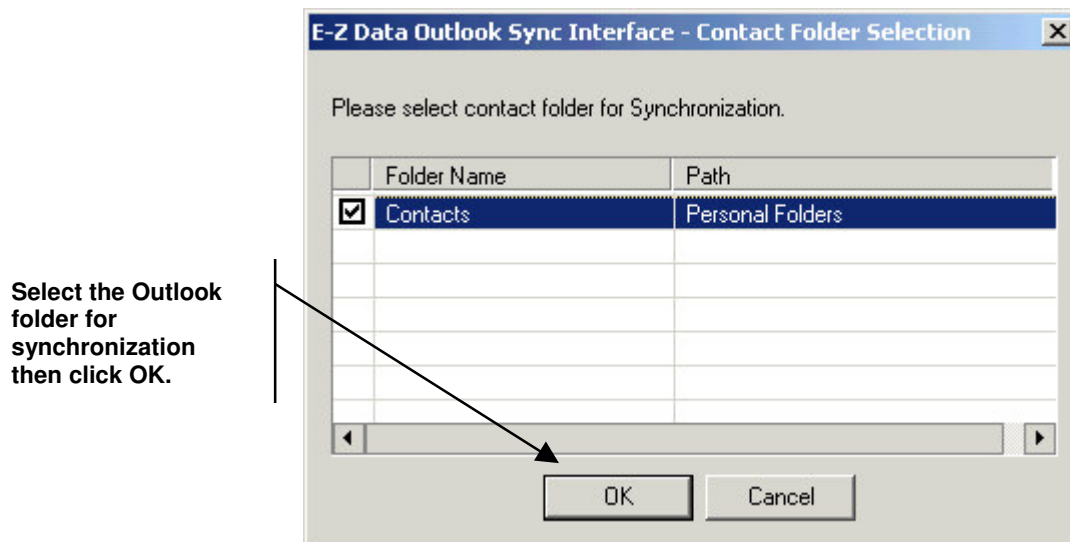


Figure 14: The Outlook Sync Folder Selection screen.

Outlook will display an **Alert** screen. Standard Outlook security settings will always alert users when an outside application is attempting access addresses stored in Outlook. To perform a successful sync, use the **Allow Access** option on the **Alert** screen to allow access to Outlook.

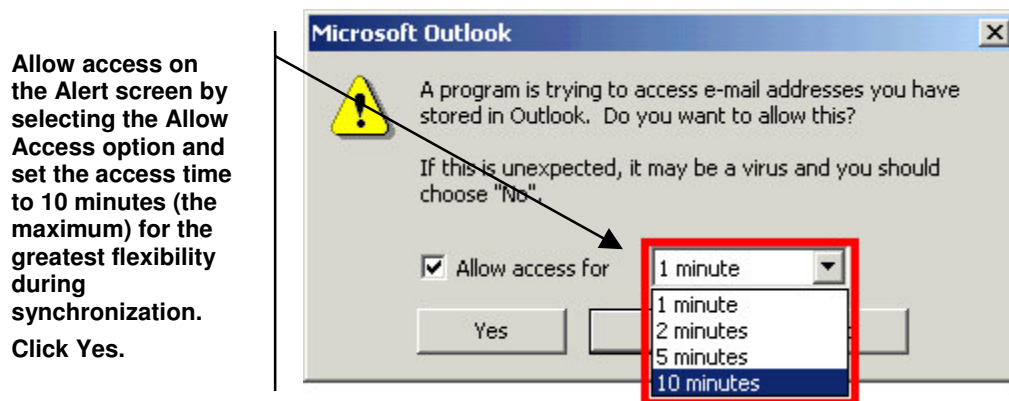


Figure 15: The Outlook Alert screen.

The number of contact and activity records being synchronized will determine the amount of time required for an initial sync. It is not unusual for an initial sync to take a few minutes. The **Record Deletion** and **Record Conflict** options will not take effect during the initial sync as each option looks for changes to synchronized records between synchronizations. However, the synchronization utility may find duplicate records during the initial sync based on options selected during Sync Setup. See the **Duplicate Records** section for information regarding duplicate record options available during synchronization.

Standard Synchronization

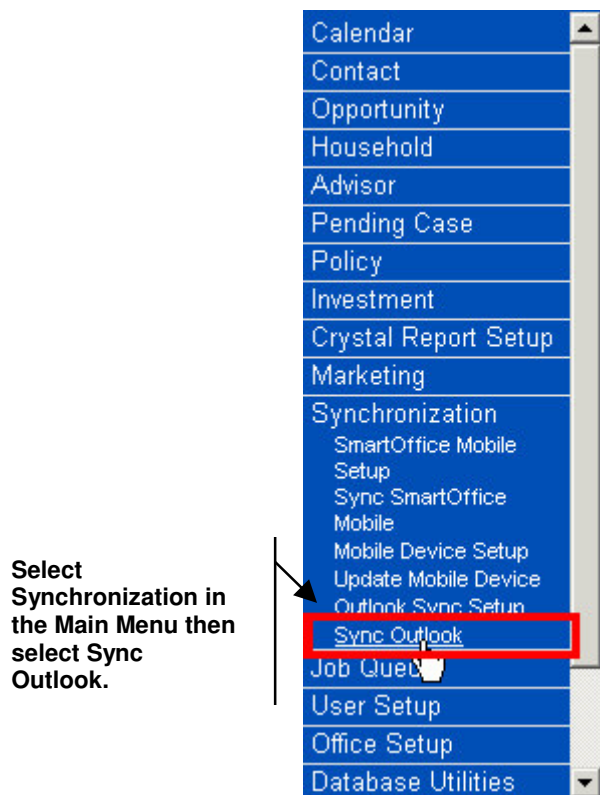


Figure 16: The Sync Outlook option in the Synchronization menu.

The Synchronization Utility will display an **Outlook Sync** confirmation screen regarding potential duplicates in SmartOffice and/or Outlook.

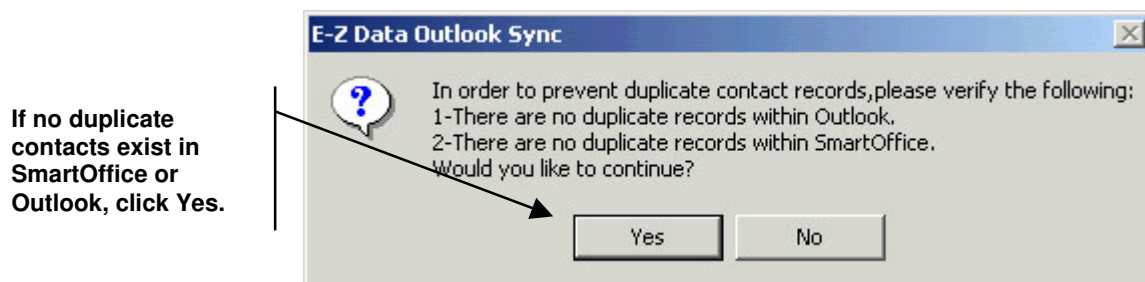


Figure 17: The Outlook Sync No-Duplicates Confirmation screen.

Outlook will display an **Alert** screen. Standard Outlook security settings will always alert users when an outside application is attempting access addresses stored in Outlook. To perform a successful sync, use the **Allow Access** option on the **Alert** screen to allow access to Outlook.

Allow access for on the Alert screen by selecting the Allow Access option and set the access time to 10 minutes (the maximum) for the greatest flexibility during synchronization. Click Yes.

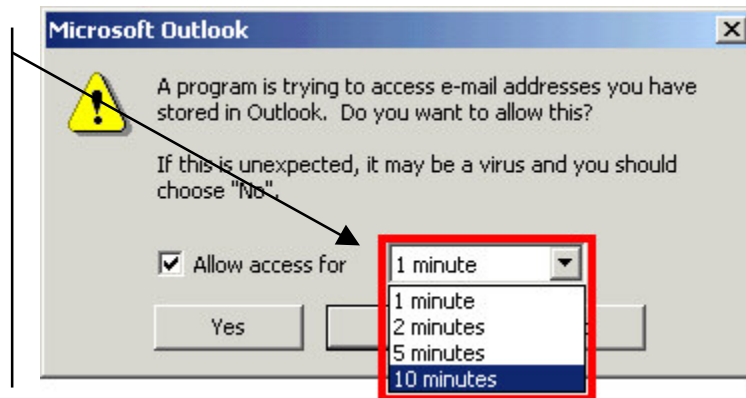


Figure 18: The Outlook Alert screen.

If the Synchronization utility detects duplicate contacts, record deletions, or record conflicts, the utility will display dialogue screens based on options selected in Sync Setup. See the appropriate section(s) for information regarding duplicate record, record deletion, and record conflict options available during synchronization.

Duplicate Records

If the **Notify Duplicate Records** option has been selected in Sync Setup the **Duplicate records** screen will open if a potential duplicate record is detected.

Select the action for potential duplicate records.
 Prefer SmartOffice Data: SmartOffice Contact info will overwrite Outlook contact info.
 Prefer MS Outlook Data: Outlook Contact info will overwrite SmartOffice contact info.
 Select Data Manually: Will open the Duplicate Records Interface.
 After making selection, click OK.



Figure 19: The Duplicate records screen.

Use the Duplicate Record Action drop-down to select an action for the potential duplicate record.
 Ignore: Will not add information or records to either application.
 Add: Will create a new record.
 Merge: User can select information (highlighted in red) to add to record where information is absent.

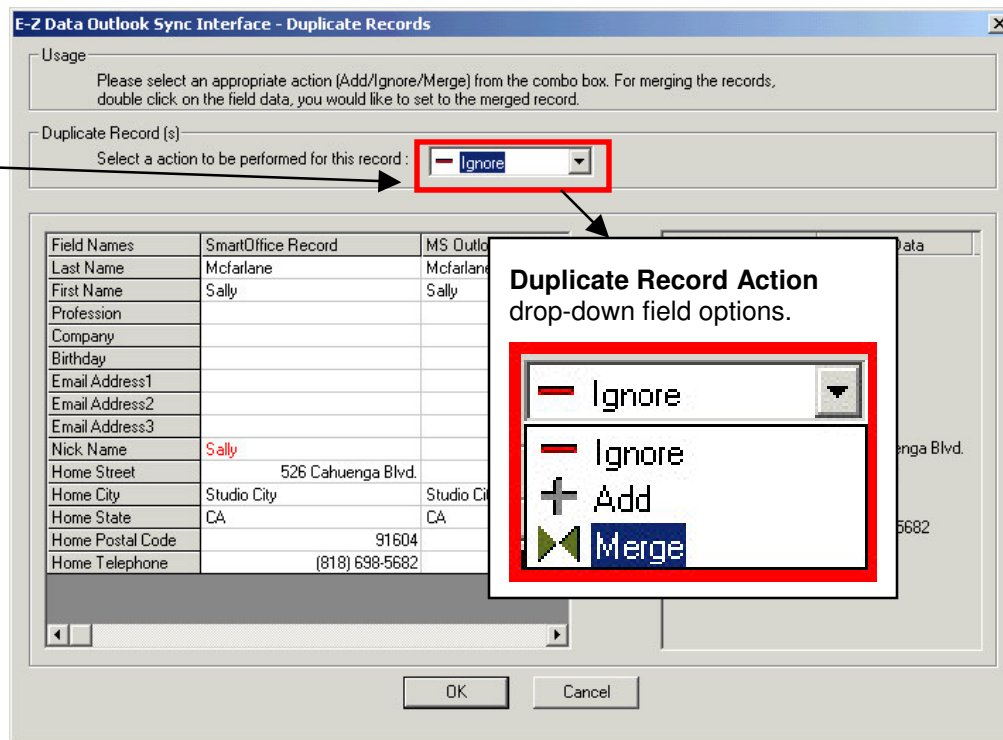


Figure 20: The Duplicate Records Interface.

If the Merge option is selected, the Merge section will become active. Click on data unique to one application (entered in red) to add the data to the application where data is absent. When there is a data conflict (different data in the same field), select the data to be preserved with a double click.

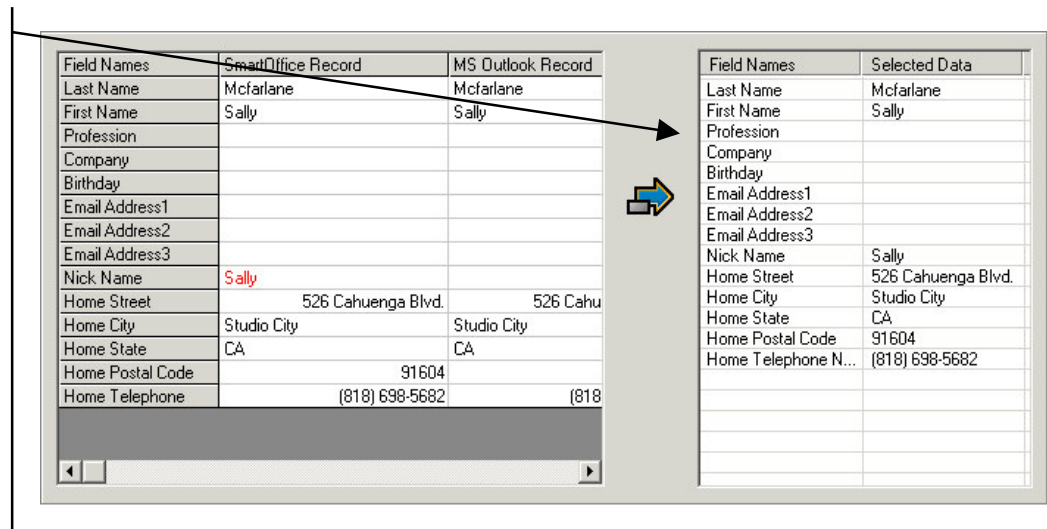


Figure 21: Duplicate record info (differences in data highlighted in red) with Merge section active.

- When finished selecting data to merge click **OK**.
- The Synchronization Utility will display a warning indicating that fields left blank in one application where data exists in the corresponding field of the other application will overwrite the data. Click **No** to select the appropriate data merge or Click **Yes** to accept the selected data merge and continue with the synchronization.
- The Synchronization Utility will continue to display all detected potential duplicate records. When duplicate contact resolution is completed, the Synchronization Utility will continue with the sync.

Record Deletions

After the initial synchronization, records that are deleted in one application between syncs will be identified by the Synchronization utility. If the **Confirm Record Deletions** option has been selected in Sync Setup, the Synchronization Utility will open the **Deletions** screen during synchronization if deleted records are detected.

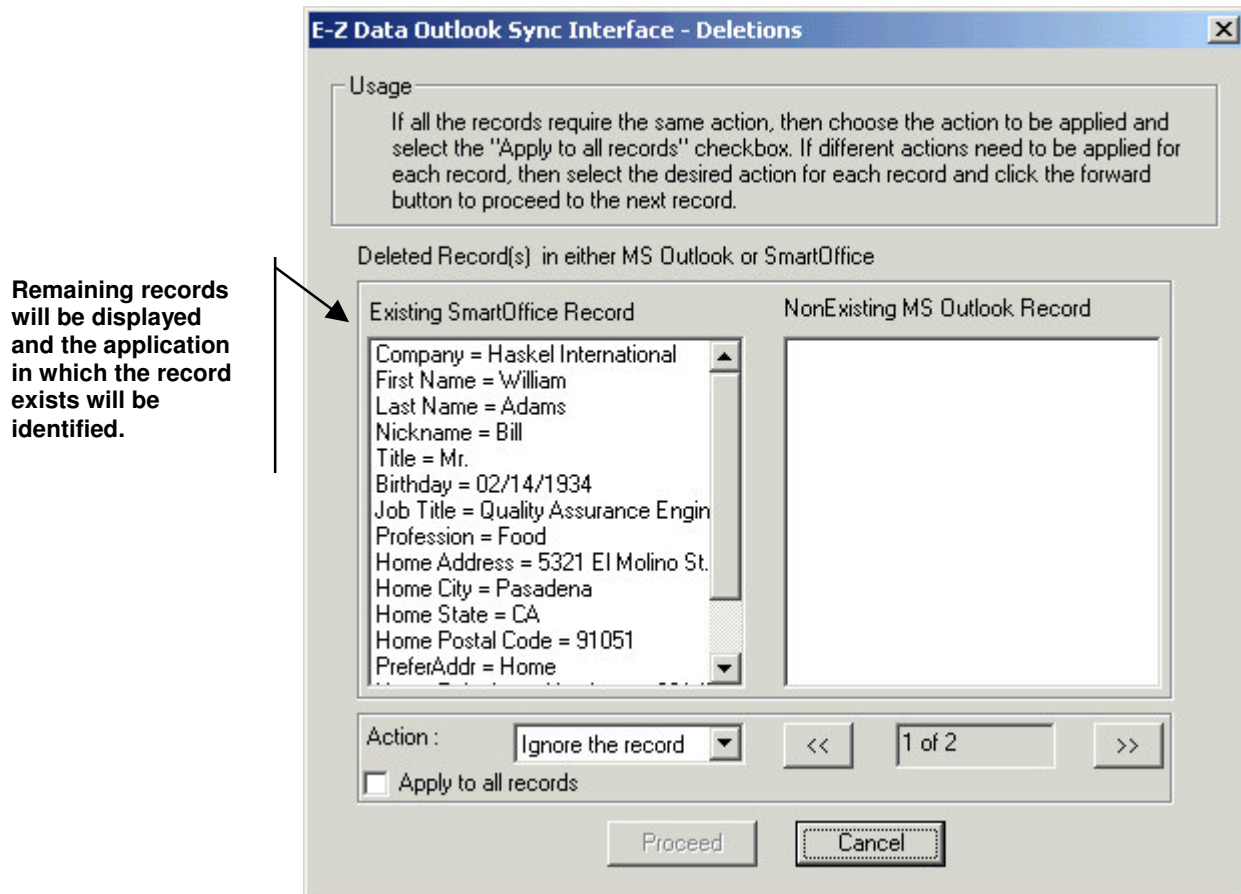


Figure 22: Synchronization Deletions screen.

- Select an option in the **Action** drop-down field to choose how the Synchronization Utility will handle the duplicate record.

Action drop-down field options –
Ignore the record: No changes will be made.
Add: The record will be added to the application where the record is non-existent. (Record will be re-added to the application it was deleted from).
Delete: Existing record will be deleted. No instance of the record will remain in either application.

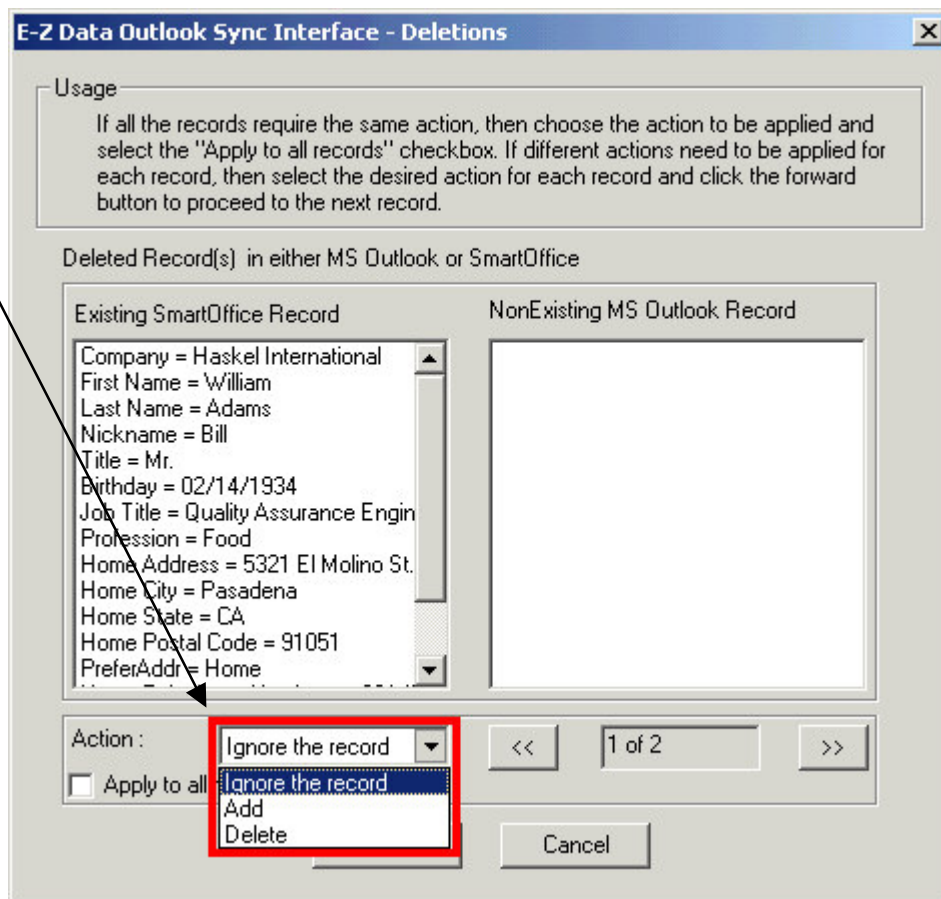


Figure 23: Synchronization Deletions screen (Action drop-down field activated).

- After selecting the deletion action for the first deleted record, the same action can be selected for all deleted records by selecting the **Apply to all records** option beneath the **Action** drop-down field or actions can be defined for each deleted record using the navigation buttons to the right of the **Action** drop-down field.

Use the navigation buttons to the right of the Action drop down to review each record.

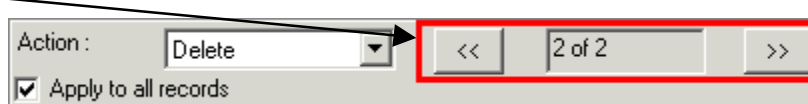


Figure 24: Deleted records navigation buttons.

Select the action for each deleted record or select the Apply to all records option to apply the same action to each deleted record



Figure 25: Deleted records Action options.

After selecting options for each deleted record. Click **Proceed** to continue with synchronization.

Record Conflicts

A record conflict is a difference in data entered into each application between synchronizations. For example, a new work phone number has been added for a contact in Outlook and a new fax number for the same contact has been added to SmartOffice. The synchronization utility will register that the same record has been altered in different ways in each application. If the **Notify when conflict occurs** option has been selected in the sync setup, the Synchronization Utility will open the **Conflict Resolution** screen if record conflicts are detected.

The Conflict Resolution screen will display the contact record where the conflict exists and fields with conflicting data.

E-Z Data Outlook Sync Interface - Conflict Resolution

Usage
 If all the records require the same action, then choose the action to be applied and select the "Apply to all records" checkbox. If different actions need to be applied for each record, then select the desired action for each record and click the forward button to proceed to the next record.

Contact Record
 Mcfarlane, Sally << 1 of 1 >>
 Action : Select Data Apply to all records

Field Name	MS Outlook	SmartOffice	Selected Data
Business Telephone	(626) 474-6832		
Mobile Telephone		(818) 314-7700	

OK Cancel

Figure 26: The Conflict Resolution screen.

- Use the Action drop-down to select record conflict resolution options.

Record Conflict Action options –
Select Data: Allows user to select which data is preferred.
Ignore the Record: Make no changes to either instance of the record.
Prefer SmartOffice Data: Overwrites Outlook record data with SmartOffice record data.
Prefer MS Outlook Data: Overwrites SmartOffice record data with Outlook record data.

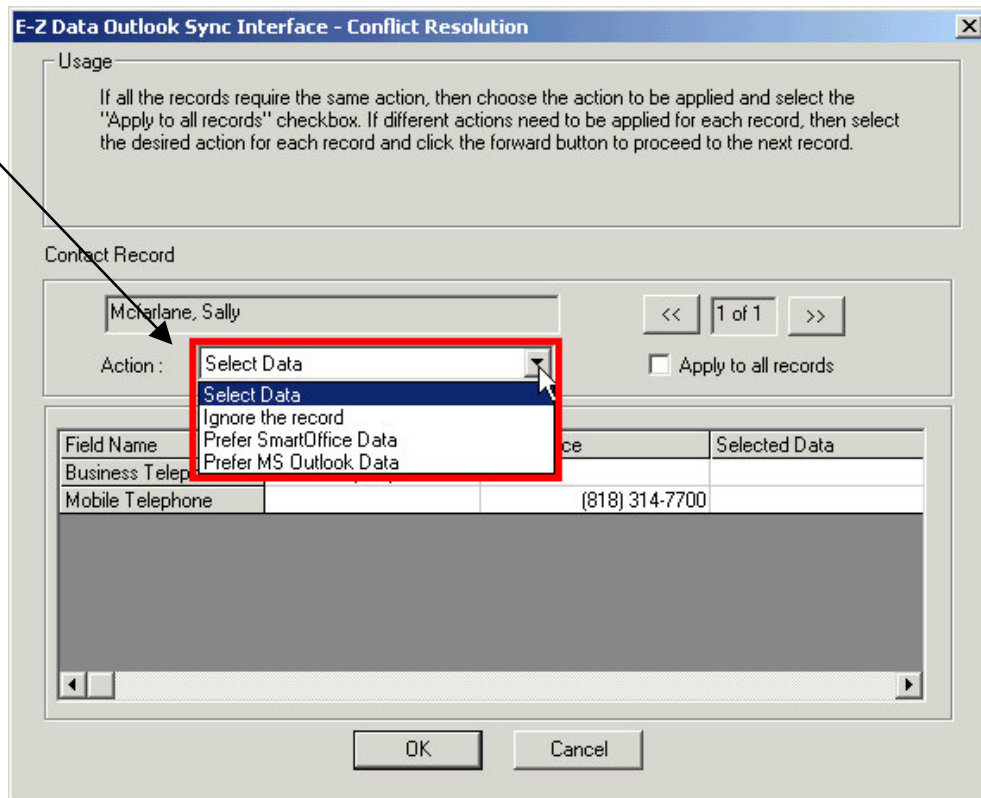


Figure 27: The Conflict Resolution screen (Action drop-down field options active).

- If the **Select Data** option is selected, select data by double-clicking on the preferred data. Preferred data will be added to the **Selected Data** column.

Preferred data will be added to the Selected Data column.

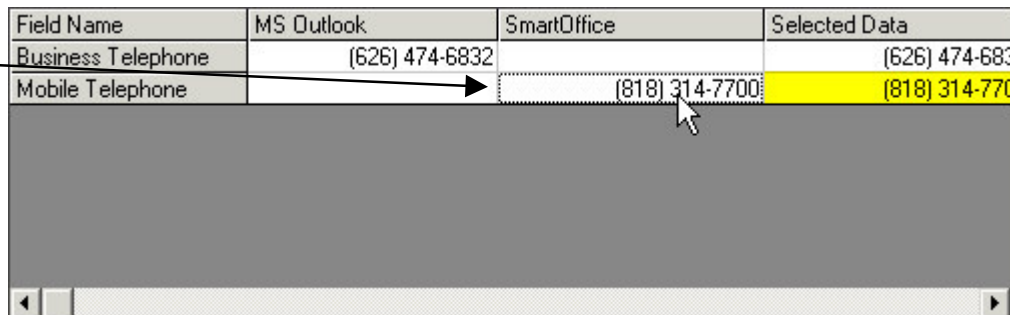
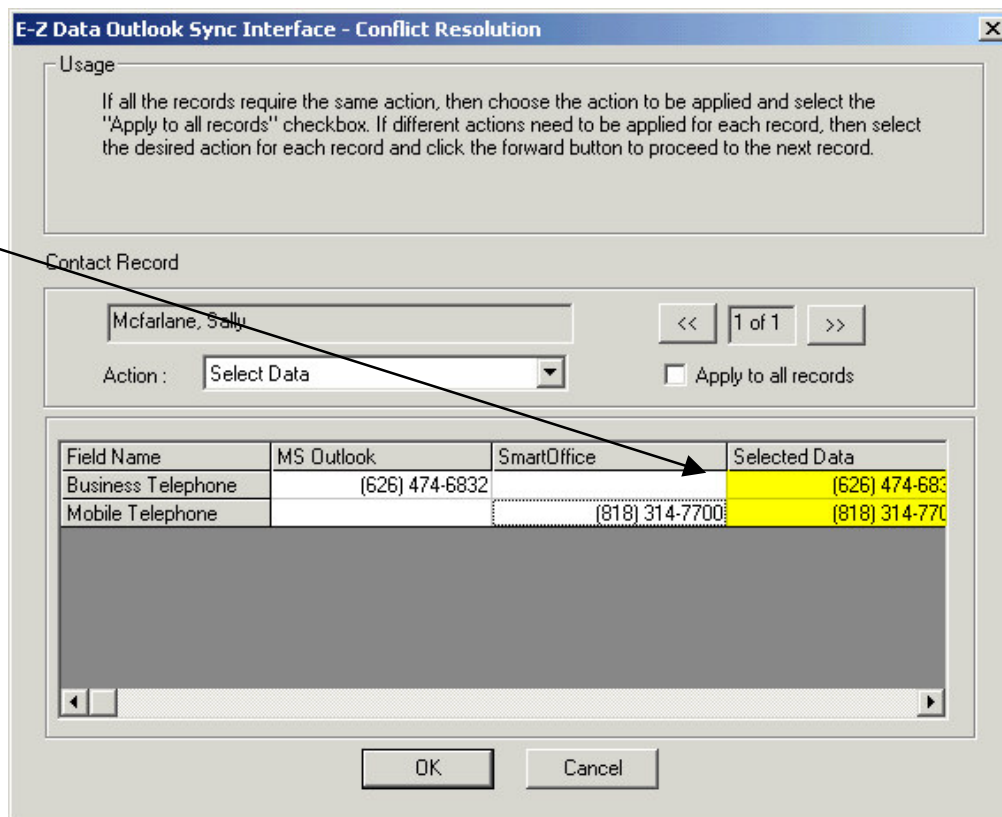


Figure 28: Preferred data moved to the Selected Data column with a double-click.

All selected data will be reflected in the Conflict Resolution screen.



Usage

If all the records require the same action, then choose the action to be applied and select the "Apply to all records" checkbox. If different actions need to be applied for each record, then select the desired action for each record and click the forward button to proceed to the next record.

Contact Record

Mcfarlane, Sally << 1 of 1 >>

Action : Select Data Apply to all records

Field Name	MS Outlook	SmartOffice	Selected Data
Business Telephone	(626) 474-6832		(626) 474-6832
Mobile Telephone		(818) 314-7700	(818) 314-7700

OK Cancel

Figure 29: The Conflict Resolution screen with preferred data.

- After selecting data for record conflict resolution click **OK** if no other record conflicts exist or use the record conflict navigation buttons to review all detected record conflicts.

Use the navigation buttons to review record conflicts and set actions. Use the Apply to all records option to set one action for all record conflicts.



Mcfarlane, Sally << 1 of 1 >>

Action : Select Data Apply to all records

Figure 30: Record Conflict navigation buttons.

- After selecting all record conflict resolution options, click **OK** to complete synchronization.

Assigning the Outlook Sync User Role

The SmartOffice Administrator must assign the **Outlook Sync User** role.

- Select Office Setup in the **Main Menu**.
- Select **Office Settings** in the **Office Setup** menu.
- Select the **Users List** tab.
- Tag the user record to which the role will be assigned.
- Select the **User Roles/Licenses** tab.
- In the Miscellaneous User Roles section of the User Roles/Licenses tab, tag the **Outlook Sync User** role.

The Outlook Sync User role is different from the Outlook E-mail user role and both must be selected if the user will sync mail, contacts, and activities.

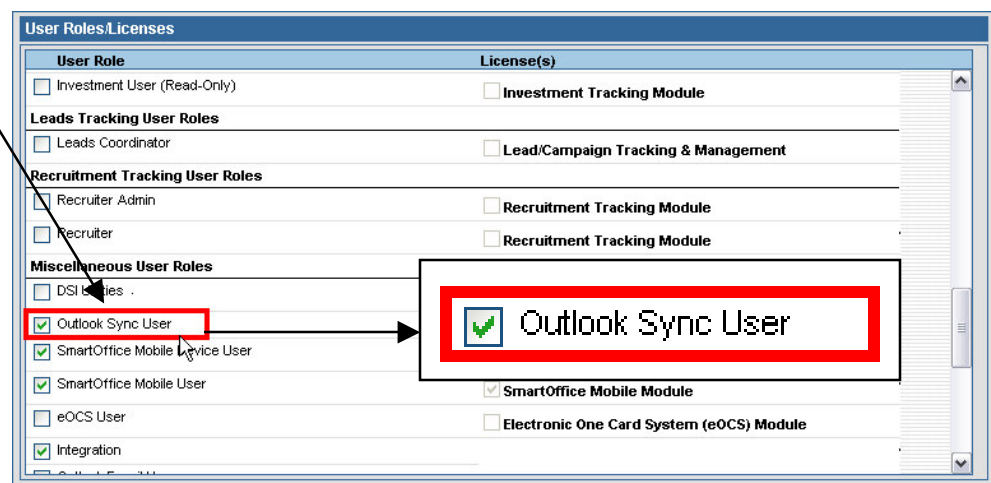


Figure 31: The Outlook Sync User role on the User Roles/Licenses tab.

- Click the **Save** button to save the new setting.
- The next time the user logs in, he or she will be able to install and use the Outlook Synchronization Utility.

Contact Field Correspondence

The table below shows the Microsoft® Outlook® Contact fields that correspond to SmartOffice® Contact fields.

	Outlook Contacts	SmartOffice Contacts
Contact Information:	Title	Title
	First	First Name
	Last	Last Name
	Suffix	Suffix
	Job Title	Job Title
	Company	Employer
Address:	Business	Business
	Home	Residence
	Other	Other
	Street	Street
	City	City
	State	State
	ZIP	Zip Code
	Country	Country
Telephone Number:	Business	Business
	Business Fax	Business Fax
	Home	Residence
	Mobile	Mobile
	E-mail	E-Mail
	Web Page	Website
	Profession	Occupation
	Nick Name	Greeting
	Birthday	Birth Date

Activity Field Correspondence

The table below shows the Microsoft® Outlook® calendar fields that correspond to SmartOffice® Timed Activity fields.

Outlook Calendar	SmartOffice Timed Activities
Subject	Subject
Location	Place
Start time	Time
End time	Duration (in minutes, days or hours)
All day event	Time: 6:00AM Duration: 1440
Importance not selected	Priority: Important
Importance: High	Priority: Urgent
Importance: Low	Priority: Normal
Body	Reason
Private	Private
E-mail	E-Mail
Web Page	Website

The table below shows the Microsoft® Outlook® Task fields that correspond to SmartOffice® Un-timed Activity fields.

	Outlook Tasks	SmartOffice Un-timed Activities
	Subject	Keyword
	Start Date (this must be entered in order to sync with SmartOffice)	Date
Status:	Not Started	Active
	In Progress	Active
	Completed	Done
	Waiting on someone else	Active
	Deferred	Discontinued
Priority:	Low	Normal
	Normal	Important
	High	Urgent
	Body	Reason
	Private	Private