

# WEBIS DESKTOP SYNC: WINDOWS® OUTLOOK® EDITION

2.0

*for Pocket Informant™ and Pocket Informant™ HD*



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## Introduction

WebIS Desktop Sync: Windows Outlook Edition (WDS) is a combination of an application that runs on your desktop and Pocket Informant™ version 2.0 and above on the iOS. The desktop application runs as an icon in your Windows system tray and connects to your iDevice via a network connection and syncs the events and tasks within Outlook to Pocket Informant™ and Pocket Informant™ HD. For most users the installation is just a few steps and configuration is easier than pairing a Bluetooth headset. The documentation below tries to cover as many questions and configurations as possible.

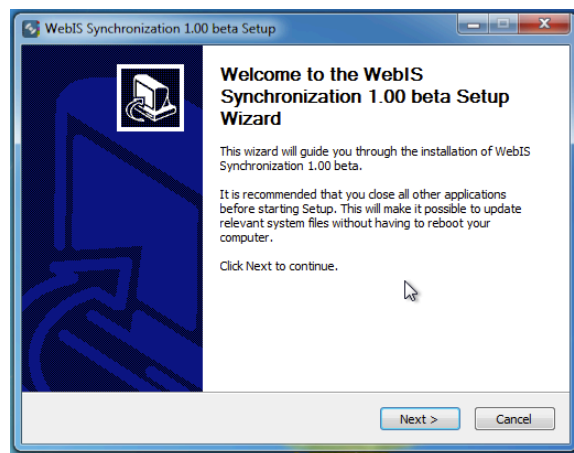
## System Requirements

- Supports Outlook 2007 -2010
  - It can be run with Outlook 2003, but we cannot support that via support
- Windows XP, Vista, Windows 7
- Bonjour® for Windows
  - Bonjour is already installed on any Windows Desktop with iTunes or QuickTime
  - Or if not download the [Bonjour for Windows Install](#) (Requires Admin Privileges)

## Installation of the Windows Desktop Sync Client

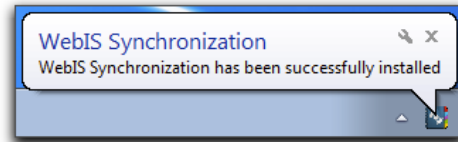
The installation process is easy!

1. [Download the Desktop Sync installer](#) from our website.
2. Double click the installer package.
3. Read and continue along with the installation wizard.



4. You may be prompted to install Bonjour for Windows if you do not already have it installed.  
*If you have iTunes or QuickTime installed already you will not be prompted.*

5. Continue the installation wizard until it's completed. You will see an icon in the system tray with a bubble.

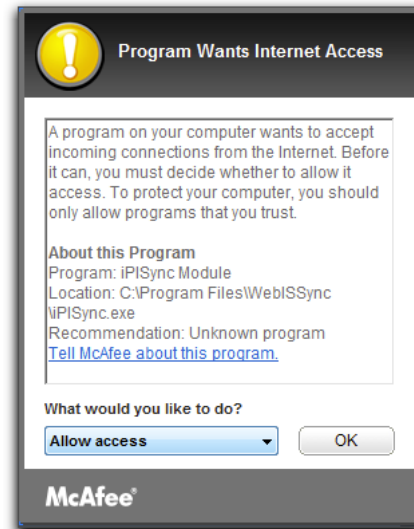


## Windows Firewall Setup

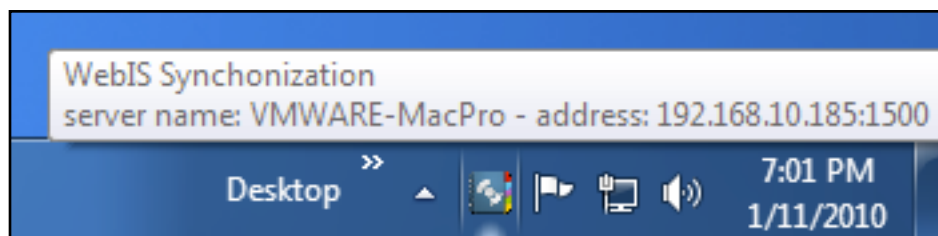
On many Windows systems there will be a network firewall installed. Our installer automatically registers WDS as allowed to access the internet for those using the Microsoft XP/Vista/7 firewall, but if you are using another firewall such as those from Symantec, McAfee, AVG or others you may see a pop-up like the picture to the right. Select allow access to WDS and press OK.

On some firewalls, such as McAfee, you may need to even open the ports specifically for McAfee to allow Pocket Informant to connect to WDS. The following is an example of configuring McAfee to allow WDS connections.

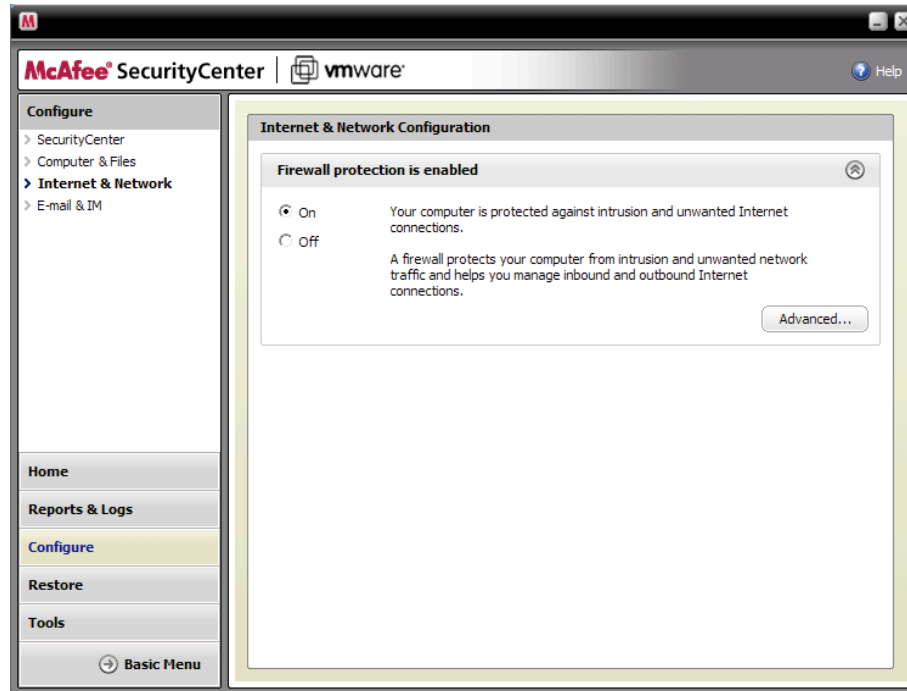
WDS by default obtains a port from Windows dynamically and then keeps using that port unless you manually change it.



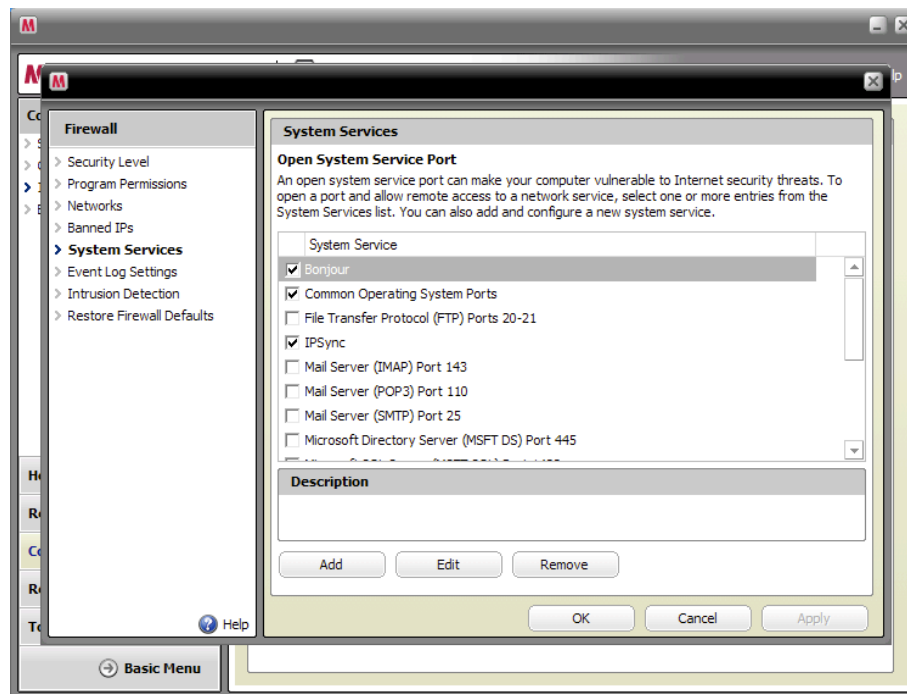
1. Mouse over the WDS icon in the system tray and note the port number at the end of the bubble. In the following example the port is the number after the colon: 1500.



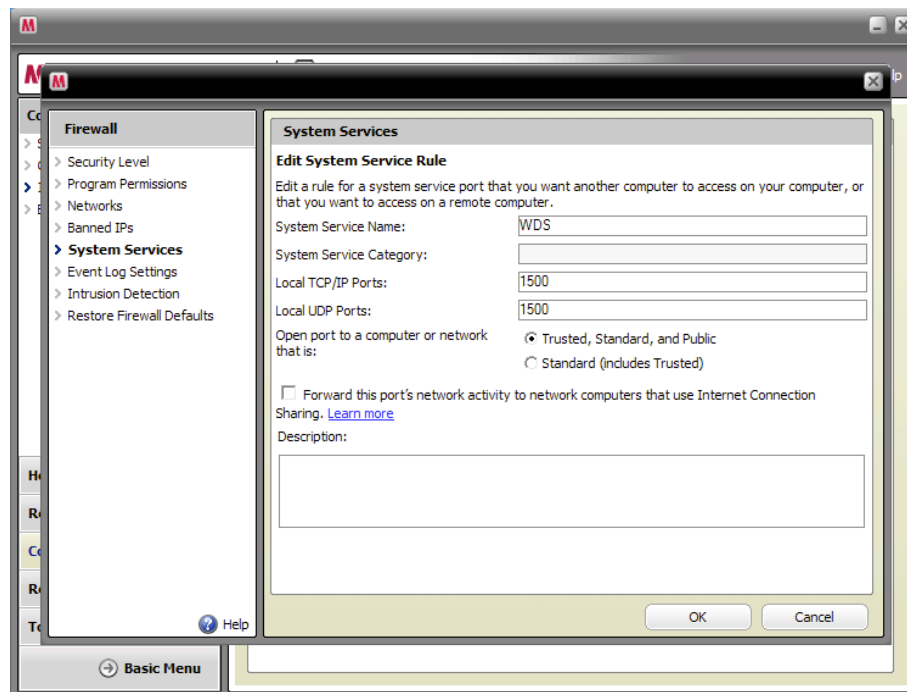
2. Open the McAfee security center and select Configure. Then select the Internet & Network section and finally click Advanced.



3. Go to the System Services section and Add a new port.



4. Name it "WDS". Then enter the port number into both the TCP and UDP port fields. Make sure its set to "Trusted, Standard, and Public". Then press OK.



5. Finally you will have to restart WDS for it to be able to see that its now available on the network.

### ***Prepare Before your First Sync***

Its important to make sure your events and tasks are ready for sync before setting up WDS to prevent duplicates, *especially* if you have been syncing Pocket Informant already with Google Calendar. Remember its always a good idea to make a backup.

Every person's configuration is different so there are no specific steps we can tell you to perform. Instead we are providing a set of guidelines to help you understand what needs to be done.

1. If you have events or tasks that already exist in both Pocket Informant and Outlook then you want to remove them first to prevent duplicates.
  - a. If all your data in Pocket Informant is already in Outlook then you want to erase all of it within Pocket Informant by performing a "First Time Sync" and choosing "Erase Local Database". Again this is to prevent duplicate information from showing up in Pocket Informant and Outlook.
  - b. If some of your data is in Pocket Informant is already in Outlook, but not all, then you'll need to manually remove that data by manually deleting the events or tasks.

- c. If you have multiple calendars in Outlook, make sure to check Outlook for identical appointments that might exist across calendars. If they remain when you sync you will see them in one view and it will look like duplicates.
- d. Check your tag color settings for categories within Outlook and the same within Pocket Informant. Colors get applied during sync based on your settings, but because Outlook uses the colors for backgrounds and Pocket Informant uses them primarily for text, you may want to make sure it all works and looks good on Pocket Informant first.
- e. Make sure your calendars in Outlook have different names. Since Pocket Informant does not support hierarchical calendars having two calendars with the same name may cause conflicts. If you have calendars within Pocket Informant from a previous sync you will want to double check them.

The main thing to remember is that sync does not match events and tasks by title/date, but by the Outlook and Pocket Informant event/task IDs. So if you have an event in Pocket Informant that also exists in Outlook before you sync for the first time, then Pocket Informant will copy the event from Outlook (and vice versa) and you will end up with two copies of the same event after your first sync (note that if this happens, you can simply go through and delete the duplicate events in either Pocket Informant or Outlook and then sync again since at this point, Pocket Informant now knows the internal ID of all your Outlook events).

The guiding principle is to make sure that your events and tasks are unique on both sides before you sync for the first time.

## Configuration

### ***Configuring Desktop***

#### **Bonjour vs Port**

This setting is used primarily when syncing WDS over the internet or when using a specified port. You can find more information on this in this section [“Can I sync over the internet”](#)

#### **Event Sync Date Range**

Here you can set what date range WDS syncs your events with Pocket Informant on the iPhone.

### ***Configuring Pocket Informant to sync***

#### **Step 1- Enable WiFi on your iPhone or iPad or iPod Touch**

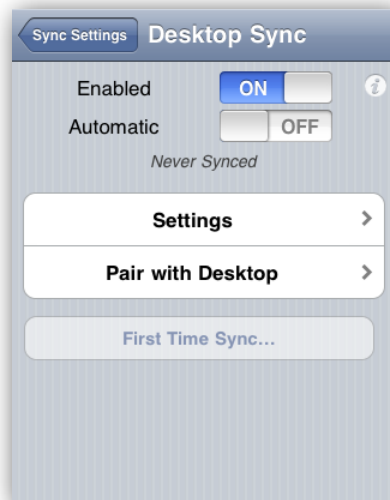
Once WDS is installed and running you will want to make sure your iPhone has WiFi on and connected to the same network as your desktop.

## **Step 2 - Navigate to Settings**

Next open Pocket Informant on your iPhone and go to the Settings tab. Select Sync Settings and then Desktop Sync and you will see the Desktop Sync settings screen. *Informant HD screens look similar.*

## **Step 3 - Turn on Desktop Sync**

Use the switch to enable desktop sync:

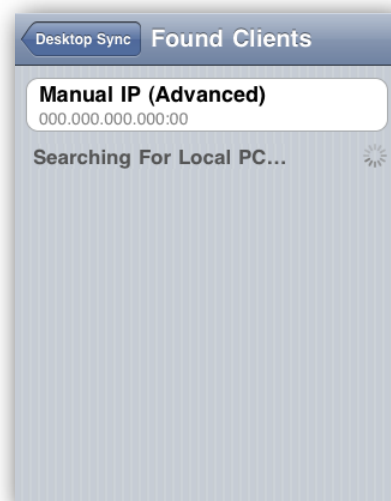


## **Step 4 - Select the Desktop to Sync With**

The first thing you need to do is *pair* your iDevice to the desktop. Select the “Pair with Desktop” item. If a the desktop client is found you will see the screen on the left; otherwise you will see the screen labeled "No desktop's found":



Found one desktop



No desktops found

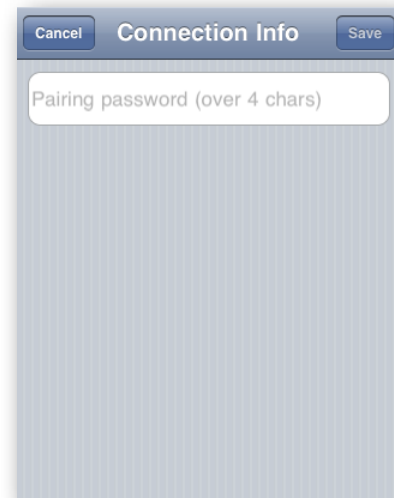
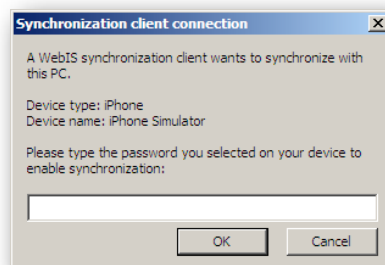
The Manual IP (Advanced) option is described in the section "[Can I sync over the internet](#)" in more detail. Normally you would see the spinning title "Search for local PC". Note: *The spinner will spin forever while this screen is open*

You should see your desktop computer and its name show up in the list under the searching title. If you do not see it show up within a few seconds, make sure:

- Your iPhone's WiFi is on
- The WiFi is connected to the same network as the desktop (i.e they are on the same subnet)
- WDS is running on the desktop
- You have enabled or allowed WDS in your computer firewall
- In some cases the software firewall installed on a computer may prevent networking. For example during testing we tried McAfee Security Center on an XP machine installed after WDS was installed and found that it would not allow networking to occur. The Microsoft firewall worked just fine. When we turned off the McAfee firewall it worked. *The point is that because WDS is a network application you may have to check your network settings if Pocket Informant cannot find the WDS over the network.*

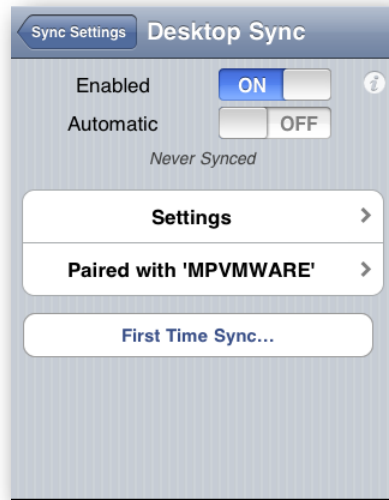
### **Step 5 - Setup a password**

- Once the device is visible, select it and a password dialog will display.
- Enter a password of your choice.
- When you sync for the first time after pairing you will be asked to enter the password on the desktop to make sure that nobody is accessing your information without your authorization.
- There is currently no way to change your password once selected. so make sure to use one you intend to use.



## **Step 6 - Ready to Sync**

Once you have saved the password you will be taken back to the main desktop sync screen:



You can now:

- Select your Settings
- Select “First Time Sync...” to start the syncing with your Desktop.

## **Sync Settings on iDevice (iPhone/iPad/iPod)**

### ***Automatic***

Automatic sync is found as a switch on the main Desktop Sync screen in the iDevice. It will automatically sync Pocket Informant with Outlook every 45 minutes if it has access to the desktop sync while Pocket Informant is running. It will also sync changes you make such as creating, deleting, or changing events/tasks from Pocket Informant up to Outlook if WDS is running and you are on the same network. It will not automatically sync changes from Outlook to Pocket Informant in real-time.

### ***Calendars to Sync***

Pocket Informant provides several choices on what calendars to sync with.

- The default Outlook calendar
- All calendars on both Pocket Informant and Outlook
- Specific calendars that are on Pocket Informant.

*If you choose one calendar to sync with or the default calendar alone, then you can also choose additional sync options that determine how Pocket Informant handles Outlook categories.*

By default Pocket Informant syncs Outlook categories as



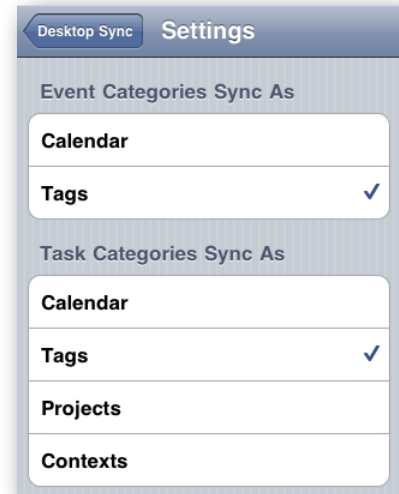
Pocket Informant *tags*. However if you are syncing just one calendar you can also specify if you wish to sync categories as Pocket Informant calendars. This is primarily useful for people who have already configured their data in this way as they were syncing with gSyncIt and Google prior to this release.

*Please note that Pocket Informant tasks sync to the default Outlook task list. WDS does not support task folders in Outlook yet. Support for additional task folders is being looked into for future release.*

### ***Syncs Task Categories as Calendars, Tags, Projects, or Contexts***

Alternatively with Tasks you can also choose to sync Outlook categories as Pocket Informant calendars (unless you are syncing more than one calendar or all calendars) or Projects and Contexts. This will take the first category (if you have multiple) and use it as the name of the Project/Context.

If you create a task with a category in Outlook, it will sync to PIIP, but deleting an Outlook category won't delete it from PIIP. Similarly, creating a new project or context for a task in PIIP will add that to Outlook as a category on the next sync, but deleting that project or context in Pocket Informant won't drop it from Outlook.



## **Syncing Over The Internet**

### ***Basic Router Configuration Steps***

Performing WDS sync is possible via the internet but the router must be properly configured to allow access. Below are the steps to do so. It is important to note here that these are generic steps. All routers are different and you may need to find similar settings if your router does not have the exact settings listed below. These steps were developed and tested using a Linksys WRT-54G router.

First you will need to set up a hostname at [www.dyndns.org](http://www.dyndns.org). It is important to remember your hostname, login name, password and your routers IP address which dyndns will show you once you have signed up.

Next you will want to login to your router and go to the DDNS settings. Select the dyndns.org option. Then enter your dyndns user name, password, and hostname. The internet ip address should auto populate. Then click save settings.

Go to the Applications and Gaming tab. Enter the application as WebIS WDS. Start 12345, End 12345. For protocol you will want to select "Both". Enter the IP address of the desktop machine that you are wanting to sync with. Then click on "Enable". From there click the save settings button at the bottom of the page.

On the desktop right click on the WebIS synchronization icon in the system tray. Select “Synchronization Settings”. Put a check mark in to automatically start the Bonjour service if it is not already running. Click the “Use Following TCP port number” radio button. Fill in the field with the same port number 12345 then click OK.

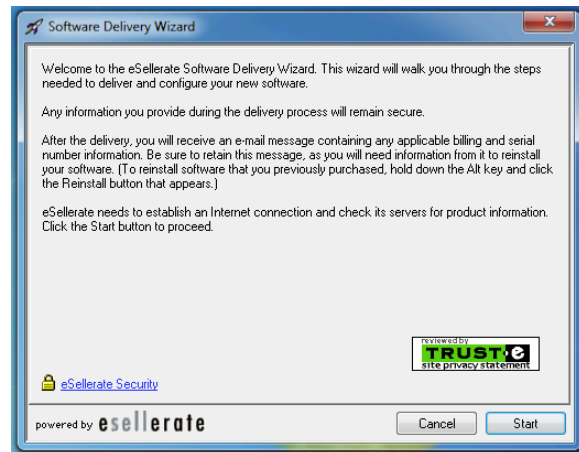
In Pocket Informant go to Settings->Sync Settings->Desktop Sync. Then pair using a manual configuration, enter the same password that you used for your dyndns/DDNS settings in the router. Then enter your dyndns hostname and enter the port number 12345. Save the settings.

Back on the desktop in the sync window click enabled to ON. Choose carefully here the calendars to sync because it is very easy to duplicate information as on the initial sync all items are treated as new and unique even if all of the information is the same. This results in duplicates. If possible it is always a good idea for the initial sync to use a blank Outlook calendar. Also on the initial sync the desktop will prompt for a password, that will be the dyndns account password.

## Purchase

WDS costs \$5.00 USD via the built-in purchasing engine. WDS does use a liberal form of software activation. We try to follow Apple’s lead in providing soft anti-piracy protection without causing a headache for you.

To purchase simply right click on the WDS icon in the system tray and then select Purchase from the menu. The purchasing wizard will walk you through the Welcome, Customer Info, Credit Card, and Checkout screens.



# Common Questions and Answers

## ***My colors did not sync***

Colors are used differently within Pocket Informant than within Outlook and so colors do not sync. We can only get access to the color of the appointment itself which we assign to a calendar upon sync. New categories that sync as a tag will always sync as orange. You can change the colors within Pocket Informant and set them as you wish. We are further developing this feature to include tag colors but as of this writing only the calendar colors are being synced.

## ***Sync connects and then disconnects***

This will occur if the pairing key that Pocket Informant and WDS exchanged does not match. This is a special key that WDS generates upon the first connection and then Pocket Informant stores. If it doesn't match the connection will not occur. You may need to go back into pairing window and re-select the desktop. This will refresh the pairing and you will be asked to enter the password again on the desktop.

## ***I am getting requests to allow access to Outlook***

WDS is written to use the primary direct access to Outlook but also has a backup method of accessing the Outlook data. The backup method causes this Windows Outlook dialog to pop up and you have to press Allow. When this backup method is run it is because WDS was not allowed to connect to Outlook using the direct method. This may be if it is running a software firewall that protects against MAPI access or if the security policies of the machine don't allow it. You may need to check with your machine configuration.

## ***Can I sync with multiple desktop computers at one time?***

While we have developed our software to be able to support multiple sync services and desktops, this is currently *not* enabled at this time. We expect to support this at some future date.

## ***Can I sync with Outlook, Toodledo, and Google at the same time?***

While the technical answer to this question is yes, it is not officially supported and not recommended.. The conditions where this makes good sense to do so are limited as there are several issues that you as a sync consumer must be aware of and understand to be able to do this.

The key to being able to do this successfully is that they source data must be different. You cannot have the same data originally in both places and try to create a circle of sync. This will never work. The easiest way to explain this is with several examples.

Say you have on Google Calendar Personal events and on Outlook work events. You sync Pocket Informant to Google and then sync Pocket Informant to Outlook. It should work and Pocket Informant will transact the two nicely. With your settings set to sync all calendars on both Outlook and Google the Outlook calendar will come down to Pocket Informant and Pocket Informant will push it up to Google and the Google calendar will come down to Pocket Informant and push itself to Outlook as well.

However the scenario that will not work (or anything that resembles it) is if you have on Outlook a Work calendar and on Google you have a Work calendar because in the past you synched Outlook up to Google. Now you add Pocket Informant to the mix. Because both Outlook and Google will have different IDs for the same event, Pocket Informant will see them as two different events and duplicate them internally. Then it will send these new events back up to the other service - duplicating them there.

Pocket Informant never matches events/tasks by name/date. We only match things up by the service IDs.

In summary while its possible to sync all these services simultaneously and we do allow you to do so – when everything works, it will work well. But because the bonds are fragile - based completely off IDs for each completely different service - if something goes wrong the results would be undetermined. Its not something we fully recommend doing because it also makes troubleshooting dramatically more difficult.

### ***An error occurred on the server, access is denied.***

On the iDevice, open Pocket Informant, go to Settings, Sync Settings, Desktop Sync, Paired with <your computer name>, select the computer and re-enter the password. Then sync. Make sure to enter the exact same password on the desktop.

### ***nodename nor servname provided or not known***

This error occurs when your computer's network name is unavailable.

### ***Can I sync over the internet?***

Yes. You simply open the WDS settings window, set a port number you wish to use. If you have multiple computers each one can have its own port. Then read your router's documentation on how to setup a "port-forward". In most routers its as easy as using its web-based administration page, going to port forwarding, typing in the port number and the private computer address. Then you would choose the "Manual Configuration" option where you can enter a static IP or DNS host name under "Name or IP Address" and the port. If you do not have a static IP use a dynamic DNS service instead such as [DynDNS.com](http://DynDNS.com). Then you simply have to enter the DynDNS name in the "Manual Configuration" section along with the port number. The terminology may sound a bit arcane, but for the most routers its very simple.

### ***What to do when Outlook is asking for a profile?***

1. On your PC, click "Start" and open the control panel
2. Double click the "mail" control panel applet. If you cannot find the Mail applet icon, switch to Control Panel's "Classic View" (Windows XP/Vista) or switch to "Small Icons" view (Windows 7).
3. In the "Mail Setup - Outlook" window, click the "Show Profiles..." button.

4. Check the “Always use this profile” option and make sure the profile selected in the drop down list is the correct profile you want to use for synchronization.
5. Click “OK” to save your changes and close the Mail Applet.

### ***I do not see anything in the Pairing View (using Bonjour)***

There can be several reasons for WDS not displaying in the Pocket Informant Pairing Window.

1. Make sure your iPhone’s WiFi is turned on and its on the same wireless network as your desktop computer is. Bonjour is a local auto-discovery feature. It will not auto-discover across multiple routers or on a guest network.



2. Because WDS is a network based application it does require that it can access your network. Many computers today come with software firewalls on the computer. WDS’s installer configures your Windows Firewall to allow WDS to access the internet, but if you are using a third-party firewall application such as Symantec or McAfee or others, you will have to allow WDS to access the internet otherwise it cannot talk to your iPhone.

### ***Does WDS support multiple Task Folders?***

Not in the current release. However we are looking at providing support in a future release.

### ***How can I pick what calendars to sync with before my first sync?***

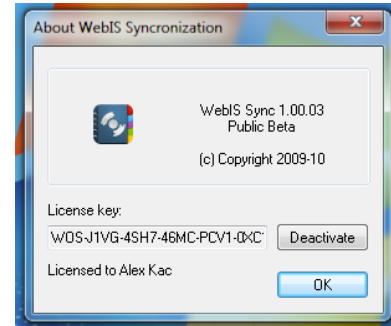
Unfortunately at this time Pocket Informant does not know what calendars you have on the desktop until it has done a full “All Calendar” synchronization first. Once it has done that it can know what calendars you have. This is a known design deficiency that we expect to improve in a future release.

## Software Activation

Activation scans the computer during installation, identifies a serial number for its hardware and links it to a specific product key to create a unique installation ID. That ID is then sent back to the product activation application to verify authenticity and proper use.

WebIS does use software activation in WDS but we use a very liberal method specifically to try and ensure that nearly no user will ever experience problems from activation. We've taken the approach that we can trust our users in general but sometimes people need a reminder and if a single install gets installed too often the activation reminds them that its not meant to be licensed that way.

With the WDS Activation you are given 5 activations (at the time of this writing) and the activation counts are automatically reclaimed after 90 days. This should ensure, unless you're installing the software on more than 5 computers within a 90 day period (which would be against the license) that



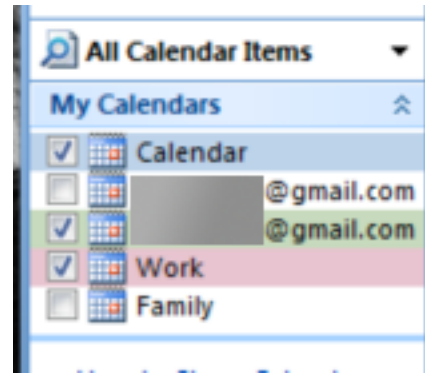
you

would not see any activation issues. You can also de-activate the software at any time to reclaim an activation.

Our activation is run by eSellerate which has been doing software activations for thousands of small and large software developers for years.

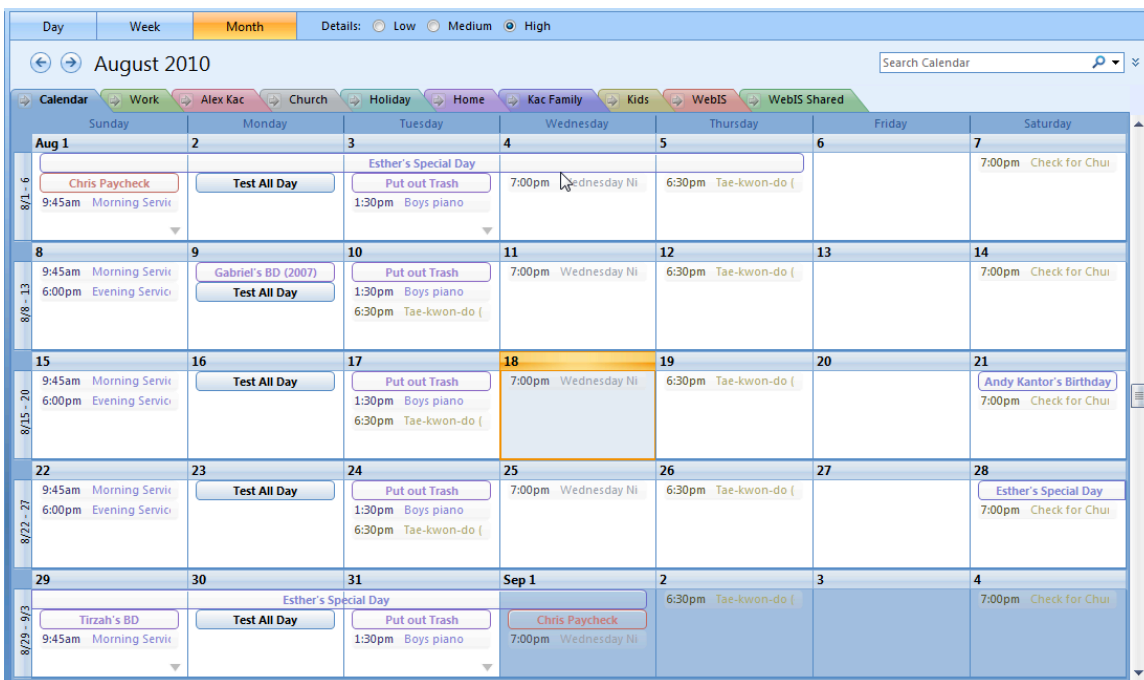
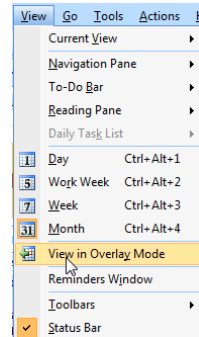
## Outlook 2007+

It is important to know what calendars that you are syncing from your iDevice to Outlook. It is very easy to look at the base calendar in Outlook and not see your events even though you just completed a full synchronization. Likely this is because your events did indeed go into Outlook just on a different calendar. In the screen shot you see a list of calendars in Outlook. The calendars that you are syncing should be listed here. To view them simply put a check mark next to them. Once selected you should see a view similar to the one below.



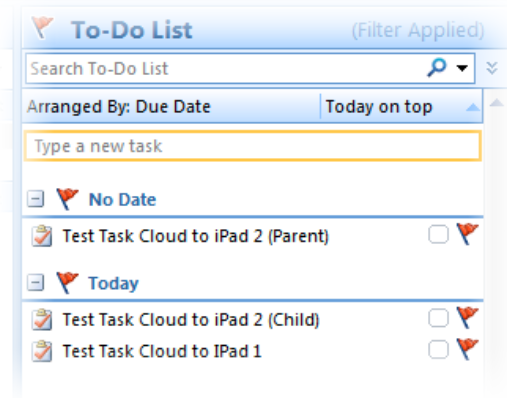
Notice that the three calendars that I am viewing are all different colors and have different appointments on them. The colors are not synced over, that is discussed previously in this manual. What these colors do show you is that at a glance you can see which calendar your event may be on.

You can also show the calendars overlayed on top of each other using the View in Overlay Mode.



## Tasks

It is very important to reiterate that WDS only supports task syncing from the main folder. It will not sync any task subfolders or flagged emails.



```

Administrator: C:\Windows\system32\cmd.exe

Windows IP Configuration

Ethernet adapter Local Area Connection:

    Connection-specific DNS Suffix  . : 
    Link-local IPv6 Address . . . . . : fe80::81d9:d3e5:debe:a5a0%8
    IPv4 Address. . . . . : 192.168.1.134
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : 192.168.1.1

Tunnel adapter Local Area Connection* 6:

    Connection-specific DNS Suffix  . : 
    IPv6 Address. . . . . : 2001:0:4137:9e74:de:21d9:3f57:fe79
    Link-local IPv6 Address . . . . . : fe80::de:21d9:3f57:fe79%9
    Default Gateway . . . . . : 

Tunnel adapter Local Area Connection* 11:

    Media State . . . . . : Media disconnected
    Connection-specific DNS Suffix  . : 

C:\Users\Wesley Sandlin>

```

## Troubleshooting

Once configured WDS is a very reliable means of syncing your iDevice with Pocket Informant and Outlook however if you do hit a bump along the way this "Troubleshooting" area should be able to help you resolve the most common issues.

Please note that if you are using an iDevice with iOS4 that supports multi-tasking and you put Pocket Informant in the background the desktop sync will not occur nor complete if it is in progress. This is caused by a limitation in the iOS4 background services management and is not a malfunction.

Also please remember that your initial desktop sync, with a new computer or new iDevice will take longer, sometimes substantially longer as a lot of data is being moved and parameters are being set up. The good news is that following syncs should move more quickly.

*Q: Automatic detection of my PC is taking forever, my iDevice just shows the spinning wheel and nothing is happening, what do I do?*

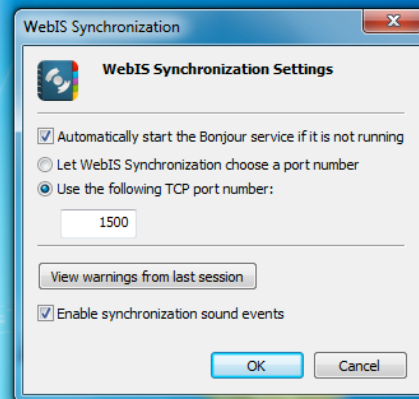
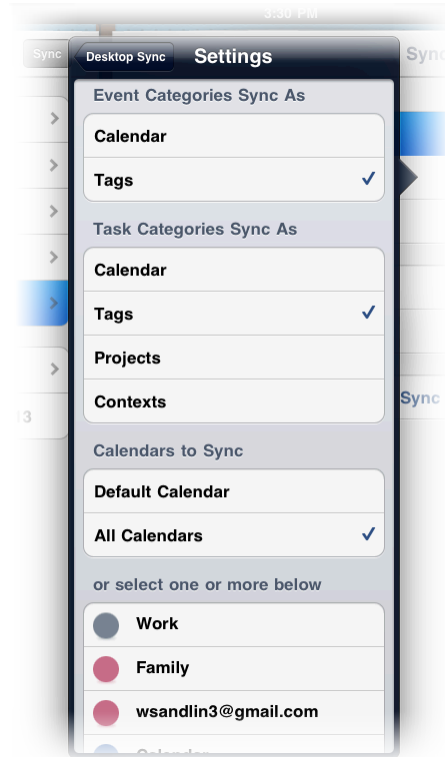
A: If you have followed the setup steps outlined in this guide you may need to switch to the manual configuration mode. There can be many



reasons for the auto detect not to work. Two of the most common are firewall settings and the fairly new IPv6 IP addresses.

Manual configuration is straightforward. First you must get your computers IP address. This can be accomplished in a couple of different ways. First is to glide your mouse over the WebIS sync icon in the Windows system tray which is down by the clock on the desktop. A pop up will appear with your ip address, you will want to copy this number down. If the popup goes away before you get it copied, simply glide over the icon again as many times as necessary.

The alternate method of getting an IP address is to open a Windows command prompt. To do this go to start and run in XP or "Start Search" box in Vista and Windows 7. Type cmd, this should open up a DOS prompt. In the DOS prompt type ipconfig and press return, your screen should come back looking like the following;



Here you will see the IPv4 address of 192.168.1.134, that is the IP address that we will enter on our iDevice for pairing. It has shown to be more reliable than the computer name when setting up the connection manually. The next field that we will need to fill in on the iDevice is the port. You can put any port number you want in there, however in our testing we have found the most reliable port number to be 1500.

It is important to note here that the first field in the WDS manual setup is the password. The iDevice is the driver for the password, if you don't know what your last password was don't worry, set a new one

on the iDevice. Once these settings are in place press the save button on the keyboard. From here press the Sync button. **You will be prompted to enter a matching password on your computer.**

**Notice;** here in this screenshot the slider button for “Automatic” is turned off. This means that during the automatic sync the desktop sync will not automatically take place. To add the desktop sync to the normal sync routine simply move this slider to the on position.

Press the done button to complete the setup operation.

*Q: How do I get specific calendars or tags to sync with Outlook?*

A: After your pairing is complete you’ll notice in the screenshot above a button labeled “Settings”. Tap that button to open up the dialogue for tweaking the content that is synced. From here you have full control to adjust many of the content attributes for the items you are syncing with Outlook. See the screenshot above showing the multiple calendars for a sampling of what this looks like. After all of your selections are made press the “Desktop Sync” button in the top left to accept your settings. Then press the “Done” button in the top right. Your WDS should now be ready to go.

*Q: How do I adjust the desktop client settings?*

A: Simply right click on the WebIS icon in the system tray and click on “Sync Settings”. From Here you will see the following screen. Make sure that the port number matches the one you assigned if you did a manual configuration. Otherwise you will want to leave the option checked for letting WebIS Sync choose the port number.

**Notice;** If a sync gets stuck, you can also stop a sync operation by right clicking on the WebIS icon in the system tray and selecting “Stop Synchronization”.