



IPSWITCH

IMail Server™

Microsoft Exchange ActiveSync®
Getting Started Guide

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CHAPTER 1

Overview

About Mobile Device Synchronization

IMail Server now supports the synchronization of data between a user's mobile device and your IMail Server with the use of **Microsoft Exchange ActiveSync®**.

Ipswitch has created this document to assist mobile device users to configure and initiate Microsoft Exchange ActiveSync® synchronization of their mobile devices for e-mail messages, calendar appointments, contact information and tasks.

This document will help users configure Microsoft Exchange ActiveSync® for the following devices:

- Windows Mobile® 5
- Windows Mobile® 6
- Windows Mobile® 6.1
- iPhone™ and iPod Touch™ Software version 2.2.1 or later
- Google Android™ Incredible by HTC
- Google Android™ Droid by Motorola
- Google Android™ Droid X by Motorola

Mobile Client Requirements

Two requirements are essential for mobile device synchronization:

- 1 iPhone™, Windows Mobile® 5.0 and later, and Google Android (HTC Incredible, Droid, and Droid X) are the only devices that IMail currently supports for synchronizing data to your mobile device.
- 2 Data Access for synchronization by either:
 - A data plan provided by your cellular provider or
 - A wireless connection with internet data access

Synchronizing with Microsoft Exchange ActiveSync®

To correctly set up your mobile device to synchronize with your IMail Server, Microsoft Exchange ActiveSync® must be configured to run on your mobile device. Microsoft Exchange ActiveSync® compares the information on your device with the information on your IMail Server and updates all locations with the most recent information. Microsoft Exchange ActiveSync® will synchronize with your IMail Server information from your E-mail, Contacts and Calendar through your Web Client.

Outlook Synchronization

For Outlook synchronization, the WorkgroupShare Client must be installed. Once installed Outlook will synchronize E-mail, Contacts, Calendar and Tasks with the IMail Server. Check with your IMail Administrator for installation procedures.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.

Web Client Synchronization

Your web client has direct access to E-mail, Contacts and Calendar data, and does not require synchronization. Once the WorkgroupShare Client and Microsoft Exchange ActiveSync® are correctly configured, information updated using the Web Client will synchronize with your mobile device and Outlook.

CHAPTER 2

Configuring Windows Mobile

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Configuring Windows Mobile with Microsoft Exchange ActiveSync

The following steps will assist Windows Mobile device users to set up a data connection with your IMail Server to begin synchronizing your Web Client information (e-mail, contacts and calendar appointments) using Microsoft Exchange ActiveSync®, as long as an active wireless connection to the internet is maintained.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.

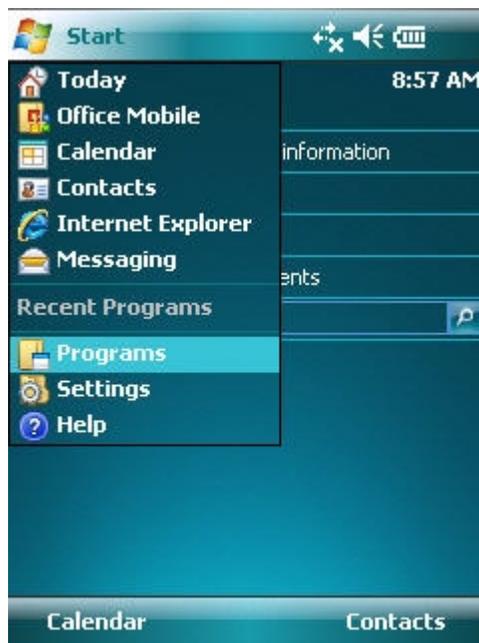


Caution: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

Configuring Microsoft Exchange ActiveSync®

Steps To Activate Your Mobile Device

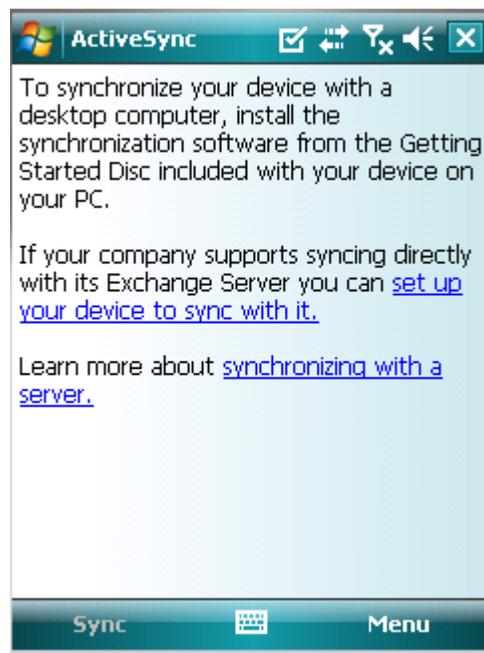
- From the Start menu, select **Programs**.



- From the Programs selection, find and select **ActiveSync®**.



- Select the first link "**set up your device to sync with it**", or select **Menu > Configure Server**.



 **Important:** Windows Mobile® 6.1.4 devices has an extra page to enter your e-mail address and a check box for attempting to detect Exchange Server settings automatically. Uncheck this option.

- Enter the Server Address as given to you by your IMail Administrator



Warning: If synchronizing does not work with SSL checked, contact your IMail Administrator to be sure an SSL certificate is available, or uncheck the option. Unchecking the SSL option is not recommended.

ActiveSync

Edit Server Settings

Server address:
wks206.qatest.local

Note: This is the same as your Outlook Web Access server address.

This server requires an encrypted (SSL) connection

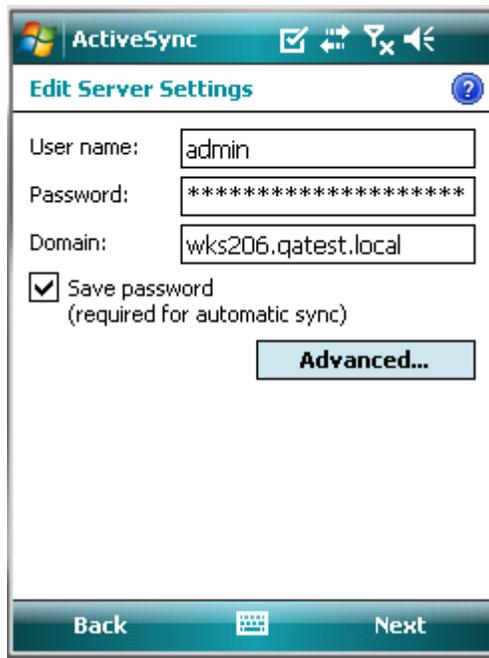
Cancel Next

- Enter User name and Password.
- Enter Domain.

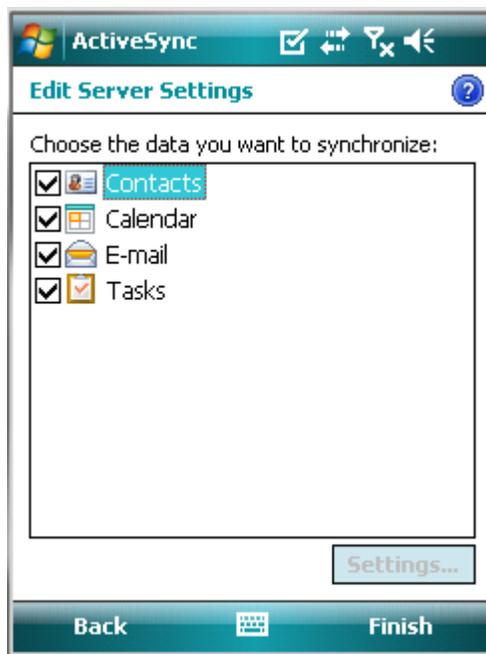
Example:	
E-mail address: admin@wks206.qatest.local	User name = admin Domain = wks206.qatest.local



Note: If a password is not entered and saved, you will be prompted for the password with each synchronization.



- Check only the data that you want synchronized.



- Click **Finish**



Note: Your initial synchronization depending on the amount of data, could possibly take several minutes.



Warning: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

- **Synchronization** should automatically begin on your device with your IMail Server, checking for changes on both your device, and your IMail Server account. Synchronization will update any changes as follows:
 - Updates you made on your mobile device will upload to your IMail Server.
 - Updates made with your Web Client or Outlook (running WorkgroupShare Client) since your last Sync will update to your mobile device.



- Your device has completed synchronization when it displays:
 - "Connected" for push devices,
Current date and time of the last sync for all others.

Synchronizing with Windows Mobile

Once Microsoft Exchange ActiveSync® has been set up, manual synchronization should not be required. Your mobile device will synchronize with one of the following methods:

- **Push.** Mobile devices with a data plan will synchronize whenever a change has been detected by your IMail Server.
- **Scheduled.** When Push is not available then your device has a set schedule that will automatically synchronize as long as a data connection has been established.



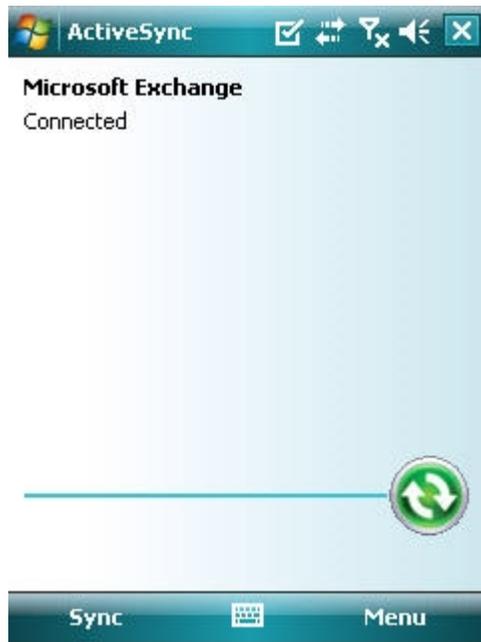
Note: Many devices disable the data connection when the battery becomes low.

Should manual synchronization become necessary, follow these steps:

- From the **Start** menu select **Programs > ActiveSync**.



- To begin simply click the **Sync** option on the lower left portion of the screen.



- This will begin synchronizing your device with your IMail Server, checking for changes on both your device, and your IMail Server account. Synchronization will update any changes as follows:
 - Updates you made on your mobile device will upload to your IMail Server.
 - Updates made with your Web Client or Outlook (running WorkgroupShare Client) since your last Sync will update to your mobile device.



- Your device has completed synchronization when it displays:
 - "Connected" for push devices,
 - Date and time of the last sync for all others.

CHAPTER 3

Configuring iPhone and iPod Touch

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Configuring iPhone with Microsoft Exchange ActiveSync

Apple® iPhone™ and iPod Touch™

The following steps will assist iPhone™ users to set up a data connection with your IMail Server to begin synchronizing your Web Client information (e-mail, contacts and calendar appointments) using **Microsoft Exchange ActiveSync®**, as long as an active wireless connection to the internet is maintained.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.



Caution: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

Configuring Microsoft Exchange ActiveSync® to Work with IMail Server

Step 1 - From your Apple® iPhone™ home page select **Settings**.



Step 1 - iPhone™ Home page

- **Step 2:** On the Settings page select **Mail, Contacts, Calendars**.



Step 2 - Settings page

- **Step 3:** On the **Settings > Mail, Contacts, Calendar** page select **Add Account**.

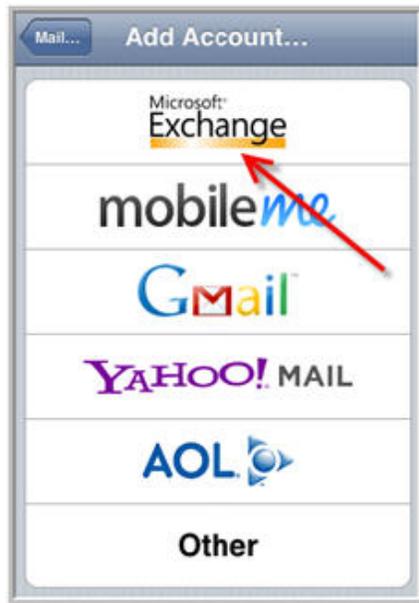


Step 3 - Mail, Contacts, Calendars Page



Note: Only 1 account can be set to use Microsoft Exchange ActiveSync®.

Step 4: On the Add Account page select **Microsoft® Exchange**



Step 4 - Add Account Page

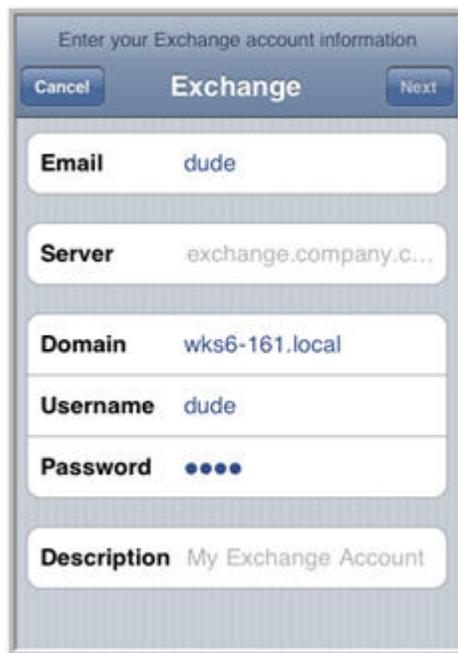
Step 5: On the **Microsoft® Exchange** page enter your **E-mail address, Username and Password**

A screenshot of the 'Enter your Exchange account information' screen. The title bar contains 'Cancel', 'Exchange', and 'Next' buttons. Below are several input fields: 'Email' with the value 'email@company.com', 'Domain' with the value 'Optional', 'Username' with the value 'Required', 'Password' with the value 'Required', and 'Description' with the value 'My Exchange Account'.

Step 5 - Exchange Page

- **Email.** Full user's e-mail address.
- **Domain.** Required only if the e-mail address above contains only the user ID. Enter the domain name, e.g. "myname@company.com" the domain would be "company.com".
- **Username.** Enter the assigned User Name, normally "myname@company.com" the username would be "myname".
- **Password.** Enter the assigned password that is normally entered when logging in to check e-mail.

Step 6: Enter the Server name, as identified by your IMail Administrator.



Enter your Exchange account information

Cancel Exchange Next

Email dude

Server exchange.company.c...

Domain wks6-161.local

Username dude

Password ●●●●

Description My Exchange Account

Step 6 - Exchange with Account information

Step 7: Your e-mail account will require verification.



Verifying Exchange account information

Exchange

Email dude

Server 192.168.6.161

Domain wks6-161.local

Username dude

Password ●●●●

Description dude

Step 7 - Verifying Exchange Account Information

Should any **errors** occur at this point check for the following:

- Typos
- Re-enter your password.

- Verify your Domain name and Server are correct.
- Verify your SSL setting (See Step 9 below). Contact your IMail Administrator to be sure an SSL certificate is available, or uncheck the option. Unchecking the SSL option is not recommended.
- Contact your IMail Administrator to verify your User ID has been enabled for ActiveSync®

Step 8: Once your account has been verified, select the data to be synchronized, then click **Done**.

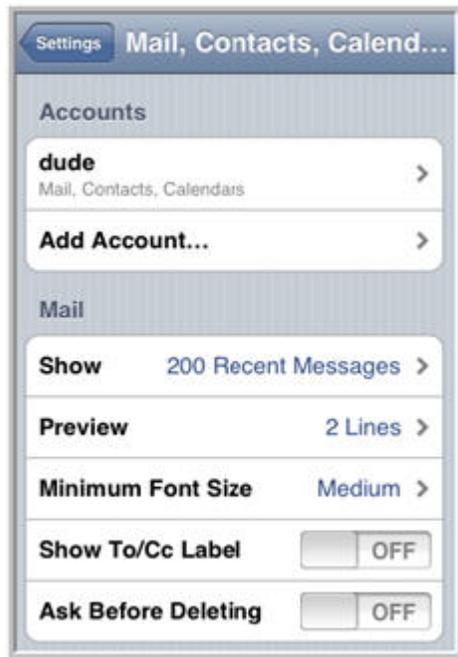


Additional Options

Step 9: Once this information is saved, your iPhone™ will begin synchronizing. You can go back to your accounts settings to configure additional options, such as the amount of weeks / months to synchronize.

On the **Settings > Mail, Contacts, Calendars** page, scroll down to the bottom of the page, to modify the **Sync** settings.

Select your new account to view your SSL connection setting.



Displaying above is the new e-mail account. Scroll down to view sync settings. Click to view **settings**.



Display of account settings

Synchronizing with iPhone and iPod Touch

Setting Your Apple® iPhone™ and iPod Touch™ to a Schedule

Once Microsoft Exchange ActiveSync® has been set up manual synchronization should not be required. Your mobile device will synchronize with one of the following methods:

- **Push. (Set by default)** Mobile devices with a data plan will synchronize whenever a change has been detected by your IMail Server.
- **Fetch (Scheduled).** When Push is not available then your device has a set schedule that will automatically synchronize as long as a data connection has been established.



Note: Many devices disable the data connection when the battery becomes low.

To modify the **Push** or **Fetch** schedule follow these steps.



Caution: Keep in mind, turning **Push "Off"** will also affect all applications using this feature.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.



Caution: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

- **Step 1** - From the Apple iPhone™ home page select **Settings**.



- **Step 2:** On the Settings page select **Mail, Contacts, Calendars**.



- **Step 3:** On the Mail, Contacts, Calendars page select **Fetch New Data**.



- **Step 4:** On the Fetch New Data page, **Push** must be turned "**Off**" for **Fetch** schedule to be working.

The following options are available for **Fetch**:

- Every 15 Minutes,
- Every 30 Minutes,
- Hourly,
- and Manually (when application is opened)



Caution: Keep in mind, turning **Push "Off"** will also affect all applications using this feature.



CHAPTER 4

Configuring Google Android

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Google Android™ is a mobile operating systems based on a modified version of the Linux kernel. Currently IMail supports the following phones for synchronization of e-mail, contacts, and calendars.

- Google Android™ Incredible by HTC (on page 19)
- Google Android™ Droid by Motorola (on page 22)
- Google Android™ Droid X by Motorola (on page 22)
-

Configuring HTC Incredible with Microsoft Exchange ActiveSync

Google Android™ - HTC Incredible

The following steps will assist HTC Incredible users to set up a data connection with your IMail Server to begin synchronizing your Web Client information (e-mail, contacts and calendar appointments) using **Microsoft Exchange ActiveSync®**, as long as an active wireless connection to the internet is maintained.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.



Caution: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

Configuring Microsoft Exchange ActiveSync® to Synchronize with HTC Droid Incredible

Step 1. From your HTC Incredible Home page select **Menu**.

Step 2. Next, select **Settings > Accounts & Sync**.

Step 3. Select **Add Accounts Settings > Microsoft Exchange ActiveSync**.

Step 4. Enter **Full E-mail Address** and **Password**, select Next.



Step 4a. If presented:



- **Email address.** Enter the full user's e-mail address.
- **Server address.** Enter the Server name, as identified by your IMail Administrator.
- **Domain.** Enter the Domain, as identified by your IMail Administrator.
- **Username.** Enter the assigned User Name, normally "myname@company.com" the username would be "myname".
- **Password.** Enter the assigned password that is normally entered when logging in to check e-mail.

- **Domain\Username.** Enter the assigned User Name, normally "myname@company.com" the username would be "myname" .
- If applicable, check the "This server requires an encrypted SSL connection" to enable / disable as required. Enabled when a green check mark is present.

Step 5. Select the data to synchronize with your IMail Server, then select **Finish Setup**. Data should start synchronizing to the mobile device.



- Select Next, when a green check mark displays for using a secure connection.
- Verify all your settings are correct before selecting Done.

Step 6: Your e-mail account will require verification. Should any **errors** occur at this point check for the following:

- Typos
- Re-enter your password.
- Verify your Domain name and Server are correct.
- Verify your SSL setting (See Step 9 below). Contact your IMail Administrator to be sure an SSL certificate is available, or uncheck the option. Unchecking the SSL option is not recommended.
- Contact your IMail Administrator to verify your User ID has been enabled for ActiveSync®

Step 7: Once your account has been verified, your E-mail, Calendar and Contacts will synchronize.

Configuring Droid with Microsoft Exchange ActiveSync

Configuring Microsoft Exchange ActiveSync® to Synchronize with Droid and Droid X

Due to Android™ open source technology, each mobile device has slightly different steps to configure and setup for synchronization with ActiveSync. Ipswitch recommends referring to the mobile device user's guide and your IMail Server Administrator for specific data input.

Below are general steps to configure and begin synchronization with your e-mail, contacts, and appointments.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.



Note: Many devices disable the data connection when the battery becomes low.



Caution: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

Step 1. From your Droid / Droid X Home page select **Menu**.

Step 2. Next, select **Settings > Accounts & Sync**.

Step 3. Select **Add Accounts Settings > Microsoft Exchange ActiveSync**.

Step 4. Enter **Full E-mail Address** and **Password**, select Next.

Step 5. When presented:

- **Email address.** Enter the full user's e-mail address.
- **Server address.** Enter the Server name, as identified by your IMail Administrator.
- **Domain.** Enter the Domain, as identified by your IMail Administrator.
- **Username.** Enter the assigned User Name, normally "myname@company.com" the username would be "myname".
- **Password.** Enter the assigned password that is normally entered when logging in to check e-mail.
- **Domain\Username.** Enter the assigned User Name, normally "myname@company.com" the username would be "myname".
- If applicable, check the "This server requires an encrypted SSL connection" to enable / disable as required. Enabled when a green check mark is present.

Step 6. Select the data to synchronize with your IMail Server, then select **Finish Setup**.

Step 7: Your e-mail account will require verification. Should any **errors** occur at this point check for the following:

- Typos
- Re-enter your password.
- Verify your Domain name and Server are correct.

- Verify your SSL setting (See Step 9 below). Contact your IMail Administrator to be sure an SSL certificate is available, or uncheck the option. Unchecking the SSL option is not recommended.
- Contact your IMail Administrator to verify your User ID has been enabled for ActiveSync®.

Step 8: Once your account has been verified, your E-mail, Calendar and Contacts will synchronize.

Synchronizing with Google Android

Setting Your Android HTC Incredible to Synchronize Manually

Once Microsoft Exchange ActiveSync® has been set up manual synchronization should not be required. Your mobile device will synchronize with one of the following methods:

- **Push. (Set by default)** Mobile devices with a data plan will synchronize whenever a change has been detected by your IMail Server.
- **Fetch (Scheduled).** When Push is not available then your device has a set schedule that will automatically synchronize as long as a data connection has been established.

Due to Android™ open source technology, each mobile device has slightly different steps to configure and setup for synchronization with ActiveSync. Ipswitch recommends referring to the mobile device user's guide and your IMail Server Administrator for specific data input.

Below are general steps to configure and begin synchronization with your e-mail, contacts, and appointments.



Note: To synchronize your device with Outlook on your IMail Server, installation of the WorkgroupShare Client is required. See your IMail Administrator for more information.



Note: Many devices disable the data connection when the battery becomes low.



Caution: Your device may require an initial set up that will possibly delete any current contacts and calendar items you have on your mobile device.

- **Step 1** - From the HTC Incredible home page select **Menu**.
- **Step 2:** Select the **Settings > Accounts & Sync**.
- **Step 3:** Select the account to synchronize
- **Step 4:** Select **Sync**.

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