

# GO!NotifyLink Windows Mobile ActiveSync Solution

User Guide



## What's in this document

This document:

- Lists software requirements
- Provides instructions for creating the required Microsoft Exchange® mail account on the device
- Provides some information for getting started using your *Windows Mobile ActiveSync* device with *GO!NotifyLink*

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# Requirements

- You must be set up with a user account on the *GO!NotifyLink* Enterprise Server
- A *Windows Mobile ActiveSync* device operating on Windows Mobile 6, 6.1, or 6.5

## Account Setup Instructions

### Before You Begin

**Have the following information ready.** You may need to consult your system administrator for the mail server name and authentication password.

- Mail server name for sending and receiving mail
- Your email address
- Your Authentication Password

**PIM items existing on the device prior to account setup** remain on the device after the initial synchronization. Existing items for any PIM item type (calendar, contacts, tasks) that you choose to synchronize will also be sent down to the ActiveSync server. This could result in duplicates on the device and server if you maintained the same events, contacts or tasks in both places prior to creating the ActiveSync account.

If you remove your ActiveSync account or disable the synchronization of a particular PIM type, all associated PIM items, even those that existed on the device prior to the account creation, will be removed from the device.

**Troubleshooting Issue:** Registration fails to complete - see [Knowledge Base article](#)

## Setup Your ActiveSync Account on the Device

1. Select **Start > Programs > ActiveSync**.
2. From the text on the ActiveSync screen, click on the link: *set up your device to sync with it* or select **Menu > Add Server Source**.
3. Depending on the OS version of your device, you may be prompted for your **Email address**. Enter the address and tap **Next**. This is for the purpose of auto-detecting the Exchange Server and although this is not supported, you must make an entry.
4. Enter the following information. The order in which you enter it may vary by OS version:
  - Server Address** – Enter the address of the *GO!NotifyLink* server  
**(GO!NotifyLink On Demand users, enter the server address noted in your welcome letter.)**
  - Username** – Enter the full email address of your mail account
  - Password** – Enter the Authentication Password
  - Domain** – Leave blank
  - Save Password** – Mark this check boxSelect **Next** to continue.
5. Mark the **SSL** check box if your web server is equipped for this protocol, then select **Next**.
  - Note:** An SSL certificate must be installed on your web server in order for you to use SSL. Check with your system administrator to determine if this feature is available to you.
6. Select **Next**.
7. Choose the data you want to synchronize. Mark or unmark the check box beside each type.
  - Contacts
  - Calendar
  - E-mail
  - Tasks
8. Select **Finish**. A status bar appears indicating that the device has started synchronizing. You will see information about the data that is synchronizing.
  - Note:** As synchronization begins, a pop-up dialog informs you that the server must enforce security policies to continue synchronizing. Tap **OK**. If you tap *Cancel*, synchronization will stop and you will not be able to continue the account setup process.

# Account Maintenance

If you are moving your *GO!NotifyLink* account to a different device, you will need to:

- Clear Registration on the *GO!NotifyLink Client Web*
- Remove your *GO!NotifyLink* account from the old device and recreate it on the new device

## Clear Registration Before Reregistering Your Account on a New Device

If you are reregistering your account because you changed devices, you must **Clear Registration** via the *GO!NotifyLink Client Web*.

See [instructions for accessing the GO!NotifyLink Client Web](#).

1. Login to the *GO!NotifyLink Client Web* and select **General > Device**.
2. Click the **Clear Registration** button.
3. Proceed with reregistering your account.

## Removing Your Account from the Device

When you remove an account from the device, the account and all mail and PIM (Contacts, Calendar Events, and Tasks) associated with it, are deleted from the device.

1. From the Windows Mobile Home screen select **Start > Programs > ActiveSync**.
2. From the ActiveSync screen, select **Menu > Options** and tap the **Delete** button.

# Settings

## Device IT Policy Comparison Chart

Link to this [chart](#) to learn which *GO!NotifyLink* IT policies are supported and which are not supported when using the *GO!NotifyLink Windows Mobile ActiveSync Solution*.

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## Synchronization Settings

Your Windows Mobile device automatically checks the server to see if new messages have arrived.

The automatic check may be set at a *Scheduled Push* interval or at a *Direct Push* setting called: “*As items arrive*.” With the Direct Push setting, the device essentially maintains an open connection so that information is automatically delivered (pushed) to the device as it is available.

Direct Push (*As items arrive*) is the default setting and requires a cellular network connection (not supported on WiFi, cradle connection, etc.)

**Direct Push and Battery Life.** Though a Direct Push mode offers more up-to-the-minute message delivery, for some users, increased battery consumption may be the tradeoff. If your battery is not lasting as long as you would like, try changing the setting to a *Scheduled Push* interval.

Mail, contacts, calendar items, and tasks sent *from* the device can be processed immediately, independent of the scheduled push sessions.

## Change Your Synchronization Setting

1. Select **Start > Programs > ActiveSync**.
2. Open the ActiveSync **Menu** and select **Schedule...**
3. Select the interval at which the device should check for new items. Select an interval for *Peak times* and for *Off-peak times*:
  - Manually (use the Inbox menu option: *Send/Receive* or the ActiveSync menu option: *Sync*)
  - As items arrive (Requires a cellular network connection – Direct Push)
  - Every 5, 10, 15, 30 or 60 minutes
  - Every 2 or 4 hours
4. Mark the check box, **Send outgoing items immediately**. If left unmarked, outgoing items are sent from the device according to the intervals set in the synchronization schedule.

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# Settings on the GO!NotifyLink Client Web

There are several settings, configurable on the *GO!NotifyLink Client Web*, that control what synchronizes to your device. What follows are instructions for accessing the Client Web online.

## When instructions in this guide direct you to change a setting from the Client Web:

**On Premise Users:** In your web browser, enter the server address of the web server running the Http/Web component of *GO!NotifyLink*, followed by **/client/**

**On Demand Users:** In your web browser, enter the server address of the On Demand web server:

**https://hosted<#>.notifylink.com/client/clientlogin.php**

Where # is indicated, insert the server number you have been assigned to (without brackets <>).

### **Login**

In the **Username** and **Password** fields of the Login screen, enter the email address and password of your mail account. (You can change the password assigned to you in the *Client Web* from the **Accounts** page.)

Consult the [Enterprise Server Client Web Guide](#) for more information on the Client Web.

## Device IT Policy Comparison Chart

Link to this [chart](#) to learn which *GO!NotifyLink* IT policies are supported and which are not supported when using the *GO!NotifyLink Windows Mobile ActiveSync* Solution.

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# Email and PIM Settings

## ActiveSync Email Sync Options

Several *Email Sync Options* can be set on the Windows Mobile device. The following settings are supported for use with *GO!NotifyLink*:

- **Download the past:** - Establish a synchronization range for email
- **Download size limit:** - Limit the size of the email
- **Include file attachments** – Enable to automatically download attachments

1. Open **ActiveSync**.
2. Select **Menu > Options**.
3. Select **E-mail**, then tap **Settings**.
4. At **Download the past:**, enter the mail synchronization range. Choose from:
  - 1 or 3 days
  - 1 or 2 weeks
  - 1 month
  - All (this will synchronize 180 days)
5. At **Download size limit:**, select how much of the email you want to download. Choose:
  - 0.5 KB, 1 KB, or 5 KB
  - Entire message
  - Headers only (only headers without the email body will download)

If you limit the size of an email, you can still manually download the rest of the message when viewing the email.

6. At **Include file attachments**, check the box to automatically download attachments with the email. You can also enter a size limit for downloaded attachments (**Only if smaller than:**). If the box is unchecked, you must manually download attachments from an open message in the E-mail application.

## More Email and PIM Settings

This chart summarizes the settings that control how email and PIM (calendar events, contacts, and tasks) are synchronized to the device. Some settings are configurable on the Windows Mobile device. Others are configurable through the *GO!NotifyLink Client Web*: [Instructions for accessing the Client Web](#). Below is a list of the settings and where they can be configured.

Configuration Setting	Description	Configurable via:
<b>Filters</b>	Filters messages sent from the server	GO!NotifyLink Client Web: <b>Mailbox &gt; Filters</b>
<b>Folder Mirroring</b>	On the web, Folder Mirroring is automatically enabled. Select email folders to be synchronized to the device. Users may choose Sent, Drafts, or custom folders. (Trash/Deleted Items is the exception. It cannot be synchronized to the device.)  You must also select the folders on the device for folder mirroring to function properly.	GO!NotifyLink Client Web: <i>To select folders:</i> <b>Mailbox &gt; Folders</b>  Device: <i>From the mail application select</i> <b>Menu &gt; Tools &gt; Manage Folders</b> <i>Check the folders you want to synchronize</i>
<b>Notification ON/OFF</b>	Enables/Disables GO!NotifyLink message notification. Restarts/Suspends retrieval of Email from the server.	GO!NotifyLink Client Web: <b>General &gt; Control Options</b>
<b>E-mail Sync</b>	Number of days a message is available on the device. Use as a cleanup setting to manage message quantity. Cleanup will take effect within 24 hours of the scheduled delete. Choose 1 or 3 days, 1 or 2 weeks, 1 month or <i>All</i> . (If <i>All</i> is chosen, range will default to 180 days.)	Device <b>Start &gt; Programs &gt; ActiveSync &gt; Menu &gt; Options</b> <i>Select the E-mail folder and tap Settings.</i>
<b>Calendar Sync</b>	Set the calendar synchronization range - how far back and ahead to sync your calendar events on the device.  <b>Look-back</b> is set from the device. Default is 2 weeks. Choose from 2 weeks, 1, 3, 6 months or <i>All</i> . (If <i>All</i> is chosen, Look-back is set to 104 weeks.)  <b>Look-ahead</b> is set from the client web. Default is 26 weeks. Choose from 1 to 52 weeks.	Device: <b>Start &gt; Programs &gt; ActiveSync &gt; Menu &gt; Options</b> <i>Select the Calendar folder and tap Settings.</i>  GO!NotifyLink Client Web: <b>PIM &gt; Calendar &gt; Synchronization Range</b>
<b>Choose Address Books</b>	If the groupware server supports multiple address books, you can choose which one will synchronize to the device. Windows Mobile devices can only synchronize one address book. Contacts from the chosen address book will synchronize to the device's "All Contacts."	GO!NotifyLink Client Web: <b>PIM &gt; Contacts &gt; Choose Address Books</b>
<b>Task Sync</b>	Set task synchronization look-ahead range. Choose from 1 to 104 weeks. Default is 26 weeks.	GO!NotifyLink Client Web: <b>PIM &gt; Tasks</b>
<b>Filter Meeting Response Emails</b>	If enabled, this option filters out meeting response emails sent directly from the Windows Mobile device to the meeting organizer. The organizer may still receive an email from the attendee's PIM server, however, in addition to the calendar update they receive.	GO!NotifyLink Client Web: <b>PIM &gt; Calendar</b>

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# Security Settings

## SSL

SSL is an encryption protocol for data-in-motion between the device and *GO!NotifyLink* server. An SSL certificate must be installed on the web server in order for you to use SSL. Check with your IT administrator to determine if this feature is available to you. (*GO!NotifyLink* On Demand users may use SSL since all On Demand servers are equipped with SSL certificates.)

You may enable the SSL encryption when you create your Windows Mobile ActiveSync account.

You may also enable SSL from the ActiveSync application menu.

### Enable SSL from the ActiveSync Application

1. Select **Start > Programs > ActiveSync**.
2. Open the ActiveSync **Menu** and select **Configure Server...**
3. Mark the **SSL** checkbox.

### Required Password and Inactivity Timeout

If your organization's mobile security policy requires that your device be password protected, you will be prompted to define your lock password on the device.

**Note:** If your organization does not enforce the password policy, but you wish to password protect your device, you can:

- Request that your IT Administrator turn on the enforcement for your account through the *GO!NotifyLink* Administrative Web. Then follow the instructions below.
  - Use the device's native *Lock* option (*Start > Settings > Lock*) to set a Simple PIN (4 or more digits) or a Strong alphanumeric password (7 mixed characters).
1. The "**Update Required**" message will appear. Tap **OK**.
  2. The checkbox labeled, "**Prompt if device unused for**" will be marked and a timeout interval will display beside it. You may change the value of the interval, however, it may **not** be greater than the setting enforced by the server policy.
  3. If the server password strength is set to '*Weak*,' you can choose whether you will use a **Simple PIN** or a **Strong alphanumeric** password. If the server password strength is set to '*Strong*,' you must enter a **Strong alphanumeric** password.
    - Simple PIN – Must be 8 or more digits
    - Strong alphanumeric – Must be at least 8 characters and contain 3 of the following:  
Uppercase letters, Lowercase letters, Numerals, Punctuation

### Wipe on Failed Unlock Attempts

This security feature has to be enabled from the *GO!NotifyLink* Administrative Web. The purpose of *Wipe on Failed Unlock Attempts* is to limit the chances an unauthorized user has to guess a password. As attempts are made to enter the code, the device displays a message such as: *2/10 attempts*

## Remote Wipe

In the event that your device is lost or stolen, contact your IT Administrator as soon as possible. The administrator has the ability to enforce a *Remote Wipe* security function on the device from the *GO!NotifyLink* Administration Web.

A *Remote Wipe* will remove all data and configuration information (messages, contacts, calendar events, tasks, the mailbox account, etc.) from the device. Then the device is returned to its original, factory settings.

# Using Your Device

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## Mail

### Email Folders

*GO!NotifyLink* can synchronize email from multiple folders on the mail server to the device *Inbox* and to multiple folders that mirror those on the server.

**Note:** With Windows Mobile ActiveSync, the **Deleted Items** folder synchronizes in only one direction, from the device to the server. Items in the Deleted Items folder on a user's PC will not appear on the device even if it is selected for synchronization. See [Knowledge Base article](#).

If you have access to the [GO!NotifyLink Client Web](#), you can select the folders you wish to synchronize to the device.

From the *GO!NotifyLink* Client Web home page, select **Mailbox Properties > Folders** and select the folders you want *GO!NotifyLink* to monitor. In addition to the *Inbox*, you can select the *Sent Items*, *Drafts*, or any custom folders.

### You must also select the folders on the device

Selecting folders on the device is required to make synchronizing multiple folders successful. This is also a requirement for being able to successfully move email from folder to folder.

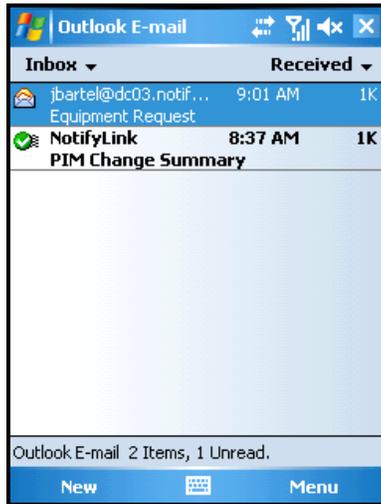
On the device, go to the device *Inbox* and tap **Menu > Tools > Manage Folders**. Check the folders you wish to synchronize.

For more information see the following Knowledge Base articles: [Select Folders](#) and [Move Folders](#).

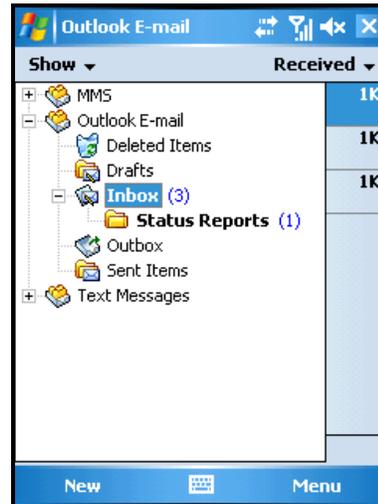
## Reading Email

To view the Email folders available in addition to the *Inbox* while in the device email application:

- On a **Windows Mobile Standard** device, select **Menu > Folders**.
- On a **Windows Mobile Professional** device, click the folder drop down arrow located at the top of the screen.



*Inbox Message List*



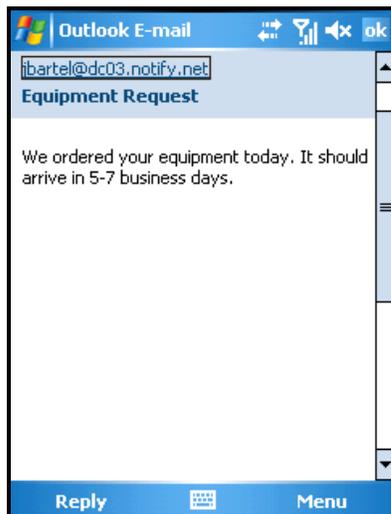
*Email Folder List*

## Viewing an Open Message

Scroll through your message list and select a message to open it.

What appears in the header and body of the message when you view it depends on how your *Notification Format* is set. Seeing the entire header may require scrolling up on the message screen. If you have been granted access to the *Notification Format* settings, they can be modified from the *Client Web*.

You can choose to include any or all of the following information:



Section	Contents
<b>Header*</b>	<ul style="list-style-type: none"> <li>•Address of the sender</li> <li>•Subject of the message</li> <li>•Time the message was sent</li> <li>•CC: recipients, if any</li> </ul>
<b>Message Body</b>	Message text
<b>Task Bar</b>	<ul style="list-style-type: none"> <li>•Reply button</li> <li>•On-screen keyboard icon (WMP)</li> <li>•Menu button – options similar to the menu on the message list</li> </ul>

## Viewing Attachments

Attachments associated with Email messages are available for download to the device.

Attachments will download automatically if the *E-mail Sync Option* “**Include file attachments**” is enabled. See [Email and PIM Settings](#). If attachment download is not automatic, you may initiate the download while viewing the message.

1. Open an email message with an attachment.
2. If the attachment has downloaded automatically, tap the attachment to open it.
3. To initiate a manual download, tap the attachment once to download it. Once it has downloaded, tap it a second time to open it.
4. To save the attachment, press and hold the attachment (WMP), then choose **Save As** (or select *Save As* from the menu). Select the folder and location for saving the file. An attachment must be saved in order to be forwarded or attached to a new message.

Tested / Supported File Formats	
File Extension	Type
.doc	Microsoft Word®
.xls	Microsoft Excel®
.ppt	Microsoft PowerPoint®
.jpg, .bmp, .gif, .png	Image files
.htm/.html	Webpage
.txt, .rtf	Text
.pdf	Portable Document Format
.zip	Data compression/archive format
.mp3, .wav	Audio files
.vcf	Contacts
.tiff *	BigTIFF Image
.docx *	Microsoft Word®
.xlsx *	Microsoft Excel®
.pptx *	Microsoft PowerPoint®

\* *In testing, these files failed to open with WM OS v6.0, but succeeded with newer OS versions.*

## Replying To and Forwarding Messages

To access a list of options for messages in your *Inbox*, highlight a message and select the **Menu** option from the taskbar. (*Windows Mobile Professional devices: Tap and hold on a message to access a pop-up menu of options.*) These options are also available from the menu when viewing an open message.

Menu Option	Description
<b>Delete</b>	Deletes the item and puts it in the Deleted Items folder.
<b>Reply</b>	Compose a reply to the sender.
<b>Reply All</b>	Compose a reply to the sender and all recipients of a message.
<b>Forward</b>	Forward a message to another address.
<b>Folders</b>	Displays the Email folder list and allows you to open another folder. ( <i>Windows Mobile Standard only. Windows Mobile Professional devices: Tap the arrow beside 'Inbox' to display a list of Email folders.</i> )
<b>Mark as Read/Unread</b>	Marks a selected read message as unread or vice versa.
<b>Move</b>	Allows you to place the Email into another folder on the device

## Responding to Meeting Requests

Meeting Requests, issued from a user on the same groupware server, appear in your *Inbox*. If you accept the invitation, your Calendar is updated as well.

**Note:** Meeting requests sent to you from users on external groupware servers may appear as messages in your *Inbox*. You can reply to these messages, however, you will not be able to accept or decline the meeting, nor will the request initiate a change to your calendar.

Open the meeting request email and do one of the following:

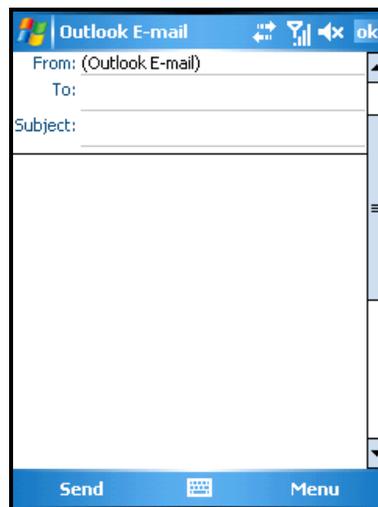
- To accept the request and insert the meeting into you calendar, tap or click **Accept**.
- To decline the request, tap or click **Menu > Decline**.
- To tentatively accept the request and insert a tentative meeting into your calendar, tap or click **Menu > Tentative**.

## Sending Email

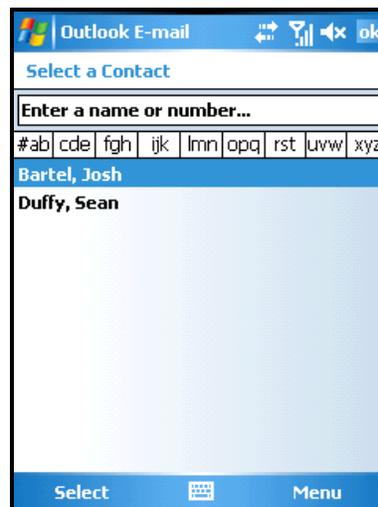
1. Select **New** from the task bar on any Email folder screen.
2. Type a name or email address in the **To** field or select **Add Recipient** from the menu to add a name from your contacts. As you type, matching email addresses from your contacts appear. Select a recipient and repeat to add more addresses.

**Note:** You can use *Remote Lookup* while composing an email as well. From the *To/Cc/Bcc* fields, select **Menu > Add Recipient**.

Select the **Company Directory** option, type in a partial name, address, etc. and select **Search**.



*Compose a New Message*



*Add Recipient*

3. Scroll up to add recipients in the **Bcc** or **Cc** fields. Type in contacts or use **Add Recipient**.
4. Enter a Subject and then the body of your message.
5. To include an attachment, select **Menu > Insert > File** and choose a file to attach. *See more on attachments below.*
6. Tap **Send** or select **Save to Drafts** from the **Menu**.

## Menu Options

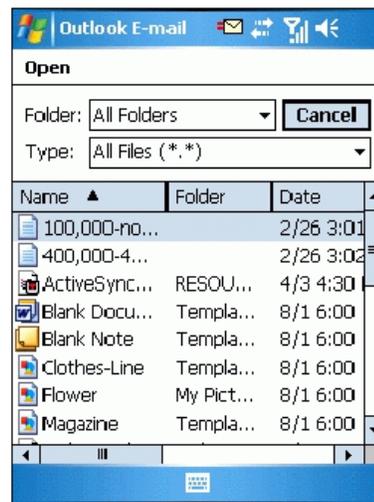
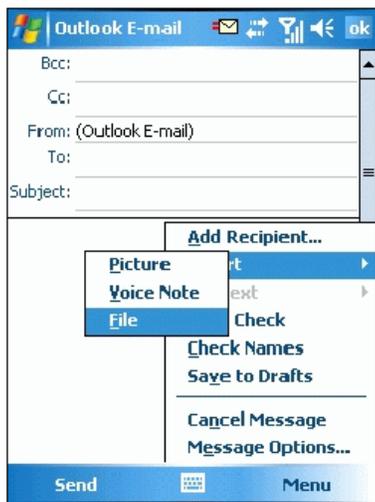
The following options are available through the task bar or the Menu option:

Option	Description
<b>Send</b>	Sends the message to the Outbox where it waits to be processed. Once it is sent it moves to the Sent Items folder.
<b>Add Recipient</b>	Select this to go to the Contact screen to look up or add a contact. Option available when you are in the To:, CC:, or BCC: fields.
<b>Insert</b>	Allows you to add a file attachment to the message.
<b>Save to Drafts</b>	Saves the message in the Drafts folder allowing you to work on and/or send the message later.
<b>Cancel Message</b>	Cancels the message and returns you to the Email folder list.
<b>Message Options</b>	Set message priority and message language.

## Attaching a File

To attach files to a message you are composing, choose **Menu > Insert > File**. Browse through your device folders and select the file you wish to attach. When you *Send* the message, the body sends and then the attachment begins sending.

**When Errors Occur.** If an error occurs while uploading an attachment or the transfer was cancelled or interrupted, the message will remain in the Outbox and be sent later.



## Sending Email From the Address Book

You can create new Email message directly from the device address book using the *GO!NotifyLink* Email application.

1. Access your contact list and **select the contact** you wish to Email.
2. The contact's Email address displays with the label "Send e-mail." Select the address or select the **E-mail** option from the task bar at the bottom of the screen.  
**NOTE:** If the contact has multiple Email addresses, you can select which address to use.
3. Choose the **Outlook E-mail** account to send the message via *GO!NotifyLink*. You will automatically be placed in the *Compose* screen with contact you selected in the To: field.

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## Calendar

From the Calendar screen you may create or edit a calendar event and view existing events.

### Creating New Calendar Events

1. Select **Menu > New Appointment** from the calendar screen task bar.
2. Enter the information for any or all of the optional fields or accept the defaults.
3. Select **Done/OK** (WMP) to return to the calendar.

### Meeting Requests

Windows Mobile Professional devices have the ability to create a new event (meeting) on the device calendar and send a request for other participants to attend, by using the **Attendees** field when creating a new event.

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# Contacts

From the *Contacts* screen you may create or edit a contact entry and view existing entries.

You can view the contact list sorted by **Last Name** or by **Company**.  
Select **Menu > View By > Name/Company**.

## Adding New Contacts

1. Select **New** from the contact screen task bar.
2. Enter the contact's name and personal information for any of the optional fields available.  
**Note:** Make sure you choose a Category for the contact. Categories correspond to server address books. If a category is not chosen, the contact will be added into a default category and may not be where you expect it to be on the server side.
  - a. Select the Categories field.
  - b. Select the category you want and click *Done/OK* (WMP).
3. Select **Done/OK** (WMP) to save the new contact and return to the contact list.

## Using Remote Lookup

If there are public address books on the server and the server is set up correctly, the *Contact* application menu option, **Company Directory...** will allow you to search through the public address book and add contacts from it to the device contact list.

1. Open **Contacts**.
2. From the menu, select **Menu > Company Directory...**
3. Enter a name, address or other information in the search field.
4. Select **Search**.
5. Contacts that meet the search criteria will display on the screen. Select a contact.
6. Select **E-mail** to send an email to the contact or select **Menu > Add to Contacts** to add it to the device contact list.

## Using Remote Lookup While Composing Email

You can use *Remote Lookup* while composing an email as well.

1. From the *To/Cc/Bcc* fields, select **Menu > Add Recipient**.
2. Select the **Company Directory** option and proceed with the search process described above.

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# Tasks

From the Tasks screen you may create new tasks and delete or view existing tasks.

## Adding New Tasks

1. Enter the **Subject** of the task in the text entry box or select **Menu > New Task**.
2. Windows Mobile Professional users can enter information for any or all of the optional fields or accept the defaults.
3. Select **Done/OK** (WMP) to save the new task and return to the task list.