

GO!NotifyLink Windows Phone 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 Phone 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 Phone* device with operating system 7, 7.5, or 8

Account Setup Instructions

Since the *GO!NotifyLink* server has the ability to communicate via the Exchange ActiveSync protocol, you use the *Outlook: Exchange and Outlook Web App* account setup procedure on the device to create your *GO!NotifyLink* account. As you create your account, keep in mind that you will always enter credentials associated with your *GO!NotifyLink* account.

Before You Begin

Gather the following information prior to setting up your *GO!NotifyLink* account on your device. You may need to consult your *GO!NotifyLink* administrator for the mail server name and authentication password.

| When you are prompted for: | Enter: |
|---------------------------------|---|
| Email address | Your email address on the groupware server. |
| Authentication Password* | A password generated from the <i>GO!NotifyLink Enterprise Server</i> identifying you as an authorized <i>GO!NotifyLink</i> user. Consult your <i>GO!NotifyLink</i> administrator for this password. |
| Username | Your full email address. |
| Domain | Nothing. Leave the domain blank or enter 'Notify' if an entry is required. |
| Server | The external address or domain name of the <i>GO!NotifyLink</i> server. (It is best to use a domain name, as opposed to an IP address.) |

*During the account setup process, the software will prompt for “*Password.*” This is **not** your mail password, but the **Authentication Password** assigned to you by your *GO!NotifyLink* administrator. Consult your administrator for this password or log into the *GO!NotifyLink Client Web* and select, **General > Device**, to view the stored password. See [Accessing the GO!NotifyLink Client Web](#).

Setup Your ActiveSync Account on the Device

Note: If you change an entry during the account setup process, you may be required to re-enter the *Authentication Password*.

Enter Your Account Information

1. On the Windows Phone *Home* screen, flick left to the App list, and then tap **Settings**  > **email & accounts**.
2. Tap **add an account**.
3. Tap **Outlook**.
4. Enter your **Email address**.
5. In the **Password** field, enter the **Authentication Password** assigned to you by your *GO!NotifyLink* administrator.
6. Tap **sign in**.
7. In the **User name** field, enter your full email address once again.
8. Leave the **Domain** field blank.
9. Tap **sign in**.
10. Tap **advanced** at the dialog that tells you that your server settings could not be found. Then, tap **show all settings**.
11. In the **Server** field, enter the external address or domain name of the *GO!NotifyLink* server. (It is best to use a domain name, as opposed to an IP address.)
12. Verify that the **Server requires encrypted (SSL) connection** setting is correct. Leave the box checked if your *GO!NotifyLink Enterprise Server* uses SSL encryption. If your server does not use SSL encryption, you will see an error message when you access your account saying that the device is having a problem connecting. You must disable the SSL feature by removing the check from the box in order to complete your account setup.

Note: An SSL certificate must be installed on your web server in order for you to use SSL. Check with your administrator to determine if this feature is available to you. *GO!NotifyLink On Demand* users should leave the box checked, as SSL certificates are installed on all *GO!NotifyLink On Demand* servers.

Select Your Synchronization Settings

1. Tap **Download new content** to select the synchronization method. Select:
 - as items arrive (the *Direct Push* setting)
 - every 15 minutes
 - every 30 minutes
 - hourly
 - manually
2. Tap **Download email from** to select a message history range. Select:
 - the last 3 days
 - the last 7 days
 - the last 2 weeks
 - the last month
 - any time
3. Under **Content to sync**, select the types of items you wish to synchronize. Check the box(es) beside:
 - Email
 - Contacts
 - Calendar
4. Tap **sign in**.

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](#) Login to the *GO!NotifyLink Client Web* and select **General > Device**.

1. Click the **Clear Registration** button.
2. 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 and Calendar Events) associated with it, are deleted from the device.

1. On the Windows Phone *Home* screen, flick left to the App list, and then tap **Settings**  > **email & accounts**.
2. Tap and hold your Outlook (*GO!NotifyLink*) account.
3. Tap **delete**.

Settings

Device IT Policy Comparison Chart - Reference this [chart](#) to learn which *GO!NotifyLink* IT policies are supported and which are not supported when using the *GO!NotifyLink Windows Phone Solution*.

Synchronization Settings

Synchronizing Items from the Server to the Device

Direct Push vs. Scheduled Push. When you setup an Exchange ActiveSync account, the default synchronization mode may be **Direct Push**. With *Direct Push*, the device maintains an open connection so that information is delivered to the device as it becomes available. The setting for *Direct Push* on a Windows Phone device is called, “*as items arrive*.” The alternative is a **Scheduled Push** mode where the device is set to check for new messages at a set interval.

Battery Life. Though Direct Push offers more up-to-the-minute message delivery, for some users, increased battery consumption may be a tradeoff. If your battery is not lasting as long as you would like, set a **Scheduled Push** interval by changing the **Download new content** option on the device.

1. Open your Outlook (*GO!NotifyLink*) account and tap the ellipses to access your **account settings**.
2. Tap **sync settings**.
3. Tap **Download new content** to select the synchronization method. Select:
 - as items arrive (*Direct Push* setting)
 - every 15 minutes
 - every 30 minutes
 - hourly
 - manually
4. Tap **Download email from** to select a message history range. Select:
 - the last 3 days
 - the last 7 days
 - the last 2 weeks
 - the last month
 - any time
5. Under **Content to sync**, select the types of items you wish to synchronize. Check the box(es) beside:
 - Email
 - Contacts
 - Calendar

Accessing 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 Phone* Solution.

Email and PIM Settings

This chart summarizes settings that control how email and PIM (calendar events and contacts) are synchronized to the device. Some settings are configurable on the 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 Settings | Description | Configurable via: |
|-----------------------------|--|--|
| Filters | Filters messages sent from the server | GO!NotifyLink Client Web: <i>Mailbox > Filters</i> |
| Folder Mirroring | On the web Folder Mirroring is automatically enabled. Select email folders to be synchronized to the device. Users may choose Sent, Trash, Drafts, or custom folders. | GO!NotifyLink Client Web: To select folders: <i>Mailbox > Folders</i> |
| Notification ON/OFF | Enables/Disables <i>GO!NotifyLink</i> message notification. Restarts/Suspends retrieval of Email from the server. | GO!NotifyLink Client Web: <i>General > Control Options</i> |
| Message History | Number of days a message is available on the device. Choose from 3 or 7 days, 2 weeks, or 1 month. This also works as a cleanup to manage message quantity. Cleanup will take effect within 24 hours of the scheduled delete. | Device <i>Settings > sync settings > Download email from</i> |
| Calendar Sync Range | Set the calendar synchronization range - how far back and ahead to sync calendar events. This also works as a cleanup to manage calendar event quantity on the device. Look-back is pre-set on the device at 2 weeks. At this time, it cannot be changed. Look-ahead is set from the client web. Default is 26 weeks. Choose from 1 to 52 weeks. | GO!NotifyLink Client Web: <i>PIM > Calendar > Synchronization Range</i> |
| Choose Address Books | If the groupware server supports multiple address books, you can select which address book to synchronize. The device will synchronize only one address book, but you may choose which one it syncs. | GO!NotifyLink Client Web: <i>PIM > Contacts > Choose Address Books</i> |

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. (SSL is available to *GO!NotifyLink* On Demand users, as all On Demand servers are equipped with SSL certificates.)

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

You may also enable/disable SSL encryption at a later time through the account settings.

1. Open your Outlook (*GO!NotifyLink*) account and tap the ellipses to access your account settings.
2. Tap **settings** > **sync settings**.
3. Scroll down to: **Server requires encrypted (SSL) connection**

Leave the box checked if your *GO!NotifyLink Enterprise Server* uses SSL encryption.

If your server does not use SSL encryption, you will see an error message when you access your account saying that the device is having a problem connecting. You must disable the SSL feature by removing the check from the box in order to complete your account setup.

Note: An SSL certificate must be installed on your web server in order for you to use SSL. Check with your administrator to determine if this feature is available to you. *GO!NotifyLink On Demand* users should leave the box checked, as SSL certificates are installed on all *GO!NotifyLink* On Demand servers.

Password, Lock, and Wipe Features

Require Password and Inactivity Timeout

If your organization's mobile security policy requires that your device be password protected, you will be prompted to create a password. You may be required to enter a numeric password that of a specific length or pattern.

The device will lock after a specified *Inactivity Timeout* interval. You must enter your unlock password to access the device.

To change your password or the inactivity timeout interval:

1. On the device Home screen, flick left to the App list, and then tap **Settings**  > **lock & wallpaper**.
2. Choose the Screen time-out: 30 seconds, 1, 3, or 5 minutes.
3. Enter a new password and confirm it by typing it a second time.

Wipe on Failed Unlock Attempts

Wipe on Failed Unlock Attempts is a security feature that limits an unauthorized user's ability to guess your unlock password.

If the device supports this feature, it will allow only so many attempts before it will delete all data, accounts, and applications from the device, but it will not erase the SD card.

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 issue a Remote Wipe security command to the device from the *GO!NotifyLink Administration Web*.

The remote wipe will delete all data, accounts, and applications from the device and the SD card.

Note: For more information on how Windows Phone uses SD cards, see <http://support.microsoft.com/kb/2450831>.

Using Your Device

Mail

To view the Inbox tap the Outlook mail application icon on the Home screen.

Selecting 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.

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.

Composing Email

Select the Outlook application icon. Tap the **Compose** icon (circle with a plus sign).

Type a name or email address in the **To** field. As you type, matching email addresses from your contacts may appear. You can select a recipient from this list or you can display and choose from your contacts folder by tapping the plus sign next to the To: field. Repeat to add more addresses. Tap the ellipses (. . .) to access the application menu for **cc/bcc** or **message priority** options.

Enter the **Subject** and **body** of the email.

To add an **attachment** tap the paper clip icon and choose a file to attach. See more on attachments below.

Tap the **send** icon (envelope) to send the email or the **save/discard** icon (x) to save the email in your *Drafts* folder or delete it.

Sending Email from the Address Book

You can create a new Email message directly from **People**, the contacts application.

Tap the **People** application icon on the Home screen. Select a contact and tap the **send email** option. At the *SEND FROM* screen, select Outlook. You will automatically be placed in the email *Compose* screen with the contact you selected in the To: field.

Reading Email

To view available Email folders in addition to the *Inbox*, enter the Outlook mail application and tap the **Folders** icon. Select a folder to view from the list.

Viewing an Open Message

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

Viewing Attachments

Attachments associated with Email messages are available for download to the device. The device must have a viewing application that supports the attachment's file type.

Open the message. The attachment name, file type, and file size display. Tap the attachment name to download the file. When the download is completed, the paper clip icon changes to one which represents the file type. Tap the attachment name again to open it.

Replying To and Forwarding Messages

When viewing a message, tap the **respond** icon (arrow envelope) and select **Reply**, **Reply All**, or **Forward**.

Responding to Meeting Requests

Meeting Requests, issued from a user on the same groupware server, appear in your *Inbox* and your Calendar. You may respond from either the mail or calendar application.

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 invitation and tap the respond icon (arrow calendar) to choose your response: **accept**, **tentative**, or **decline**. Tap the **send** icon.

You can also add comments to your response before sending it, if you wish.

Once you respond, the invitation is removed from your *Inbox*. If you decline the invitation, the event is removed from your calendar, as well.

Calendar

From the **Calendar** application, you may create new calendar events and edit, view, or delete existing events. Select the Calendar icon from the Home screen. You may view the calendar in a today or month view.

Creating New Calendar Events

Select the **Calendar** icon and tap the new item icon (plus sign) to create a new event.

Enter the information for any or all of the fields or accept the defaults.

- Subject
- Location
- Account (choose Outlook)
- When (Date and Start time)
- How long (0, 30, 90 minutes, 1 or 2 hours, All day, Custom)

Tap more details to add:

- Reminders
- Occurs (recurrence pattern)
- Availability status (free, tentative, busy, out of office)
- Attendees (meeting requests)
- Private status
- Notes

Creating a Recurring Event

To make the event you are creating a recurring series of events, tap the **OCCURS** option.

Select from:

- once
- every day
- every weekday
- every (day of the week)
- day (day of the month) of every month
- every (today's date)

Issuing a Meeting Request

You can issue a meeting request from the Calendar application. This may be done by adding **Attendees** when creating a new event.

Contacts (People)

Adding New Contacts

Select the **People** application.

Select the icon for adding a **New** contact (plus sign).

Tap the name option to enter the contact's name and personal information and select the **Account** you wish to save it in (choose **Outlook** for your *GO!NotifyLink* account).

Choose an Address Book

If your groupware server supports multiple address books and you have access to the *GO!NotifyLink* Client Web you can select the address book you wish to synchronize to the device.

Note: The device will synchronize only one address book, but you may choose which one it syncs.

From the *GO!NotifyLink* Client Web home page,

Select **PIM > Contacts > Choose Address Books** and select the address book to be monitored.

Note: FirstClass, MDAemon, Meeting Maker, Mirapoint, Oracle, and Sun Java Enterprise System collaboration suites do not support multiple address books.

Using Remote Lookup

If there is a public address book on the server and the server is configured correctly, you can use the contact application to search the public address book and add contacts from it to the device contact list.

Select the **People** application and tap the search icon (magnifying glass). Begin to enter text in the search bar. Contacts from the *People* application that meet the search criteria will display. Tap **search Outlook directory** to initiate a remote lookup of contacts on the public address book that meet the search criteria.

You can then add contacts, from the list that the remote lookup returns, to your device contact list.

Using Remote Lookup While Composing Email or Creating a Meeting Request

You can use Remote Lookup in the *Mail* application while composing an email or in the *Calendar* application when creating a meeting request at the fields where you enter recipients. Tap **search Outlook directory** to initiate a remote lookup of contacts from these applications.