



**Microsoft Exchange
ActiveSync®
Administrator's Guide**

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Using the Treo™ 650 Smartphone with Exchange ActiveSync®

Mobile workers can have wireless access to Microsoft Exchange Server 2003 email and calendar information using the Treo™ 650 smartphone by palmOne with built-in Exchange ActiveSync® technology. With this solution, companies don't incur additional expense and management overhead involved in evaluating, purchasing, installing, and updating third party behind-the-firewall servers. While these additional servers do provide some unique benefits, many businesses won't need more than what's offered through Exchange ActiveSync—functionality that's built in to Exchange Server 2003 and the Treo 650 smartphone.

With the latest mobile technology, Treo 650 smartphone users have fast and easy access to the most current email and calendar information on the corporate Exchange server wherever they can get a cellular signal.

How Exchange ActiveSync works on the Treo 650 smartphone

The Internet, wireless technology, mobile devices, and advanced software are allowing mobile workers access to business information without imposing time or location constraints, enabling them to be more competitive and have more freedom to shift their work hours and location. Whether their business information is on the web or on an Exchange server, mobile professionals want to access it.

The Treo 650 smartphone by palmOne has the portability and speed you won't get from a laptop computer. A Treo smartphone is much easier to carry than a laptop, and a Treo smartphone can be turned on and ready for work quicker than the fastest laptop. Smartphones broaden an organization's traditional computing model—a desktop computer accessing corporate server(s)—to include wireless access to information on the corporate server. Mobile professionals who carry a Treo smartphone can be connected and productive in hallways, restaurants, hotel rooms, convention centers, or anywhere else where coverage is available.

Commercial carriers have invested heavily to expand the coverage of their networks and increase the speed of connections, so mobile professionals can connect quickly and stay connected. The Treo 650 smartphone is a great choice for mobile professionals because it combines the convenience and simplicity of a

phone with heavy-duty enterprise security and Microsoft Exchange ActiveSync technology, the latest in mobile wireless technology.

VersaMail® and Calendar software by palmOne preinstalled on the Treo 650 smartphone includes Microsoft Exchange ActiveSync technology, so smartphone users can send, receive, and manage email and calendar information from the smartphone with a wireless connection. Treo 650 smartphone users can synchronize Exchange Server 2003 email and calendar data without going to a desktop, plugging in a cable, and pressing a synchronize button.

This makes the Treo 650 smartphone ideal for corporate executives, sales people, managers, field engineers, and others who need to stay on top of email and calendar appointments while on the move. Treo smartphones connected to an Exchange server enable users to access the information and services they need to do high-quality work faster.

Advantages of Exchange Server 2003

Exchange Server 2003 includes built-in server support for wireless synchronization of email and calendar information with devices that support Exchange ActiveSync, such as the Treo 650 smartphone. The improved features, tools, and scalability of Exchange Server 2003 help reduce costs and provide the following benefits:

- Enhanced security—The new and improved security features include restricting access to the local Exchange server, setting restrictions on large email messages, and preventing spam and viruses.
- Improved mobility features—The mobile and client features let users access Exchange Server 2003 without using a Virtual Private Network (VPN). On a Treo 650 smartphone from palmOne, mobile users have direct access to email and calendar information on an Exchange Server 2003. Your company doesn't have to purchase a third-party server to manage and get email or calendar information.
- Better management of and collaboration on documents—Exchange Server 2003 provides more ways to share documents and information. It also provides ways to integrate that information into various supported applications.

NOTE For more information about Microsoft Exchange Server 2003, visit www.microsoft.com/exchange.

What users can do with Exchange ActiveSync and the Treo 650 smartphone

The VersaMail and Calendar applications are preinstalled on the Treo 650 smartphone. These applications can synchronize directly and wirelessly with email and calendar information on Exchange Server 2003.

With Exchange ActiveSync and the Treo 650 smartphone, users can do the following:

- Send and receive email wirelessly. Newly composed mail is sent from, and new mail that has arrived at the server is received onto the Treo 650 smartphone.
- Work while offline. On the Treo 650 smartphone, mail can be read, deleted, composed, and addressed while offline, and then transferred by synchronizing with the Exchange server when it is convenient.
- Synchronize all messages in the email Inbox.
- Synchronize only the email attachments that you want on the Treo 650 smartphone.
- Synchronize all of the email Inbox, including replies and forwarded messages. VersaMail appends the original reply or forwarded part of the message from the server and only the actual response is sent from the device. This reduces the time used for sending messages and may save on data charges.
- Synchronize automatically or manually. Users can synchronize wirelessly based on a schedule they create or synchronize manually when they want.
- Accept, tentatively accept, or decline meeting invitations. Users can respond to meeting invitations in VersaMail software and view the meeting location and attendees in Calendar.
- Synchronize new or updated events from Calendar. Whether users update or create events in Calendar on the device or new events are created on the server, the Calendar information is synchronized.
- Include time zone information for each calendar event so that events appear in the time zone selected on the user's smartphone.

NOTE Users can't use Exchange ActiveSync to synchronize Contacts, Tasks, or Notes in this release.

System and Smartphone Requirements

To synchronize wirelessly, users must have Exchange Server 2003 and the Treo™ 650 smartphone by palmOne.

Exchange server requirements

Exchange Server 2003 has mobile capabilities built in and uses Exchange Server ActiveSync technology for synchronizing with client applications. See “[Typical Exchange ActiveSync server implementation](#)” for more information about typical Exchange server setup.

To use Exchange ActiveSync technology with the Treo 650 smartphone, the email server must be Exchange Server 2003 mailbox server with Outlook Mobile access enabled. While not required, the following options are recommended:

- Front-end Exchange Server (Outlook Web Access) and/or a proxy server, such as MS Internet Security and Acceleration Server (ISA) in conjunction with your Exchange server
- Secure Sockets Layer (SSL) encryption
- Virtual Private Network (VPN)

NOTE Secure Sockets Layer (SSL) doesn't have to be configured in all situations, but using SSL is highly recommended. While access to Exchange Server 2003 email and calendar information is possible without SSL, allowing non-secure access to information is not recommended.

Treo 650 smartphone requirements

The Treo 650 smartphone comes with the VersaMail® 3.0 and Calendar applications preinstalled. If users want to synchronize other information, such as Contacts, with the Treo 650 smartphone, they need to install the Palm® Desktop software and choose to synchronize with either Palm Desktop or Microsoft Outlook.

NOTE Outlook is Windows only, but Palm Desktop software works on Windows and Mac computers.

CAUTION Earlier versions of the desktop software don't work with the Treo 650 smartphone.

Internet connection and security requirements

To use the Treo 650 smartphone to access information on the Exchange server, the following is required:

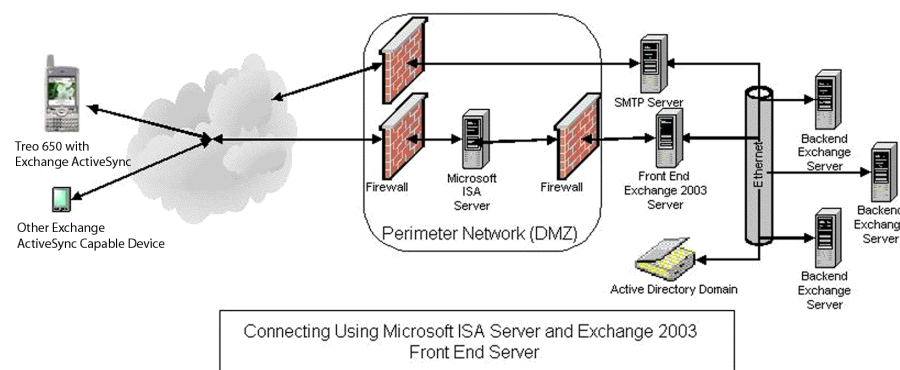
- Each user must have active service with a mobile provider and must subscribe to a wireless data service.
- The Exchange server must be reachable using the Internet.
- SSL or VPN are highly recommended. SSL is required by Microsoft when using ISA Server as a proxy.
- The default SSL port on the server is set to 443. If you are using a different port, users must enter the new port in the VersaMail client. For more information, see [Chapter 3](#).

Typical Exchange ActiveSync server implementation

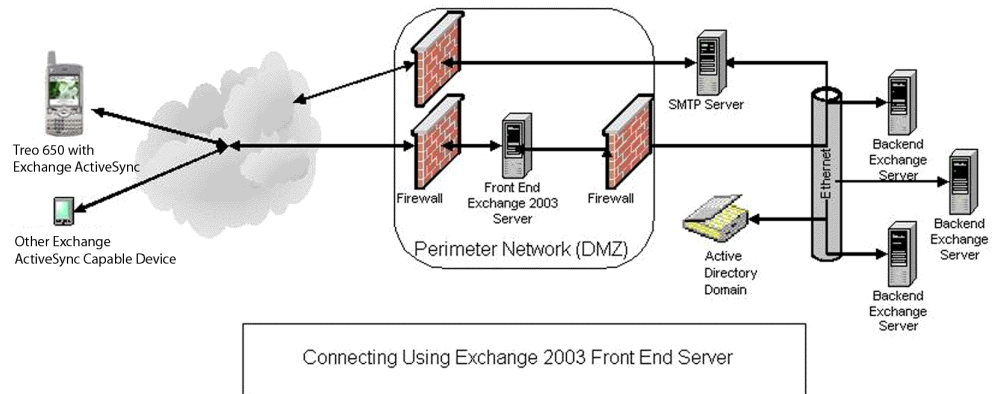
NOTE The Microsoft website provides important information on planning and deploying an Exchange Server 2003 system architecture. If you need information about the prerequisites and procedures to successfully deploy and install Exchange Server 2003 into your infrastructure, go to <http://www.microsoft.com/technet/prodtechnol/exchange/2003/library/depguide.mspx>.

This section describes two typical implementations in which a Treo smartphone connects to an Exchange Server 2003. Your corporation's typical Microsoft Exchange Server 2003 implementation may differ from both of these typical implementations based on the organization's needs, system configuration, and installed features.

The following figure shows how a Treo smartphone connects using a proxy server and a Microsoft Exchange 2003 front-end server (Outlook Web Access). To connect to the Exchange server via the Internet in this scenario, the Exchange server must be reachable using SSL or VPN either to the front-end server or the proxy server. We recommend using the SSL protocol for a secure transmission of messages that you send and receive. By default, the Treo smartphone settings assume SSL is turned on.



Your company may also use a proxy server, such as Microsoft Internet Security and Acceleration (ISA) Server 6.0, to intercept incoming web requests from clients and redirect them to the Exchange Server 2003 mailbox server or front-end server (if used). ISA can perform content inspection and filtering and can use the URLScan feature to check the incoming requests for valid commands and to reject buffer overflow attacks.



For more information

If you would like additional information about deploying front-end servers for Exchange Server 2003, go to www.microsoft.com/downloads/ and check for the most current version of the article "Using Exchange 2000 Server and Exchange 2003 Front-End Servers." From this web page, you can link to the Exchange Server 2003 Technical Library, which is the source for Exchange Server technical documentation.

NOTE palmOne provides technical support for the Treo 650 smartphone and the Exchange ActiveSync functionality built-into the VersaMail and Calendar applications. Microsoft provides support to the Exchange server administrator or network administrator for setting up and configuring the Exchange server depending on your company's support agreement with Microsoft.

Setting Up an Exchange ActiveSync® Account

To begin using Microsoft Exchange ActiveSync® with the Treo™ 650 smartphone, an account must be set up in VersaMail®. In some cases, you may want to set up a user's VersaMail account configuration, but each user can also set up an Exchange ActiveSync account.

How to set up an Exchange ActiveSync account

Users on a Windows computer can quickly set up an Exchange ActiveSync account on their computer, and then synchronize the settings to the device. Only one Exchange ActiveSync account can be set up in VersaMail.

NOTE Because the VersaMail setup wizard is not available on the Mac, Mac users must set up an Exchange ActiveSync account in the VersaMail application on their device.

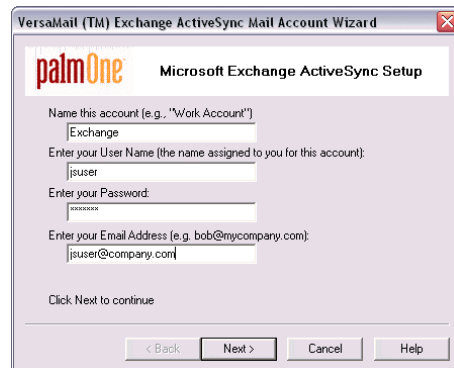
On a Windows computer

On a Windows computer, setting up an Exchange ActiveSync account is easy using the VersaMail Account Setup Wizard. The wizard also has features for editing and deleting accounts as well as setting options for synchronizing email accounts. The following steps show how to set up an account in the VersaMail Account Setup Wizard.

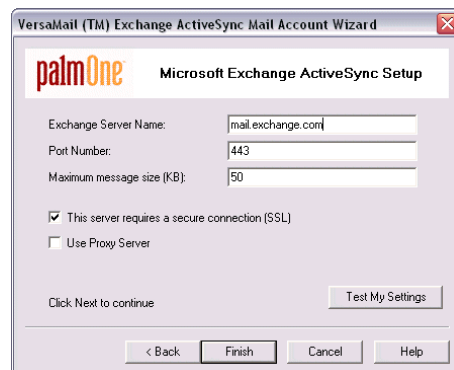
To set up an Exchange ActiveSync account (Windows only):

1. Select an option to set up the email software:
 - a. On the Discover Your Device screen of the software installation CD, choose to set up an account at that time.
 - b. Or on the Windows desktop, select Start > Programs > palmOne > VersaMail Setup.
2. Select the appropriate username from the drop-down list at the top of the screen, and then select the option to create a new VersaMail email account. Click Next.
3. Select the option to synchronize the device with a mail service from this list, and then select Exchange ActiveSync. Click Next.

4. Enter the basic account information:
 - a. Enter a descriptive name for the account.
 - b. Enter the account username and password.
 - c. Enter the email address for this account.
 - d. Click Next.



5. Enter the server information:
 - a. Enter the name of the Exchange server, the port number for the server, and the maximum message size to download.
 - b. Check the boxes if the server requires authentication or a proxy server. is used. You, as the system administrator, can provide this information to your users.



6. (Optional) If a proxy server is used, enter the server name. Click Next.
7. (Optional) To test the account settings, click Test My Settings. Click OK after settings have been tested.
8. Click Finish.

9. Do one of the following:

- To synchronize the account information to the device, click the top button.
- To set up another email account, click the bottom button.

NOTE Only one Microsoft Exchange ActiveSync account can be set up. If users want to set up another email account, it must be a different type.

10. Click Next.

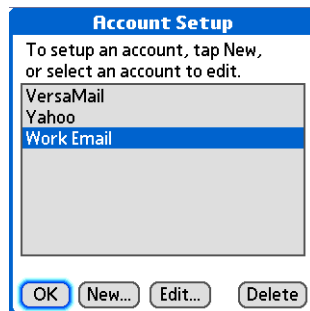
When all accounts are set up, click Finish on the Transfer Settings screen.

On the device

If users don't set up an account on their computer, they can use the Account Setup screen in the VersaMail application to set up a new Exchange ActiveSync account. The following steps show how users set up an account in the VersaMail application on the device.

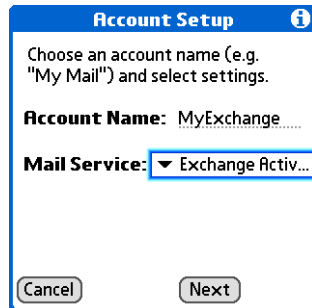
To set up an account on the device:

1. Go to Applications and select VersaMail.
2. Open the Account Setup screen:



- a. Open the menus.
- b. Select Accounts, and then select Account Setup.
- c. Select New.

3. Enter the basic account information:



- a. In the Account Name field, enter a descriptive name.
 - b. Select the Mail Service pick list, and then select Exchange ActiveSync.
 - c. Select Next.
4. Enter the account username and password:
 - a. Enter the username used to access the email account.
 - b. Select the Password box, enter the email account password, and then select OK.
 - c. Select Next.
 5. Enter the account's email address and Exchange mail server name. Select Next.



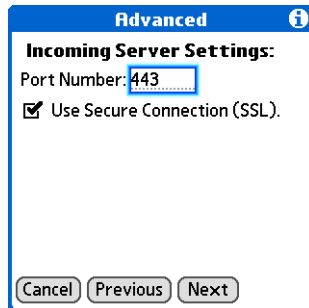
6. (Optional) Select Test My Settings to test settings for this account.
7. Do one of the following:
 - Select Done to finish setup and go to the Inbox of the account you set up, where you can begin getting and sending email.
 - Select Advanced to set advanced mail options.

Advanced mail options on the device

In most cases, the default advanced mail options don't need to be changed. Users can change the port number, uncheck the Use Secure Connection box, or enter proxy server information. These steps show how users can change the advanced mail options.

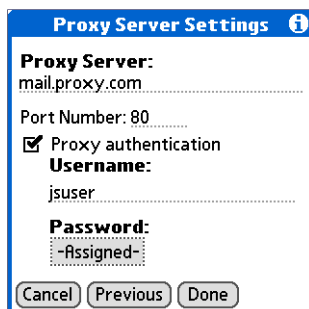
To set advanced mail options:

1. Set the incoming mail server options:



The screenshot shows a dialog box titled "Advanced" with an information icon. Under the heading "Incoming Server Settings:", there is a "Port Number:" field with the value "443" entered. Below it is a checked checkbox labeled "Use Secure Connection (SSL)". At the bottom of the dialog are three buttons: "Cancel", "Previous", and "Next".

- Port Number—By default, the port number setting is 443. The port number may need to change if users choose not to retrieve incoming mail over a secure connection.
 - Use Secure Connection—By default, this box is checked, meaning that incoming mail is retrieved over a secure (Secure Sockets Layer, or SSL) connection. Users should uncheck the box if they do not want to receive email over an SSL connection.
2. Enter the proxy server name and port number and check the box if the server requires authentication.



The screenshot shows a dialog box titled "Proxy Server Settings" with an information icon. Under the heading "Proxy Server:", there is a text field containing "mail.proxy.com". Below it is a "Port Number:" field with the value "80" entered. There is a checked checkbox labeled "Proxy authentication". Underneath, there is a "Username:" field with the value "jsuser" and a "Password:" field with the value "-Assigned-". At the bottom of the dialog are three buttons: "Cancel", "Previous", and "Done".

Synchronizing Accounts

In a Microsoft Exchange ActiveSync® account in the VersaMail® application, both the email and calendar information synchronize directly with the info on the Exchange server. The email and calendar info doesn't synchronize with the desktop software application, such as Palm® Desktop software or Microsoft Outlook. Other information on the device, such as contacts, tasks, and memos, continues to synchronize with information in the desktop software application.

Retrieving email messages

The following describes what takes place during message retrieval for an Exchange ActiveSync account whether message retrieval is manual or using an Auto Sync schedule.

- **Wireless synchronization.** Microsoft Exchange ActiveSync supports wireless synchronization with the server only. In order to retrieve email messages and Calendar events, users must select Sync in VersaMail to make a wireless connection to the server. If users synchronize the device with their computer during a HotSync® operation, info from other applications—Contacts, Memos, and so on—is synchronized, but email messages and Calendar events are not.
- **Message retrieval.** When a user gets messages manually or through Auto Sync, Microsoft Exchange ActiveSync not only retrieves email messages directly from the server for the time interval set on the device (default is seven days)—it also retrieves all Calendar events directly from the server for the preceding seven days. The interval for Calendar event retrieval is always seven days, regardless of the interval you set on the device.

TIP Users can increase the time interval for how many days' worth of email to retrieve so that recent messages are not removed from the device. You can change the number of days by selecting Preferences from the Options menu within VersaMail, selecting Delivery Option, and then selecting a different interval. Note that the interval for Calendar event retrieval is always seven days.

- **Message removal.** Microsoft Exchange ActiveSync removes any email messages from the device that fall outside of the time interval set on the device, as well as any Calendar events that are more than seven days old. For example, if the time interval is set at seven days, any email messages or Calendar events that are eight days old are removed from the device. This info is not removed from the Exchange server.

- **Email attachments.** Microsoft Exchange ActiveSync accounts let users view a list of all attachments to a message, with approximate file size, so users can decide which ones to download. Users do not need to fully download a message to view the list of attachments—it appears dimmed at the bottom of the message screen whether or not the message is fully downloaded.

NOTE When a user synchronizes a Microsoft Exchange ActiveSync account, a copy of any messages sent from the device is placed in the Sent Items folder on the Exchange server. A copy of any messages deleted from the device are placed in the Deleted Items folder on the server.

Calendar events and Exchange ActiveSync

In a VersaMail account that uses Microsoft Exchange ActiveSync, any new Calendar events on the server for the preceding seven days are downloaded to the device; any events older than seven days are removed from the device, although they remain on the server. The interval for synchronizing Calendar events is always seven days, even if a different interval is set on the device for synchronizing email messages. If the interval is less than 14 days, then 2 weeks of calendar data is removed; if the interval is more than 2 weeks, then one month of calendar data is removed.

IMPORTANT Users cannot choose to synchronize Calendar events with Palm Desktop software or Outlook once they set up a Microsoft Exchange ActiveSync email account. If users want to stop synchronizing Calendar events with the server, they must delete the Microsoft Exchange ActiveSync email account.

When synchronizing Calendar with Microsoft Exchange ActiveSync, the following takes place:

- Time zones are always included for Calendar events when using Microsoft Exchange ActiveSync. When synchronizing with the Exchange server and downloading new events, the time zone information is included with each event. If users travel to a different time zone, the event times are automatically adjusted in Calendar on their device.
- For meetings, users can see a list of attendees to the meeting.
- Any events created on the device are synchronized to the server.
- Any events created or changed in Outlook on the user's computer that are on the Exchange server are synchronized to the user's device.
- Any meeting invitations are displayed in the Inbox of the user's Microsoft Exchange ActiveSync account in VersaMail. When a user responds to an invitation, the response is synchronized to the server, then synchronized from the server to Calendar on the device.

Deleting an Exchange ActiveSync account

To stop synchronizing Calendar events with the Exchange server, users must delete the Microsoft Exchange ActiveSync email account. After deleting the account, all Calendar events are purged from the user's device. Then, when the user synchronizes Calendar with the desktop software application—Palm Desktop or Outlook—the events synchronize to the user's device, so they don't end up with duplicate events.

Troubleshooting

This appendix contains information that is helpful for resolving known issues.

Multiple Domains

If the Exchange server environment has more than one domain, you'll likely need to specify a domain when trying to access the Exchange server from the Treo™ 650 smartphone.

During the account setup when a username is entered for the account, do the following:

- Under username type

`/domainname/username`

where the information after the first slash is the domain where the Exchange server you want to reach is located, and the info after the second slash is the Exchange username. For example:

`/palmone/John Smith`

Using ISA 2000 or 2004

When using Web publishing in an environment that uses Microsoft ISA 2004 Enterprise Edition, there's a known issue related to communicating with the Treo 650 smartphone. The problem has been fixed by Microsoft in a patch for ISA 2004 Enterprise Edition. Install Internet Security and Acceleration (ISA) Server 2004 Standard Edition Service Pack 1 (SP1) or any later patch or Service Pack which supersedes this one.

Until you install the patch, there are two work a rounds:

1. Turn off web publishing and instead use server publishing. This will cause requests to ISA on port 443 to be redirected to the Exchange server.
2. Turn off web publishing for just Exchange ActiveSync.

To learn more about web and server publishing for ISA 2000, visit this link:

http://www.isaserver.org/tutorials/Publishing_Multiple_Web_Sites.html

SSL issues

The Treo 650 supports only server SSL certificates and does not support client-side certificates.

