NOKIA

Intellisync Mobile Suite Client Guide

Smartphone Platform

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Intellisync Mobile Suite Client Guide - Smartphone Platform

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1 Setting Up Your Device

Options for installing Intellisync Mobile Suite

To install the Intellisync Mobile Suite software on your device, you have the following options for downloading the installation file to your device

- Access the installation Web site using your device and download the installation file wirelessly

  Advantages

  - This option is more convenient than physically connecting your phone to your computer.
  - Your first synchronization session occurs wirelessly.

  Disadvantages

  - You may incur charges from your carrier when you send an SMS message and download the installation file.
  - The download could take several minutes, during which time you will not be able to make or receive phone calls.
  - You must synchronize wirelessly; you cannot initiate a synchronization session using a cradle or USB cable.

- Access the installation Web site using your PC and download the installation file through a USB cable or cradle

  Advantages

  - This option eliminates potential carrier charges.

  Disadvantages

  - Connecting your phone to your PC may not always be convenient.

Review for pre-installation instructions, and then continue to , which allows you to choose the installation method that best suits your needs.

Setting up ActiveSync

This chapter contains the information for installing Intellisync Mobile Suite on the server. In addition to basic installation instructions, there are steps you can take before and after installation to make sure Intellisync Mobile Suite functions correctly.

To install and synchronize your device from the cradle, you must have Microsoft ActiveSync 4.x or later already installed on your PC.

To configure ActiveSync settings, complete the following steps:

1. Open ActiveSync on your PC.

2. From the **File** menu, choose **Connection Settings**. The Connection Settings dialog box appears.

3. From the Computer Connected list, select **Automatic**.

4. Click **OK**.

The next time you connect your device to the USB cable or cradle, these settings transfer to the device to synchronize correctly.

Starting the Installation Process

To start the installation process, complete the following steps:

1. Go to the URL provided by your system administrator. The Intellisync Mobile Suite Login page appears.

2. Enter your user name and password, and then click **Login**.

3. On the left navigation bar, click **Settings**. The Settings page appears.

4. Click **Add Sync Device**. The device selection page appears.

5. Select the Smartphone OS-Based option, and then click **Next**. The Install Software page appears.

To receive the installation file over the air, continue to "Downloading the Installation File Wirelessly" on page 9 To download the installation file to your computer and install through a USB cable or cradle via ActiveSync, see "Downloading the Installation File to a Computer" on page 9.

Downloading the Installation File Wirelessly

Installing Intellisync Mobile Suite software wirelessly allows you to initiate the installation process over the air and eliminate the need for synchronization with a computer. Complete the following steps to install Intellisync Mobile Suite wirelessly.

1. Select the **Carrier and Phone Number** option.

2. Select your wireless carrier from the list.

   Note
   If your carrier is not listed, select the Email Address option, enter the Internet email address of your mobile phone, and then click Send Message. Continue to step 4.

3. Type the phone number of your device without parentheses or dashes, and then click **Send Message**.

   A Web page appears with notification that a text message was sent to your device. Verify that you received the text message on your device.

4. Open the text message on your device.

5. Select the link in the text message for Intellisync Mobile Suite's installation file.

6. Select the Install Software link. The Download dialog box appears.

7. Select the "Open file after download" check box, and then select Yes. The client download status bar appears at the top of the screen.

   When the download completes, Intellisync Mobile Suite software loads to your device. After the software installation completes, your device prompts you to enter your user name and password to start your first synchronization.

Downloading the Installation File to a Computer

Downloading the Intellisync Mobile Suite installation file to your computer allows you to initiate the installation process by using ActiveSync. Complete the following steps to download the installation file to your computer.

1. Connect your device to your USB cable or cradle.

2. Using Intellisync Mobile Suite on the Web, select **Install to PC**. The Install Software page appears.

3. Select the Install Software link. A file download dialog box appears.

4. Select **Run** to start the download process.

5. On the Intellisync Mobile Suite Installation screen, select **Install**. The installation process begins and ActiveSync downloads the installation files to your device.

   When the download completes, Intellisync Mobile Suite software loads on your device. After the installation completes, your device prompts you to enter your user name and password to start your first synchronization.

Completing an Initial Synchronization on the Device

When Intellisync Mobile Suite installs to your device, a dialog box appears for you to enter your user name and password. After entering this information, a screen appears with the initial synchronization session options:

Refresh. This option replaces the data on your device with data from your company's server.

Merge. This option combines data from your company's server with the data on your device. Selecting the Merge option may cause duplicate entries.

When the synchronization session completes, Intellisync Mobile Suite main screen displays the status of the synchronized items.

Using Intellisync Mobile Suite on the Web, click **Next** on the Install Software page. The Settings page appears.

Your Pocket PC device appears in the device name list. Intellisync Mobile Suite is successfully installed on your device.

2   Configuring Synchronization Settings

This chapter provides information on how to use the synchronization settings available with Intellisync Mobile Suite.

Synchronizing your Device

Intellisync Mobile Suite synchronizes your email messages and PIM information on your device with your company's server. You can synchronize in two ways: wirelessly or through the cradle using ActiveSync.

Synchronizing Wirelessly

To synchronize your device wirelessly, complete the following steps:

1. Select the **Intellisync** icon on your device, and then press **OK** on your phone pad. The Intellisync Mobile Suite main screen appears.

2. Select the **Sync** icon, and then press **OK** on your phone pad. The Sync Process dialog box appears.

   When the synchronization session completes, Intellisync Mobile Suite main screen displays the status of the synchronized items.

Synchronizing using ActiveSync

To synchronize your device through the cradle, complete the following steps:

1. Connect your device to the USB cable or cradle.

2. Open ActiveSync on your PC.

3. From the **File** menu, choose **Synchronize**.

   When the synchronization session completes, the ActiveSync main screen displays the status of the synchronized items.

Configuring Synchronization Settings

If your administrator allows you to change your default synchronization settings, you can configure Intellisync Mobile Suite to suit your individual requirements.

Configuring What to Synchronize

You can modify settings to manage your synchronization sessions. Complete the following steps to navigate to the What to Sync screen:

1. Select the **Intellisync** icon on your device, and then press **OK** on your phone pad. The Intellisync Mobile Suite main screen appears.

2. Select the **Settings** icon, and then press **OK** on your phone pad. The Settings screen appears.

3. Select **What to Sync**, and then press **OK** on your phone pad. The What to Sync screen appears.

4. Select or clear the appropriate check boxes to enable or disable synchronization SyncMail folders (Inbox, Outbox, Sent, and Drafts) and PIM information (Calendar, Contacts, Tasks, Notes, and Travel Info).

Configuring Mail - Inbox, Sent, and Drafts Settings

Complete the following steps to modify each mailbox (Inbox, Sent Items, and Drafts) setting:

1. Select the **Intellisync** icon on your device, and then press **OK** on your phone pad. The Intellisync Mobile Suite main screen appears.

2. Select the **Settings** icon, and then press **OK** on your phone pad. The Settings screen appears.

3. Select **What to Sync**, and then press **OK** on your phone pad. The What to Sync screen appears.

4. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:

    Truncate after. Enter the maximum number of characters to display for email messages.

    Sync Attachments. Enable or disable attachments for email messages.

    Remove Older Than. Enter the number of days to retain email messages on your device. Based on your permissions, your administrator may have disabled this setting.

    Max attachment size. Enter the maximum size for attachments.

    Sync only certain types of files. Enter valid attachment types.

    Overwrite Inbox with server information. Enable setting to overwrite any device data with data from your company's server.

5. Select **OK** on your phone pad to return to the What to Sync screen, and then select **Done** to return to the Settings screen.

Configuring When to Synchronize

When to Sync settings allows you to select synchronization settings. To set up these options, follow these steps:

1. Select the **Intellisync** icon on your device, and then press **OK** on your phone pad. The Intellisync Mobile Suite main screen appears.

2. Select the **Settings** icon, and then press **OK** on your phone pad. The Settings screen appears.

3. Select **When to Sync**, and then press **OK** on your phone pad. The What to Sync screen appears.

4. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:

   Push. Automatically synchronizes email messages and PIM information.

   Timed Interval. Select an interval from the list. This indicates the frequency with which you want synchronization to occur.

   Limit sync to. Select the daily or weekday setting for synchronization.

   Not Before. Enter the time when synchronization will not occur before this time.

   Not After. Enter the time when synchronization will not occur after this time.

   Disable if battery is less than. Enter a percentage of battery life at which you want to disable synchronization.

   Sync when device connects. Select this check box to start a ReadySync session as soon as you make a connection.

   Initiate connection. Select this check box to automatically initiate a network connection.

   Power on device. Select this check box to automatically initiate a network connection when the device is powered off.

   High-speed default. Select from the list the type of connection for a synchronization session.

   Low-speed default. Select from the list the type of connection for a synchronization session.

   Use Network push. Select this check box to automatically initiate a network connection.

   Use SMS push. Select this check box to automatically initiate a network connection when the device is powered off.

   Allow screen-off during sync. Select this check box to power off during a synchronization session.

   Note
   If your device loses its network connection when powered off, clear this check box.

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5. Select **OK** on your phone pad to return to the When to Sync screen, and then select **OK** to return to the Settings screen.

Guidelines for Setting up Push Options on your Device

Use the following guidelines for setup and management of Push options. Because everyone has different levels of email activity, settings for each person may vary. These guidelines help you determine the optimum setup for your conditions.

- Because your device synchronizes more often when you use the Push option, your device is powered-on more often. Adjust the power settings on your device to minimize battery drain.
- You may want to disable synchronization when battery power is below 20 percent.
- SMS-based Push relies on SMS messaging. Many service providers and carriers use a different billing structure for SMS messages. If you go over your allotted number of SMS messages within a billing period, you (or your company) may be charged additional fees. Check with your system administrator, department manager, or service provider to find out about SMS messaging restrictions.

Configuring Notification Alerts

You can change the notification settings to manage your synchronization sessions.

1. Select the **Intellisync** icon on your device, and then press **OK** on your phone pad. The Intellisync Mobile Suite main screen appears.
2. Select the **Settings** icon, and then press **OK** on your phone pad. The Settings screen appears.
3. Select **Notification**, and then press **OK** on your phone pad. The Notification screen appears.
4. Read the directions to manage and change your notification settings.
5. Select **Done** on your phone pad to return to Settings screen.

Configuring Connection Settings

You can modify the connection settings to manage your synchronization sessions.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **Connection**. The Connection screen appears.
3. Modify the following settings as necessary:

   User name. Enter a valid user name to access the server.

   Server name. Enter the server address.

   Connection. Select to keep connection active or disconnect if not needed.

   Connection management. Select the connection type for the server.
4. Click **Done** on your phone pad to return to the Settings screen.

Configuring ActiveSync Settings

You can modify your ActiveSync settings to manage your synchronization settings with your computer.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.

2. Select the **Settings** icon, and then select **ActiveSync Setup**. The ActiveSync Setup screen appears.

3. Choose from the following options:

   Enabled. When the device is connected to a computer, ActiveSync will automatically start a synchronization session.

   Note

   If you have other applications that use ActiveSync, you may corrupt your data or have duplicate entries on your device.

   Ask Each Time. When the device is connected to a computer, a message appears asking if ActiveSync should perform a synchronization session. This is the default setting.

   Disabled. When the device is connected to a computer, ActiveSync will not start a synchronization session.

4. Select **OK** on your phone pad to return the Settings screen.

3   Security on the Device

Nokia Intellisync Mobile Suite provides additional security features that your system administrator delivers through profiles or that you can set up on your device.

This chapter provides information about how to add such security features as

■   Locking your device by enforcing a password after your device is locked, turned off, or in sleep mode

■   Automatically deleting your personal information when your device is lost or stolen

Locking your Device

You can enforce a password every time your device is locked, turned off, or in sleep mode to protect access in case it is lost or stolen. Your locked device can receive inbound calls and dial out only specified phone numbers set up by your system administrator. You cannot synchronize the device or access any screens except the password screen until you enter your password.

To lock your device manually,

1.   From the main menu, choose **Start** > **Settings**.

2.   Choose **9 Security**.

3.   Choose **1 Device Lock**. The Security screen appears.

4.   Select the checkbox, **Prompt if Device Unused for**.

5. Select the number of minutes or hours you want your device to remain inactive before being prompted for a password.

Option	Description
0 minutes	Only locks when • you power off the device manually or • the device is configured to turn off automatically to save power
1 minute 5 minutes 15 minutes 30 minutes 1 hour 1.5 hours 2 hours 12 hours 24 hours	Displays the Power-on-Password screen after this time interval passes.

6. Select a **Password Type**.

Simple PIN	Numbers or letters only; no punctuation
Strong alphanumeric	Password must be at least 7 characters long and contain at least 3 of the following: uppercase and lowercase letters, numerals, and punctuation.

7. Enter your new password in the **Password** field and the **Confirm** field.

8. Save the settings. The device is now locked and will now prompt for a password each time it is turned on or reactivated.

Note

To help you remember your password, choose the **Hint** tab, and enter text that will help you remember your password.

If your system administrator sets up the power-on password, the first time you synchronize your device after the setup, a prompt appears on your device to create a password. Follow the same procedure, beginning at step 6 to set up or change your password.

Unlocking your Device

To unlock your device:

1. Click **Unlock**.

2. Enter your password, and click **Done**.

Note
If you forget your password, contact the system administrator.

Power-on-Password Character Settings

Your system administrator can set up the password to meet one of the following restrictions:

Type	Restrictions
4 numeric characters	Exactly 4 characters; numbers only
4 alphanumeric characters	Exactly 4 characters; numbers and (case-sensitive) letters only
5 to 40 alphanumeric characters	From 5 to 40 characters; numbers and (case-sensitive) letters only
8 to 40 multi-characters	From 8 to 40 characters; must include at least one of each of the following: • lowercase letter (case-sensitive) • uppercase letter (case-sensitive) • numerical digit • any of the following characters: - ( ) ! ? . : / +

Outbound Telephone Call Settings

Your system administrator can set up the device so that a person can make some outbound phone calls on your device within certain restrictions when your device is locked. For example, the person may be able to make one or both of the following types of phone calls:

- Exact phone numbers (such as numbers where you can be reached if the phone is found)
- Telephone calls with a certain number of digits (such as 3-digit emergency phone calls only)

Note
These restrictions are bypassed when you enter the power-on-password to unlock the device.

Protecting Your Data

Theft/Loss protection ensures that personal information on your device is protected from unauthorized use if lost or stolen.

To activate Theft/Loss Protection,

1. From the Web PIM, select Settings.

2. Select your device name.

3. Click Theft-Loss Protection.

4. Select an option, and click OK. Based on your company's product license, possible options may include all or some of the following:

   ■ Erase only PIM information (contacts, tasks, notes, and calendar appointments) and Email data from the device

   ■ Hard Reset the device, deleting all user data and files

   ■ Lock the device (providing and confirming a password for unlocking the device)

Note
The Erase Data and Hard Reset options cannot be undone.

Your system administrator can also invoke these Theft/Loss Protection features, and can also configure the device to delete specified files from your device if lost or stolen.

Theft/Loss Protection options remain effective until you or your system administrator reset them.

Allowing Remote Access by a System Administrator

A system administrator can access your device remotely when you have trouble operating your device or need help with a complicated feature.

If remote access by a system administrator seems beneficial, the administrator first sends you a message asking for permission to connect remotely with your device. You accept or reject the connection, depending on whether it is a convenient time for the interruption.

After connecting, the system administrator can see a copy of what appears on your device screen exactly as you press buttons and menus, type information, and change screens. You can also see when the administrator takes over control and begins using the device remotely, pressing buttons and menus, typing, and changing screens.

This remote access is ended when either you or the system administrator disconnects from the device.