

## iAnywhere<sup>®</sup> Mobile Office for Lotus Domino

Administrator Getting Started Guide

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*NOTE: Register at our technical support site for the latest information for your product. This site is available only to customers with a valid maintenance contract.*

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# Table of Contents

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<b>Copyright and Trademarks</b> .....	<b>i</b>
<b>Disclaimer</b> .....	<b>i</b>
<b>Technical Support</b> .....	<b>i</b>
<b>Table of Contents</b> .....	<b>ii</b>
<b>Welcome</b> .....	<b>1</b>
Architecture Overview.....	1
<b>Mobile Office Installation</b> .....	<b>2</b>
System requirements .....	2
Set up the Mobile Office Server .....	3
<b>Mobile Office Admin</b> .....	<b>5</b>
Managing users .....	6
Configuring templates.....	8
<b>Appendix</b> .....	<b>9</b>
Registered Users List .....	9
Administrative User Functions .....	10
Template Settings .....	11

# Welcome

Welcome to iAnywhere® Mobile Office for Lotus Domino, a component of the Sybase® Information Anywhere® Suite. iAnywhere Mobile Office is specifically designed for today's mobile business workforce. It combines fully integrated wireless email and PIM with on-device security and business process mobilization. iAnywhere Mobile Office for Lotus Domino enables organizations to manage critical, time-sensitive workflow business processes. iAnywhere Mobile Office offers key features that provide the foundation for a company's mobile inbox of the future.

This brief *Administration Getting Started Guide* will help you install iAnywhere Mobile Office in your Domino environment and provides instructions on how to manage the installation, users, and configuration settings.

*NOTE: The procedures outlined in this guide are generic. Your installation may vary slightly, but the concepts are generally the same.*

## Architecture Overview

iAnywhere Mobile Office for Lotus Domino is built on proven OneBridge technology.

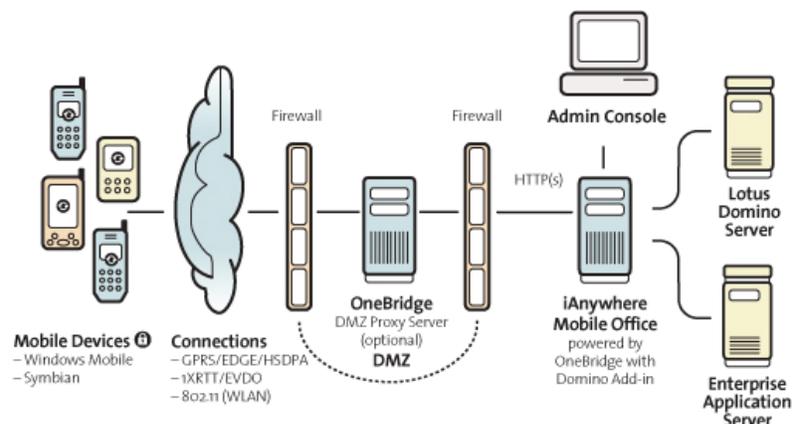
Mobile Office clients communicate with the server infrastructure using a secure optimized protocol for today's always-on wireless networks of all major carriers worldwide.

The OneBridge DMZ Proxy adds an extra layer of security. This server

component deployed inside the enterprise DMZ allows secure behind-the-firewall deployment of the iAnywhere Mobile Office Server. The DMZ Proxy enables the unique OneBridge outbound connection model. The iAnywhere Mobile Office Server makes outbound connections into the enterprise DMZ using the secure HTTPS protocol. When using this component, connections from all mobile devices truly end within the DMZ of your enterprise.

*NOTE: For evaluation purposes, Sybase iAnywhere provides a hosted OneBridge DMZ Proxy environment. Information on how to connect your mobile device with your iAnywhere Mobile Office Infrastructure using the environment is provided later in this document as well as within the email you receive when signing up for an evaluation. If you choose to use the hosted environment, there is no need to open any incoming ports within your corporate firewall.*

The iAnywhere Mobile Office Server communicates with connected enterprise back-end applications using their native protocols. It delivers email and PIM data instantly to connected clients. No data is staged or stored within the enterprise DMZ at any time.



# Mobile Office Installation

When you register for an evaluation version of the iAnywhere Mobile Office Server, you will be sent an email containing the necessary configuration information to active your installation. Be sure to have this information available as you perform the installation.

Your registration email will also contain a pointer to the download page for the iAnywhere Mobile Office installation package.

## *System requirements*

The iAnywhere Mobile Office server is designed for installation on a Lotus Domino mail server, version 7.x or higher, running a Microsoft Windows 2003 Server operating system. The iAnywhere Mobile Office Server service by default runs with the *Local System* account privileges. The account information can be changed using the Services Control Panel of your Microsoft Windows 2003 Server installation.

The iAnywhere Mobile Office server extends email and PIM data from Lotus Domino R6 and later Lotus Domino infrastructures to all supported device platforms, even though the Mobile Office Server itself needs to be installed on a version 7.x or higher Lotus Domino Server. During installation, two new tasks are added to the local Lotus Domino server's notes.ini. These Lotus Domino add-ins communicate directly with your Domino infrastructure and the iAnywhere Mobile Office Server. They listen for changes and store data coming from connected devices into the mailboxes of users who are registered to receive wireless email and PIM data. For this reason, the local Lotus Domino server must have Manager Access Rights to the mailboxes of registered users.

Also as part of the installation, you can install the iAnywhere Mobile Office OTA Web site software so that your users can access and install the software onto their mobile devices. The iAnywhere Mobile Office OTA Web site is an ASP.NET 2.0 application that installs on an Internet Information Server (IIS).

*Note: For evaluation purposes, Sybase iAnywhere provides a hosted OTA Web site for mobile devices to download the iAnywhere Mobile Office client application. Point your device's Internet browser to <http://beta.obproxy.com/> to simplify your client deployment for evaluation.*

## Set up the Mobile Office Server

To install the iAnywhere Mobile Office software on your Domino server:

- Once you downloaded and extracted the evaluation installation package, launch the **Setup.exe**. In the opening screen, select *iAnywhere Mobile Office* and click **next**.

*Note: For more information about the other options available, refer to the general documentation within the installation package. For simplicity, this Getting Started Guide does not provide further details.*

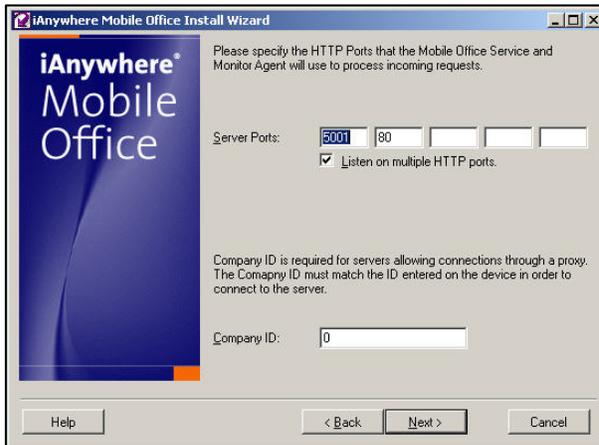
- In the subsequent screen (not shown) select *Server* and click **install now**. Sequential installation of components begins.
- Read and accept the license agreement if you are in agreement.
- The next screen (not shown) will show you the installation path of your local Domino Server installation. If the installation cannot detect your local installation, or if you have multiple Domino Servers installed, point the installation to the directory of the Domino Server instance where you want to install the Mobile Office add-ins.
- For evaluation purposes, accept the default paths for on the subsequent screens (not shown):
  - Mobile Office Server Directory
  - Data Directory



- In the Install Wizard license screen, click **Update License**, enter your serial number, and click **Next**.

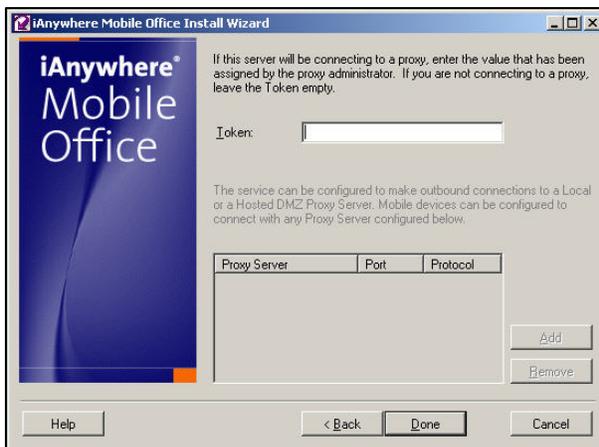
*Note: An evaluation serial number was issued to you. The serial number can be found in the email that was sent to you upon your registration.*

- Click **OK** in the License Request Information window (not shown).



8. For evaluation purposes, in the Wizard server ports screen, accept the default server ports to be monitored for incoming requests, or customize the settings. If you are connecting through a proxy server, enter your company's ID value; otherwise leave 0 as the default. Click **Next**.

*Note: A Company ID was issued to you. If you plan to use the hosted evaluation environment during the beta, enter the Company ID from your registration email.*



9. If your devices will connect through a proxy, enter your *Token*. Otherwise, leave this field blank. Click **Done**.

*Note: A Token was issued to you. If you plan to use the hosted evaluation environment during the beta, enter the Token from your registration email. The Token value is used as a shared key between the hosted DMZ Proxy and your Mobile Office Server. If you plan to use the hosted DMZ Proxy, add beta.obproxy.com using port 443 and the HTTPS protocol to the proxy list.*

10. As the installation continues, you will be asked to restart the Lotus Services before using iAnywhere Mobile Office. Click **OK**.

*Note: The iAnywhere Mobile Office installation adds two new server tasks to your local Lotus Domino installation. You can only register users in the iAnywhere Mobile Office Server if these tasks are running.*

11. When asked if you wish to start iAnywhere Services now, click **Yes**.
12. When the installation completes, click **exit** on both installation splash screens.
13. To start configuring your mobile users, start the Administration console through the **Start** menu (*Extended Systems OneBridge, Mobile Office*).

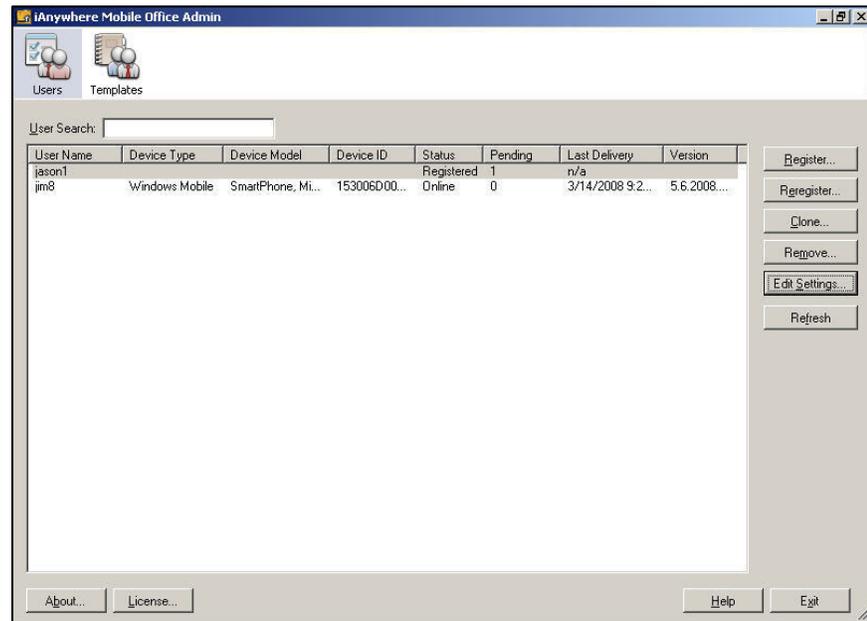
# Mobile Office Admin

The iAnywhere Mobile Office Admin is the main administration tool for registering users and devices and configuring them.

The Admin interface includes two main screens:

The **Users** screen allows you to register a user or to change the settings of an existing user. It also lists you the status of all users registered in the iAnywhere Mobile Office Server.

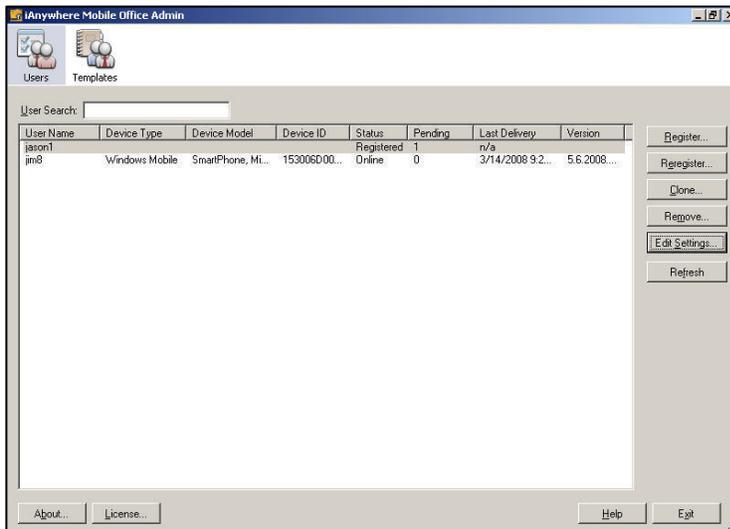
The **Templates** screen lets you create different configuration settings templates. When registering users, you can select a predefined configuration depending on the needs of the user or group you are registering.



The Appendix of this *Getting Started Guide* contains an overview describing all the different settings and functions in more detail.

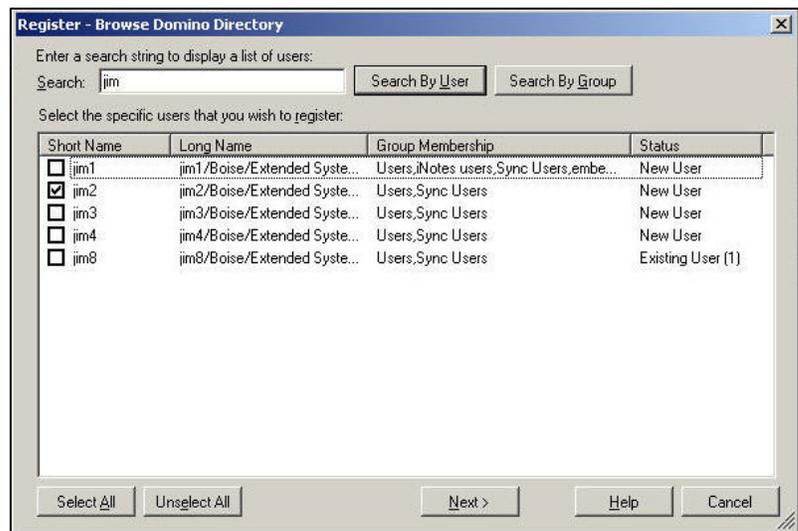
## Managing users

Adding new users and editing the settings of existing users are the primary administrative tasks. The screens in this section and the details in the Appendix briefly describe the data elements and functions available on the main **Users** screen.



To the left is the main users screen. This screen provides the Administrator with an overview about all currently registered users. You can filter the listing of registered users using the text field above the list. To register a new user, click **Register**. The registration process includes three distinct screens, which are described in the steps below.

1. In the **Register – Browse Domino Directory** screen, search your Lotus Domino Directory for the user to be registered. In this example, using the search value **jim**, several individuals named Jim were found. Jim2 is a new user who is to be registered. After you have selected the user or users to be registered, click **Next** to continue the registration process.



2. In the **Register – Email Activation** screen, select the appropriate template you wish to use (see also *Configuring Templates*), and customize the information that will be sent to Jim2 in his activation email. The information specified is required to configure the Mobile Office Client on the device to connect to the server. Optionally, you can specify an activation code that will be shown in the email. If you do not specify an activation code, one will be generated for you. When ready, click **Next**.

3. Use the **Register – SMS Activation** screen to optionally send Jim2 a message containing instructions on downloading and activating the software. If possible, the Mobile Office Client will automatically read the information send via SMS to the device and configure itself automatically. When ready, click **Register**. The activation information will be sent to Jim2. Once Jim2 has completed the activation process, he will be listed as a registered user on the main **Users** screen.

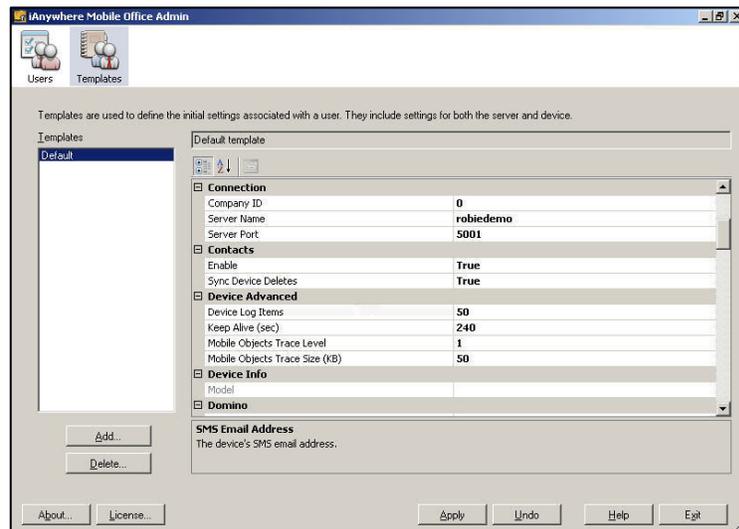
Once a user is registered, the Mobile Office Server will begin to queue items contained in the Lotus Domino Server databases to be delivered to the user's device. (The types of items that are queued are selected in the Template selected during registration in Step 2.) The administrator can also **Edit Settings** on an individual user base.

Other **User** tasks, including **Reregister** and **Clone**, operate in a similar manner using similar screens. Refer to the **Registered Users List** and **Administrative User Functions** tables in the Appendix for further explanation of the **User** function data elements and functions.

## Configuring templates

A template is a named configuration that specifies the default settings for a user registration. A single default template is created when you install the iAnywhere Mobile Office Server, which you can modify and use as your standard template. You can also design custom templates to meet the requirements of regular users, managers, and other groups within your organization.

Templates are used only for initial user registration. Subsequent changes to a template will not affect any users originally registered with that template. For example, once a user is provisioned using a Manager template, any later changes to the Manager template will not affect the user's individual settings. The



user's can be changed, if needed, using the **Edit Settings** function on the **Users** screen.

To create a new template, click **Add** in the **Templates** screen. Enter a name and, if desired, a description for the template. The **Template Settings** table in the Appendix further describes each element within the template that can be customized.

# Appendix

## Registered Users List

User Primary Pane Data Element	Description
<i>User Name</i>	The name of the user associated with the device that is registered. Typically the user's Lotus Notes short name.
<i>Device Type</i>	The mobile operating system being run by the device, such as Windows Mobile or Symbian.
<i>Device Model</i>	The name of the hardware and Manufacturer information.
<i>Device ID</i>	The unique device identification number.
<i>Status</i>	<p>The current status of the client:</p> <ul style="list-style-type: none"> <li>○ Registered: Registered but not yet activated.</li> <li>○ Expired: User did not activate within the stated activation period and the activation has expired.</li> <li>○ Online: Client is activated, connected to the server, and is processing messages.</li> <li>○ Offline: Client was activated but is currently not connected to the server.</li> </ul>
<i>Pending Items</i>	The number of queued messages on the server awaiting delivery to the device when next time connected.
<i>Last Delivery</i>	If a user is registered, this indicates the last time that the device and server exchanged data, and, provides an indication of the user's level of activity. If a user is not yet registered, this field will show N/A.
<i>Version</i>	The client version currently installed on the device.

## Administrative User Functions

User Admin Actions	Description
<i>Register</i>	Add a completely new user or group of users to the system. The user must be a registered Domino user. <ul style="list-style-type: none"> <li>○ Configure activation options, such as client download address, company ID, and server address and communication port.</li> <li>○ Specify an activation code.</li> <li>○ Send an activation email to the user.</li> <li>○ Optionally send an activation SMS to the users device.</li> </ul>
<i>Reregister</i>	Used when the user's data should be resent to the device. The last known device settings are still kept, but a new activation code is issued to the user and new activation messages are sent.
<i>Clone</i>	Used to copy the settings of a registered device to a new device. All device settings and subfolder configurations are cloned to the second registration. A new activation code is issued to the user and new activation messages are sent
<i>Remove</i>	Removes a registered user and its device. This operation permanently deletes all information stored for the user.
<i>Edit Settings</i>	Modify the stored settings for a user's device; a user can request that the administrator edits the settings. The settings on the device are automatically updated when changes are saved.
<i>Refresh</i>	Refresh the list of users in the primary pane.
<i>About</i>	View general information about the iAnywhere Mobile Office Admin version number and copyright.
<i>License</i>	View information about your organization's iAnywhere Mobile Office license.
<i>Exit</i>	Click <b>Exit</b> to exit the function.

## Template Settings

Template Pane Data Element	Description
<i>Calendar</i>	<b>Calendar</b> sets synchronization options for calendar items on the device and the server; sets the number of records to retain on the device; and establishes whether calendar items deleted on the device are deleted on the server.
<i>Client Updates</i>	<p>This category has seven configurable properties:</p> <ul style="list-style-type: none"> <li>○ Client AutoUpdate: enables or disables the AutoUpgrade feature.</li> <li>○ Client CD Version: defines the CAB version of the Corporate Directory application on the device.</li> <li>○ Client MO Version: defines the CAB version of Mobile Objects on the device.</li> <li>○ Client OB Version: defines the CAB version of iAnywhere Mobile Office on the device.</li> <li>○ Client SM Version: defines the CAB version of Security Manager on the device.</li> <li>○ Require Security Manager Install At Activation: enables or disables installation of Security Manager prior to PIM processing.</li> <li>○ Security Manager Level: defines the level of security provided by Security Manager on the device.</li> </ul>
<i>Connection</i>	<p><b>Connection</b> includes these editable properties:</p> <ul style="list-style-type: none"> <li>○ Company ID: an alphanumeric string associated with a specific company or organization.</li> <li>○ Server Name: the DNS Name or IP Address of the sync server such as "sync.company.com".</li> <li>○ Server Port: the value of the port number used for the connections between the device and the sync server.</li> </ul>
<i>Contacts</i>	<p><b>Contacts</b> includes two editable properties:</p> <ul style="list-style-type: none"> <li>○ Enable: establishes how contacts are synced between the device and the server.</li> <li>○ Sync Device Deletes: establishes whether contacts deleted on the device are deleted on the server.</li> </ul>

Template Pane Data Element	Description
<i>Domino</i>	<p><b>Domino</b> contains several properties that define how the Mobile Office Server communicates with the Domino mail server:</p> <ul style="list-style-type: none"> <li>○ Journal File Formula: defines the location and file name of the Personal Journal database.</li> <li>○ Journal Server: defines the name of the Lotus Domino Server that holds the Journal database replica.</li> <li>○ PAB File Formula: defines the location and file name of the Personal Address Book.</li> <li>○ PAB Server: defines the name of the Lotus Domino Server that holds the Personal Address Book replica.</li> <li>○ Sync iNotes Contacts: determines whether the iAnywhere Mobile Office Server synchronizes contacts stored in the user's iNotes/Domino Web Access mail file or contacts stored in the Personal Address Book replica.</li> <li>○ Sync iNotes Journal: determines whether the iAnywhere Mobile Office Server synchronizes the user's Journal/Notebook entries stored in the iNotes/Domino Web Access mail file or the entries stored in the Personal Journal database replica.</li> </ul>

Template Pane Data Element	Description
<i>Domino Advanced</i>	<p><b>Domino Advanced</b> allows advanced options to be set for:</p> <ul style="list-style-type: none"> <li>○ Calendar: sets options for syncing meeting invitations made on the device, to read calendar settings, and set parameters for reading the calendar.</li> <li>○ Contacts: the Contact options set or manipulate default values for the notes adaptor and Contact datastore.</li> <li>○ DST/Meetings/Full Name: this options defines how daylight savings time is handled (this setting can be overridden by the DST Override); and shows the fully qualified Domino user name for the connected user.</li> <li>○ Inbox: the Inbox options set or manipulate default values for the notes adaptor and Inbox datastore, and define those documents in the datastore that are Inbox items.</li> <li>○ Journal: the Journal options set or manipulate default values for the notes adaptor and Journal datastore, and define those documents in the datastore that are Journal items.</li> <li>○ Mail: sets the name and relative path for the user's Mail File, and sets the name of the server that hosts the user's mail file and mailbox.</li> <li>○ Outbox: directly manipulates the field read logic in the notes adapter.</li> <li>○ Sent Items: the Sent Items options set or manipulate default values for the notes adaptor and Sent Items datastore, and define those documents in the datastore that are Sent Items.</li> <li>○ Short Name defines the user's Lotus Notes short name.</li> <li>○ Tasks: the Sent Items options set or manipulate default values for the notes adaptor and Tasks datastore, and define those documents in the datastore that are Task items.</li> </ul>
<i>Email Notification of Data Errors</i>	<p><b>Email Notification of Data Errors</b> includes four configurable properties:</p> <ul style="list-style-type: none"> <li>○ Email Body: provides text for the body of the error notification email.</li> <li>○ Email From: defines the Notes account used to send the error notification email.</li> <li>○ Email Subject: provides text for the Subject line of the error notification email.</li> <li>○ Enabled: Sets whether the Mobile Office Server should send users email messages regarding data errors.</li> </ul>

Template Pane Data Element	Description
<i>Inbox</i>	<p><b>Inbox</b> contains these editable properties:</p> <ul style="list-style-type: none"> <li>○ Enable: enables or disables synchronization between the device and server Inbox.</li> <li>○ Past Days: determines the number of days the device will retain previously downloaded emails.</li> <li>○ Preview Size (KB): the number of characters in a single email downloaded from the server to the device. The user can download the entire email on demand.</li> <li>○ Sync Device Deletes: sets whether deletes in the device's Inbox are sent down to the Lotus Domino server.</li> </ul>
<i>Memo</i>	<p><b>Memo</b> contains two property items:</p> <ul style="list-style-type: none"> <li>○ Enable: enables or disables synchronization between memo items on the device and the server.</li> <li>○ Sync Device Deletes: sets whether deletes on the device are sent down to the Lotus Domino server.</li> </ul>
<i>Outbox</i>	<p><b>Outbox</b> contains two property values:</p> <ul style="list-style-type: none"> <li>○ Enable: sets whether Outbox items on the device are sent to the server</li> <li>○ Signature: defines the Signature added to all messages sent from the device.</li> </ul>
<i>Sent Items</i>	<p><b>Sent Items</b> contains these editable property values:</p> <ul style="list-style-type: none"> <li>○ Enable: determines if Sent items are synced between the device and the server.</li> <li>○ Past Days: determines the number of days the device will retain previously downloaded emails.</li> <li>○ Preview Size (KB): the number of characters in an email that are downloaded from the server to the device.</li> <li>○ Sync Device Deletes: sets whether deletes in the device's Sent Items are sent down to the Lotus Domino server.</li> </ul>
<i>Subfolder Defaults</i>	<p>Editable <b>Subfolders</b> properties include:</p> <ul style="list-style-type: none"> <li>○ Past Days: determines the number of days the device will retain previously downloaded emails.</li> <li>○ Preview Size (KB): the number of characters in an email that are downloaded from the server to the device.</li> <li>○ Sync Device Deletes: sets whether deletes in the device's Folders are sent down to the Lotus Domino server.</li> </ul>

Template Pane Data Element	Description
<i>Tasks</i>	<p><b>Tasks</b> contains these editable values:</p> <ul style="list-style-type: none"> <li>○ Enable: determines if Tasks items are synced between the device and the server.</li> <li>○ Sync Device Deletes: sets whether deletes are sent down to the Lotus Domino server.</li> <li>○ Uncompleted Tasks Only: determines whether only uncompleted tasks or all tasks are synced.</li> </ul>
<i>User Registration</i>	<p>Editable <b>User Registration</b> properties include:</p> <ul style="list-style-type: none"> <li>○ Activation Email Body: defines the message to the user containing the activation instructions.</li> <li>○ Activation Code Expiration: defines in hours how long a user has to activate their account before the account activation period expires.</li> <li>○ Activation Code Length: the number of characters to be contained in the activation code.</li> <li>○ Client Download Address: the Web address where the client software is to be downloaded.</li> <li>○ Email CC List: defines which email addresses receive copies of the email activation message.</li> <li>○ Email From: the name of the sender of the email.</li> <li>○ Email Subject: the Subject line of the activation email.</li> <li>○ SMS Activation Information: activation message text sent to the device.</li> <li>○ SMS Email Address: the SMS email address of the device.</li> <li>○ SMS User Instructions: Text containing the Web address where the client software is to be downloaded.</li> </ul>