



USER GUIDE
MOBILE DEVICE SETUP

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MeritMail Mobile Overview

MeritMail Mobile is the MeritMail synchronization program that provides 'over-the-air' mobile data access (email, contacts, calendar) to devices using the native software / UI installed on the device. It works with Symbian S60/S80, Windows® Mobile (WM5), and Palm smartphones.

Devices listed below can be configured to work with MeritMail Mobile out of the box. Many more devices work with MeritMail Mobile natively but a sync plug-in is not bundled with the device (plug-in is available via a 3rd party - DataViz).

You enable MeritMail Mobile in the ZCS COS or for individual Accounts. Users configure the device's software for MeritMail Mobile similarly to how they configure the device to sync against Microsoft® Exchange. The following may need to be configured:

- **Server address.** Type the fully qualified hostname of the user's MeritMail Collaboration Suite mailbox server.
- **User name.** Type the user's name as configured in their MeritMail account. The domain is configured separately.
- **Domain Type** the user's MeritMail mailbox domain name.

Afterwards users can sync their MeritMail mailbox to their mobile device. They can send email, create appointments, and add contacts.

MeritMail supports the DirectPush technology that is available on mobile devices that run Windows Mobile 5.0 and have the MSFP (Messaging and Security Feature Pack) installed.

IMPORTANT: Some users may experience configuration difficulty if using SSL. WM5 includes a limited number of root certificates and it may be necessary to install your server's signing CA's certificate on the device in order to use SSL

Configuring a Windows Mobile 5 device for over-the-air sync with the MeritMail server

Follow these steps on the device. For the examples, we will configure ActiveSync for a user bob@example.com to connect to a MeritMail server known on the internet as MeritMail.example.com.

1. Select Start.
2. Select ActiveSync.
3. Choose to configure a new account:
 - A. If no account is configured for ActiveSync, select the option to “Set up your device to sync with it” [the server].
 - B. If you are replacing a pre-existing account, select Menu and then select “Configure Server”.
4. In the box for “Server address:”, enter the publicly accessible hostname of the server (MeritMail.example.com).
5. If the server requires SSL (that is, if the server’s MeritMailMailMode is either “https” or “mixed”), check the box for “This server requires an encrypted (SSL) connection”. Note that Windows Mobile enforces strict verification of server certificates; if your MeritMail server has the default self-signed certificate, you will not be able to use MeritMail Mobile unless you import the root certificate from the server into the device. See the link to the SSLChainSaver utility below.
6. Select Next.
7. In the “User name:” box, enter the username part of the email address (“bob” of “bob@example.com”).
8. In the “Password:” box, enter the password of the user (bob@example.com’s password).
9. In the “Domain:” box, enter the domain part of the email address (“example.com” of “bob@example.com”).
10. Check the “Save password” box.
11. Select Next.
12. Check the boxes for any combination of Contacts, Calendar, and E-mail. As of ZCS 4.5.6, Tasks do not sync through MeritMail Mobile; selecting Tasks will cause the device to not sync properly with the server.
13. Select Finish.

The device has been configured. Select Sync to synchronize the selected items with the server.

Configuring a Windows Mobile 6 device for over-the-air sync with the MeritMail server

Follow the Windows Mobile 5 configuration. Use SSL. Only “Contacts” and not “Emailed Contacts” sync to the WM6 device. WM6 will require you to enter the certificate name as the user name when connecting to a cert secured 802.11 network.

Resetting your device

Why is a full resync necessary

A MeritMail server upgrade sometimes includes data structure changes to the sync state metadata. For example, the upgrade from 4.0.5 to 4.5 happens to include such a change. In such cases after the upgrade the devices that were in sync with server may experience errors on the next sync transaction. This is because when the server detects that a client’s state is no longer compatible with server metadata, a special reset code is sent back to the client. However the special reset code is handled in different ways on different devices.

Performing a full resync

Windows Mobile

On a Windows Mobile device, such as Treo 700w and MOTO Q, the phone display the following error message: “A critical error has occurred. ActiveSync can recover from this error, but the next time you synchronize, you may lose changes made since your last successful synchronization”. The user can click OK and proceed to sync again. This “critical error” message may appear a couple of times depending on what’s being sync’ed. Simply click “OK” and click “Sync” button again on error prompt. After a couple of trials the client will reset its state and automatically start a full resync, which will bring the client to be in sync with server.

In the rare cases when automatic reset and full resync on WM device does not happen, the user can manually force a client state reset. In the ActiveSync program, choose Menu->Options... and uncheck all the checkboxes on sync categories such as Contacts, Calendar and E-mail. The device will ask the user to confirm that all client sync data will be removed. Click “OK” to proceed. Once the data are removed, re-enabled the desired sync categories and click “Sync” button. That will kick off a full resync.

Palm devices (Versamail)

The VersaMail 3.5 client on Palm devices, such as Treo 650 (with upgrade) or Treo 700p, has somewhat similar behavior. Upon receiving the reset code from the server, VersaMail displays an error message saying “There was a problem syncing messages”. If you dismiss that error message and click “Sync” again, you will see an alert message like this: “There was a problem syncing with the Exchange ActiveSync server. Your next sync will take a little longer than usual. Do you want to sync now?” If you click Yes then the full resync will start. The alert message may appear more than once depending on what’s being sync’ed.

Palm devices (Versamail) - Continued

Note that VersaMail clients older than the latest 3.5 do not support the reset code. In that case the user only sees the error message but is not given the choice of a resync. To force a manual reset and resync, the user needs to update the sync profile as a workaround. To update the sync profile, launch VersaMail and click on the pull down menu of "Account Setup". Select the Exchange sync account and click "Edit...". Change the username to anything and save. When you click "Done", the client will ask "Are you sure you want to overwrite the existing settings for the XXX account?" Click "Yes". You will see an alert message. Click "No" to dismiss the alert. Now edit the sync profile again to revert the username change you did earlier in order to force a reset. When you are done, this time click "Yes" on the alert message to start a full resync. Depending on your version of VersaMail, the error messages and alert messages you see may vary, but the general process is the same.

Nokia symbian devices

On Nokia E61, the Mail for Exchange client does not handle the reset code at all. Upon receiving the reset code, the client just displays this error message: "Unable to synchronize with server. Please try again later". However the client does make it very easy to do a manual full resync. Simply choose Options->Full resync, and it will resync everything from scratch.

Other devices

If your device doesn't support a forced-resync, removing and recreating your profile will accomplish the same thing.

Other Devices: Motorola Q Phone

Note: These instructions describe configuring IMAP access. To sync mail, calendar, and contacts with MeritMail Mobile, see Moble_Device_Setup and the Motorola Q guide to Setting up Microsoft® Exchange Server ActiveSync Email.

Here are the steps that need to be taken to setup a Moto Q with Verizon:

Go to <http://www.wirelessync.vzw.com> (you should actually be able to do this from the phone's browser). Click on sign up on the right of screen and send your password to your phone. You will see a text message with a temporary password.

Go back to the web site and key the temporary password and change to the password you want. I don't think the rest of the mail setup on the web site is needed.

Now go to the Moto Q.

Go to start -> messaging

This next part is strange. Select any of the existing accounts, it doesn't matter which one. Now click the menu button, then select options. Now select New Account. For some reason, it takes a few seconds for the Email Setup screen to appear, so be patient.

Screen 1

- Fill in your full name
- Fill in full email address
- Uncheck the automatic setup
- Hit next

Screen 2

- Fill in your MeritMail user name followed by a /wm (for example, guest/wm)
 - Fill in MeritMail password
 - Leave domain blank
 - Hit next
- this looks like settings for IMAP, not for mobile sync.*

Screen 3

- Change server type to IMAP4
- Change account name to a name of your choosing
- Set Network to Internet
- Hit Next

Screen 4

- Set Incoming Server to the external address of your MeritMail server
- Check the box for Require SSL connection
- Set Outgoing Server to smtp.vzwmail.net
- Check the box that the Outgoing server requires authentication
- Go into Outgoing Server Settings
- Check the box that says "Use different use name for outgoing server"
- Under username, use <cell phone number>@vzwmail.net (for example 1112223333@vzwmail.net).
- In the password box, fill in your Verizon password.

Other Devices: Motorola Q Phone (Continued)

- Check the box to save the password
- Make sure that the require SSL box is not checked
- Click Done, then next

Screen 5

- Personal preference here
- Hit finish

It will ask if you want to connect. Click yes, then enter the password you obtained from the Verizon web site above. It won't ask for it again. You should be working now.

Other Devices: Nokia E51

To use the E51, you'll need to download the latest version of Nokia's Mail for Exchange software from http://www.businesssoftware.nokia.com/mail_for_exchange_downloads.php and install it on your phone.

Once that's done, set up a profile:

Connection settings

Option	Value
Exchange server	Webmail server name
secure connection	yes if https or mixed mode, no otherwise
access point	Whichever AP your service provider gives you
sync while roaming	up to you
default port	yes or no
port	depends on your mail mode - usually 80 or 443

Credentials

Option	Value
username	your email address
password	your password
domain	your email domain, may be empty in some cases

Sync Content

Option	Value
Sync calendar, contacts, email	your choice
In case of conflict	your choice

Everything else depends on your needs

Other Devices: Nokia E61

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Option	Value
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Sync Content

Option	Value
Sync calendar, contacts, email	your choice
In case of conflict	your choice

Everything else depends on your needs

Other Devices: Nokia E62, Nokia E65 & Nokia E90

Follow the steps outlined above for the Nokia E61 to get Nokia Mail for Exchange setup.

Palm Treo 650

To setup syncing on the Palm Treo 650, setup your account in Versamail as an “ActiveSync” account. Use your regular username and password. Versamail can be configured to automatically sync the MeritMail ActiveSync account on a schedule as defined by the user.

By default the Treo 650 only supports syncing of E-mail and Calendar over-the-air. In order for contacts, task & notes to be sync'd over-the-air you will need to patch activesync [1] and update VersaMail to 3.5 [2] which together costs about \$14.00 USD

Note that VersaMail v3.5 has problems with self-signed certificates. If a self-signed certificate is being used then the root for that certificate needs to be imported using the Palm Certificate Modification Tool [3] If a “QuickInstall.exe not found” error occurs even after following the instructions for resolution at the download page, try looking in the folder where the certificate file that was added to PalmCertificates.exe is located. The certs.pdb file was likely generated anyway and can be installed manually.

If HotSync fails to install the certs.pdb saying that the file already exists you may need to do a soft reset of the device first as the file may be locked by an application.

If even the soft reset does not allow the new certs.pdb to be installed the old file may need to be removed manually using something like FileZ. [4] When browsing the Palm file system with this utility it will be helpful to uncheck the ROM option and be aware that the certs.pdb file will be listed as “CertMgrDB”.

If the manual deletion is not possible due to file locking the file can actually still be renamed. A rename, followed by another soft reset, will (finally!) allow the new certs.pdb to be installed. At this point there will be both the new CertMgrDB file and whatever the old one was renamed to. It is not necessary to actually delete the old renamed file, another soft reset will cause it to silently disappear with no ill effects and the new one will automatically be picked up in its place.

Palm Treo 680

Setup for the Treo 680 is very easy. You just need to setup an Exchange Activesync account in Versamail. However, if you are using self-signed certificates there is an added level of complexity. You will first want to download the SSL Chain Saver Utility. (Note that this program requires the Microsoft .NET Framework). You also are going to want to get the Palm Certificate Modification Tool.

Once you have these tools, you will use the SSL Chain Saver Utility to get the self-signed certificate from your server. Then you will use the Palm Certificate Modification Tool to load the certificate onto your Treo. Finally setup the account in Versamail and you should be good to go.

Palm Treo 700

To configure a Treo 700, configure MeritMail as an Exchange server in VersaMail.

Palm TX

To configure a TX, add a new account, and set it up as an Exchange Activesync, with your username, password and server.

Sony Ericsson P910i

MeritMail CS push mail is available with Sony Ericsson P910i, using Dataviz's software : Roadsync (<http://www.dataviz.com/solutions/enterprise/roadsync/index.html>).

Just configure your Roadsync account as an Exchange account, and here it is :)

Should work with all devices supported by Roadsync, see:

http://www.dataviz.com/solutions/enterprise/roadsync/supported_devices.html

for an exhaustive list.

Sony Ericsson P990i

The P990i (and the M600) come with a version of Dataviz' Roadsync (<http://www.dataviz.com/>) for exchange. See: Exchange ActiveSync for Symbian UIQ (<http://www.dataviz.com/products/bundle.html>)

Settings

- Server name: server address of the MeritMail server, NOT a URL!

Example: mail.somecompany.com Do not prefix the server address with http:// !

- Domain: The domain defined in the MeritMail server.

Example: somecompany.com

- User Name: your exchange account user name
- Password: your exchange account password

Cingular 8525

Active sync can be initiated from your smart phone device.

Launch Active Sync (under programs) Menu -> Configure Server

Key in the following: Server Address: (FQDN) () Choose SSL or not

<Next> User Name: (xxxxxx) Password: (XXXXXX) Domain:

i.e. Username JoeUser@company.com The above would be: U:JoeUser PW: XXXXX Domain: Company.com

You can now determine what is to be synchronized. () contacts () Calendar () E-mail

Notes: MeritMail Mobile apparently doesn't support Tasks. Synchron Options: Calendar- How long to synchronize: All, 2 Weeks, 1 Month, 3 Months, or 6 Months E-mail- Include previous: 1 day, 3 days, 1 week, 2 weeks, 1 month, All Limit e-mail size to: 0.5kb, 1 kb, 5 kb, All or Headers Only. Include File attachments (yes or no) if yes, how large (?)KB

Advanced email synchron options:

Security ()encrypt all outgoing e-mail messages ()sign all outgoing e-mail messages

Choose Certificate Certificate must be installed on your smart phone device.

Primary e-mail address

Qtek A9100

I have setup a Qtek A9100 using this steps:

Launch Active Sync Menu -> Configure Server

Setup the following: Server Address: (FQDN) () Choose SSL Unselect this option

User Name: user Password: MeritMailpassword Domain:domain.com

Select the items to be synchronized, leaving Task out because MeritMail does not handled this.

Then you can modify settings for mail and calendar at your will. It worked fine.

It's important that you have the server cert installed on the smartphone, if you dont, proceed to do so.

Limitations

Push email or always-on is not supported over wi-fi for devices using Activesync. Mail for Exchange also uses Activesync so, even though, the Operating System may not be Windows Mobile, always-on will not work when communicating to MeritMail over Activesync.

Here's the relevant entry from the MSDN blog: <http://blogs.msdn.com/windowsmobile/archive/2006/11/08/wifi-did-you-do-that.aspx>