



# **Helio™ “Mail for Microsoft Exchange”**

## **Administrators Guide**

**Version 1.0**

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# **Chapter 1. Using Helio's "Mail for Microsoft Exchange" application on Ocean Devices**

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## **Introduction to Helio's "Mail for Microsoft Exchange" Application**

Helio's new "Mail for Microsoft Exchange" solution now enables members to access their corporate Email accounts which use Microsoft Exchange servers. The "Mail for Microsoft Exchange" application uses the trusted Microsoft 'Exchange ActiveSync' protocol. Members can now have access anytime and anywhere to their Email, Calendar, and Contacts for available Exchange servers.

To be able to access an Exchange Server through the "Mail for Microsoft Exchange" application on an Ocean device, the member must first subscribe for the service and then download the application to the device. After downloading it, the Ocean device must be configured to access the appropriate Microsoft Exchange Server (Exchange Server 2003 SP2 or Exchange Server 2007)

This guide is designed to help members and their IT Support departments with the initial setup and configuration of their new "Mail for Microsoft Exchange" application. We recognize that there are many different configurations and settings when dealing with the Microsoft Exchange servers, and try to provide an overview of the various tools available to ensure necessary mobile access,

### **Subscribing/Downloading**

Helio members may subscribe to the "Mail for Microsoft Exchange" service during initial activation, or via our various Member care channels including MyAccount on Helio.com.

During the initial sign-up for Helio service for the Ocean device, the member may select "Mail for Microsoft Exchange" from among the Service 'Extras' presented. Additionally, the application will be available on the Helio Download Store and during the initial download process members can complete the subscription process as well.

There are several prerequisites for Helio members to successfully get started.



### Microsoft Exchange Setup

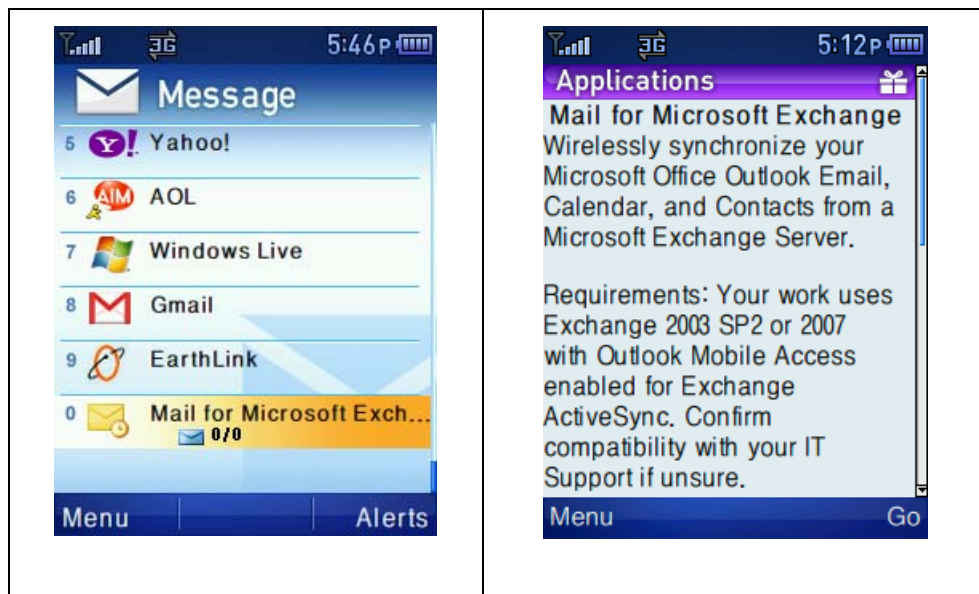
- The Microsoft Exchange Server you wish to connect must be appropriately set-up for the Exchange ActiveSync protocol to access it. This is only available on Exchange Server 2003 (with Service Pack 2.0 or higher) or Exchange 2007.
- Outlook Mobile Access must be enabled to download Exchange ActiveSync application; this is traditionally part of the Web Access setup effort as well.

### Helio Account

- Your Helio account will need to be the primary account. If not, the primary account holder will need to approve the "Mail for Microsoft Exchange" activation for you.
- Your account plan must be one of Helio's "All-In" plans. The activation process will not be completed without one of the appropriate plans.

The download process can then be initiated from several places on the Helio Ocean.

- Message Menu: The "Mail for Microsoft Exchange" application will appear on Ocean devices Message menu area when available.
- Helio Download Store: The application will also be available for download from the Apps area on the Helio Download Store.



Follow the steps for the Application download. The application will download to your Ocean device and prompt itself for initial setup. The member will be asked to confirm or activate the subscription during the download process.



## Setup:

Following the initial download, the member will be prompted to Setup the Account Settings for the "Mail for Microsoft Exchange" application.

In addition to Chapter 2, Helio has also posted additional User Guides and FAQs on its website that may provide usage assistance. Please visit at [www.helio.com](http://www.helio.com).

**TIP:** If the member tries to access Exchange mails without having subscribed to the service, the member receives a message with instructions to subscribe.



## **Chapter 2. Setting up “Mail for Microsoft Exchange” on the Ocean Device**

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### **How to Set Up Helio “Mail for Microsoft Exchange”**

Ocean device ‘All-In Plan’ members can use the Helio “Mail for Microsoft Exchange” application to synchronize directly with their Exchange Server.

The Helio members with the application on their Ocean device who have the address of their Exchange Server and know their respective Exchange usernames, passwords, and domains can try to access their corporate Exchange server to retrieve Email, Contacts and Calendar. The associated Helio “Mail for Microsoft Exchange” User Guide is designed to walk them through the 'on-device' setup and usage steps.

Members can subscribe, download and set up the “Mail for Microsoft Exchange” application through the Helio Download store, and then synchronize the data on the Ocean device with the Exchange server.

We hope that this guide provides our member's IT and Mail Support organizations the necessary overview of the “Mail for Microsoft Exchange” solution such that they are able to provide any additional necessary information to our members so they may access their Exchange Servers.

#### **On the Ocean device**

The primary areas of functionality in this Ocean device are:

- Email
- Calendar
- Contacts

The following steps show how members set up an account on the Ocean device.

To set up an account on the Ocean device:



1. From the Today View screen, press {Menu}, select {Settings} and then {Account settings}. The member needs to enter the following fields:
  - i. Exchange Server Address URL: This address/URL represents the Outlook mail box server for Exchange Active sync access.
    - a. IT Support Feedback: Helio messages to our members that this is generally the same URL and address that they might access for Web Mail access. Administrators will likely need to let Helio members know if alternative URLs have been used for Server address.
  - ii. Username: Enter the username used to access the Email account.
    - b. IT Support Feedback: Hopefully member is aware of username.
  - iii. Password: Select the Password box, enter the Email account password.
    - c. IT Support Feedback: Hopefully member is aware of Password. Note if member makes a Password change on the server, they will need to make similar change on their device manually.
  - iv. Save Password: Check Box. Feature allows member to have Device side application password protection.
    - d. IT Support Feedback: If the box is 'unchecked', the user will be prompted every time they open the application, thus providing additional security for their Email information. For highly secure working environments with mobile travelers, Administrators may want to encourage the use of the feature.
  - v. (Optional) Domain Name: Domain is needed only on some accounts where administrators have created multiple domain environments for Exchange access..
    - e. IT Support Feedback: If the Exchange server environment has more than one domain, members need to specify a domain when trying to access the Exchange server from the Ocean device. We message that Administrators will need to provide as necessary.
  - vi. (Optional) SSL encryption: SSL is the technology used to encrypt sensitive information that is exchanged between the member and the server, such as the password. The Ocean device supports only server SSL certificates and does not support client-side certificates.
    - f. IT Support Feedback: Helio messages that our members will generally need to confirm with their IT Support if SSL is turned-on. Administrators should provide appropriate feedback if member should turn-on, and if optional or mandatory.
  - vii. Auto-check Enabled: Auto-check is a feature enabled, where-in the Ocean device constantly synchronizes with the Exchange server for updates. These updates can be collected for Email, Calendar and Contacts.
    - g. IT Support Feedback: The member can choose to disregard these for Auto-Check functionality. This can speed common sync. times. This is primarily a user experience issue.
2. Continue: Select {Flame} from the 'Continue' box to finish setup and check to ensure successful connection has been made between the "Mail for Microsoft Exchange" application and the corporate Exchange server.



- a. IT Support Feedback: This feature is designed to do a quick verification of the connection ("handshake") between the application and server.
  - i. If Successful: Helio messages to the member if setup was successful and then prompts them to kick-off the application usage with the initial Sync.
  - ii. If Unsuccessful: Helio messages to our members that if unsuccessful they should work closely with their IT support. Hopefully this guide along with the other "Mail for Microsoft Exchange" documentation helps IT Support and Email Administrators with the basic setup needs so that our members can get up and running.

## Chapter 3. Exchange ActiveSync Protocol Overview

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### How Ocean devices Work with Exchange ActiveSync

Exchange ActiveSync enables the member to synchronize data between the Ocean device and Exchange Server 2003/Exchange Server 2007. Email, Contacts, and Calendar information can all be synchronized by the "Mail for Microsoft Exchange" application from Helio. The Exchange ActiveSync feature was previously available through Mobile Information Server and was referred to as Microsoft Server ActiveSync.

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### Requirements

To use Exchange ActiveSync technology with the Ocean device, the Email server must be an Exchange server 2003/Exchange server 2007 mailbox server with Outlook Mobile access enabled.

### Exchange ActiveSync Protocol

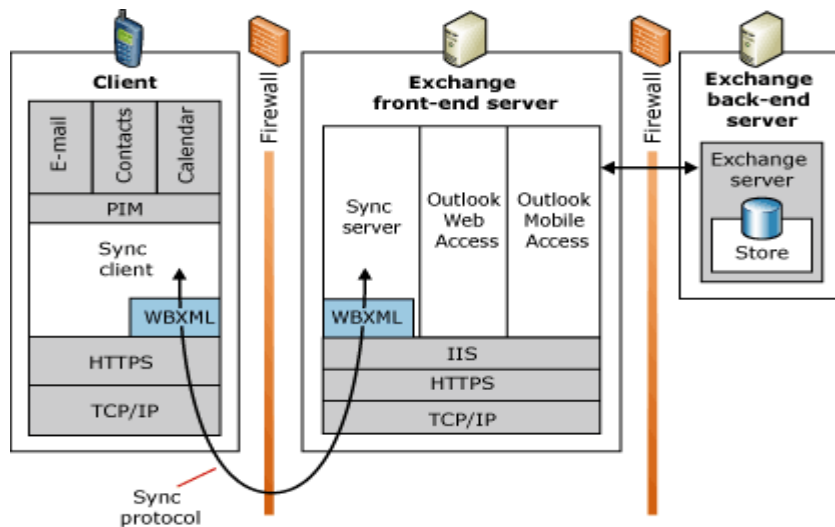
The ActiveSync protocol is a request and response protocol built on a client and server communications model. It is built on the HTTP protocol, using the HTTP POST request and response mechanism and the HTTP OPTIONS command. The HTTP POST header specifies a protocol command and if the command requires it, command data is sent in the HTTP POST body. The data is typically formatted as compressed Wireless Binary XML (WbXML), which makes efficient use of the constrained bandwidth of mobile clients.

The client initiates communication by posting a request. When the server receives the request, it parses the request and then sends an HTTP POST response that contains the requested data in its body.

The ActiveSync protocol requires a TCP/IP connection between the client and server. However, the underlying network layers are implementation-specific. The transport layers that support the protocol for Helio's "Mail for Microsoft Exchange" application is the CDMA EVDO and 1xRTT. The sync protocol requires that any transmission errors are handled by the networking software, and that the protocol messages sent between the client and server are complete and error-free.



The ActiveSync protocol is designed to enable any Helio Ocean device to efficiently synchronize PIM data with data stored on an Exchange server. To do this, the client uses the sync protocol to talk to the Exchange front-end server component, which provides the synchronization as the means to retrieve data from the Exchange store.



**Figure. Exchange ActiveSync communication between client and server**

Benefits of Exchange ActiveSync are:

1. Exchange ActiveSync is built into Exchange Server so that you do not need additional software or servers.
2. Exchange ActiveSync gives members a consistent Microsoft Office Outlook experience across the environment.
3. Exchange ActiveSync does not require any desktop software or connection software.
4. Exchange ActiveSync does not require special data plans or subscriptions. A member can buy as much data as he or she needs through Helio's 'All-In' plan and can use his or her devices globally.

## Exchange ActiveSync and Exchange 2007

Microsoft Exchange Server 2007 builds upon the solid, highly scalable foundation of Exchange ActiveSync to deliver even more powerful mobile messaging. It includes support flags, HTML mail, and other productivity-enhancing features.



The Exchange ActiveSync protocol also provides for control over Ocean devices, including the ability to provision and enforce device security policies. Exchange Server 2007 makes improvements in this area as well, allowing for per-member policies, better control of which devices can synchronize with Exchange Server, and enhanced monitoring and logging.

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## Overview of Helio's "Mail for Microsoft Exchange" Security Features

The "Mail for Microsoft Exchange" application has implemented most of the critical security protocols which go along with the Exchange Activesync protocol. Throughout this document there are deeper discussions around the message security, this section is designed to provide a brief overview on a couple of the specific application features included.

### Options Implemented on Helio's "Mail for Microsoft Exchange"

1. **SSL Support:** The application fully supports SSL settings from your Exchange server environment.
2. **Device Password :** The "Mail for Microsoft Exchange" application lets you set a required password to enter the application itself.
3. **Reset feature:** Helio added a new member option to do a "Reset" from within Mail for Microsoft Exchange that will delete all of their member data and remove all Settings.
4. **Remote Wipe:** Helio has built in support for the Exchange Activesync Remote Wipe capabilities.

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## Direct Push in Exchange ActiveSync

Initially the Helio "Mail for Microsoft Exchange Application is not using the Direct Push functionality available from the Exchange ActiveSync protocol. The HTTPS request that can be made for updates is actually controlled by device side functionality which opens a secure data connection on a regular basis as determined by the User Preference. The Default setting is every 15 minutes, though can be lowered to 5 minutes..



## Chapter 4. Overview of Configuring Exchange Server 2003 for Client Access

This chapter is designed to help provide additional details about where to find critical information about configuring your Microsoft Exchange Server for mobile client access.

The principle source of available information is the Microsoft website, several valuable links include;

### How to Enable Exchange ActiveSync (2007) for a User

- <http://technet.microsoft.com/en-us/library/bb124315.aspx>

### How to Manage Exchange ActiveSync (2007) Users

- <http://technet.microsoft.com/en-us/library/aa998239.aspx>

### How to Enable Exchange ActiveSync (2003) for a User

- [http://www.microsoft.com/technet/solutionaccelerators/mobile/deploy/msfp\\_6.mspx](http://www.microsoft.com/technet/solutionaccelerators/mobile/deploy/msfp_6.mspx)

### How to Manage Exchange ActiveSync (2003) Users

- [http://www.microsoft.com/technet/solutionaccelerators/mobile/deploy/msfp\\_8.mspx](http://www.microsoft.com/technet/solutionaccelerators/mobile/deploy/msfp_8.mspx)

### Exchange ActiveSync FAQs

- <http://technet.microsoft.com/en-us/exchange/bb288524.aspx>

### Exchange Activesync Web Admin Tools

- <http://www.microsoft.com/downloads/details.aspx?FamilyID=e6851d23-d145-4dbf-a2cc-e0b4c6301453&DisplayLang=en>

### Certificate Tools for Exchange ActiveSync:



- <http://www.microsoft.com/downloads/details.aspx?FamilyId=82510E18-7965-4883-A8C3-F73F1F4733AC&displaylang=en>

Technet: Troubleshooting for Activesync 2003

- <http://support.microsoft.com/default.aspx?scid=kb;en-us;836024>

ActiveSync Error Codes:

- <http://support.microsoft.com/?scid=915152>

Exchange 2003 Server Guide

- <http://technet.microsoft.com/en-us/library/a388ad5b-2871-44e5-8954-2f3f85482717.aspx>

Exchange 2007 Server Guide

- <http://technet.microsoft.com/en-us/library/bb124558.aspx>

When referencing these and other Microsoft documents, please note that some references will be made for Windows Mobile devices which may not be appropriate for the Exchange Activesync solution available on your Ocean's "Mail for Microsoft Exchange" solution.



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## Chapter 5. Trouble Shooting

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### Troubleshooting Exchange Issues in Ocean Devices

This chapter helps to trouble-shoot problems that might arise with Ocean devices. The chapter provides a description of the Error, Cause, and rectifying Actions. This chapter contains information that is helpful for resolving known issues.

Again it is recommended that you work with your system administrator or IT support during the initial setup process, downloading and installing the "Mail for Microsoft Exchange" application and your corporate Microsoft Exchange server.

If you still have additional questions or issues arise after a successful setup, please contact Helio's Member Care team at 888-88-HELIO.

If after you have been using the "Mail for Microsoft Exchange" application, and issues arise please use the Troubleshooting guide below to initially try to address issues. If you continue to have issues operating the application after you've successfully synchronized you can try using the "Mail for Microsoft Exchange" Reset feature to remove the data from your Ocean device and attempt to re-synchronize it with your server. This clearing process will many times resolve outstanding issues.

This chapter provides troubleshooting information for various kinds of issues. They are:

Synchronization Issues: Synchronization problems related to Account settings.

Network or Server Issues: Problems connected to Server.

HTTP Errors: Server problems.

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### Synchronization Issues

Error	Synchronization could not be completed. Verify that you have entered the correct server address.
Cause	Although this message appears to indicate an error caused by your "Mail



	for Microsoft Exchange” settings, this is not the case. The issue can be caused by Exchange Server load conditions, and is generally temporary.
Action	Try to sync again later.

Error	You have cancelled synchronization.
Cause	This error usually occurs when you cancel the Exchange Server credentials page.
Action	Make sure you are correctly set up to sync with Exchange Server, and try to sync again.

Error	Email, Contacts, or Calendar are unsynchronized. Please enable synchronization in Settings.
Cause	This happens when Email, Contacts, or Calendar are disabled in the account settings.
Action	Enable the Email, Contacts, or Calendar in the account settings and synchronize.

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## Network or Server Issues

Error	ActiveSync encountered network problems or an internal server error while synchronizing.
Cause	This type of error is often returned when the Exchange Server runs out of memory.
Action	This condition is generally temporary. Try to sync again later.

Error	Exchange Server requires certificates to log on. Connect your Ocean
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	device to your PC on the corporate network to obtain a certificate.
Cause	In environments where security certificates are required, synchronization cannot be completed until the proper certificate is obtained.
Action	Contact your IT administrator to add the correct certificate to your Ocean device.

Error	ActiveSync encountered a problem on Ocean device.
Cause	Don't worry, it's not something that you did. This condition is generally temporary.
Action	Try to sync again later.

Error	The Ocean device timed out waiting for you to supply credentials.
Cause	The Exchange Server credentials page was left open too long.
Action	Re-enter the Exchange Server credentials, and try to sync again.

Error	Your account information could not be detected. Choose Configure Server on the ActiveSync menu to check your Exchange Server credentials.
Cause	If you enter incorrect information when setting up Exchange ActiveSync to sync wirelessly with an Exchange Server, you will see this error. Correct the credentials:
Action	<ul style="list-style-type: none"><li>○ Press Start and select Programs. Then select ActiveSync.</li><li>○ Press Menu and select Configure Server.</li><li>○ Enter the correct information on each check box: server address, SSL requirement, user name, password, domain, and data types to sync.</li><li>○ Try to sync again.</li></ul>

Error	The server could not be reached. This can be caused by temporary network conditions.
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Cause	Synchronization was not completed because your Ocean device had to wait too long to establish a connection with Helio's Exchange Server.
Action	Try to sync again later. If the issue persists, contact your IT administrator.

Error	This error appears in the WCESLog.log file.
Cause	This error indicates that an application is interfering with network connectivity.
Action	Work with your organization's IT department to determine which VPN, firewall, internet security or internet optimization software is causing the issue. You may need to change the permissions in the software, or disable or delete it for this reason, please do not attempt this without the help of your IT administrator.

Error	The server that ActiveSync queried returned a 404 error. Usually, this means that the server is not a valid Exchange front-end (which is usually due to entering the wrong server address).
Cause	Confirm that the server address and other Exchange server information is correct:
Action	<ol style="list-style-type: none"><li>1. Press Start and select Programs.</li><li>1. Select ActiveSync.</li><li>2. Press Menu and select Configure Server.</li><li>2. On the next three screens, confirm the Server Address your User Name, Password and Domain and select the data you want to sync.</li><li>3. Press Continue and sync.</li></ol>

Error	The security certificate on the server has expired. Check that the date and time on your Ocean device are correct.
Cause	The date on the certificate for the Secure Sockets Layer (SSL) connection does not match your Ocean device settings.



Action	<p>This can mean one of three things:</p> <ul style="list-style-type: none"><li>○ Your Ocean device date and time are incorrect. If you need to correct the time and date, press Start and select Settings. On the System tab, select Clock &amp; Alarms. Make your changes here.</li><li>○ The certificate is expired. If the certificate has expired, you may need to contact your organization's IT administrator.</li><li>○ If you sync on a schedule, sync has been changed from scheduled to manual.</li></ul>
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Error	<p>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.</p>
Cause	<p>After you see this message, the next time you try to sync, you should succeed.</p>
Action	<p>Try not to make any changes on your Ocean device until you can complete a successful ActiveSync operation, because these changes may be lost.</p>

Problem	<p>The security certificate on the server is invalid. Contact your Exchange administrator or ISP to install a valid certificate on the server.</p>
Action	<p>This message can mean one of two things:</p> <ul style="list-style-type: none"><li>○ If you sync on a schedule, sync has been changed from scheduled to manual.</li><li>○ ActiveSync does not recognize the Certificate Authority that generated the server's certificate. Contact your IT administrator for assistance.</li></ul>



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## HTTP Error Codes

Helio member may encounter some HTTP error codes from the Exchange Server. As Administrators may need to explain or help resolve issues that may be encountered by Helio members, the link to the list of standard error code message is below.

- <http://support.microsoft.com/kb/915152>