Getting Started

Exchange ActiveSync® Updater

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Introduction

The Exchange ActiveSync® Updater from Palm works with corporate email systems that use Microsoft Exchange Server 2003 with Service Pack 2, and newer versions of Exchange Server such as Exchange Server 2007. The Updater adds new features to your Microsoft Exchange ActiveSync account in the VersaMail® application on your smartphone. For example, when the Updater is installed, Microsoft Exchange ActiveSync pushes email messages, Calendar events, and updated contact information from the server to your Exchange ActiveSync account. The Updater also enables Remote Address Lookup for addressing email messages and IT policies for your system administrator that enhance the security of data transmission.

This guide provides an overview of the new features and describes how to install and use the Exchange ActiveSync Updater on your smartphone. For information on all other features and functionality of a Microsoft Exchange ActiveSync account, see the VersaMail *User Guide* that came with your smartphone.

Overview

The Exchange ActiveSync Updater supports the following Microsoft Exchange ActiveSync features:

Push email, calendar, and contacts The server pushes email messages, Calendar events, meeting invitations, and updated contact information it receives onto your smartphone. Likewise, when you create an email message or event or you update a contact on your smartphone, it is pushed to the server.

> KEY TERM **Push** Technology in which a server automatically delivers new information (such as new email messages) to a device and retrieves new information from a device; the user does not need to do anything.

In addition, when you delete or change an email message (for example, mark a message read or unread) in one location, the change is pushed to the other location.

Push from server to smartphone happens automatically as new or changed items arrive on the server. If items are created or changed on the smartphone, the items are pushed from smartphone to server at the following times:

- When a server-to-smartphone push takes place.
- When you select Sync in your Exchange ActiveSync account to manually retrieve information.
- At a preset time interval, if neither of the preceding two events takes place during that interval—for example, if neither a server push nor a manual sync takes place for 10 minutes.

Remote Address Lookup When you address an email message, you can search for and retrieve email addresses on your corporate Exchange server.

IT policies Supported IT policies include remote wipe, which enables the system administrator to remotely wipe out all data on a user's smartphone—for example, if a smartphone is lost or stolen—and password enforcement, which enables the system administrator to set requirements for smartphone passwords.

What do I need to get started?

- Your corporate email system must use Microsoft Exchange Server 2003 with Service Pack 2, or a newer version of Microsoft Exchange Server such as Exchange Server 2007.
- You must have VersaMail version 3.5 on your smartphone. If the application is not already on your smartphone, you can install it from the Palm Software Installation CD included with your smartphone. See your smartphone's *User Guide* for installation instructions.
- You must have a Microsoft Exchange ActiveSync account set up on your smartphone. See the VersaMail *User Guide* included with your smartphone for instructions.

Installing the software

BEFORE YOU BEGIN Obtain the web address of the Exchange ActiveSync Updater download page from your system administrator. You may obtain this address in a text message, or you may need to paste the address into the web browser on your smartphone.

Download the software

1 Open the Updater download page by doing one of the following:
   - If you obtained the page address in a text message, open the message and select the address.
   - Otherwise, open the web browser on your smartphone and enter the address in the web address field. Press **Center** on the 5-way to open the page.

2 Follow the onscreen instructions to select a language, accept the license agreement, and so on.

3 If a "Do you want to continue?" prompt appears, select **Yes**.

4 When the "Do you want to download?" prompt appears, select **Yes**.

5 Select **Save**.

6 Select **Yes** to accept the file into Applications.

7 When downloading has finished, select **OK**.

Install the software

1 Go to **Applications** and select **EAS Update**.

2 Select **Update Now**.

3 When installation has finished, select **OK** to reset your smartphone.

Perform the initial synchronization

1 When the reset has finished, an alert icon appears in the upper-left corner of your screen. Tap the icon to view an alert prompting you to synchronize your Exchange ActiveSync account.

2 Select the alert to open your Exchange ActiveSync account Inbox.

3 Select **Sync**.

4 Select **Yes**.

IMPORTANT You must perform this initial manual sync in order for push email to work correctly.

5 If prompted to connect to the Internet, select **Yes**.

TIP When synchronization has finished, another alert icon appears in the upper-left corner of your screen. Tap the icon to view an alert notifying you that push is now enabled.

Using push

When you install the Exchange ActiveSync Updater, Microsoft Exchange ActiveSync pushes email, calendar, and contact information automatically as long as your server supports push and has push turned on.

DID YOU KNOW? When push is enabled, certain preferences change for your Microsoft Exchange ActiveSync account only. A new AutoSync preference is created, including AutoSync and Alerts options. The Advanced preferences, including Connection and Server options, are removed.

If you have previously set up an AutoSync schedule for your Exchange ActiveSync account to retrieve email, calendar, or contact information, and your server supports push, the schedule automatically switches to push when you install the Exchange ActiveSync Updater. The time interval on the AutoSync preferences screen changes to As Items Arrive.

DID YOU KNOW? You can manually retrieve information at any time by selecting Sync.

If your server does not support push or does not have push turned on, push does not take place when you install the Updater. If you have set up an AutoSync schedule, your smartphone continues to retrieve email, calendar, and contact information according to that schedule.

DID YOU KNOW? Your smartphone screen turns on and an alert appears anytime you receive a new message. To save battery life, you can turn alerts off for your Exchange ActiveSync account. Go to the account, press **Menu**, select **Options**, and then select **Preferences**. Select **Alerts**, and then uncheck the alert box.

Turning off push

When push is enabled, you can turn it off—for example, to save battery life.

1 Open VersaMail and go to your Exchange ActiveSync account.

2 Press **Menu** .

3 Select **Options**, and then select **Preferences**.

4 Select **AutoSync**, and then do one of the following:

- To switch from push to an AutoSync schedule for email, calendar, or contacts, select the **When** pick list and then select any schedule option except As Items Arrive.
- To turn off push and manually retrieve information, uncheck the box next to the type of information you want to get manually (Mail, Calendar, or Contacts).

Using Remote Address Lookup

Before you can use Remote Address Lookup, your smartphone's phone must be on and you must be in a coverage area.

1 Open VersaMail and go to your Exchange ActiveSync account.

2 Select **New**.

3 On the new message screen, begin addressing the message. If the name you want does not appear on the Smart Addressing list, press **Menu** , select **Options**, and then select **Remote Lookup**.

4 Enter text that you want to find on the server. For example, type "Ste" to search for a person named Steve.

5 Select **Search**. Any names or addresses on the server that match the characters you entered are displayed.

6 When the name you want appears, select it, and then select **Add**.