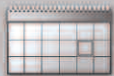


ROADSYNC™
Using Exchange ActiveSync®



RoadSync Java MIDP 2.0 Manual



DataViz®
Compatibility. Instantly.

Table of Contents

General Product Information

What is RoadSync™ (Exchange ActiveSync®)	4
Advantages for Companies and IT Administrators	4
Key Product Features.....	5
System Requirements.....	6
Detailed Functionality	6

Installation and Getting Started Guide

Installing RoadSync	9
Setting Up RoadSync	10
Adjusting Sync Settings.....	11

RoadSync Exchange Server 2003 Administrator's Guide

Enabling Mobile Access for Exchange Server 2003 (SP1) Users.....	13
Enabling Mobile Access for Exchange Server 2003 (SP2) Users.....	14
Typical Network Configurations.....	15

Help

Frequently Asked Questions	17
Troubleshooting Tips.....	17
Contact Information and Support	18



ROADSYNC[™]
Using **Exchange ActiveSync**[®]

General Product Information

What is RoadSync™? (Exchange ActiveSync®)

Based on Exchange ActiveSync technology licensed directly from Microsoft, RoadSync provides secure, wireless synchronization of corporate Outlook® E-mail in an affordable, scalable and easy to manage package. In addition to significantly enhancing end-user productivity, RoadSync simultaneously lowers IT costs by providing an easy to implement mobile e-mail strategy which eliminates the need for middleware servers and subscription fees.

- No middleware server
- No service or subscription fees
- No cradle or desktop sync software
- Secure data transmission
- And much more...

As the first and only independent software vendor to license the Microsoft Exchange ActiveSync protocol, DataViz is committed to extending this technology to reach the world's most popular smartphones and mobile handsets.

Advantages™ for Companies & IT Administrators

Lowest Total Cost of Ownership on the Market

A one-time software licensing purchase of RoadSync provides a mobile ActiveSync client that directly communicates with Exchange 2003, thus eliminating the need for a middleware server, a desktop redirector or typical set up and service fees.

Simple Installation & Deployment

With over-the-air distribution, end-users and IT departments can install RoadSync without any desktop interaction by entering just a few settings on the mobile handset. For the IT administrator, it is simply a matter of enabling mobile access for the user which is typically on by default on the Exchange 2003 server.

Secure Transmission of Sensitive Data

RoadSync supports industry-standard SSL (Secure Socket Layer) connections over port 443, so all sensitive data will be kept safe when transmitted over-the-air using the same level of encryption trusted for online banking.

Support for Today's Most Popular Mobile Devices

With support for today's most popular devices, IT departments have a choice when it comes to hardware as well as the flexibility to mobilize employees who may already own a personal device.

Tried & Tested Solution

RoadSync is a Symbian Signed and tested application, plus DataViz offers 24 hour web support with business-hour phone and e-mail support. For corporate-wide deployments, DataViz will assign an enterprise account representative to handle additional maintenance agreements and support resources. DataViz contact information can be found at the end of this manual.

Key Product Features

Wirelessly Synchronize E-mail

Any changes made on the handset will automatically be synchronized with the Exchange Server and reflected when you open Outlook on the desktop. Similarly, any changes made in Outlook will automatically be reflected on the handset.

Fully Integrated with Phone's Built-in Applications

Maintaining features like speed dial, caller ID, message alerts and keyboard support will help lower the overall product learning curve, while increasing productivity.

Data Stored Locally on the Device for Offline Use

Mobile workers can now get work done quickly and efficiently even when there is no service available (i.e., on a plane, train or subway).

Optimized for Mobile and Wireless

Reduce data usage and increase sync speed by defining custom sync criteria such as date ranges and message size limits. Furthermore, the RoadSync client uses a minimal amount of device memory.

No Strings Attached

RoadSync is a completely wireless solution. There are no cords, cables or cradles needed to access your Outlook e-mail and info on your smartphone. Plus, setup is easy and all DataViz products are backed by a 30-day money-back guarantee.



System Requirements

Device Requirements

- Supported wireless device
- Wireless service coverage with data plan
- Exchange 2003 user name, password, and server information (you can get this information from your IT administrator)

Office Environment Requirements

- Microsoft® Exchange Server 2003
- Mobile access enabled (on by default)

Note: RoadSync supports SSL connections. This can be direct to the Exchange Server, through a front-end server or through a proxy server.

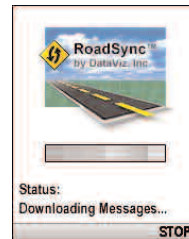
VPN connections are also supported but may require an additional client application on the handset.

For additional information regarding server configurations, user settings and all supported devices, please visit www.dataviz.com/roadsync

Detailed Functionality

Main RoadSync Application

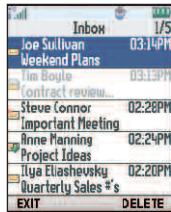
The main RoadSync application controls all of your synchronization settings in addition to displaying status information and log data.



- Over-the-air wireless installation to the phone
- Easy set-up process (simply enter your name, password, server, and domain)
- Date range Options (1 Day, 3 Days, 1 Week)
- Message size limits (500, 1000, and 5000 characters)
- Support for industry standard secure SSL connections
- Helpful verbose logging and troubleshooting tools with easy “Reset” option to start clean

E-mail

A RoadSync mailbox will be integrated with the phone's main messaging application; however, all corporate e-mail is kept separate from other SMS, MMS, POP and IMAP accounts.



- Compose new, reply, reply to all, forward and delete messages
- Mark messages as read or unread
- Message status icons (high priority, low priority, read/unread status and truncation)
- Message summary & more detailed information view



Installation and Getting Started Guide

Installing RoadSync:

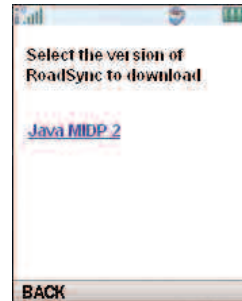
The first step in installation is getting the RoadSync installer to your device.



Via download

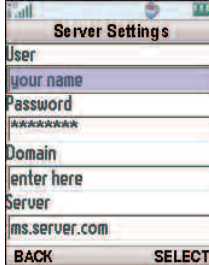
You can use the web browser on your wireless device to download RoadSync directly from the web. Please refer to the link provided to you at the time of purchase or go to www.dataviz.com/rsd. Simply download the file and continue with the steps below.

1. Go to **www.dataviz.com/rsd**
2. Click on the link **Java MIDP 2.0**
3. **Select** to download the installer.
4. Once the download is complete the install will start immediately.
5. It will ask if you want to Run RoadSync. Select **Yes**.



Setting Up RoadSync:

1. Click the **RoadSync icon**, if RoadSync is not already open, to walk through setting up RoadSync.
2. Open the menu and select **Settings**.
3. Select **Server Settings**.
4. Enter the following information: (Please consult your IT staff if you are uncertain about the settings below)
 - a. **User name** - This is the user name you use to connect to your Exchange account. It is typically the same as your Windows login user name.
 - b. **Password** - This is the password you use to connect to your Exchange account. It is typically the same as your Windows login password.
 - c. **Domain** - This is the domain you belong to in your corporate network.
 - d. **Server Name** - This is the publicly accessible server name (this name should not include http:// or /, but be in the form of exchange.mycompany.com).
5. Once your settings are entered click **Back** twice.
6. At this time, you are ready for your first sync. Select Sync. You will see the progress of the sync as it connects, checks for new data, downloads new data, and updates the data on your wireless device. When the sync is complete, you will see a message that says "Direct Push Active" or "Last Sync" with the current date and time.



Note: If you receive an error when trying to verify your settings or establish a network connection please check the following:

- Verify your settings with your IT staff.
- Your password may be case sensitive.
- A data connection is available and you can access the internet on your phone.
- Please check Tip 3 on page 18

Note: Your first sync will take longer than subsequent syncs.

Note: To change additional synchronization settings, please refer to the following page 'Adjusting Sync Setting'

Adjusting Sync Settings

RoadSync is capable of various settings that will enhance your wireless synchronization experience.

Time Zone Options

RoadSync allows you to select your current time zone. To change this feature, complete the following steps:

1. Open **RoadSync**.
2. Open the menu and select **Settings**.
3. Select **Time Zone Options**.
4. **Select** your current time zone.
5. Press **OK**.

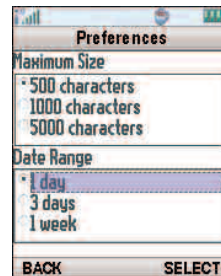


E-mail Filtering Options

You can adjust RoadSync to filter e-mail you receive on your wireless device. Adjustments can be made by date range and e-mail size. By default, e-mail is limited to the past three (3) days and the size of the e-mail to be downloaded is set to 500 characters.

Complete these steps to adjust e-mail filtering:

1. Open **RoadSync**.
2. Open the menu and select **Settings**.
3. Select **E-mail Options**.
4. **Select** an e-mail size limit from the list provided.
5. **Select** a date range from the list provided.
6. Press **Back** twice.





RoadSync Exchange Server 2003
Administrator's Guide

Enabling Mobile Access for Exchange Server 2003 (SP1) Users

Please verify the settings in the diagrams to ensure Exchange Server 2003 is configured for mobile access via RoadSync.

- Settings are applied at the user level.
- These features are enabled by default.
- Please refer to Microsoft's Exchange Server 2003 support for further details: www.microsoft.com/exchange/support

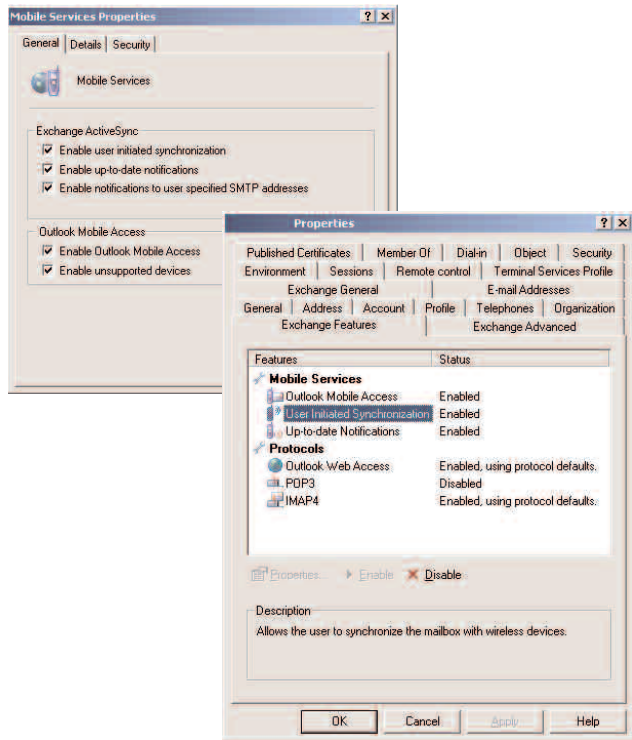
How to access Mobile Services Properties:

1. On the server go to **Start/ Programs/ MS Exchange/ System Manager**.
2. Go to the **exchange server/ Global Settings/ Mobile Services**.
3. Right-click on **Mobile Services** and choose **Properties**.

How to access User Properties:

1. On the server go to **Start/ Programs/ MS Exchange/ Active Directory**.
2. Go to the **domain/ Users folder**.
3. Double-click on the **user**.

Tip: RoadSync uses the same Exchange ActiveSync connection found on Microsoft PocketPC and Windows Mobile devices.



Enabling Mobile Access for Exchange Server 2003 (SP2)

Please verify the settings in the diagrams to ensure Exchange Server 2003 SP2 is configured for mobile access.

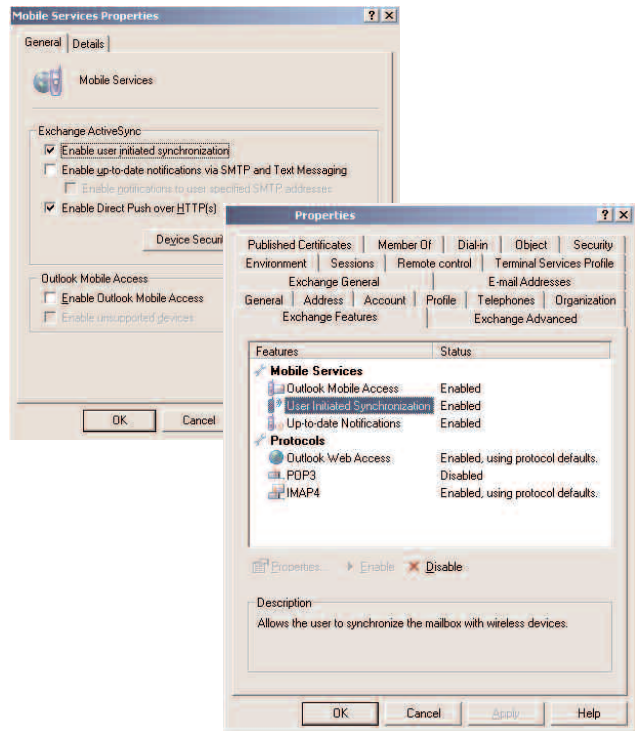
- Settings are applied at the user level.
- These features are enabled by default.
- Please refer to Microsoft's Exchange Server 2003 support for further details: www.microsoft.com/exchange/support

How to access Mobile Services Properties:

1. On the server go to **Start/ Programs/ MS Exchange/ System Manager**.
2. Go to the **exchange server/ Global Settings/ Mobile Services**.
3. Right-click on **Mobile Services** and choose **Properties**.

How to access User Properties:

1. On the server go to **Start/ Programs/ MS Exchange/ Active Directory**.
2. Go to the **domain/ Users** folder.
3. Double-click on the **user**.
4. Go to the **Exchange Features** tab.



Typical Network Configurations

SSL (Secure Socket Layer) connection to Exchange account

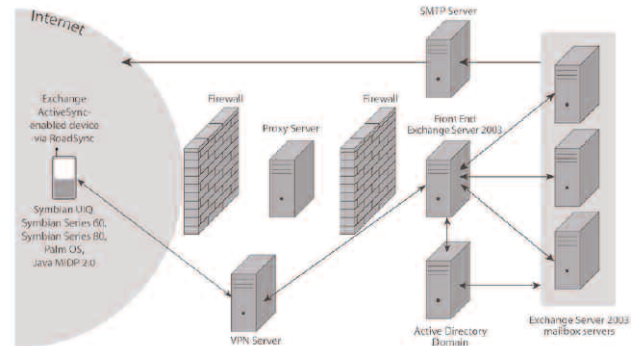
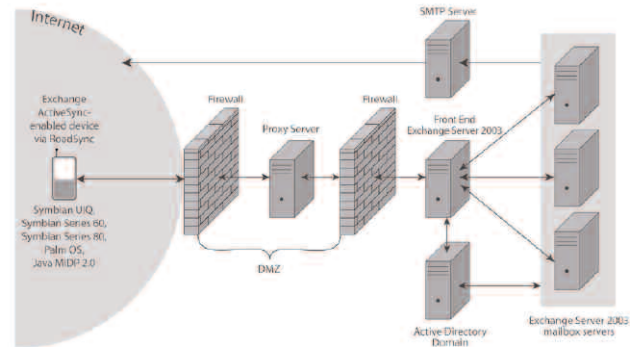
This type of connection secures the mobile client via SSL over port 443. The connection must be passed through the external firewall on this port, however it can be routed through the rest of the backend using any port-forwarding that is currently in place.

In this diagram, several of the servers are not necessary, but recommended for security and connecting to more than one back-end Exchange mailbox.

- The proxy server refers to any intermediate server such as an ISA or load-balancing server.
- The front-end server may not be necessary if there is only one Exchange server in the network.
- The SMTP server may not be necessary if the Exchange server is configured for outgoing mail.

Optional – VPN (Virtual Private Networking) connection to Exchange account

This type of connection secures the mobile client via VPN. Once connected to the VPN server, traffic can be passed over port 443 (SSL) or port 80, depending on the configuration of the internal network. In a VPN configuration, a separate VPN software package is required for the mobile device. The VPN connection must be established before RoadSync begins synchronization.





ROADSYNC[™]
Using **Exchange ActiveSync**[®]

Help

Frequently Asked Questions

FAQ 1 - Does RoadSync require the installation of a server or additional software on the Microsoft Exchange Server?

No. RoadSync is not middleware. RoadSync is a client that installs on the handset and communicates directly with the Microsoft Exchange Server 2003 via the Exchange ActiveSync protocol over HTTP. RoadSync does not require the installation of additional servers or software on the Microsoft Exchange Server.

FAQ 2 - What is ActiveSync?

Microsoft Exchange ActiveSync is a protocol developed by Microsoft and licensed by DataViz. It allows applications to talk directly to MS Exchange Server 2003 without any additional middleware server or desktop redirector.

FAQ 3 - How does RoadSync deal with SSL/Root Certificates?

The device includes a series of Certificate Authority (CA) root certificates issued by various companies. A CA root certificate provides a trusted "third-party" to verify the ownership of SSL certificates issued to companies and websites. When syncing RoadSync via SSL, the root certificate on the server must match a trusted root certificate on the phone in order to synchronize without asking for user permission to make a connection.

Troubleshooting Tips

Tip 1

If you receive an error when trying to verify your settings during the installation:

- Your password within the RoadSync Server Settings is case sensitive. Verify that you have entered it correctly.
- Verify that a data connection is available and that you can access the internet on your phone.
- Verify your settings with your IT staff.

Tip 2

If you are experiencing a problem with the RoadSync application you may find that turning your phone off and then back on, or resetting RoadSync from the Advanced Tab in Settings will resolve the issue. In some cases, you may need to remove and then reinsert the battery.

Tip 3

You will find a list of errors and known causes on the following link.

<http://www.dataviz.com/rsSyncError>

This guide is intended as an overview to begin the troubleshooting process. Should you need more details or have further questions, please contact your IT staff.

About DataViz, Inc

DataViz is an industry leader in developing and marketing Office compatibility and productivity solutions across a variety of platforms including Palm OS, Pocket PC, Symbian OS, Java, Windows and Macintosh. Founded in 1984, DataViz began its business developing file conversion software and has since expanded its expertise to providing solutions that meet the increasing demands of the handheld and mobile markets. With solutions that include their award-winning mobile Office suite, Documents To Go, and wireless Outlook synchronization solution, RoadSync, DataViz is committed to providing premium solutions that mobilize 'Microsoft Office' for today's knowledge workers and provide instant access to critical files and business data. DataViz is a member of Nokia Forum Pro, palmOne Plugged-In Developer's program, Sony Ericsson Core+ developer's program and is a Symbian Platinum Partner and Orange Partner Premium member. In addition, the company has developed strategic partnerships with Microsoft, Palm, Sony, Apple and other industry leaders both domestically and abroad

Further Information and Support

You can find out more about RoadSync on our web site at:

<http://www.dataviz.com/roadsync>

For RoadSync support, please visit:

<http://support.dataviz.com/>

For information on pricing, site licensing and pilot programs, please contact the DataViz Enterprise Sales team at:

+1.203.874.0085