

ROADSYNC™
Using Exchange ActiveSync®



RoadSync Palm OS Manual



DataViz®
Compatibility. Instantly.

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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 & Attachments—all in one 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
- Full support for attachments
- 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

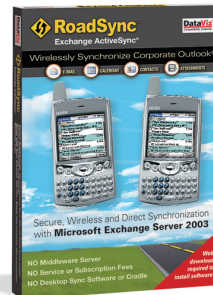
Reduce data usage and increase sync speed by defining custom sync criteria such as date ranges and message size limits. Furthermore, the RoadSync client uses a minimal amount of device memory.

Full Support for Attachments

RoadSync combined with our Documents To Go application provides the most reliable solution when creating, editing and sending critical Office files. All document formatting will be maintained via our revolutionary InTact™ Technology.

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 both SSL (recommended) and non-SSL connections. This can be direct to the Exchange Server, through a front-end server or through a proxy server.

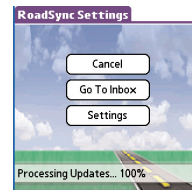
VPN connections are also supported but may require an additional client application on the handset.

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.

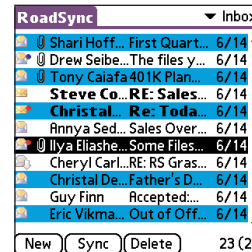
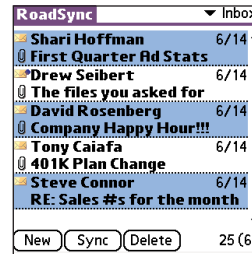


- Easy set-up and installation process (simply enter your user name, password, server, and domain)
- Scheduled Sync Intervals (every 5 minutes, 15 minutes, 1 hour, 4 hours, 12 hours and Manual)
- Date Range Options (1 Day, 3 Days, 1 Week, 2 Weeks and ALL)
- Message Size Limits (Headers only, 1/2 KB, 1 KB, 5 KB and Complete)
- Save handheld memory by storing files and data on expansion cards
- Ability to save a copy of your sent messages
- Support for industry standard secure SSL connections
- Helpful verbose logging 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.

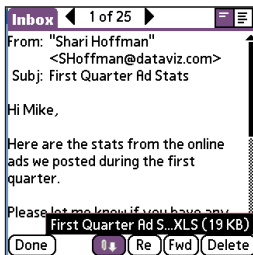
- Compose New, Reply, Reply to All, Forward, Mark as Read, Mark as Unread, Delete or File messages
- Message status icons (high priority, low priority, read/unread status, truncation and attachments)
- Adjust display options to show row color, date and time, one or two line view
- Sort messages by date, sender or subject
- Mail preferences allow use of signatures as well as confirmations dialog and text display options
- Message summary & detailed view
- Contact lookup options for built-in database as well as Beyond Contacts
- Support for auto-launch of hyperlinks, URLs, e-mail addresses and phone numbers
- Convenient file browser view while attaching and sending files
- "Blackberry-like" keyboard shortcuts for performing common operations
- Full 5-way navigation support for Treo 600 & 650



Attachments

RoadSync supports the ability to download and use attachments on demand utilizing programs on the device to open, edit and view the respective file types.

- View attachment type and size before download
- Download attachment over GPRS or WLAN connection
- Insert and send new and updated attachments
- Support for online and offline use



Note: DataViz recommends using Documents To Go to use Microsoft Word and Excel files. Through our new and revolutionary InTact Technology™, you can now create, view edit and send Office attachments while maintaining 100% of the original document formatting. For more information, please visit: www.dataviz.com/documentstogo



Installation and Getting Started Guide

Installing RoadSync:

The first step in installation is getting the RoadSync installer to your device. You can do this via several different methods. Please review the following options and select the one that best suits your needs:



Via Cradle Synchronization using HotSync software:

Put your wireless device in the cradle and double-click the RoadSync.prc file that you downloaded from the internet. This will add the file to your Palm Quick Install Tool. Synchronize your device. Once the RoadSync application is on your device, continue with the steps on the next page to install.



Via Bluetooth

Once you've paired your wireless device with your Bluetooth-equipped PC, you can send the RoadSync.prc application from your PC to the device. On the PC, simply right click on the RoadSync.prc file, select "Send To", and then select "Bluetooth." Select the wireless device you want to send RoadSync to. Once the RoadSync.prc file is on your device, continue with the steps on the next page to install.



Via IR

On your wireless device, verify your IR port is turned ON. Start the IR connection with your PC by aligning your device's IR port with the PC's IR port. Once the connection is active you can beam the RoadSync.prc application from your PC to the wireless device. On the PC, simply right click on the RoadSync.prc file, select "Send To", and then select "A nearby computer". Once the RoadSync.prc file is on your device, continue with the steps on the next page to install.



Via expansion card

Using a card reader, you can copy the RoadSync.prc file to your expansion card. After copying, insert the card into the wireless device, browse to the folder with the installer, and continue with the steps on the next page to install.



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 for the location of the RoadSync.prc install file. Simply download the file and continue with the steps on the next page to install.

Installing RoadSync:(cont.)

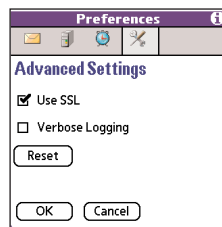
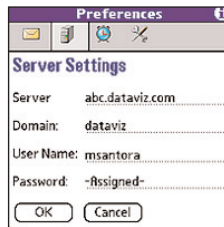
1. Once the **RoadSync.prc** file is on your device (by one of the methods listed on the previous page), open it to begin the installation.
2. The license agreement will appear. To accept the agreement and continue, click **Accept**.

Setting Up RoadSync:

1. Click the **RoadSync Settings icon** to walk through setting up RoadSync.
2. Tap **Settings**.
3. Enter the following information: (Please consult your IT staff if you are uncertain about the settings below)
 - a. **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).
 - b. **Domain** - This is the domain you belong to in your corporate network.
 - c. **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.
 - d. **Password** - This is the password you use to connect to

your Exchange account. It is typically the same as your Windows login password.

4. Once your settings are entered click **OK**.
5. SSL is enabled by default. To disable this feature, please complete the steps below:
 - a. Tap on the wrench/screwdriver icon.
 - b. Uncheck "Use SSL"
6. Tap **OK**.



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 5 on page 20

- 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 “Last Sync” with the current date and time.



RoadSync

You can access **RoadSync** from the Palm launcher. If you tap on RoadSync, the mail inbox is displayed. You can sync from this screen to retrieve new e-mail.



RSSettings

From the launcher, you can also open **RSSettings**. This application will allow you to configure RoadSync, view the sync log, and perform a sync. You can find out more about RSSettings in the next section.

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

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

Adjusting Sync Settings

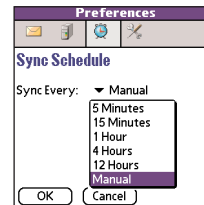
RoadSync is capable of various settings that will enhance your wireless synchronization experience.

Sync Scheduling

You can have RoadSync automatically synchronize at a defined time interval. To take advantage of sync scheduling, please complete these steps on your wireless phone:

- Open **RoadSync Settings**.
- Tap **Settings**.
- Select the **clock icon** at the top of the screen.
- Select a time interval from the list provided.
- Tap **OK**

Scheduled Sync will continue as long as the phone is turned on. It will remain enabled after turning the phone off and then turning it on again. If the phone is in use during a scheduled sync, the sync will be skipped and attempted again at a later time.



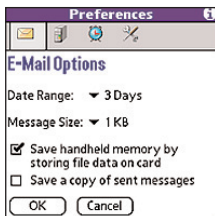
E-mail Filtering Options

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 one (1) kilobyte.

Complete these steps to adjust e-mail filtering:

1. Open **RoadSync settings**.
2. Tap **Settings**.
3. Select the **Envelope icon** at the top of the screen.
4. **Select** a date range from the list provided.
5. **Select** an e-mail size limit from the list provided.
6. Press **Ok**.

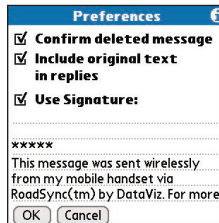
Also on this screen, you can store attachments on an expansion card to save additional space on the handheld. Check “*Save handheld memory by storing file data on card*” to enable this feature. You can also save a copy of sent messages on your handheld by checking the option on this screen. Sent e-mails will appear in your “*Sent Items*” folder in Outlook regardless of whether you have this option checked or not.



E-mail Reply Options

You can also always reply with the sender's text intact. RoadSync also allows you to attach a signature to all outgoing e-mails. To enable these features, please complete the following steps:

1. Open **RoadSync**.
2. Select the drop down menu & choose **options**.
3. Select **Mail Preferences**.
4. Check **Include original text in replies**
5. Check **Use signature**.
6. Enter a signature in the **Signature** field.
7. Press **Ok**.





ROADSYNC™
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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

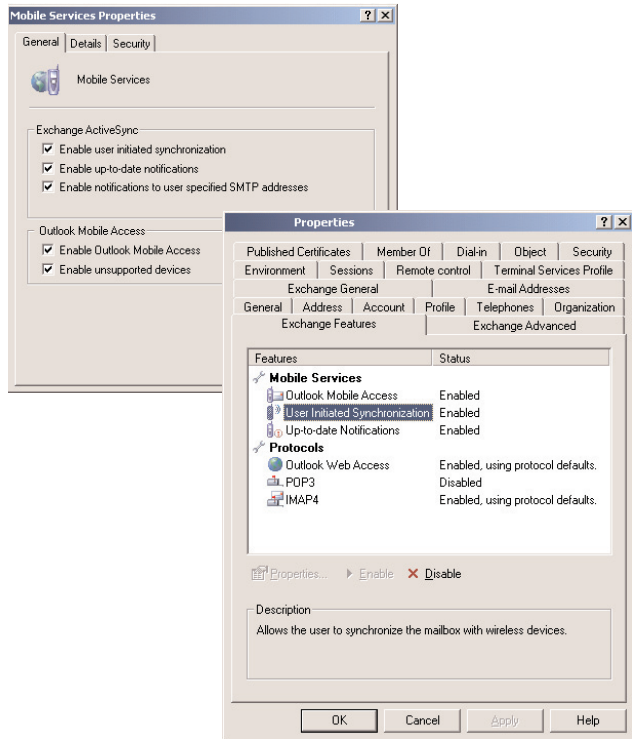
How to access Mobile Services Properties:

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) Users

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

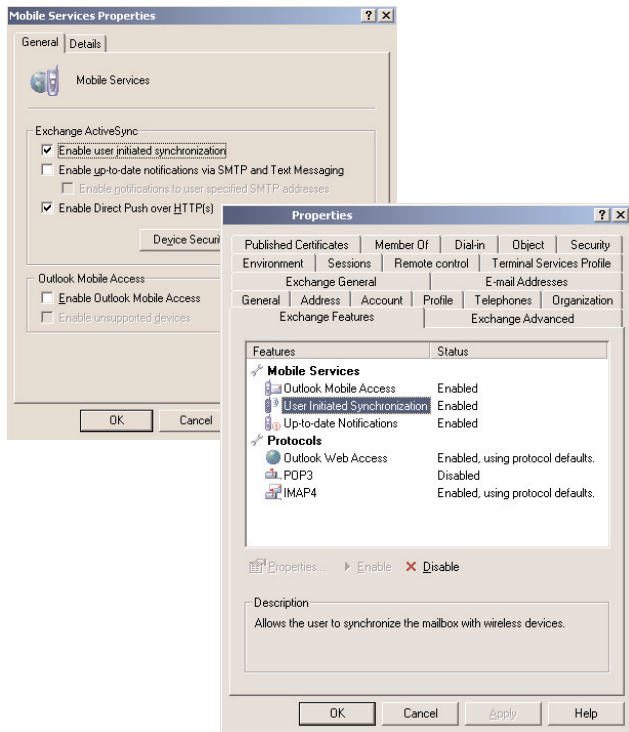
- Settings are applied at the user level.
- These features are enabled by default.
- Please refer to Microsoft's Exchange Server 2003 support for further details: www.microsoft.com/exchange/support

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

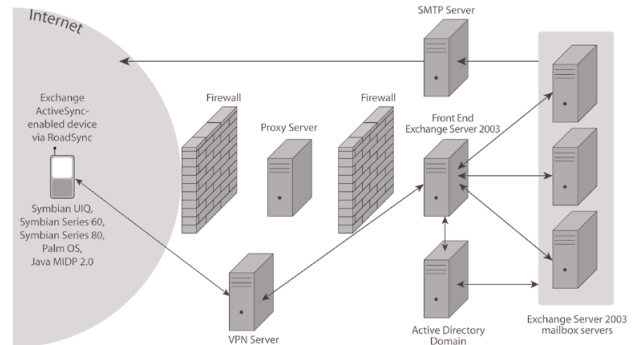
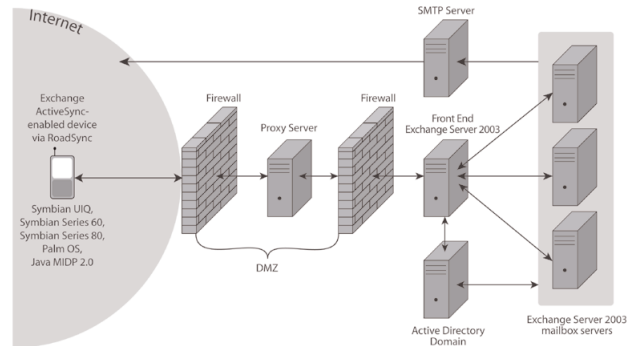
This type of connection secures the mobile client via SSL over port 443. The connection must be passed through the external firewall on this port, however it can be routed through the rest of the backend using any port-forwarding that is currently in place.

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™
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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. When using a root certificate on the server that does not exist in the list of trusted root certificates on the phone, the certificate should be installed on the phone manually.

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 Settings Tab in Settings will resolve the issue. In some cases, you may need to remove and then reinsert the battery.

Tip 3

If the phone is in use during a scheduled sync, the sync will be skipped and attempted again at a later time. RoadSync displays: "Lost connection" try the sync again or wait a few minutes.

Tip 4

How to enable RoadSync logging:

1. Open **RoadSync Settings**.
2. Tap **Settings**.
3. Tap on the **wrench/screwdriver icon**.
4. **Check** Verbose Logging.
5. Press **OK**.

Tip 5

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.

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

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.