

**ROADSYNC™**  
Using Exchange ActiveSync®



# Windows Mobile 2003 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 .....	10
Setting Up RoadSync .....	12
Adjusting Sync Settings.....	14

### RoadSync Exchange Server 2003 Administrator's Guide

Enabling Mobile Access for Exchange Server 2003 (SP2) Users With Direct Push .....	19
Typical Network Configurations.....	20
IT Policy .....	21
Remote Wipe .....	21

### Help

Frequently Asked Questions .....	25
Troubleshooting Tips .....	27
Contact Information and Support .....	28



General Product Information

## What is RoadSync™? (Exchange ActiveSync®)

Based on Exchange ActiveSync technology licensed directly from Microsoft, RoadSync provides secure, wireless and direct push synchronization of corporate e-mail, calendar, contacts & 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.

Similar to the MSFP for Windows Mobile 5.0, RoadSync now supports select mobility enhancements provided by Microsoft Exchange Server 2003 SP2 including:

- Direct Push
- Remote Wipe
- Global Address List Lookup
- IT Policy Enforcement

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 & Management 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. In addition, IT managers can enforce device security policies such as requiring a password or remotely wiping the device in the event it is lost or stolen.

### **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 “Designed for Windows Mobile™” certified 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, Calendar & Contacts**

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.

### **Now with Direct PUSH\***

With new Direct Push technology, your e-mail, calendar and contacts are 100% current. No need to manually synchronize your data or even schedule it to sync for you. It's the most convenient way to stay up-to-date & informed when mobile.

### **Full Support for Attachments**

Whether you want to recalculate your latest sales spreadsheet, edit a press release or view a fun media clip, RoadSync supports native attachments of all types. Simply download the files on-demand and then open, view and edit them in the corresponding mobile application.

### **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.



\* Direct Push requires Microsoft Exchange Server 2003 SP2. For more information please see the *Frequently Asked Questions* section at the end of this manual.

## 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 SP2
- 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.

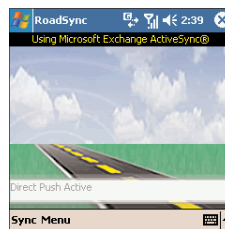
VPN connections are also supported but may require an additional client application on the handset.

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

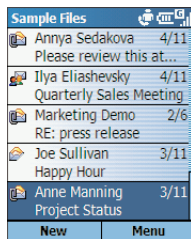
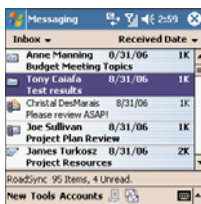


- Configure application with user name, password and server information
- Enable Push (requires Exchange Server 2003 SP2)
- Set scheduled sync intervals or manually initiate a sync
- Define e-mail date ranges, message sizes and signature settings
- Define calendar date range settings
- Connect securely via SSL (over port 443)
- Advanced logging tools for troubleshooting information

## 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.

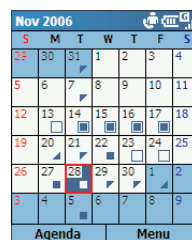
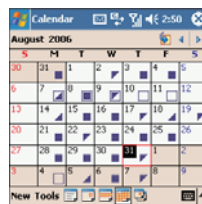
- Multiple inbox viewing options
- Sort by date, size, priority, sender, subject, or message type
- Read, reply, reply to all, forward, smart-forward, create and delete messages
- Cut, copy, paste, select all and undo\*
- Save sent items and drafts
- Accept & decline meeting notices
- Show complete message details
- Look-up and add recipients from the Contacts application or online Global Address List (GAL)
- Automatically assign signatures to outgoing messages
- Download the remainder of large e-mails
- Support for online and offline use



## Calendar

RoadSync will synchronize your Outlook Calendar data with the phone's built-in Calendar application; therefore, the features and functionality are provided by the device.

- Multiple calendar viewing options and zoom levels
- Synchronize, update and create new calendar appointments and events
- Accept and decline meeting requests (through the RoadSync messaging application)
- View and set description, location, date, time and meeting notes
- Set alarms, flags and recurrences
- Set a date range for syncing calendar items (through the main RoadSync application)
- Support for online and offline use

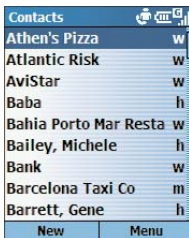
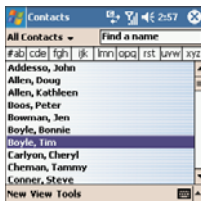


\*Feature not available on Windows Mobile 2003 Smartphones.

## Contacts

RoadSync will synchronize your Outlook Contact data with the phone's built-in Contact application; therefore, the features and functionality are provided by the device.

- Multiple contact viewing options
- Synchronize, update and add new contact and notes
- Support for multiple e-mail addresses
- Support for multiple home, business and mobile phone #'s
- Support for multiple home, business and mobile fax #'s
- Support for multiple home and business mailing addresses
- Support for speed dial and caller-id
- Multiple search and look-up options
- Support for online and offline use
- Support for Global Address List (GAL) when composing new e-mail messages



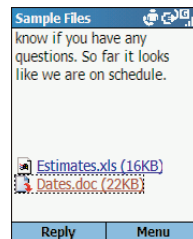
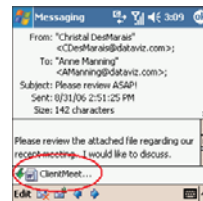
## Attachments

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.

- Download attachment over GPRS or WLAN connection
- Insert and send new and updated attachments
- Download only selected file or download all at once
- Support for online and offline use

**Note:** Global Address List Lookup is a new mobility enhancement of Microsoft Exchange Server 2003 SP2.

**Note:** Windows Mobile 2003 Smartphone users will need to use the File Explorer application in order to browse & send attachments. For more information please review the FAQ at the end of this manual.







## 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 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.CAB install file. Simply download the file and 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.CAB application from your PC to the device. On the PC, simply right click on the RoadSync.CAB file, select "Send To", and then select "Bluetooth." Select the wireless device you want to send RoadSync to. Once the RoadSync.CAB 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.CAB application from your PC to the wireless device. On the PC, simply right click on the RoadSync.CAB file, select "Send To", and then select "A nearby computer". Once the RoadSync.CAB 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.CAB 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.

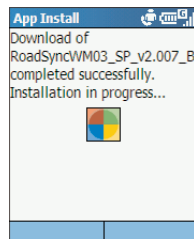
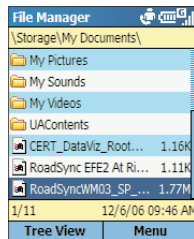
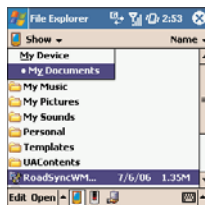


### Via RoadSync.exe file

If the RoadSync.exe file is available to you, you can use that to install the RoadSync.CAB to your device. Once the RoadSync.exe file is on your computer, simply double click on it to queue up the RoadSync.CAB file to ActiveSync on your computer. The next time your device is connected to your computer the RoadSync.CAB will be transferred to your device via ActiveSync.

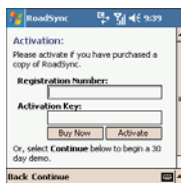
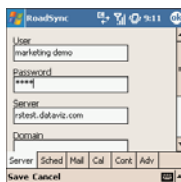
NOTE: ActiveSync must be installed on your desktop for this option to work.

1. Once the **RoadSync.CAB** file is on your device (by one of the methods listed on the previous page), open it to begin the installation.
2. You will see the installation proceed. If you wish to cancel the installation, select the **Cancel** button.
3. Once the installation is complete, you are ready to use RoadSync.



## Setting Up RoadSync:

1. Click the **RoadSync icon** in Programs to walk through setting up RoadSync.
2. Click **Next**.
3. The License Agreement will appear. To accept the agreement and continue. Click **Accept**.
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. **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).
  - d. **Domain** - This is the domain you belong to in your corporate network.
  - e. **SSL** is enabled by default. To disable this feature, uncheck the box.
5. Once your settings are entered click **Verify Settings** to ensure that you can successfully connect to the Exchange Server.
6. Enter your Registration Number and Activation Key, or you may click Continue to install as a 30-day demo.



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

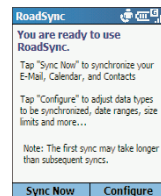
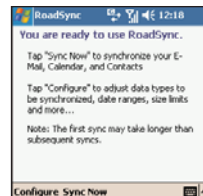
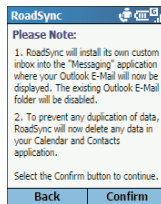
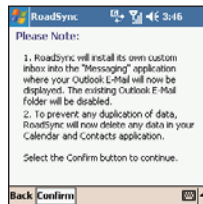
- Verify your settings with your IT staff.
- Your password may be case sensitive.
- A data connection is available and you can access the internet on your phone.
- Please check Tip 5 on page 27

- The next screen informs you that RoadSync will install its own inbox folder and disable the Outlook E-mail folder. In addition, to prevent duplication, Calendar and Contacts data will be deleted. Click **Confirm**.
- You are now ready to use RoadSync. Tap **Sync Now** to sync immediately. Tap **Configure** to adjust preferences.

When your Sync is underway, 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:** Your first sync will take longer than subsequent syncs.

**Note:** To change additional synchronization settings, please refer to page14 'Adjusting Sync Setting'



## Adjusting Sync Settings

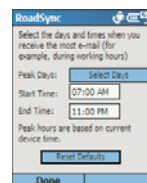
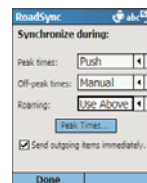
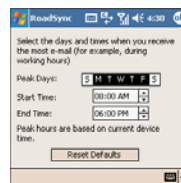
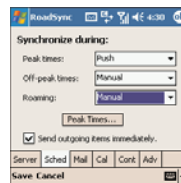
RoadSync is capable of various settings that will enhance your wireless synchronization experience.

### Push & Sync Scheduling

You can have RoadSync automatically push information to and from your phone or synchronize at a defined time interval. By default, push is enabled. To take advantage of push or sync scheduling, please complete these steps on your wireless phone:

1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select the **Sched** tab for Sync Schedule options.
5. Set your **Peak** and **Off-Peak** schedule types.
  - a. Push
  - b. Scheduled Sync
  - c. Manual
6. If you are using **Scheduled Sync**, select a time interval and data from the list provided.
7. Define your **peak days, starting and ending** times.
8. Set your **Roaming** scheduled type.
  - a. Manual
  - b. Use Peak and Off Peak schedule
9. Select **Save** to save and exit settings.

Push and 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 push or scheduled sync, the sync will be skipped and attempted again at a later time.



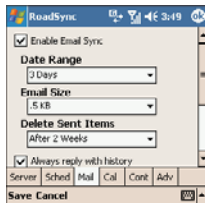
**Note:** Push will not be enabled by default if you are not using Exchange Server 2003 SP2. For further information about Exchange Service Pack 2 please refer to the FAQ section at the end of this manual.

**Note:** The "Roaming" option is available in an effort to prevent unexpected or excessive data charges. The roaming information is provided by system data on the phone but may not always be an accurate reflection of your service plan or operator agreement.

## E-mail Filtering Options

You can adjust RoadSync to filter e-mail you receive on your wireless device. Adjustments can be made to date range, e-mail size, storage of sent items, reply with history, and signatures. By default, e-mail is limited to the past three (3) days, the size of the e-mail to be downloaded is set to .5 kilobyte, and storage of sent items is set to 2 weeks. Complete these steps to adjust e-mail filtering:

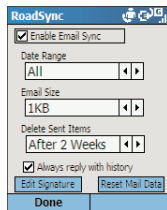
1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select the **Mail** tab for E-mail options.
5. Verify **Enable Email Sync** is checked.
6. **Select** a date range from the list provided.
7. **Select** an e-mail size limit from the list provided.
8. **Select** a sent items limit from the list provided.
9. Select **Save** to save and exit settings.



## E-mail Reply Options

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

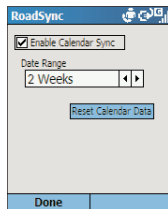
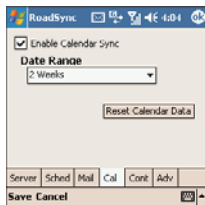
1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select **Mail**.
5. Select **Always reply with history**.
6. Select **Edit Signature** button to edit your signature.
7. Select **Save** to save and exit settings.



## Calendar Syncing

RoadSync allows you to synchronize your Outlook Exchange calendar with your wireless device. This feature allows for creating, reviewing and modifying calendar events on your device.

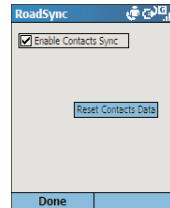
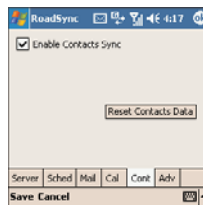
1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select **Cal** tab for calendar options.
5. Verify **Enable Calendar Sync** is checked.
6. **Select** a date range from the list provided.
7. Select **Save** to save and exit settings.



## Contacts Syncing

RoadSync allows you to synchronize your Outlook Exchange contacts with your wireless device. This feature allows for creating, reviewing and modifying contacts on your device.

1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select **Cont** tab for contact options.
5. Verify **Enable Contacts Sync** is checked.
6. Select **Save** to save and exit settings.

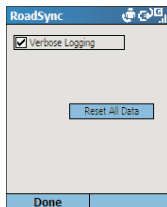
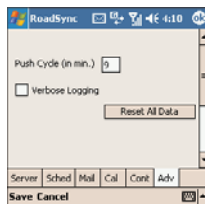




### Advanced Settings

This tab provides settings for troubleshooting the RoadSync application. This is where verbose logging can be turned on, push cycle can be adjusted, and an option for resetting all RoadSync data can be found.

1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select **Adv** tab for advanced options.
5. Choose the troubleshooting setting and make any necessary adjustments.
6. Select **Save** to save and exit settings.





# RoadSync Exchange Server 2003 Administrator's Guide

## Enabling Mobile Access for Exchange Server 2003 (SP2) Users With Direct Push

Please verify the settings in the diagrams to ensure Exchange Server 2003 SP2 is configured for mobile access and direct push via RoadSync.

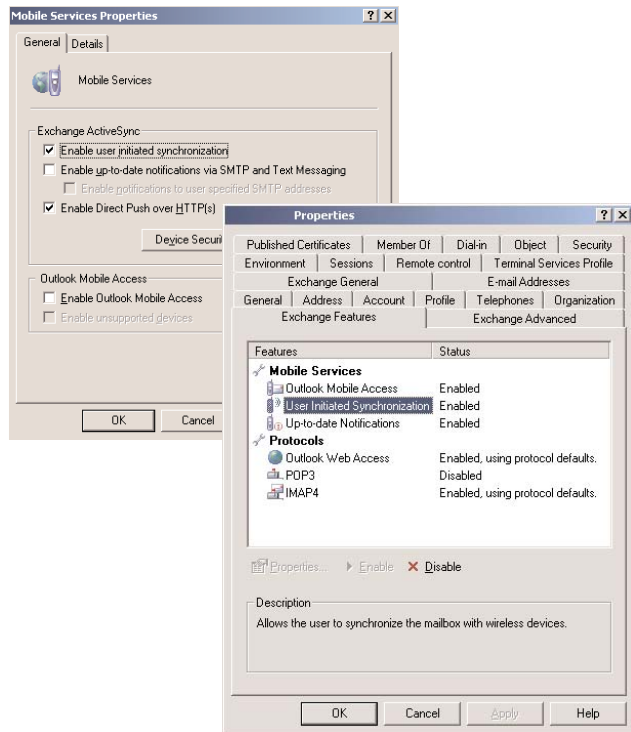
- Settings are applied at the user level.
- These features are enabled by default.
- Please refer to Microsoft's Exchange Server 2003 support for further details: [www.microsoft.com/exchange/support](http://www.microsoft.com/exchange/support)

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.



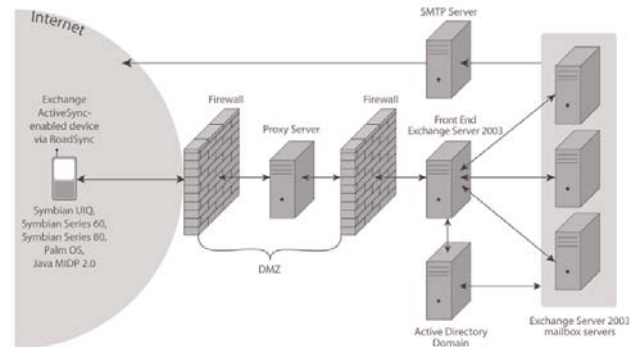
## Typical Network Configurations

### 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.

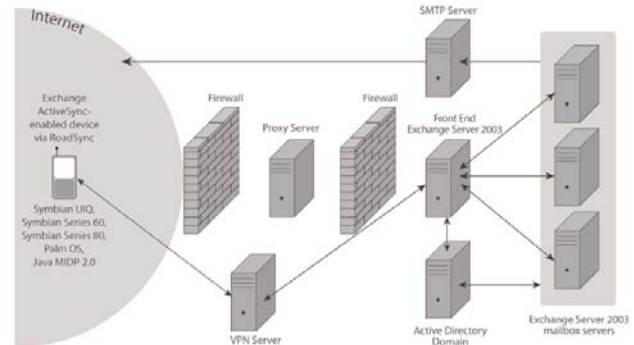
In this diagram, several of the servers are not necessary, but recommended for security and connecting to more than one back-end Exchange mailbox.

- 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.



## IT Policy Support

Exchange Server 2003 Service Pack 2 gives IT administrators greater control over device security. This is often referred to as IT Policy Support. IT administrators now have the ability to set policies that require a **password** to be entered on a device in order to unlock it. In addition, a policy can be set that will initiate a **local wipe** of a device if an incorrect password is attempted after a certain number of tries. An IT administrator can also send a **remote wipe** command to a device to hard reset it in the case a device is stolen or lost. (See next section for more details about remote wipe capabilities). Each of these device security policies help ensure corporate data or applications are not compromised when devices are lost or stolen. RoadSync supports all the device security features of Exchange Server 2003 (SP2).

To utilize the device security features of Exchange Server 2003, please follow the steps below:

1. Make sure Exchange Server 2003 SP2 is installed.
2. Go to **Global Settings**, right click on **Mobile Services** and choose **Properties**. In the **General** tab, choose **Device Security**.
3. Set the appropriate **Device Security Settings**. On the next sync with RoadSync, those security settings will be enforced on the mobile device.
4. To set **Exceptions**, tap the Exceptions button and select users that will not have the policies enforced on their devices.

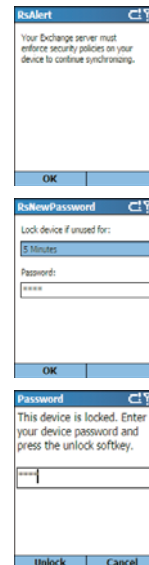


On the device, the users experience will be as follows:

1. The user must accept the security policies before synchronization can continue.
2. If a password is not already in place on the device, then the user will be required to enter a new password.
3. The device will need to be reset in order to accept the password and complete the policy enforcement.
4. Upon the next power on of the device, the user is prompted to enter their password.
5. Depending on the additional policies set, the user will see additional prompts or warnings.

**Note:** Some device security settings are implemented differently on Pocket PC and Smartphone platforms.

- Enforce Password on Power-On [PPC & SP]
- Set Minimum Password Length [PPC & SP]
- Require both Numbers and Letters [PPC only]
- Set Inactivity Time [PPC & SP]
- Set Maximum Retries before Local Wipe of Device and All Data [PPC only]



## Remote Wipe

Remote Wipe is an Exchange Server 2003 Service Pack 2 feature that allows IT administrators to remotely hard reset mobile devices that may have been stolen or lost. To utilize this feature please follow the steps below:

**Note:** Details may vary due to network configuration. Please consult the ReadMe files provided with the installer download from Microsoft.

1. Make sure Exchange Server SP2 is installed.
2. Download and Install “**Microsoft Exchange Server ActiveSync Web Administration Tool**” on your exchange server. <http://www.microsoft.com/downloads>
3. Once everything is installed and setup, go to the website:
  - a. From server - <https://localhost/mobileadmin>
  - b. From remote machine - <https://exchange.mycompany.com/mobileadmin>
4. Enter **username** and **password**.
5. Choose **Remote Wipe**.
6. Enter the **mailbox name** you would like to initiate wipe.
7. The devices that this mailbox has synced to will be listed.
8. Match the Device ID with the Type “RoadSyncClient” that you would like to wipe.
9. Choose **Wipe** by clicking the link for that device.
10. The Status for the device will change to “Wipe Initiated”.

11. The wipe will occur the next time a sync takes place on the device. This depends on how RoadSync is setup:
  - a. Push enabled: as long as the data connection is available on the device this will occur immediately.
  - b. Scheduled Sync Time Interval: the next interval when a data connection is available.
  - c. Scheduled Sync Manual: the wipe will only occur when the sync is forced manually on the device.
12. Once the device is wiped it will be confirmed on the screen.

**Note:** When installing Microsoft Exchange Server ActiveSync Web Administration Tool please follow requirements on Microsoft's website. For further information about Exchange Service Pack 2 please refer to the FAQ section at the end of this manual.



**Note:** A full hard reset will be enforced on Windows Mobile 2003 Pocket PC devices. On Smartphones, all Exchange data will be removed.



**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 besides Service Pack 2 (SP2).

### **FAQ 2 - Where can I find more information about Microsoft Exchange Server 2003 SP2?**

For more information about Microsoft Exchange Server 2003 SP2, please visit [www.dataviz.com/microsoftSP2](http://www.dataviz.com/microsoftSP2)

### **FAQ 3 - Is the RoadSync for Windows Mobile 2003, simply a firmware update like the MSFP?**

Although RoadSync for Windows Mobile 2003 provides similar functionality as the Messaging Security and Feature Pack (MSFP) provided for Windows Mobile 5.0 devices, it is much more than a patch. In fact, RoadSync is a full application that completely replaces ActiveSync and provides all of the wireless synchronization capabilities plus support for the SP2 features.

### **FAQ 4 - What's new in the latest version of RoadSync for Windows Mobile 2003?**

The latest update to RoadSync now adds support for both Windows Mobile Pocket PCs and Smartphones. It also adds support for subfolders in addition to minor bug fixes and optimizations. For more information and to download, please visit:

[www.dataviz.com/rsWM03new](http://www.dataviz.com/rsWM03new)

### **FAQ 5 - Are there any things to consider before updating to the latest version?**

DataViz always recommends upgrading to the latest versions of our software and the latest update to Roadsync is straightforward; however, previous versions will need to be uninstalled before installing the update. As a result, the upgrade may take a few extra moments to install and additional data charges may be incurred during the initial sync. For more information, please visit:

[www.dataviz.com/rsWM03update](http://www.dataviz.com/rsWM03update)

### **FAQ 6 - How do I work with attachments?**

There are a few differences when it comes to sending and receiving e-mail attachments on Windows Mobile 2003.

On Pocket PC devices, you simply mark the item for download and then once the icon changes, you tap and hold to open it in the respective program. To send attachments, you can create or reply to a message and then select the "Add Attachment..." from the Tools menu. Alternatively, you can also locate the file using the File Explorer and then select "Send via e-mail" from the contextual menu. (cont...)

**FAQ 6 - cont.**

On Smartphone devices, you simply mark the item for download and then once the icon changes, tap and open it in the respective program. In order to send attachments, you must locate the file from the File Explorer or the respective application and then select "Send" from the menu option. There is no "Add Attachment" menu item listed within the RoadSync mailbox. For more information, please visit: [www.dataviz.com/rsWM03attach](http://www.dataviz.com/rsWM03attach)

**FAQ 7 - What is Direct Push and Remote Wipe?**

Direct Push and Remote Wipe are part of Service Pack 2 for Exchange Server 2003, which has been announced by Microsoft and is now available. To download Service Pack 2 for Exchange Server 2003 please visit: [www.dataviz.com/microsoftSP2](http://www.dataviz.com/microsoftSP2)

- RoadSync utilizes direct Push technology based on Microsoft's ActiveSync protocol, allowing you to keep all of your Outlook information up-to-date while on the go. Direct Push technology allows RoadSync to instantly receive updates from your Outlook account and also send back updates in real time.
- RoadSync supports Remote Wipe which allows IT administrators to remotely hard reset and/or wipe all Exchange data from mobile devices that may have been stolen or lost. Once complete, the administrator receives an acknowledgement that the mobile devices information has successfully been wiped. The Remote Wipe feature is available through a web interface available to Exchange Administrators and any other users that the Administrator delegates this ability to.

**FAQ 8 - 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. It is not recommended to enable Direct Push synchronization without having a matching set of root certificates on the server and phone. 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.

**FAQ 9 - Does RoadSync support Wi-Fi?**

Yes. Users can toggle between GPRS and Wi-Fi (WLAN) network connections by selecting the connection in the Settings/Connection/Connections on the device.

## 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

If the phone is in use during a push or 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:

If you are setting up RoadSync for the first time and encounter an error:

1. Enter your settings in the wizard.
2. If the synchronization fails the log will be displayed.

If RoadSync has been working and you now encounter an error:

1. Open RoadSync.
2. Select **Menu**.
3. Choose **Settings**.
4. Select **Adv** tab for advanced options.
5. **Enable Verbose Logging**.
6. Select **Save** to save and exit settings.

### 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.

## 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

For information on pricing, site licensing and pilot programs, please contact the DataViz Enterprise Sales team at: +1.203.874.0085

## 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/>

**DataViz®**  
*Compatibility. Instantly.*

DataViz, Inc.  
Merritt Corporate Woods  
612 Wheelers Farms Rd  
Milford, CT 06461 USA  
+1.203.874.0085  
[www.dataviz.com](http://www.dataviz.com)

12/06 1137