Business. Anywhere

**Mobile Office for
MS Exchange**
<admin documentation/>

**Administration
Guide**

linked**with**
The m-knowledge company

Mobile Office for MS Exchange

Administration Guide

Release 2.5

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linkedwith
The m-knowledge company

Contents

Preface

Conventions

This manual uses the following documentation conventions:

Convention	Example	Explanation
Bold	**http://localhost:7700/ index.rsml startup.cmd**	Identifies file names, utilities, processes and URLs
Italics	*parameter1*	Identifies a variable in text; replace this with specific value.
Courier	`com.linkedwith`	The names of classes or methods; inline code
XML code	<customer id="123"/>	The XML elements and attributes; XPath statements
Square brackets	[ ]	Indicates optional items in a syntax line

The file **index.rsml** contains the <xgate:foreach> ruleset.
The object of type `java.lang.Exception`.
Open the URL **http://localhost:7700/** with your web browser.
Currently the following formats are supported:
- HTML
- WML

> Note: If you are using the note format template, you can also use the CR for an additional LF in this text.

> Next line

1

Introduction

The Admintool for the Linkedwith Mobile Office for Microsoft Exchange™ (MOE) is designed to help administrators to integrate the mobile office application into an existing Microsoft Exchange™ environment.

In order for MOE to work, some basic configuration is necessary which can easily be carried out using the Admintool:

1. The desired users have to be created with the *User manager*
2. All necessary paths have to be set using the *Notification manager*

Other, non-vital configuration options for customizing MOE to your needs include the following:

1. Public bookmark categories and bookmarks can be created and maintained by the *Bookmark Manager*
2. Tasks can be managed using the *Schedule Manager*
3. User specific event scripts can be generated with the help of the *Event manager*

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Installation

System Requirements

Hardware

The hardware needed to run MOE is dictated by the Linkedwith Server application. A system that meets the requirements of the Linkedwith Server is ready to host the MOE application as well, provided it has a few megabytes of additional unused disk space.

Software

The software requirements for MOE are:

- Microsoft Exchange™ Server 5.5 with SP4 or Microsoft Exchange™ Server 2000
- Microsoft Internet Information Server 4.0 or higher
- Microsoft Internet Explorer 5.5 or higher
- Linkedwith XML Server

Typical Configuration / Environment

Before you start, the Microsoft Exchange™ Event Handlers and the Microsoft Exchange™ ACL Manager have to be installed.

Please refer to the appropriate product documentation for further information.

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Assigning Permissions to Contacts, Inboxes, Journals, Notes, and Tasks

In order to be able to carry out the following actions, you must have administrator rights for the Microsoft Exchange™ Server.

Microsoft Exchange™ Server 5.5

1. Start the Microsoft Exchange Administrator
   (**Start → Programs → Microsoft Exchange → Microsoft Exchange Administrator)**
2. Select the user you would like to allow sharing.
3. Select **Properties → Permissions → Add**
   If Permissions menu is not available, go to the Tools Menu → options. Select the 'Permissions' property page, activate 'Show permissions page for all objects,' and activate 'Display rights for roles on permission page'.
4. Add the user and click **OK**

Microsoft Exchange™ Server 2000

1. Start the program 'Active Directory Users and Computer'
   (**Start → Programs → Microsoft Exchange → Active Directory Users and Computers)**
2. Select 'Advanced Features' **(View → Advanced features)**
3. Select the user you would like to allow sharing and show properties.
4. Choose **Exchange Advanced → Mailbox Rights → Add**
5. Add the user to whom you would like to give sharing rights
6. Set the permissions

To access shared folders, a user must have the following permissions:

- **Delete Mailbox Storage**
- **Read Permissions**
- **Change Permissions**
- **Take Ownership**
- **Full Mailbox access**

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Managers

All managers are accessed via the Admin main page of the desired application as shown in screenshot 1 for MOE.
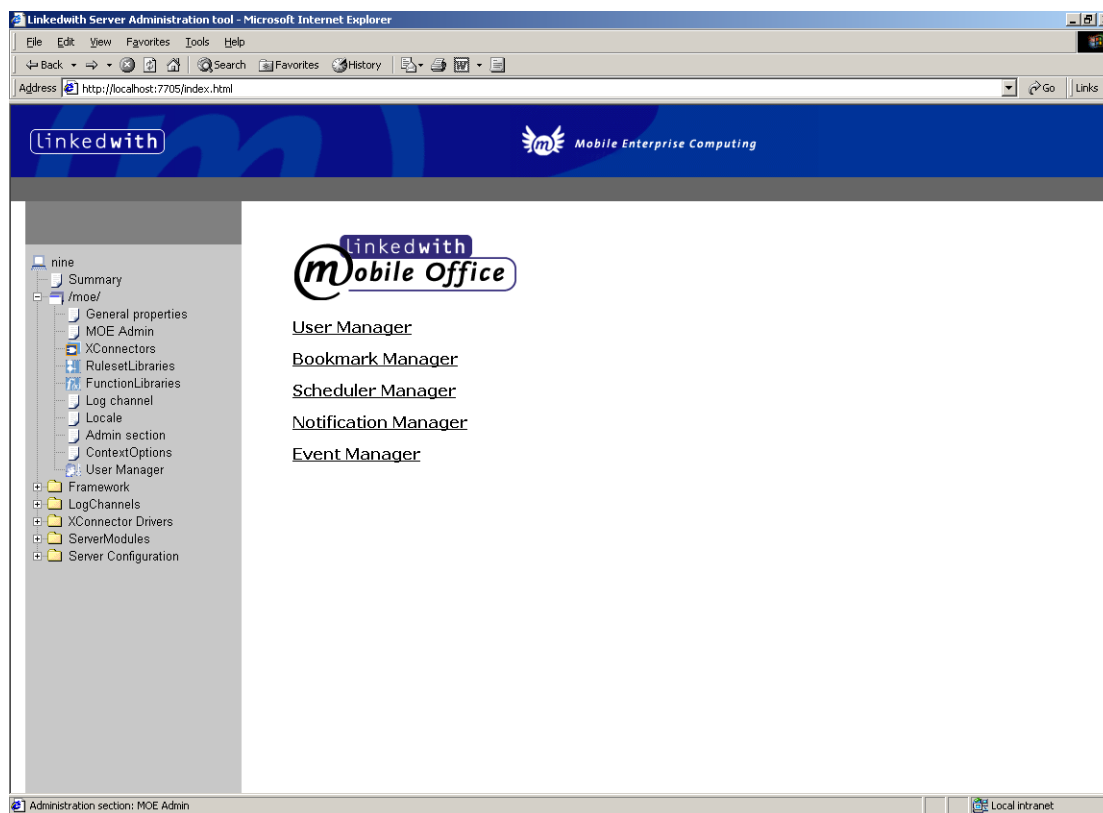
screenshot 1   Main page of the admin section of the MOE application

The User Manager

The *User Manager* is the most important part of the MOE Admintool. It is used to create and maintain all user specific information (screenshot 2). It provides functions to add, update (edit), and delete users.

screenshot 2   A list of all users currently configured in the *User Manager* of the MOE
                 application

Adding Users

New users may be added by simply following the **Add User** link on the *User Manager* page (screenshot 2) and
supplying a few items of information including:

1.   **User Name** - the name of a valid Microsoft Exchange™ user
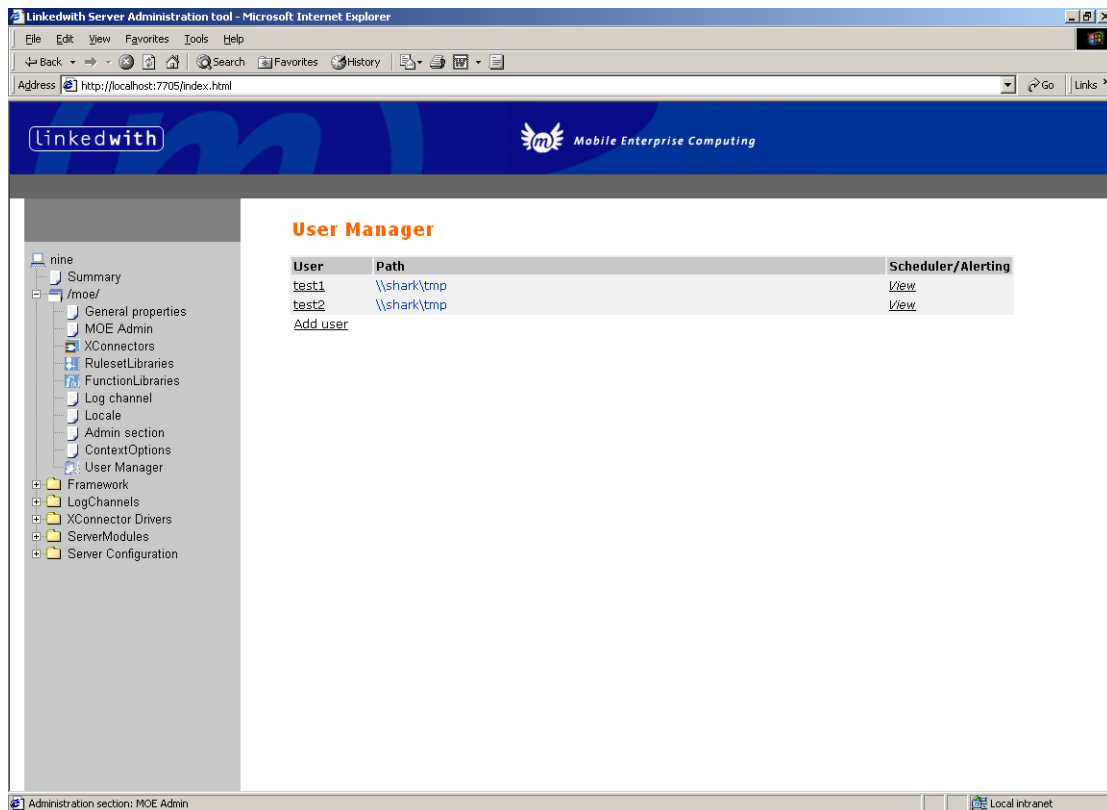2.   **Home Path** - the path to the user's private documents (home directory)
3.   **Mobile Phone Number** - the user's mobile phone number to which the sms notifications are to be sent

In addition, the notification service may be configured to activate notifications via sms in case of:

1.   New incoming e-mails
2.   Due or updated appointments from the user's calendar
3.   Tasks for the day

The following options are supported by the notification service:

1.   **New Message Notifications** *(yes|no)*
     Turns notifications about incoming e-mails on or off
     Period *(time period)*
     The minimum period of time between notifications about new e-mails
     Detailed Notifications *(yes|no)*
     Yes: a notification will be sent for each new incoming e-mail
     No: only one notification will be sent for all new e-mails since the last notification

2. **Appointment Notifications** *(yes|no)*
   Turns notification on or off for existing appointments, new appointment invitations, and modified appointments
   Period *(time period)*
   The minimum period of time between notifications concerning appointments
   Date/Appointment Notifications *(yes|no)*
   Triggers notifications to remind you of dates and appointments when set to *Yes*

3. **Tasks Notification** *(yes|no)*
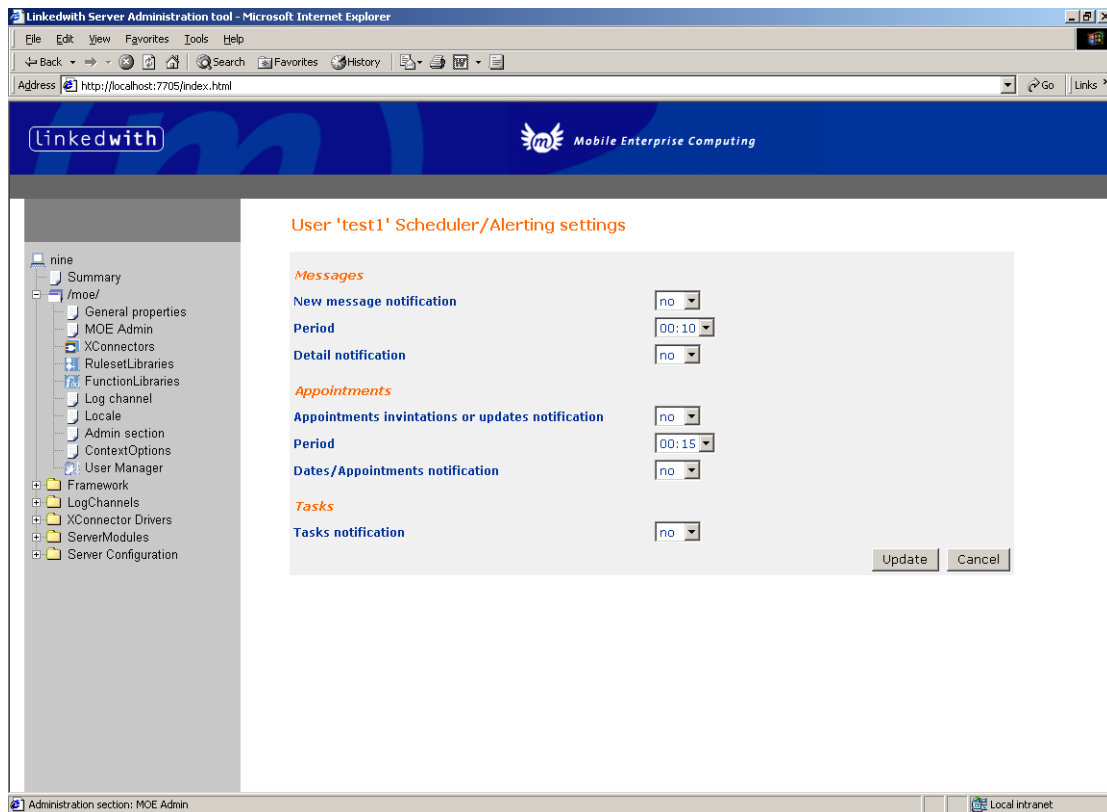   If set to *yes*, the user will be notified of all tasks for the current day at 8:00 each morning

When changing the notification service configuration, you will be asked to supply the Microsoft Exchange™ administrator's user name and password. Therefore, a valid administrator account has to be configured for the underlying installation of Microsoft Exchange™ before you can use the Admintool to change the notification service set-up.

screenshot 3 shows the user details input form for adding/modifying user data and for configuring the notification service.
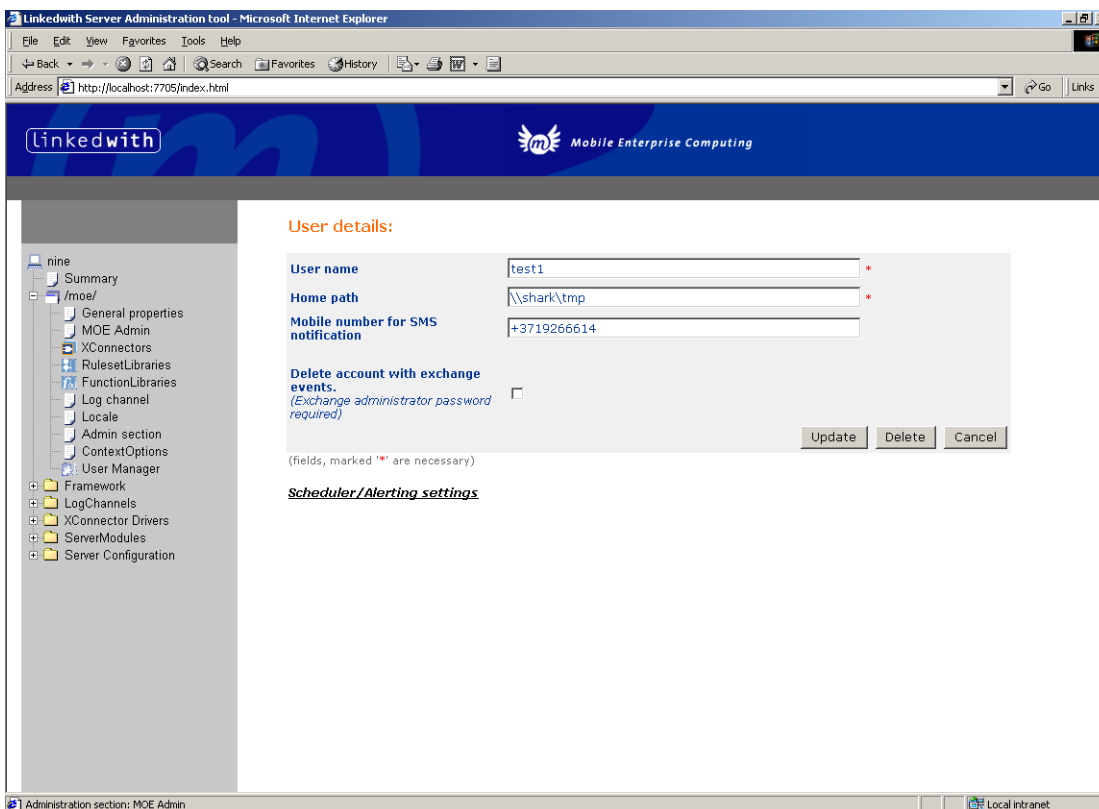
screenshot 3   The User Details input form where the user information and the notification
               service can be configured

Changing User Settings

Clicking the name of the user whose settings are to be updated on the *User Manager* page (screenshot 2) takes you to the User Details page (screenshot 3). This is the same page as the one for adding new users. The only difference is that, when changing user settings, the User Details input form will already contain the current user settings.

For a description of the configuration option, please refer to the Adding Users section.

When changing the notification service configuration you will be asked to supply the Microsoft Exchange™ administrator's user name and password. Therefore, a valid administrator account has to be configured for the underlying installation of Microsoft Exchange™ before you can use the Admintool to change the notification service set-up.

Deleting Users

To delete a user, go to the *User Manager* page (screenshot 2). Select the checkbox next to the name of the user to be deleted and press the "Delete Checked" button.

When deleting a user, the system will attempt to delete the notification service of that user as well. Hence, you will be asked to supply the Microsoft Exchange™ administrator's user name and password after pressing the "Delete Checked" button. Therefore, a valid administrator account has to be configured for the underlying installation of Microsoft Exchange™ before you can delete users.

The Bookmark Manager

The *Bookmark Manager* (screenshot 4) is accessed via the **Bookmark Manger** link on the Admin main page (screenshot 1). It is used to create and maintain public bookmark categories and bookmarks which will then be available to all users through the bookmarks module of MOE.
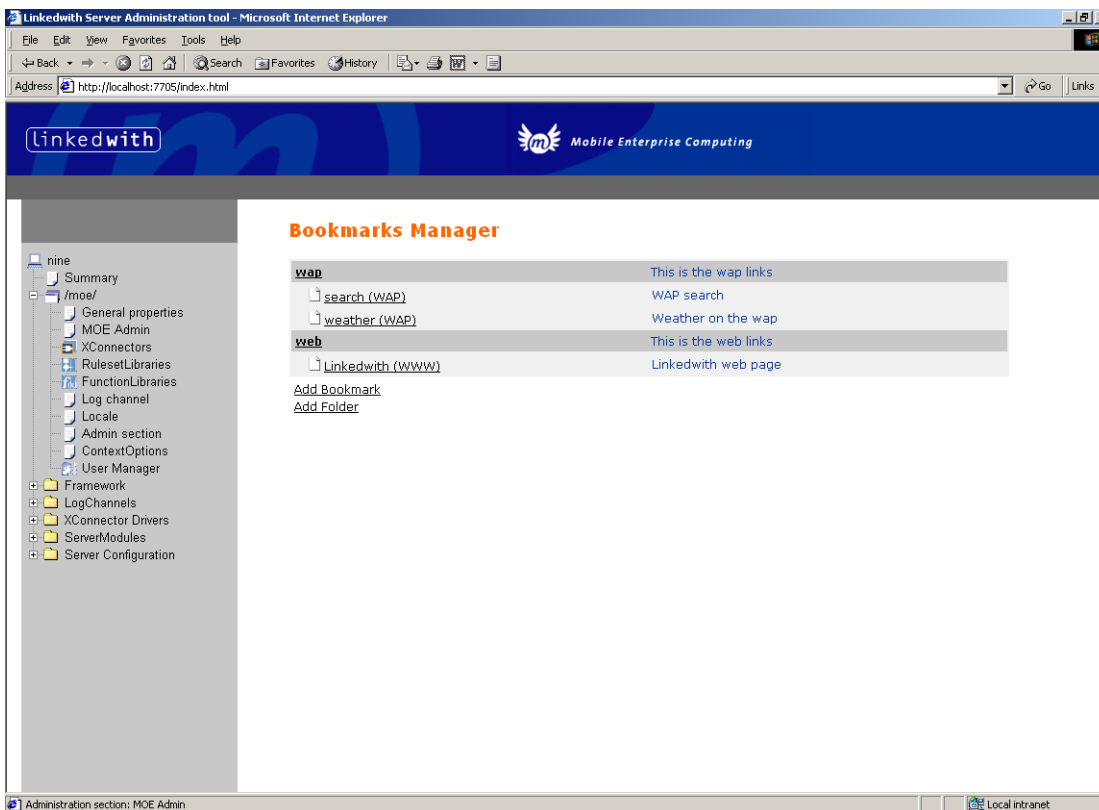
screenshot 4   The *Bookmark Manager* used to create and maintain public bookmark categories and bookmarks

Creating new Folders

Bookmarks can only be added to a folder (category), not to the *Bookmark Manager* root level. Hence, creating at least one bookmark folder is the first step to take when initially defining public bookmarks.
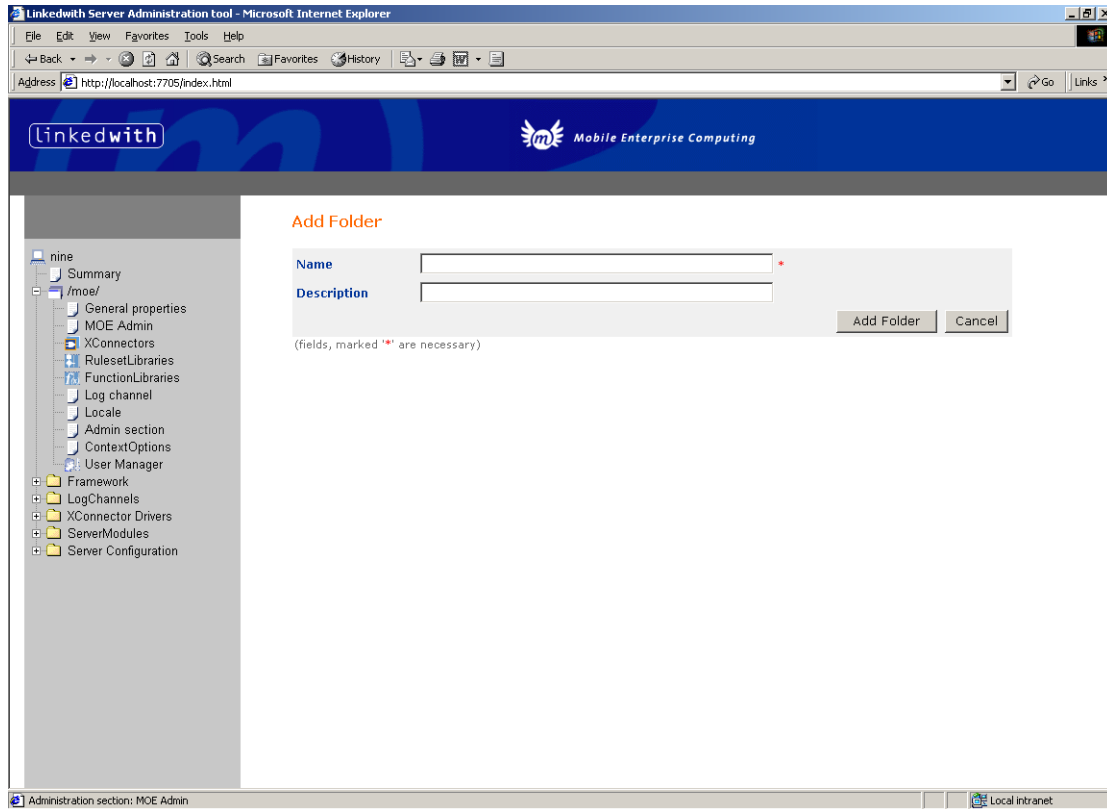
screenshot 5   The *Bookmark Manager* Add Folder page used to define a new bookmark category

To create a folder, follow the **Add Folder** link on the *Bookmark Manager* page (screenshot 4). The subsequent screen allows you to enter a **name** and a **description** for the new category (screenshot 5).

There is no limit to the total number of folders you can create. However, folders cannot be created inside folders, in other words, no subfolders are allowed.

Remember that the folder name will be displayed on WAP devices, so try to keep it short.

If you accidentally try to create a folder that already exists, an error message will appear and the existing folder will be left unchanged.

Editing Folders

On the *Bookmark Manager* page (screenshot 4) each folder is represented by a link that, if selected, will display the properties page of the corresponding folder allowing you to change the folder **name** and **description** (screenshot 6).
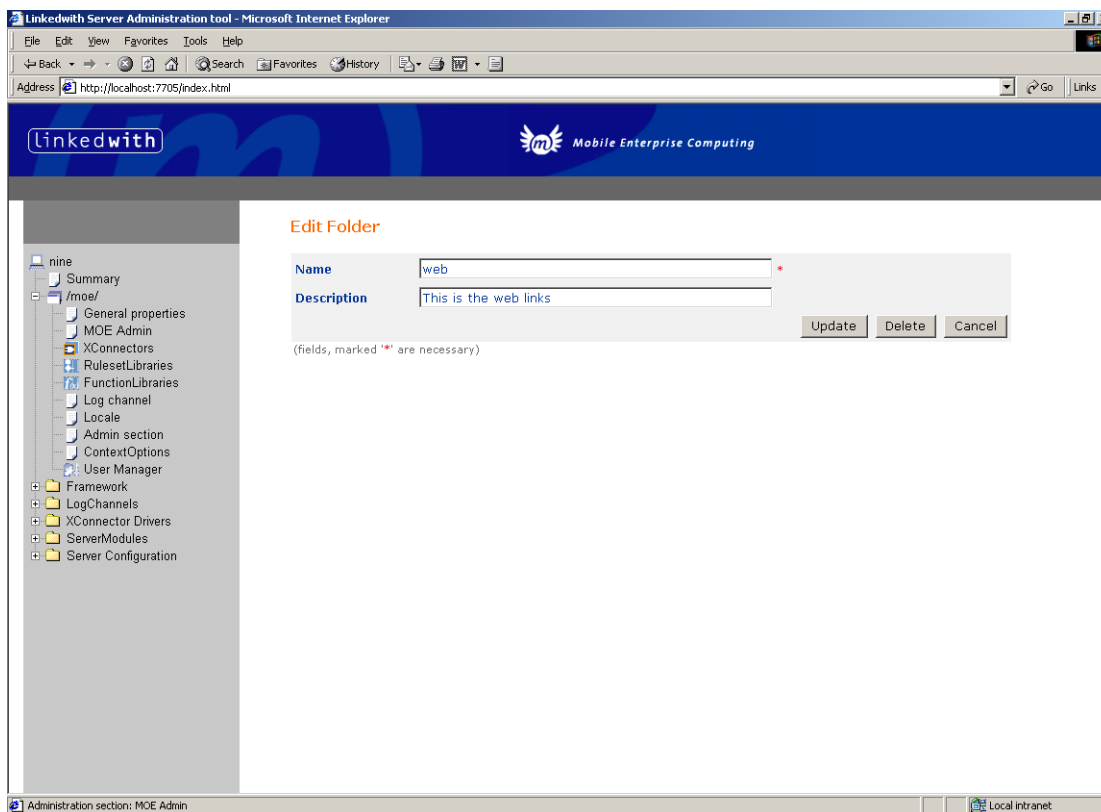
screenshot 6   The Edit Folder page where the **name** and the **description** of an existing
                   folder can be changed.

After you have finished, press the "Update" button to apply your changes or press "Cancel" to discard them.

Deleting Folders

To delete a folder click the corresponding folder name on the *Bookmark Manager* page (screenshot 4) and press the "Delete" button.

When a folder is deleted, all bookmarks in that folder will be deleted as well.

Creating new Bookmarks

Bookmarks can only be created within a folder (category), not on the *Bookmark Manager* root level. Before creating the first public bookmark, at least one bookmark folder has to be defined (see section on Creating new Folders).

There are two types of bookmarks: `wap` and `web`. The type names are more or less self explanatory: `web`-type bookmarks can only be viewed with standard web browsers. Unless you have a mobile device with a web-capable browser, these bookmarks are for reference only. A `wap`-type bookmark, however, can be activated on any wap-capable device in order to display the underlying content on your mobile phone's display.
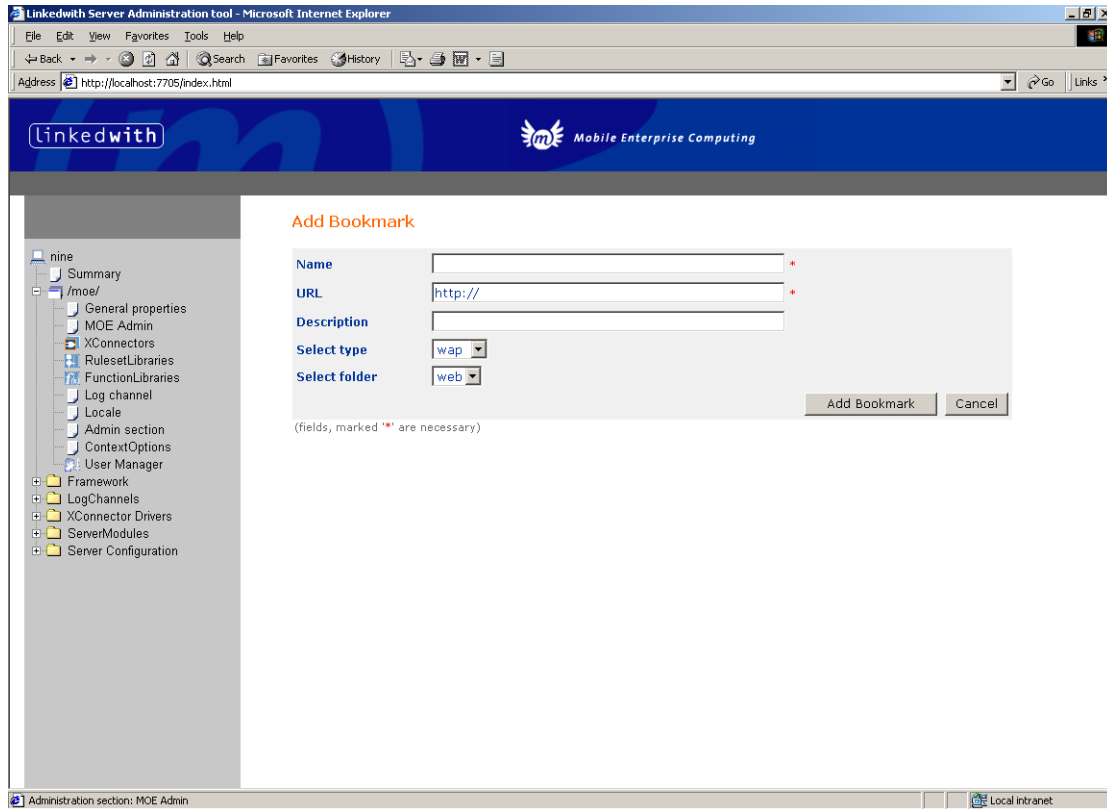
screenshot 7   The Add Bookmark input form for creating new bookmarks.

To create a bookmark, select the **Add Bookmark** link on the *Bookmark Manager* main page (screenshot 4). The "Add Bookmark" input form shown in screenshot 7 will appear and a **name**, **URL**, and **folder** for the new bookmark can be entered. You also have the option of including a **description** of the bookmark and specifying its **type**.

There is no limit to the total number of bookmarks you can create within a folder.

Remember however, that the bookmark name will be displayed on WAP devices, so try to keep it short.

Editing Bookmarks

On the *Bookmark Manager* main page (screenshot 4), all bookmarks are represented by links. Selecting a link will take you to the "Edit Bookmark" page where bookmark properties can be modified. Properties include the **name** and **description** of the bookmark and the **folder** you want the bookmark to be stored in. In addition, the selected bookmark can be deleted.
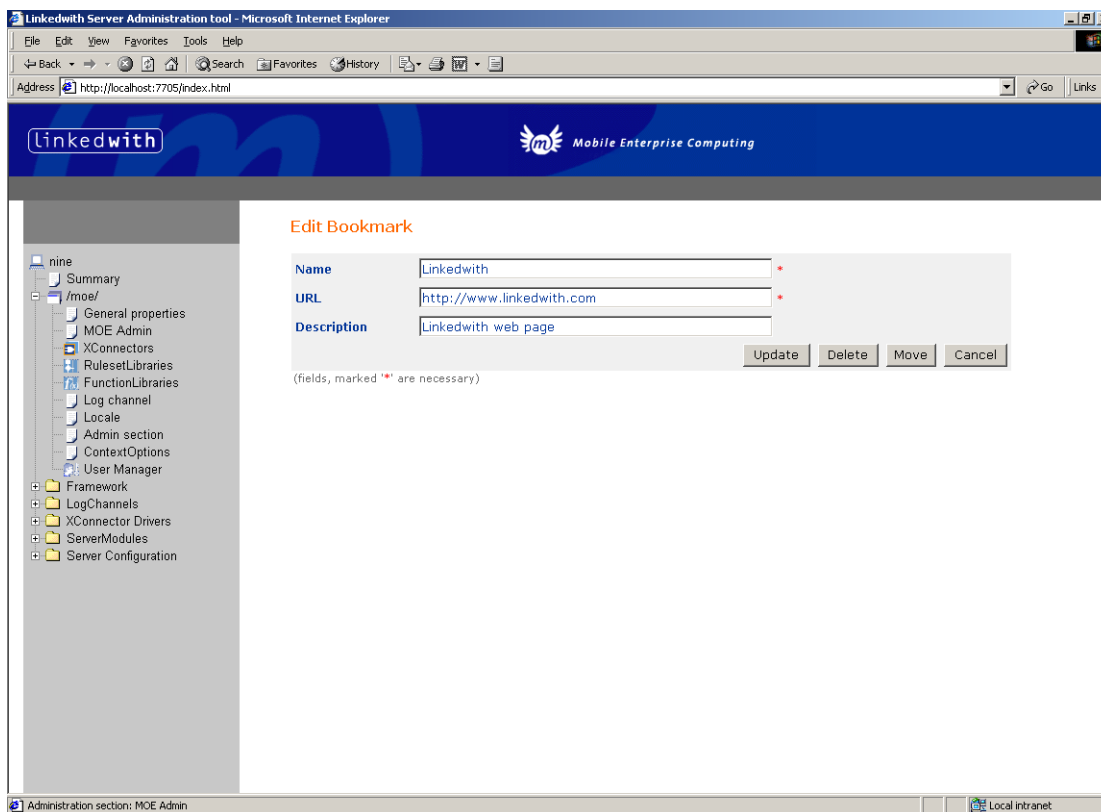
screenshot 8   The Edit Bookmark page used to change bookmark properties.

To move a bookmark to a different folder, press the "Move" button and select a destination folder. To delete the bookmark, simply press the "Delete" button. When finished, you can apply your changes by pressing the "Update" button.

The Scheduler Manager (Part of the *Messaging Agent Package*)

The *Scheduler Manager* is designed to manage scheduler tasks. It is used to execute arbitrary rsml files at specified times by retrieving their URLs. This mechanism provides you with a very powerful tool to automate certain tasks by creating your own rsml files.

You could, for example, write an rsml file that checks the stock value of your company and delivers it to you via sms. By creating an entry in the *Scheduler Manager* pointing to your rsml file, you can specify the times at which your rsml code will be executed.
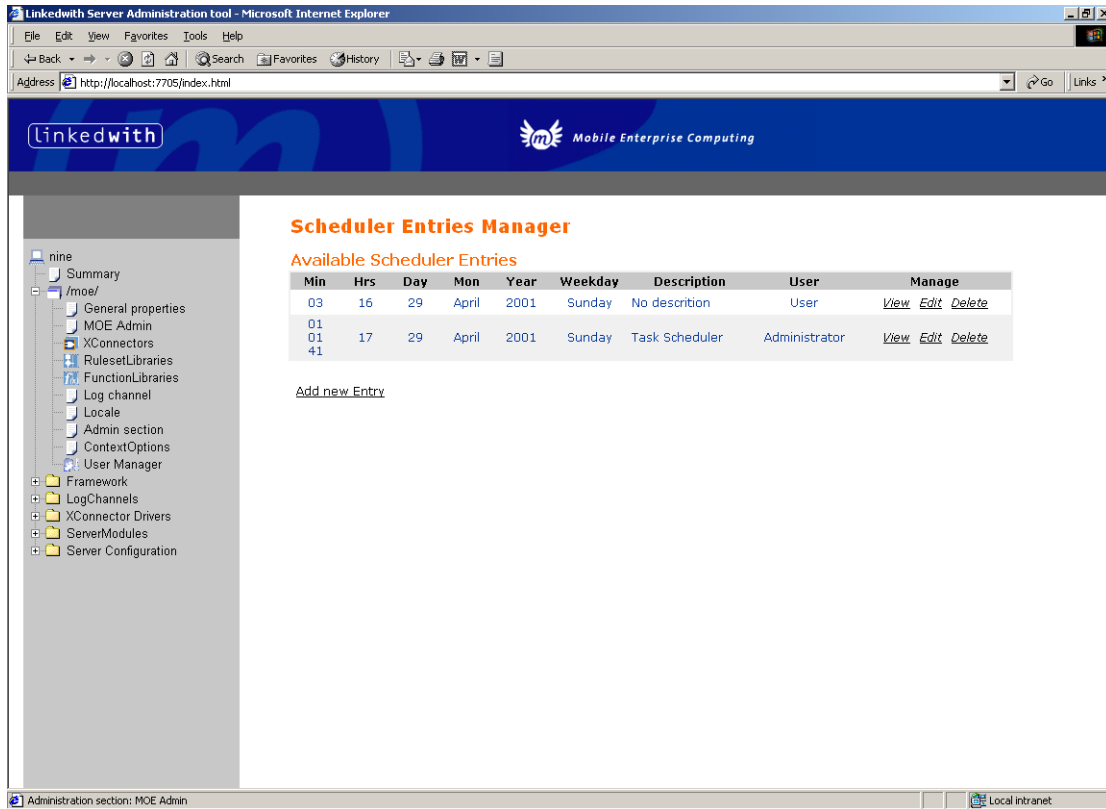
screenshot 9   The *Scheduler Manager's* Entries page. Here, task properties can be explored and changed and tasks themselves can be added or deleted.

To access the *Scheduler Manager*, select the **Scheduler Manager** link on the main page of the admin section (screenshot 1). The *Scheduler Manager's* Entries page will appear with a list of scheduled tasks providing possibilities to create, view, edit, and delete tasks (screenshot 9).

Creating new Scheduler Entries

To create a new task, press the "Add New" button on the *Scheduler Manager's* Entries page (screenshot 9) and define the task properties on the succeeding page (screenshot 10):

Internal Information

User:

Execution Time

You are able to set the time at which your task is to be executed. Using "+" you can add additional time to execute your task. Using "-" you can remove additional time.

Example:

If you have added 00, 15, 30, and 40 minutes to the minutes section using "+", the task will be executed at these times, i.e., at 00, 15, 30, and 45 minutes past the hour.

The value "Every" under each choice means the task is to be executed at every time interval.

Example:

Setting the value "Every minute" will execute the task for 60 minutes within the time you have set.

Subject

Producer: Scheduler Entries Manager
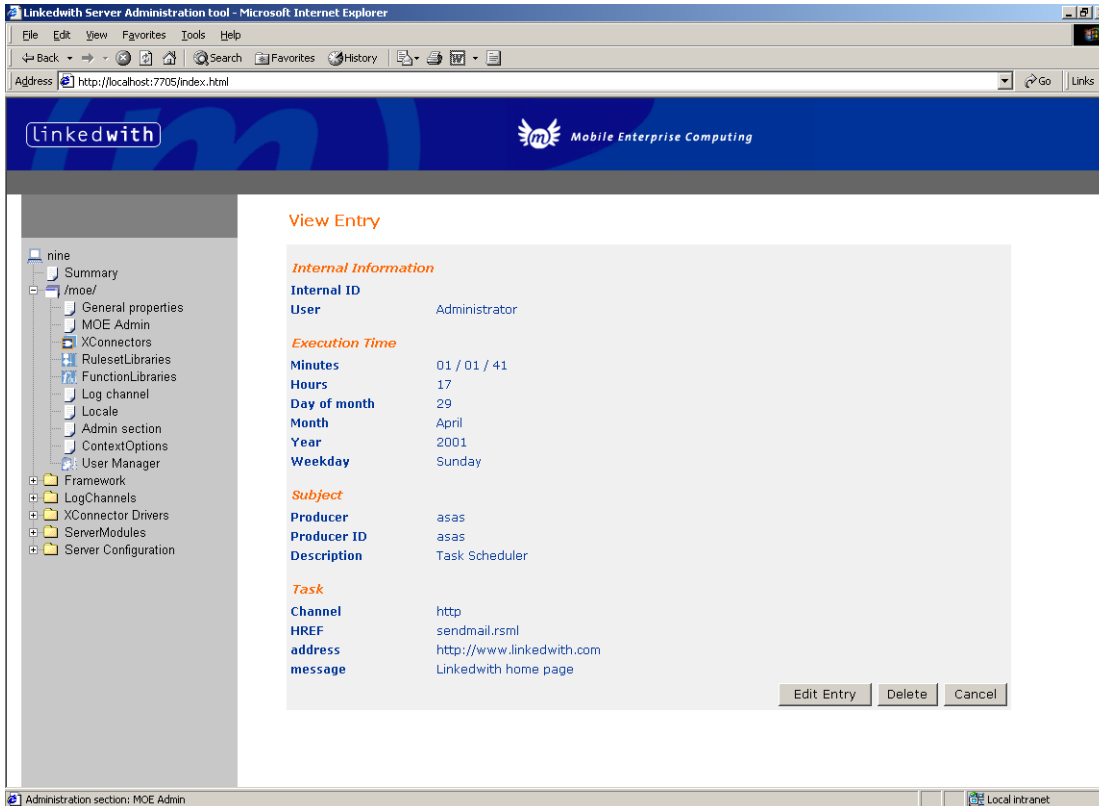**Producer ID:** 1
Description: Scheduler Manager Task

This is only additional information for the user.

Available Tasks

Channel:
Href:

As before, by pressing the "+"and "-" buttons, additional tasks can be added or existing ones can be removed.

screenshot 10   The *Scheduler Manager's* page for creating new entries.

Editing Scheduler Entries

To change a scheduled task, press the "Edit" button next to the corresponding task on the *Scheduler Manager's* Entries page (screenshot 9). You will be directed to the same page used for creating new scheduler entries (screenshot 10). However, instead of being blank, the input fields will now contain the previously defined values.

For information on the various input fields, please refer to the section on <u>Creating new Scheduler Entries</u>.

Deleting Scheduler Entries

To delete a scheduled task, simply press the "Delete" button next to the corresponding task on the *Scheduler Manager's* Entries page (screenshot 9).

The Notification Manager (Part of the *Messaging Agent Package*)

The main task of the *Notification Manager* is to set up the default and user-defined system notifications. Selecting the **Notification Manager** link on the main page of the admin section (screenshot 1) will take you to the *Notification Manager* configuration page (screenshot 11). In the upper section of this page, you will see a list of URLs responsible for the *Notification Manager* settings followed by a table containing application-specific properties.
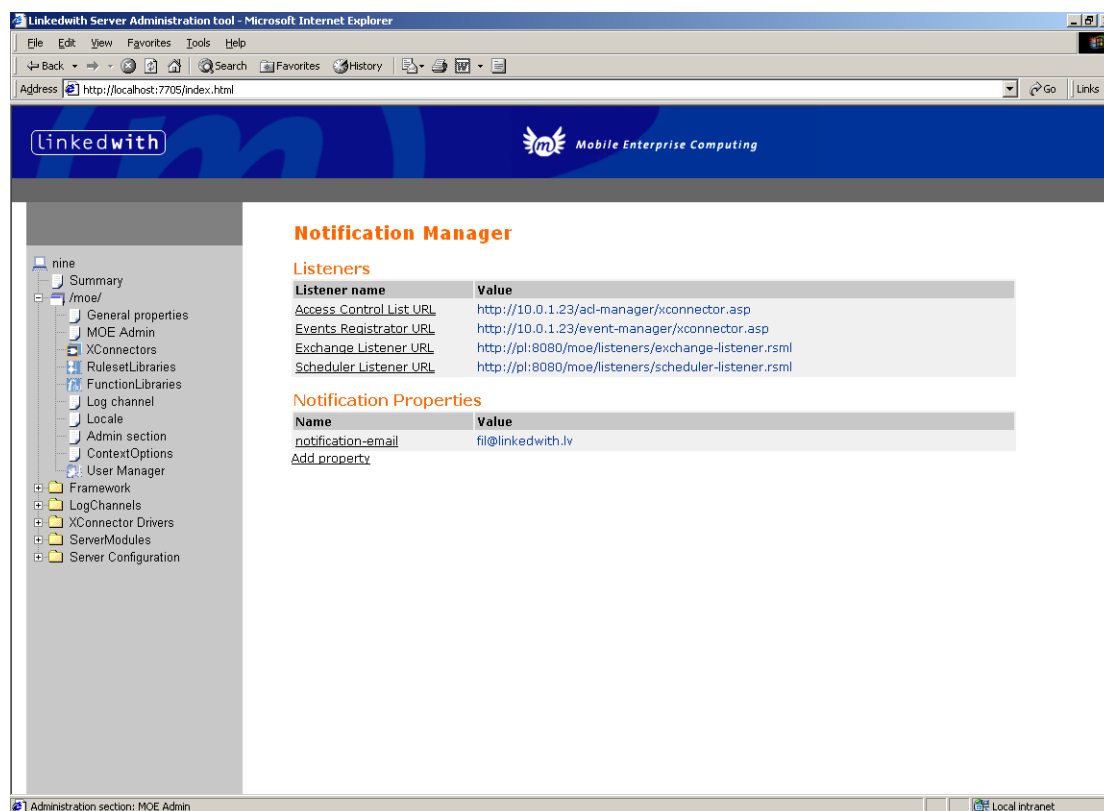
screenshot 11   The *Notification Manager* configuration page

The following settings are available with the *Notification Manager*:

Scheduler Listener URL – the URL of the *Scheduler Listener*. The *Scheduler Listener* waits for an action message from the *Scheduler Manager*, reads the messages stored by the *Exchange™ Listener*, and sends them as Microsoft Notification Messages.

The *Scheduler Listener* URL must have the same base as the MOE URL.

Example:
Mobile office for Exchange™ URL: http://host/moe/index.rsml
Scheduler Listener URL: http://host/moe/listeners/scheduler-listener.rsml

Exchange™ Listener URL – the URL of the *Exchange™ Listener*. The *Exchange™ Listener* waits for messages from the *Event Manager*, collects, and stores them.

The *Exchange™ Listener* URL must have the same base as the MOE URL.

Example:
Mobile Office for Exchange™ URL: http://host/moe/index.rsml
Exchange™ Listener URL: http://host/moe/listeners/exchange-listener.rsml

Event Registrator URL – the URL of the *Event Manager*. The *Event Manager* is responsible for sending messages to the *Exchange™ Listener* when triggered.

Example:
Event Registrator URL: http:// exhcange_server/event-manager/Events.asp

Access Control List URL – the URL of the *ACL Manager*. The *ACL Manager* is responsible for setting up permissions.

Example:
Access Control List URL: http://exhcange_server/acl-manager/acl-manager.asp

Notification Properties – please refer to the Adding, Editing, and Deleting Notification Properties sections. To do so, press the "Add" button at the bottom of the *Notification Manager* configuration page (screenshot 11). Enter the key word "notification-email" into the input field labeled **Property Name** and fill in the e-mail address to be used for sending notifications into the **Property Value** field on the succeeding page (screenshot 13). Press the „Save" button when finished.

Once a property has been defined, it will be listed in the table at the bottom of the *Notification Manager* configuration page (screenshot 11). If you wish to change or delete a property, simply click its name. The page shown in screenshot 13 will be displayed with the current property values. You then can either edit the entries and press "Save" again to apply the changes you made or you can press the "Delete" button to remove the property altogether.

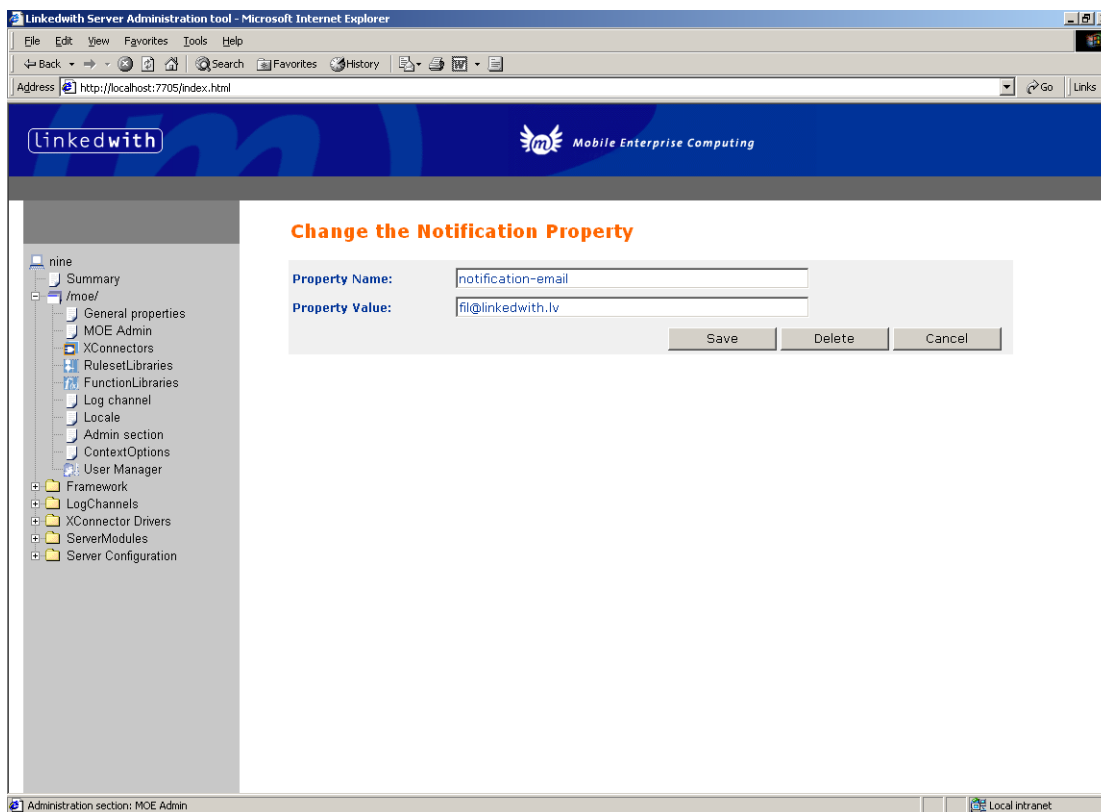# Changing Notification Manager Settings

To change a *Notification Manager* setting described in the The Notification Manager section, simply press the "Change" button below the appropriate setting (screenshot 11), enter a new URL, and press "Save" (screenshot 12).
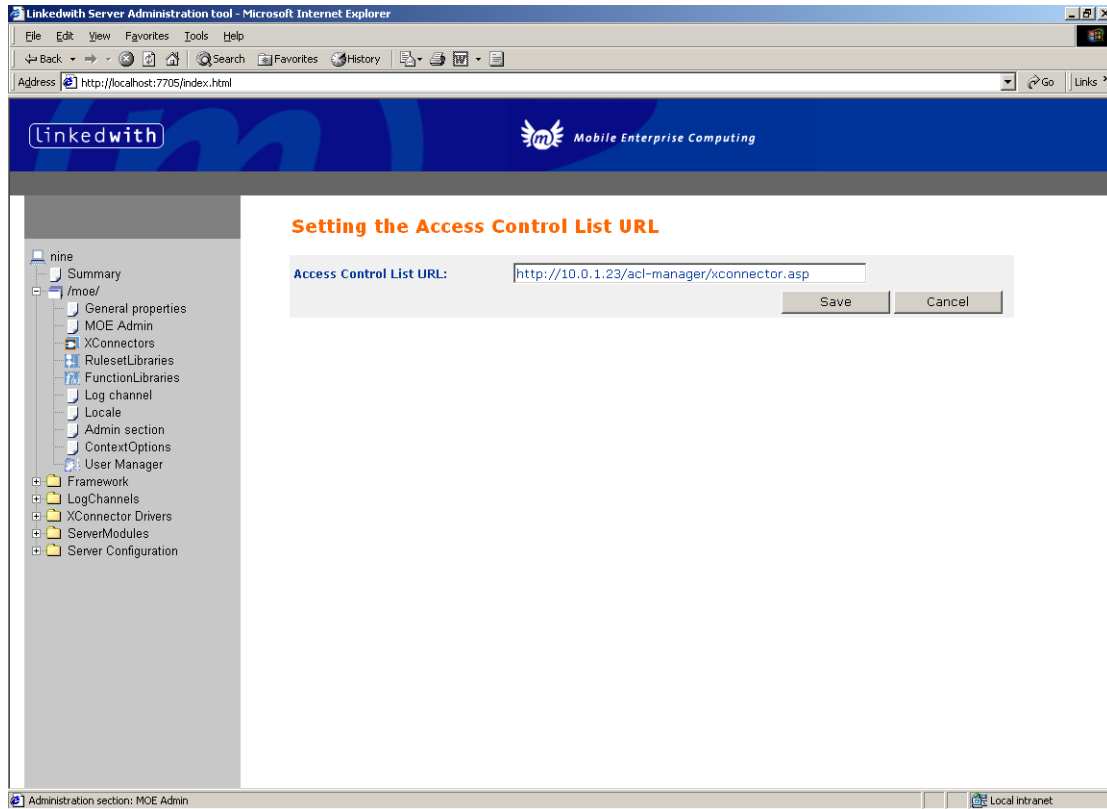
screenshot 12 Changing *Notification Manager* settings

Adding, Editing, and Deleting Notification Properties

These features allow you to set, edit, and delete certain properties of the notification service. When using the Admintool to administrate Mobile Office for Exchange™, the only property that needs to be set is the e-mail address to be used when sending notifications.

screenshot 13   Setting properties of the notification service such as the e-mail address to be used by MOE when sending notifications

To do so, press the "Add" button at the bottom of the *Notification Manager* configuration page (screenshot 11). Enter the key word "notification-email" into the input field labeled **Property Name** and fill in the e-mail address to be used for sending notifications into the **Property Value** field on the succeeding page (screenshot 13). Press the „Save" button when finished.

Once a property has been defined, it will be listed in the table at the bottom of the *Notification Manager* configuration page (screenshot 11). If you wish to change or delete a property, simply click its name. The page shown in screenshot 13 will be displayed with the current property values. You then can either edit the entries and press "Save" again to apply the changes you made or you can press the "Delete" button to remove the property altogether.

The Event Manager (Part of the *Messaging Agent Package*)

The *Event Manager* is designed to carry out user defined actions contained in an rsml file upon the occurrence of certain Microsoft Exchange™ events. Selecting the **Event Manager** link on the main page of the admin section (screenshot 1) will take you to the *Event Manager's* starting page (screenshot 14). From here you can register and unregister events or you can call up a list of events which have already been registered.

As an administrator you have control over the events of all users. However, you can also log in as an arbitrary (but valid) user with restricted access.

In order to be able to administrate notifications, all users must have their own distinct Microsoft Exchange™ login (username and password).
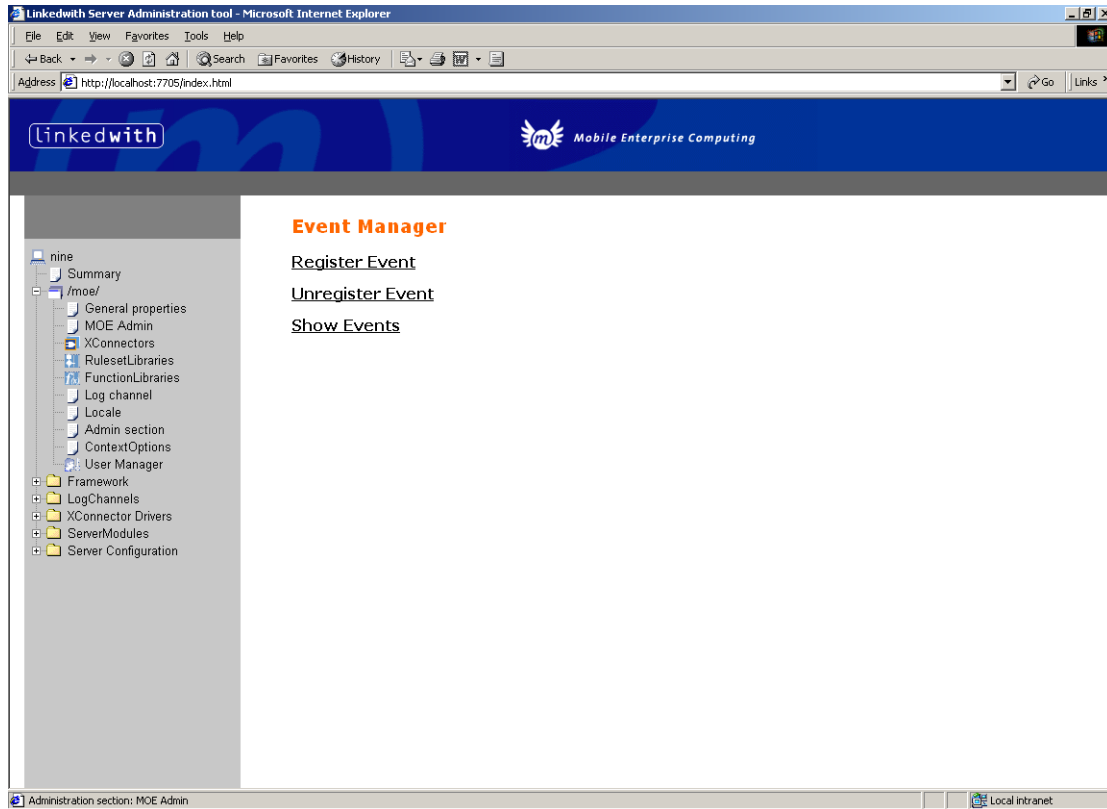
screenshot 14   The *Event Manager's* starting page providing options to register, unregister, and to view events

Registering new Events

To register a new event, select the **Register Event** link on the *Event Manager's* starting page (screenshot 14). The "Events Registration" input form will appear and the following parameters must then be defined (screenshot 15):

Target Url – an URL pointing to an rsml file which is to be executed upon the occurrence of the event defined by the remaining parameters on the page.

The default target is the URL of the *Exchange Listener*.

Mailbox – the name of the user whose mailbox should be monitored for the event specified by the **Folder Name** field and the check boxes.

Folder Name – the name of the folder to be monitored.

The Checkboxes – checkboxes define the event that will trigger the execution of the rsml file behind the **Target URL**.

Finally, to create the event, press the "Register" button.
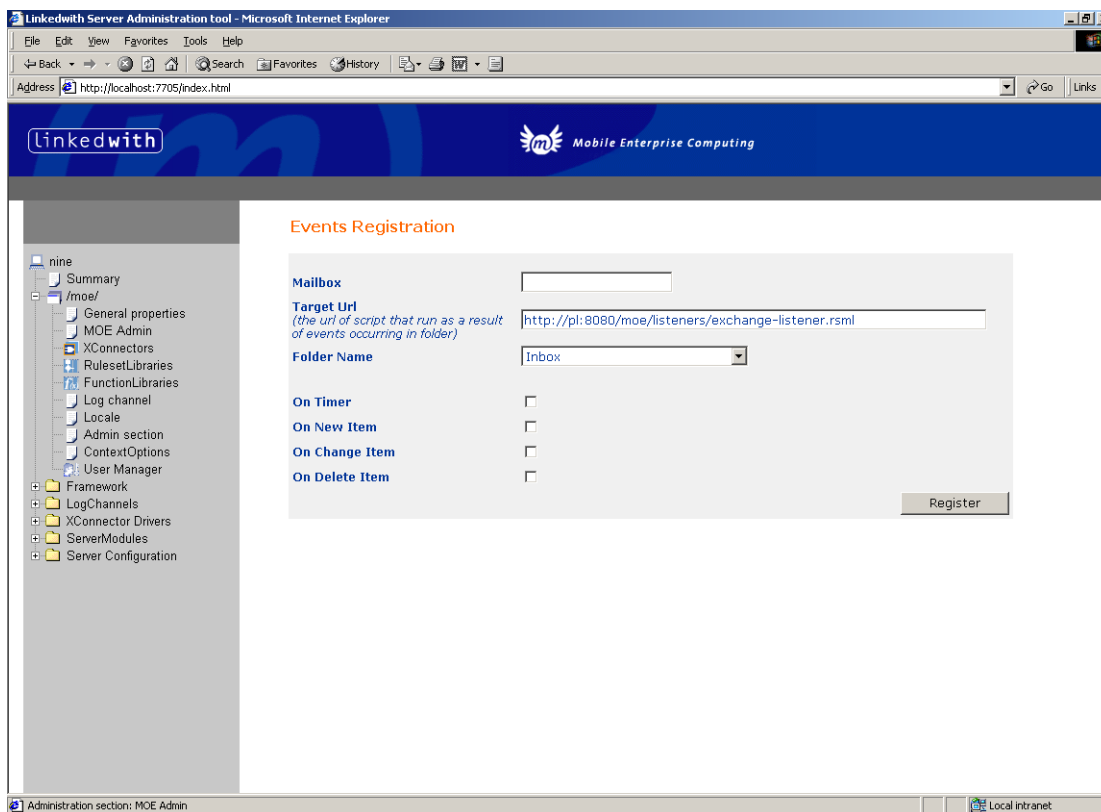
screenshot 15   The "Events Registration" input form used to define a trigger event and an URL to be executed upon its occurrence

Unregistering Events

In order to delete an event, select the **Unregister Event** link on the *Event Manager's* starting page (screenshot 14). Continue by specifying the name of the owner of the event to be deleted in the **Mailbox** field and select the appropriate **Folder Name** on the "Events Unregistration" page (screenshot 16). When done, press the "Unregister" button to delete the event.
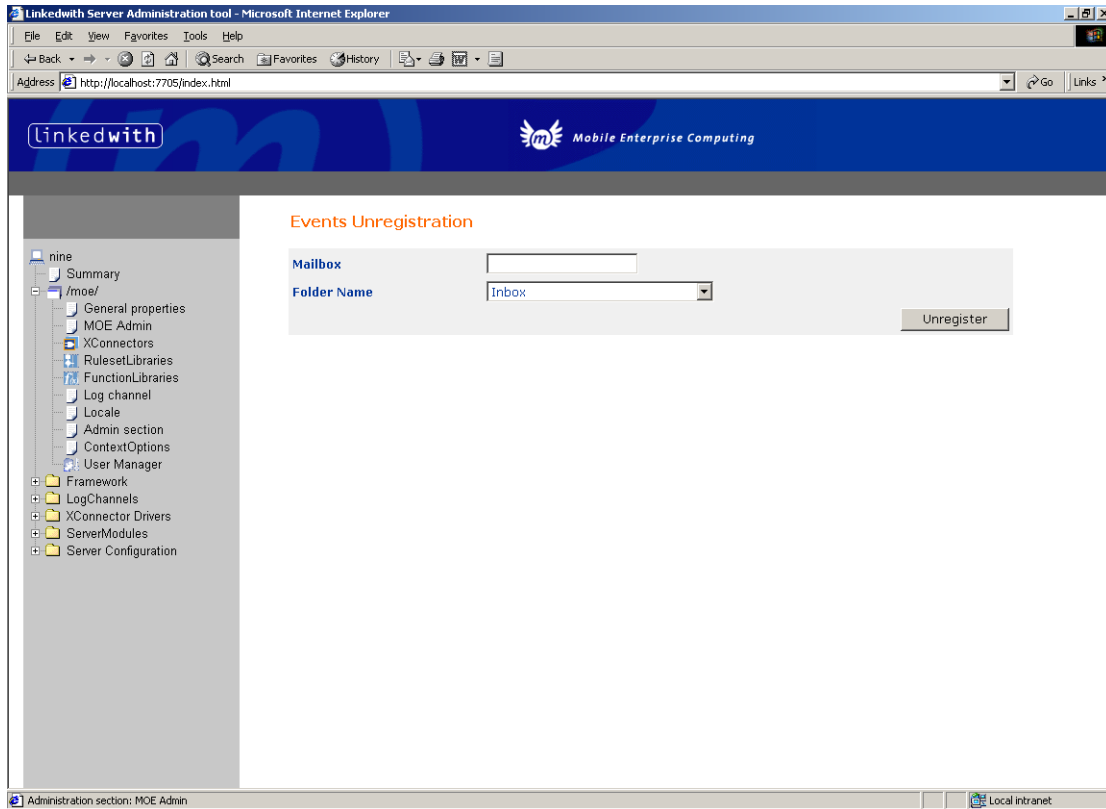
screenshot 16   By defining the name of the owner of an event in the **Mailbox** field and selecting the appropriate **Folder Name**, events may be deleted

Viewing Events

To retrieve a list of all events for a specific user, select the **Show Events** link on the *Event Manager's* starting page (screenshot 14). On the succeeding page, enter into the **Mailbox** field the name of the user whose events you would like to have listed and press the "Show" button.