

Nokia Mail for Exchange 3.0 User Guide

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Use of the Mail for Exchange is limited to over-the-air synchronization of PIM information between the Nokia device and the authorized Microsoft Exchange server.

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What is Mail for Exchange?

With Mail for Exchange, you can access the e-mail, calendar, contacts list (address book), and tasks of your Microsoft® Exchange account using your mobile device. Keeping the entries on your mobile device updated with the entries on your Exchange account is possible through the process of synchronization.

You need an Exchange e-mail account and your server system administrator must have enabled your account for synchronization. For details, contact your server system administrator or e-mail account provider.

What is synchronization?

Synchronization updates the e-mail, calendar, contacts, and tasks content on your mobile device with the content of your Microsoft Exchange account. You can personalize the way you synchronize by setting up a profile in which you can do the following:

- Select the content you want to synchronize: e-mail, calendar, contacts, tasks, or any combination of the four.
- Set up an automatic synchronization schedule. (You can also synchronize manually at any time.)

- Resolve content conflicts during synchronization by specifying whether the content of your account on the Exchange server or your mobile device prevails when a conflict occurs.
- Use Secure Sockets Layer (SSL) to increase the security between your mobile device and the Exchange server.
- Select how you want to be alerted when you receive an e-mail.

How do I use Mail for Exchange?

The basic steps in using Mail for Exchange are the following:

- 1 Install and open Mail for Exchange on your mobile device.
- 2 Create a synchronization profile that controls what and when you synchronize.
- 3 Synchronize to copy the desired content from the Microsoft Exchange server to your mobile device.
- 4 Start to use your e-mail, calendar, contacts, and tasks on your mobile device.

Install Mail for Exchange

You should not use any other method, such as Nokia PC Suite, to sync contacts, calendar entries, or tasks after installing and using Mail for Exchange on your device.

Simultaneous use of other methods may cause data loss, duplication, or corruption.

Check www.nokia.com/support or your local Nokia website for the latest guides, additional information, downloads, and services related to your Nokia product.

Install from your device

Nokia devices may have an e-mail installation wizard in the home screen. To install Mail for Exchange, select the wizard and Mail for Exchange. Follow the given instructions. For the installation information, contact your Microsoft Exchange server administrator or e-mail service provider.

Install from Nokia Download!

Your device may have the Nokia Download! application to assist you in finding and installing software into the device. Open the Download! application, and find and install the Mail for Exchange application.

Install from internet

To install the latest version of the Mail for Exchange client, install it from the internet. Open the web browser on your device, and see www.nokia.com/support

Enter the requested details. Download the Mail for Exchange .sis file. Installation starts automatically.

Install from other media

If you have received the Mail for Exchange installation file in some other way, you need to copy the file to your device. The installation file will be named MailForExchange_x.y.z.sis (where x.y.z is the version number, for example 2.9.0). To install Mail for Exchange, open the installation file on your device.

Upgrade Mail for Exchange

To upgrade to a newer version of Mail for Exchange, install a new installation file. This overwrites your current Mail for Exchange installation, while retaining your existing profile and personal information.

Open and close Mail for Exchange

Open Mail for Exchange

To open Mail for Exchange, go to the Installations folder on your mobile device, and select the Mail for Exchange icon. The application location can vary.



When you open Mail for Exchange for the first time, you are prompted to create a profile. A profile lets you personalize how you want Mail for Exchange to work. Select **Yes** to enter the required information in the profile.

You may be able to receive the Microsoft Exchange server name automatically. When prompted, enter your e-mail address, password, and access point. A connection to the Exchange server is made and the correct server name is retrieved automatically. If the automatic server name retrieval fails, continue the profile creation as instructed, since the e-mail address, password, and access point are saved to your profile anyway.

To create a profile, define the following:

- **Connection** – Enter the web address of the Exchange server that hosts your account.
- **Credentials** – Enter your user name and password.
- **Sync schedule** – Define a synchronization schedule.

- **Calendar** – Define how to synchronize your calendar.
- **Tasks** – Define how to synchronize your tasks.
- **Contacts** – Define how to synchronize your contacts.
- **E-mail** – Define e-mail options.

To create a profile later, select **Options > Create profile**.

Close Mail for Exchange

To close Mail for Exchange, select **Options > Exit**. Synchronization continues in the background according to the schedule defined in your profile. For more information, see "Sync schedule settings" on page 9.

Work with a profile

In the profile menu, select a category to display the settings in that category. Mail for Exchange provides default profile settings. Mandatory settings are indicated with an asterisk (*).

Connection settings

On the **Connection** tab, you must specify at least the name of the Microsoft Exchange server your account uses and the internet access point.

You may have already received the Exchange server name automatically when creating the profile. The access point may have also already been saved to your profile.

The connection settings are the following:

- **Exchange server*** – The Exchange server with which your mobile device connects. For the name of your Exchange server, contact your server system administrator or e-mail service provider.
- **Secure connection** – This setting must match the SSL setting for the server.
- **Access point*** – Enter the internet access point your mobile device will use to connect to the Exchange server. For information about your access point, contact your wireless service provider.

Access points may be preset in your device by your wireless service provider. See also instructions on access points or destinations in your mobile device's user guide.

- **Sync while roaming** – Synchronization while roaming may be more expensive than synchronization at other times. To manage the synchronization schedule while roaming, select from the following:
 - **No** – Synchronization does not occur while roaming, unless you manually synchronize.
 - **Yes, on peak only** – Synchronization occurs only during the peak hours you have defined in the profile.
 - **Yes, always** – This is the default. Automatic synchronization occurs according to the synchronization schedule, even while roaming. On Microsoft Exchange 2007 servers, the server system administrator can override the user's settings and require manual synchronization while roaming.
- **Use default port** – Use the server's default connection port. If you select **No**, you must specify a port in the port number field that appears. To obtain the port settings, contact your server system administrator or e-mail service provider.

Credentials settings

Credentials identify you to the Microsoft Exchange server and provide privacy. Define the following:

- **Username*** – To obtain your user name, contact your server system administrator or e-mail service provider.
- **Password** – When you enter a password, each letter appears as an asterisk. If you do not enter a password, you will have to enter a password the next time you synchronize.
- **Domain** – For the domain name, contact your server system administrator or e-mail service provider. The setting is optional.

Sync schedule settings

With Mail for Exchange, you can set up two synchronization schedules: peak and off-peak. For example, if you need to have the latest updates during business hours, you can schedule synchronization frequently and automatically during peak hours. When you do not need to have the latest updates all the time (evenings and weekends), you can synchronize less frequently or manually.

The same settings are defined for both the peak and off-peak times. Define the following:

- **Manual** – Synchronizations occur only when you select **Options > Synchronize**.
- **Always on** – Synchronizes your data automatically. Changes on the Exchange server and your device are automatically synchronized.
- **Intervals** ranging from every 15 minutes to every 12 hours.

When you select **Always on** or any of the intervals between 15 minutes and 12 hours for peak or off-peak times, you also need to define the following:

- **Peak days** – Which days have peak hours.
- **Peak start time** – What time of day peak hours start.
- **Peak end time** – What time of day peak hours end.
- **In case of conflict** – Define whether the entries on your mobile device or the entries on the server prevail if a conflict occurs during synchronization. This may occur when an item has been changed on both the mobile device and Exchange server since the last synchronization.
If an entry is deleted on one side (server or the mobile device) and modified on the other, the entry is deleted, regardless of this setting.

Calendar settings

To set how you want to synchronize your calendar, define the following:

- **Synchronize calendar** – Enable or disable the synchronization of calendar entries.
- **Sync calendar back** – Define how far back in time your calendar entries are to be synchronized. You can specify a range of weeks or months. You cannot go further back than the default setting set by the server system administrator.
- **Initial sync** – Set the device to keep its existing calendar entries or delete those entries and replace them with the entries from your account on the Exchange server when you start the initial synchronization.

If you select **Keep items on phone**, you may end up with duplicate calendar entries, especially if another sync method has been used previously. However, choosing to delete the items may result in losing calendar entries that are stored only on your device.

Contacts settings

To set how you want to synchronize your contacts, define the following:

- **Synchronize contacts** – Enable or disable the synchronization of contacts.

- **Initial sync** – Set the device to keep its existing contact entries or delete those entries and replace them with the entries from your account on the Exchange server when you start the initial synchronization.

If you select **Keep items on phone**, you may end up with duplicate contact entries, especially if another sync method has been used previously. However, choosing to delete the items may result in losing contact entries that are stored only on your device.

Tasks settings

To set how you want to synchronize your tasks, define the following:

- **Synchronize tasks** – Enable or disable the synchronization of tasks.
- **Sync completed tasks** – Define whether you want to synchronize your completed tasks. If you disable this setting, only work-in-progress tasks are synchronized.
- **Initial sync** – Set the device to keep its existing calendar entries or delete those entries and replace them with the entries from your account on the Exchange server when you start the initial synchronization.

If you select **Keep items on phone**, you may end up with duplicate task entries, especially if another sync method has been used previously. However, choosing to delete the items may result in losing task entries that are stored only on your device.

E-mail settings

To set how you want to synchronize your e-mail, define the following:

- **Synchronize e-mail** – Enable or disable the synchronization of e-mail.
- **E-mail address** – Enter your e-mail address so Mail for Exchange can exclude it from the list of recipients when you select **Reply > To all**.
- **Show new mail popup** – Enable or disable notifications of new e-mail. This setting may be affected by other settings on the device.
- **Use signature** – Include a signature in the body of the messages you send.
- **Signature** – Enter the text for your signature.
- **When sending mail** – To send e-mail messages immediately, regardless of the synchronization schedule, select **Send immediately**. To wait until the next synchronization occurs, select **Send at next sync only**.
- **Sync messages back** – Define how far back in time your e-mail messages are synchronized. A very large number of e-mail messages may affect the device's performance. Reduce this setting to improve performance.
You cannot go further back than the default setting set by the server system administrator.

Out of Office settings

Only Microsoft Exchange 2007 servers support Out of Office.

To set the Out of Office assistant, define the following:

- **Out of office** – Enable or disable the Out of Office setting. Available only if Mail for Exchange has synchronized for the first time. This option cannot be set while writing an e-mail.
- **Message** – Enter the text for your Out of Office message.

If you change your Out of Office message on your mobile device, the change applies to existing message and any scheduling is cancelled.

Edit a profile

To change the settings in a profile, select **Options > Edit profile**.

Changing some settings causes all synchronized data to be temporarily removed from the device and copied from the Microsoft Exchange server. For example, changing the user name or domain, will cause a temporary removal of the synchronized data.

Delete a profile

To delete a profile, select **Options > Delete profile**.

If you do not create another profile, you will be prompted to create a profile whenever you open Mail for Exchange.

When you delete your profile, your contacts, calendar items, and tasks will remain on your device. E-mails are deleted.

Synchronize your account

Synchronization occurs according to the profile you have created. However, you may still find occasions when you need to synchronize manually or resynchronize the content on your mobile device.

Synchronize for the first time

Synchronization occurs according to the **Sync schedule** setting in the profile settings. If you set the synchronization to **Manual**, you must select **Options > Synchronize** to get your content for the first time. If you set synchronization to **Always on** or any of the intervals, the first synchronization occurs when you save the profile.

For information about special settings during the initial synchronization, see "Calendar settings" on page 10, "Contacts settings" on page 10, and "Tasks settings" on page 10.

To synchronize at any time, select **Options > Synchronize**.

View information about the last sync

To see a log of the last synchronization, select **Options > View log** from the main menu. The log includes information about when the last synchronization occurred, whether the synchronization was successful, and a summary of which entries were synchronized.

Work with e-mail

After you have created your profile and selected to synchronize e-mail, Mail for Exchange automatically creates a Mail for Exchange folder in your mobile device's Messaging folder, which is located on your mobile device's main menu.

In the Mail for Exchange folder, your e-mail messages are arranged in subfolders. Mail for Exchange synchronizes the folders you have created and also the Sent items folder. However, you cannot add, move, rename, or delete folders from your device.

To open a folder, select the folder name. To return to the previous level, select **Back**.

To open an e-mail message in the Mail for Exchange folder, open the folder, and select the message. If a message is very large, only a portion of it has been downloaded automatically. To download the remainder of the message body, select **Options > Fetch** or keep scrolling to the bottom of the message until the remainder of the message body is downloaded.

After you open a message, select **Options** and from the following:

- **Reply** – Reply to the message.
- **Forward** – Forward the message.

- **Delete** – Delete the message.
- **Automatic find on** or **Automatic find off** – Enable or disable the use of special items, such as e-mail addresses, numbers, and web addresses.
- **Follow up flag** – Flag the message for follow up or as completed, or clear the flag from the message.
- **Move to folder** – Move an e-mail to another folder. You cannot move e-mails to or from the Sent items or Outbox folders.
- **Show as HTML** – View the e-mail in HTML format. The e-mail can include different colors and fonts, tables, and images.

If your mobile device has a QWERTY keyboard, you can use the following keyboard shortcuts after you open an e-mail:

- **r** to **Reply**
- **a** to **Reply > To all**
- **f** to **Forward**

If your mobile device has a numeric keypad, use the following shortcuts instead:

- **1** to **Reply**
- **2** to **Reply > To all**
- **4** to **Forward**

You can use the following keyboard shortcuts with both keyboards:

- To send a message being composed, press the call key.
- To delete a message (while viewing the message list), press the clear key. You cannot delete folders.

Compose a new e-mail message

Depending on your device, select either **Options > Create message > E-mail** or **Options > Create message > Mail for Exchange**.

Select **Options** and from the following:

- **Send** – Send an e-mail message.
- **Additional headers** – Modify the headers.
- **Sending Options** – Define delivery settings for the message.
- **Insert** – Insert text template or a file.

To search for a contact's e-mail address, enter a few letters of the contact's name, and select **Options > Check Names**.

When you compose a message, you can also search for recipients from the Company directory, in addition to your device contacts list.

Use the Company directory in the following way:

To add a recipient from the Company directory, go to any recipient field of the message, and select **Options > Company directory**. Enter a few letters of the contact's first name or last name in the search field, and select **OK**. When you find the correct contact, select **Options > Add recipient**. The contact is added as a recipient in your message.

To view details of a selected contact, select **Options > View details**.

To add a selected contact to your mobile device contacts, select **Options > Add to Contacts**. The contact, as well as the corresponding contact information, is added to your device contacts.

Work with e-mail attachments

An attachment is any file sent with an e-mail. Mail for Exchange does not automatically download an attachment to your mobile device when you open the e-mail that carries it. You can download an attachment after you open the e-mail. After you download the attachment, you can open it on your mobile device, if the device has the application associated with the attachment.

To retrieve an attachment, open an e-mail that has a paper clip icon, and select **Options > Attachments**. A list of attachments in the e-mail is displayed. Go to an

attachment in the list, and select **Options > Fetch**. The attachment is downloaded.

To open the attachment, go to the attachment, and select **Options > Open**. If your device has the associated application, the attachment opens.

To save an attachment, go to the attachment, and select **Options > Save**. Define where to save the attachment.

To delete an attachment, go to the attachment, and select **Options > Remove**. The attachment is deleted from your mobile device, not from the Microsoft Exchange server. You can download the attachment again.

To send an attachment while composing a message, select **Options > Insert**, the location of the file, and the file.

On Microsoft Exchange 2007 servers, the server system administrator may remotely restrict the size of attachments that can be downloaded.

Respond to meeting requests

You can view and respond to, but not initiate, meeting requests. To respond to a meeting request, you must have enabled the **Synchronize calendar** setting.

To open a meeting request in the **Mail for Exchange** mailbox, select the meeting request.

Select **Options > Response > Accept, Tentative, or Decline**. If calendar entries are synchronized, the meeting is added to your device calendar, unless you decline the request.

If a meeting request conflicts with another appointment in your calendar, a notification is displayed.

Cancel meetings

You can view, but not initiate meeting cancellations.

To remove a meeting from your calendar, you must have enabled the **Synchronize calendar** setting.

- 1 To open a meeting request in the **Mail for Exchange** mailbox, select the meeting request.
- 2 To remove the calendar entry corresponding to the meeting cancellation, select **Options > Remove from calendar**. The calendar entry and the meeting cancellation are deleted, and the deletions are synchronized with the Microsoft Exchange server.

Search for information

With your mobile device's Search, you can search for information in your contacts, notes, calendar entries, to-do notes, e-mail messages, multimedia messages, and text messages. You can also search for files in your device memory and on a memory card.

The Search application searches through messages stored in the Inbox and Sent folders. For more information, see your mobile device's user guide.

The Mail for Exchange Search only applies to certain Eseries devices.

Work with calendar, contacts, and tasks

Work with calendar

When you use Mail for Exchange to synchronize your calendar, you can use the mobile device calendar as described in the user guide of your mobile device.

Work with contacts

When you use Mail for Exchange to synchronize your calendar, you can use the mobile device calendar as described in the user guide of your mobile device.

You can also search for contacts within the Company directory, in addition to your device contacts. You can use the Company directory with or without Mail for Exchange.

Contacts with Mail for Exchange

When you install Mail for Exchange, the Company directory application is also automatically installed on your device.

To add a contact from the Company directory, go to the **Mail for Exchange** folder, and select **Comp. dir.**. Select **Options > Search**. Enter a few letters of the contact's first name or last name in the search field, and select **OK**. When

you find the correct contact, select **Options > Add to Contacts**. The contact, as well as the corresponding contact information, is added to your device contacts.

To view details of a selected contact, select **Options > View details**.

To call a selected contact, select **Options > Call**. Select a number from the list of numbers and **OK**.

To send a message to a selected contact, select **Options > Create message**. Select the type of message to be sent from the list of message types.

Work with tasks

When you use Mail for Exchange to synchronize your tasks, you can use the mobile device tasks as described in the user guide of your mobile device. The tasks may also be called To-do items on your mobile device.

If you create a task on the Microsoft Exchange server without a due date, the task is displayed in the device with a due date that is the same as the date when the task was synchronized. If you create a task without a due date, but set a reminder for it, the task is displayed in the device with a due date that is the same as the date of the reminder.

If you create a task on the Exchange server, and set a reminder or alarm for the task that is later than the due date for the task, the task is displayed in the device with no reminder set.

Additional information

Get help

For help on your mobile device, select **Options > Help** from any Mail for Exchange menu.

Device security features

Not all Nokia devices support these security features. In addition, your server system administrator may not allow devices without support for these features to connect and synchronize. If you have problems connecting, contact your server system administrator or e-mail account provider.

The server system administrator may remotely set security features that apply to all mobile device users of the server. When you connect to a Microsoft Exchange server with Mail for Exchange, you allow the following security settings on your device:

- **Device lock.** The Exchange server system administrator can require the use of a lock code after a specified amount of device inactivity. Use the lock code feature to avoid unauthorized use.
The first time you encounter the device lock, you are prompted to enter the device's default lock code. The

default lock code is 12345. Change the lock code, and keep the new code secret in a safe place separate from your device. If you forget your lock code, contact a Nokia Care point or your device dealer. For information about the lock code of your device, see also your mobile device's user guide.

When the device lock is activated, the lock icon is displayed.



- **Device wipe.** The server system administrator may set a maximum number of attempts for entering the lock code, after which the user data in the device and on the inserted memory card is deleted.
- **Remote device wipe.** If you lose your mobile device, contact your server system administrator. The server system administrator may be able to remotely erase data from the mobile device and from the inserted memory card. This feature can help protect against loss of confidential information.
- **Lock code parameters.** Your server system administrator defines criteria for the lock code and device wipe (code length, code strength, number of attempts before device wipe).

The following policies require Microsoft Exchange 2007 service pack 1 or later. The values are set by your Exchange server system administrator.

- Attachments enabled. Enables or disables attachments to be downloaded to the mobile device.
- Maximum attachment size. Specifies the maximum size of attachments that are automatically downloaded to the device.
- Require manual synchronization while roaming. Specifies whether the device must synchronize manually while roaming. Automatic synchronization while roaming may incur data costs.
- Maximum calendar age filter. Specifies the maximum range of calendar days that can be synchronized with the device.
- Maximum e-mail age filter. Specifies the maximum number of days worth of e-mails to be synchronized.
- Password history. Specifies the number of unique passwords a user has to use before an old password can be used.
- Password expiration. Enables the server system administrator to configure a length of time, after which the device password must be changed.
- Allow simple password. Enables or disables the ability to use a simple password such as 1234.
- Maximum e-mail body truncation size. Specifies the size limit, beyond which e-mail messages are truncated when they are synchronized to the device.

After you remove Mail for Exchange, the device security settings remain. These are security settings of the device, not Mail for Exchange. For instructions and information about resetting the security settings, see your mobile device's user guide.

Troubleshooting

Error messages

While using Mail for Exchange, you might see some of the following error messages:

- **Invalid credentials.** Open the Credentials tab of your profile, and correct the credentials.
- **Invalid password.** Open the Credentials tab of your profile, and correct your password.
- **Unsupported software in Exchange in server.** Contact your server system administrator to upgrade the version of Mail for Exchange on the Exchange server.
- **Error in communication.** Try again later.
- **Unable to synchronize with server.** Try again later.
- **Mail for Exchange client is busy.** Try again later.
- **Error in Exchange server.** Try again later.
- **Exchange server is not responding.** Try again later.
- **System error.** Try again later.
- **Invalid host address.** Correct the Exchange server information in the **Connection** tab of your profile.
- **Operation not possible in off-line mode.** Try again when your device is not in the Offline profile.
- **Server does not support secure connection.** Change the **Secure Connection** setting on the **Connection** tab of your profile to **No**.
- **Exchange server user account is full.** To increase the available memory, delete content in your account on the server.
- **Synchronization cancelled by user.** You have interrupted a synchronization. Start the synchronization again later.
- **Mandatory server policy failed, access refused.** Contact your server system administrator.
- **Account disabled, access refused.** Contact your server system administrator.
- **Unable to implement mandatory server policy, access refused.** Contact your server system administrator.
- **Account disabled by server administrator, access refused.** Contact your server system administrator.
- **No profile exists.** Create a profile.
- **Automatic sync requires you to store username and password.** Open the Credentials tab of your profile, and enter your user name and password.
- **Unsupported device.** Your device is not supported by the version of Mail for Exchange currently installed on your mobile device.
- **Disk full. Unable to process sync request.** Contact your server system administrator.

Resynchronize content

A full resynchronization removes the content you have synchronized to the device. The current content of your account on the Microsoft Exchange server replaces the previous content on the device. Resynchronization is recommended only when you need to reset large amounts of data on your device. To perform a full resynchronization, select **Options > Full resync**.

You will lose data that has been created or changed on the device since the last successful synchronization.

When you have selected calendar or contacts for synchronization in the profile, and you perform a full resynchronization, the initial synchronization settings for these items are set to **Delete items on phone**.

When you have selected e-mail for synchronization in the profile, resynchronization resets the messages to how they originally came from the server. Expanded messages are truncated and attachments you have downloaded from e-mails, but have not yet saved, are removed from your mobile device.

Troubleshooting logs

When diagnosing a problem with your account, your server system administrator might ask to see the Mail for Exchange administrative log, which contains a few days' history of Mail for Exchange activity.

To access the administrative log file (admin_logN.txt), go to the **File manager** application on your device. The file is stored in the Mail for Exchange directory. You can view the file with any text viewer, such as **Notes**.