

NOKIA

Intellisync Mobile Suite Client Guide

S60 3rd Edition Platform

Published July 2007

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1 Setting Up Your Device

Nokia Intellisync Mobile Suite is software that you install on your mobile device so you can:

- Access your corporate email account on your device.
- Synchronize the entries in Contacts, Calendar, Tasks, and Notes on your device with the equivalent entries in your corporate account so that both sets of entries match.
- Look up people in your company's directory and transfer those records locally into the contacts on your device.

Options for Installing Intellisync Mobile Suite

To install the Intellisync Mobile Suite software on your device, you have the following options for downloading the installation file to your device:

- Access the installation Web site using your device and download the installation file wirelessly

Advantages

- This option is more convenient than physically connecting your phone to your computer.
- Your first synchronization session occurs wirelessly.

Disadvantages

- You may incur charges from your carrier when you send an SMS message and download the installation file.
- The download could take several minutes, during which time you will not be able to make or receive phone calls.
- You must synchronize wirelessly; you cannot initiate a synchronization session using a cradle or USB cable.

- Access the installation Web site using your PC and download the installation file through a USB cable or cradle

Advantages

- This option eliminates potential carrier charges.

Disadvantages

- Connecting your phone to your PC may not always be convenient.

Continue to [“Starting the Installation Process”](#) on page 8, which allows you to choose the installation method that best suits your needs.

Starting the Installation Process

To start the installation process, complete the following steps:

1. Go to the device or PC Web Browser provided by your system administrator. The Intellisync Mobile Suite Login page appears.
2. Enter your user name and password, and then click **Login**.
3. On the left navigation bar, click **Settings**. The Settings page appears.
4. Click **Add Sync Device**. The device selection page appears.
5. Select the Symbian OS-Based Mobile Phone option, and then click **Next**. The Install Software page appears.

To receive the installation file over the air, continue to [“Downloading the Installation File Wirelessly.”](#) To download the installation file to your computer and install through a USB cable or cradle, see [“Downloading the Installation File to a Computer”](#) on page 9.

Downloading the Installation File Wirelessly

Installing Intellisync Mobile Suite software wirelessly allows you to initiate the installation process over the air and eliminate the need for synchronization with a computer. Complete the following steps to install Intellisync Mobile Suite wirelessly.

1. In the “Yes, Send Instructions to Your Device” section, select the **Carrier and Phone Number** option.
2. Select your wireless carrier from the drop-down list.

Note

If your carrier is not listed, select the Email Address option, enter the Internet email address of your mobile phone, and then click Send Message. Continue to step 4.

3. Type the phone number of your device without parentheses or dashes, and then click **Send Message**.
A Web page appears with notification that a text message was sent to your device. Verify that you received the text message on your device.
4. Open the text message on your device.
5. Select the link in the text message for the installation file.
6. Select the Install Software link. The Download dialog box appears.
7. Select **Yes** to continue the process. An installation dialog box appears.
8. Select **Yes** to install the software, and then select **Install**. Intellisync Mobile Suite installs to your device. After a successful installation, a dialog box appears.
9. Select **Done** to complete the process.

Downloading the Installation File to a Computer

Complete the following steps to download the installation file to your computer.

1. Connect your device to your USB cable or cradle.
2. Using Intellisync Mobile Suite on the Web, select **Install to PC**. The Install Software page appears.
3. Select the Install Software link. A file download dialog box appears.
4. Select **Run** to start the download process. The Choose a Configuration dialog box appears.
5. Choose Symbian Series 60 3rd Edition from the list, and then click **OK**.
6. On the Intellisync Mobile Suite Installation screen, select **Install**. The installation process begins. When the download completes, Intellisync Mobile Suite software loads on your device.

Configuring Initial Synchronization Settings

After Intellisync Mobile Suite software installs on your device, complete the following steps to configure logon credentials on your device.

1. Select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Click the **Settings** icon, and then select **Connection**. The Connection screen appears.
3. Using the key pad, enter the following settings:
 - User Name**. Enter a valid user name to access the server.
 - Password**. Enter the password to access the server.
 - Phone number**. Enter the phone number of your device.
 - Server address**. Enter the server name.
 - Connection**. Choose the connection type.

Note

Contact your system administrator for appropriate values before you enter or modify any connection settings.

4. Select **OK**, and then **Back** to return to the Intellisync Mobile Suite main menu.

Synchronizing Wirelessly

To synchronize using a wireless connection:

1. From the Intellisync Mobile Suite menu on your device, select the **Sync** icon. When the synchronization session completes, the status of the synchronized items appears.
2. Using Intellisync Mobile Suite on the Web, click **Next** on the Install Software page. The Settings page appears and your device appears in the Device Name list. Intellisync Mobile Suite is successfully installed on your device.

Note

The initial synchronization may take a few minutes. Do not use your phone during an initial sync.

Synchronizing Using a Cradle or USB Cable

To synchronize your device through a cradle or USB cable, complete the following steps:

1. Connect your device to the cradle or USB cable.
2. Open the software for your device and select the **Synchronize** icon.
When the synchronization session completes, the status of the synchronized items appears.
3. Using Intellisync Mobile Suite on the Web, click **Next** on the Install Software page. The Settings page appears and your device appears in the Device Name list. Intellisync Mobile Suite is successfully installed on your device.

Backing up and Restoring Data

The system administrator defines which files on your device are backed up on the server. In some cases the system administrator may also control when the backup occurs. You have the option of restoring the backed up data on the server to your device.

Note

Be sure that restoring data from the server to your device is the appropriate decision; the restore process overwrites the data currently on your device.

Backing up Data

If your system administrator allows you to perform a backup on your device, complete the following steps to back up data.

1. From the Intellisync Mobile Suite menu, select the **Backup** icon.
2. Select **Options**, and then select **Back Up Now**. The backup starts and a message appears indicating when the backup is complete.

Restoring Data

Complete the following steps to restore backed up data on the server to your device.

Note

Be sure that restoring data from the server to your device is the appropriate decision; the restore process overwrites the data currently on your device.

1. From the Intellisync Mobile Suite menu, select the **Restore** icon. A list of directories appears.
2. Select the items you want to restore.
3. Select **Options**, and then select **Restore Now**. A synchronization session begins during which the items you selected are copied from the server to your device.

2 Configuring Synchronization Settings

This chapter provides information on how to use the Intellisync Mobile Suite synchronization settings.

Configuring Synchronization Settings

If your system administrator allows you to change your default synchronization settings, you can configure Intellisync Mobile Suite to suit your individual needs.

Configuring What to Synchronize

You can determine the items you want synchronize with the server, such as email, calendar, contacts, and so forth. Complete the following steps to modify What to Sync settings.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **What to Sync**. The What to Sync screen appears.
2. Using the key pad, enable or disable synchronization for email, calendar, contacts, tasks, notes, files, and travel information.

Configuring When to Synchronize

Complete the following steps to modify When to Sync settings.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
2. Using the key pad, modify the following settings as necessary:
 - Push new updates.** Enable or disable automatic synchronization of data.
 - Timed sync.** Enable or disable a timed interval synchronization.
 - Timed-sync interval.** Select the time interval for synchronization sessions.
 - Weekday push.** Select a daily option to push data or enter a specific time.
 - Weekend push.** Enable or disable synchronization on weekends.
 - Disabled sync when.** Select the battery level at which you want to disable Push and Timed-sync interval synchronization.

3. Select **Back** to return to the Settings screen.

Configuring Email Settings

Complete the following steps to modify Email settings.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Email Settings**. The Email Settings screen appears.
2. Using the key pad, modify the following settings as necessary:
 - Include signature.** Select whether to append a signature to all email messages.
 - Signature.** The signature line to append to all email messages.
 - Sync read status.** Select whether to mark a message as “read” on the server after you open the message on your device.
 - Mail list view.** Select the number of lines of an email message you want to appear when listing all messages. Select “1 line” to view the sender and subject of the message, or select “2 lines” to view the sender and date of the message on line one, and the message subject on line two.
 - Message text size.** Select whether you want the message text to appear on the screen in small or large font size.
 - Display message.** Select whether to display email message content starting from the top of the message, which includes header information, or from the subject line.
 - Warn before delete.** Select whether to display a confirmation message before deleting a message.
 - Delete meeting email.** Select whether to delete meeting invitation messages (this does not remove the invitation on your calendar).
 - Show idle on screen.** Select the number of lines you want to appear when a new message arrives in any of your folders.

Configuring Folder Settings

You can set email folder settings for the Drafts, Inbox, and Sent folders using the following instructions.

Drafts Folder Settings

To configure settings for the Drafts folder, complete the following steps.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Folder Settings**. The Folder Settings screen appears.
2. Select **Drafts**. The Settings – Drafts screen appears.
3. Using the key pad, modify the following settings as necessary:
 - Sync Drafts.** Select whether to synchronize the Drafts email message folder.

Email download size. Specify the initial amount of content in an email message to synchronize to your device.

Auto-download attach. Select whether to automatically synchronize attachments.

Max attach size. Specify the maximum file size of attachments to synchronize.

Download only file types. Specify the type of file attachments you want to synchronize.

Inbox Folder Settings

To configure settings for the Inbox folder, complete the following steps.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Folder Settings**. The Folder Settings screen appears.

2. Select **Inbox**. The Settings – Inbox screen appears.

3. Using the key pad, modify the following settings as necessary:

Sync Inbox. Select whether to synchronize the Inbox folder.

Email download size. Specify the initial amount of content in an email message to synchronize to your device.

Remove older than. Select the amount of time you want messages to remain in the Inbox folder on your device.

Auto-download attach. Select whether to automatically synchronize attachments.

Max attach size. Specify the maximum file size of attachments to synchronize.

Download only file types. Specify the type of file attachments you want to synchronize.

Sent Folder Settings

To configure settings for the Sent folder, complete the following steps.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Folder Settings**. The Folder Settings screen appears.

2. Select **Sent**. The Settings – Sent screen appears.

3. Using the key pad, modify the following settings as necessary:

Sync Sent. Select whether to synchronize the Sent folder.

Email download size. Specify the initial amount of content in an email message to synchronize to your device.

Remove older than. Select the amount of time you want messages to remain in the Sent folder on your device.

Auto-download attach. Select whether to automatically synchronize attachments.

Max attach size. Specify the maximum file size of attachments to synchronize.

Download only file types. Specify the type of file attachments you want to synchronize.

Configuring Quick Text Settings

Quick texts are convenient, predefined phrases that you can insert into the body of an email message with minimum keystrokes. While composing an email message, you can select Options > Insert quick text to display the list of phrases. In the Quick Text settings, you can edit those phrases.

To edit quick text phrases, complete the following steps.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Quick text**. The Quick Text screen appears.
2. Select the quick text phrase you want to edit and select **Edit**.
3. Modify the text and select **Done**.

Configuring Security Settings

You can add a layer of security to your device by preventing access to your device after a predefined time period. By creating a secret personal identification number (PIN), only you can unlock the device and access the application. To create security settings, complete the following steps.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Security**. The Security screen appears.
2. Using the key pad, modify the following settings as necessary.
 - PIN code.** Enter a personal identification number of your choice.
 - Lock application after.** Select the amount of time to elapse before locking the device.

Configuring Account Settings

Account settings directly affect your ability to synchronize with the server. Complete the following steps to modify Account settings.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Account info**. The Account info screen appears.
2. Using the key pad, enable or disable the following settings as necessary:
 - User name.** Enter the user name that is defined on the server for your account.
 - Password.** Enter the password associated with your user name.
 - Phone Number.** Enter the phone number for your device.
 - Server name.** Enter the URL of the server with which you are synchronizing.
 - Access point.** Select an access point from the list. An access point is a connection point to the Internet.
 - Proxy user name.** Enter the user name associated with a proxy server, if required.
 - Proxy password.** Enter the password associated with a proxy server, if required.

Configuring Advanced Settings

In Advanced settings you can re-initialize email content, which deletes the email on your device and replaces it with content from the server.

1. From the Intellisync Mobile Suite menu, select the **Settings** icon, and then select **Advanced**. The Advanced screen appears.
2. Select **Re-initialize email**. A message appears on the screen confirming that this action restores all email messages from the server.
3. Select **Continue**.

3 Security on the Device

Nokia Intellisync Mobile Suite provides additional security features that your system administrator delivers through profiles or that you can set up on your device.

This chapter provides information about how to add such security features as

- Locking your device by enforcing a password after your device is locked, turned off, or in sleep mode
- Automatically deleting your personal information when your device is lost or stolen

Locking your Device

You can enforce a password every time your device is locked, turned off, or in sleep mode to protect access to your information in case the device is lost or stolen. Your locked device can receive inbound calls and dial out only specified phone numbers set up by you or your system administrator. You cannot synchronize the device or access any screens except the password screen until you enter your password.

To lock your device, you can select the number of minutes or hours your device is to remain inactive before prompted for a password. The following table shows possible options.

Option	Description
0 minutes	Only locks when <ul style="list-style-type: none">• you power off the device manually or• the device is configured to turn off automatically to save power
1 minute	Displays the Power-on-Password screen after this time interval passes.
5 minutes	
15 minutes	
30 minutes	
1 hour	
1.5 hours	
2 hours	
12 hours	
24 hours	

You also create a password within a particular security type, such as one of the following.

- Simple PIN** Numbers or letters only; no punctuation
- Strong alphanumeric** Password must be at least 7 characters long and contain at least 3 of the following: uppercase and lowercase letters, numerals, and punctuation.

After you create a new password and save the settings, the device is locked and will prompt for a password each time it is turned on or reactivated.

Power-on-Password Character Settings

Your system administrator can also set up the password to meet one of the following restrictions:

Type	Restrictions
4 numeric characters	Exactly 4 characters; numbers only
4 alphanumeric characters	Exactly 4 characters; numbers and (case-sensitive) letters only
5 to 40 alphanumeric characters	From 5 to 40 characters; numbers and (case-sensitive) letters only
8 to 40 multi-characters	From 8 to 40 characters; must include at least one of each of the following: <ul style="list-style-type: none">• lowercase letter (case-sensitive)• uppercase letter (case-sensitive)• numerical digit• any of the following characters: - () ! ? . : / +

Outbound Telephone Call Settings

Your system administrator can set up the device so that a person can make some outbound phone calls on your device within certain restrictions when your device is locked. For example, the person may be able to make one or both of the following types of phone calls:

- Exact phone numbers (such as numbers where you can be reached if the phone is found)
- Telephone calls with a certain number of digits (such as 3-digit emergency phone calls only)

You bypass these restrictions when you enter the power-on-password to unlock the device.

Unlocking your Device

To unlock your device, enter the password. The password screen disappears and you now have access to the device again. Remember that letters are case-sensitive.

Note

If you forget your password, contact the system administrator.

Protecting Your Data

Theft/Loss protection ensures that personal information on your device is protected from unauthorized use if lost or stolen.

To activate Theft/Loss Protection,

1. From the Web PIM, select Settings.
2. Select your device name.
3. Click Theft-Loss Protection.
4. Select an option, and click OK. Based on your company's product license, possible options may include all or some of the following:
 - Erase only PIM information (contacts, tasks, notes, and calendar appointments) and E-mail data from the device.
 - Hard Reset the device, deleting all user data and files.
 - Lock the device (providing and confirming a password for unlocking the device).

Note

The Erase Data and Hard Reset options cannot be undone.

Your system administrator can also invoke these Theft/Loss Protection features, and can also configure the device to delete specified files from your device if lost or stolen.

Theft/Loss Protection options remain effective until you or your system administrator reset them.

Allowing Remote Access by a System Administrator

A system administrator can access your device remotely when you have trouble operating your device or need help with a complicated feature.

If remote access by a system administrator seems beneficial, the administrator first sends you a message asking for permission to connect remotely with your device. You accept or reject the connection, depending on whether it is a convenient time for the interruption.

After connecting, the system administrator can see a copy of what appears on your device screen exactly as you press buttons and menus, type information, and change screens. You can also see when the administrator takes over control and begins using the device remotely, pressing buttons and menus, typing, and changing screens.

This remote access is ended when either you or the system administrator disconnects from the device.

