

Getting Started Administrator Guide

**iAnywhere<sup>®</sup> Mobile Office 5.7**

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*NOTE: Register at our technical support site for the latest information for your product. This site is available only to customers with a valid maintenance contract.*

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## Table of Contents

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<b>Copyright and Trademarks</b> .....	<b>ii</b>
<b>Disclaimer</b> .....	<b>ii</b>
<b>Technical Support</b> .....	<b>ii</b>
<b>Table of Contents</b> .....	<b>iii</b>
<b>Welcome</b> .....	<b>1</b>
<b>Architecture Overview</b> .....	<b>1</b>
<b>Mobile Office Installation</b> .....	<b>2</b>
System Requirements.....	2
Supported Mail Server Platforms .....	2
Hardware Requirements .....	2
Supported Microsoft Windows Server Operating Systems.....	3
Supported Microsoft Windows Workstation Operating System.....	3
Supported Operating Systems for iAnywhere Relay Server .....	4
Software Requirements for Client Download Site .....	4
Supported Devices .....	4
General Notes .....	5
Installing the Mobile Office Server .....	5
<b>Mobile Office Administration Console</b> .....	<b>9</b>
Managing Users .....	10
Configuring Templates.....	13
Assigning and Managing Workflows.....	14
Using the Diagnose Feature.....	16
Trace Configuration Tab .....	16
Trace Viewer Tab .....	16
File/Database Tab .....	17
Support Capture Tab.....	17
<b>Appendix</b> .....	<b>18</b>
Registered Users List.....	18
Administrative User Functions .....	19



## Welcome

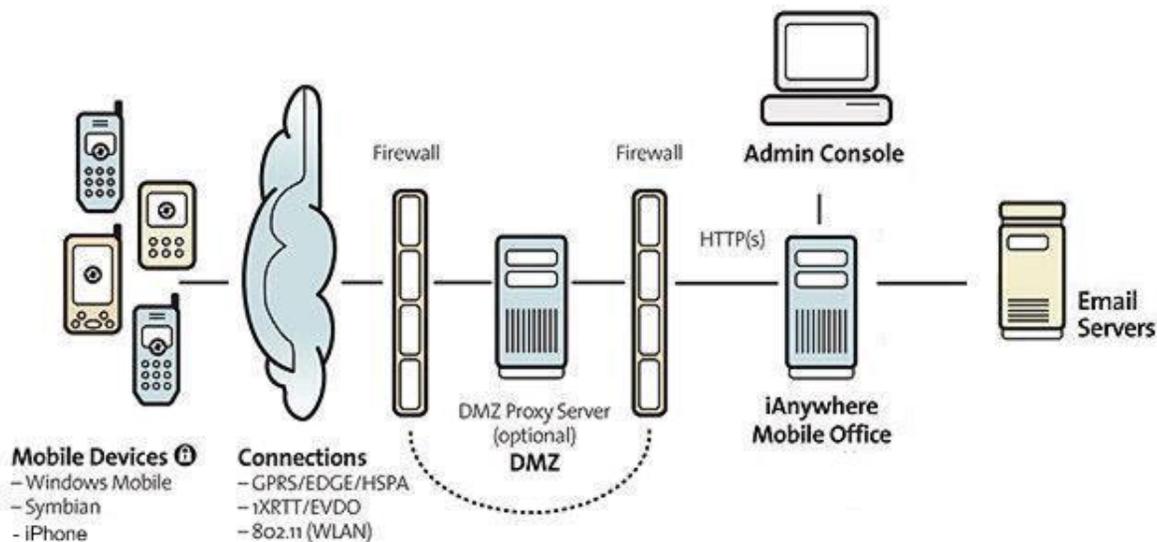
Welcome to iAnywhere® Mobile Office. iAnywhere Mobile Office is specifically designed for today's mobile business workforce. It combines fully integrated wireless email and PIM with on-device security and business process mobilization. iAnywhere Mobile Office enables organizations to manage critical, time-sensitive workflow business processes. iAnywhere Mobile Office offers key features that provide the foundation for a company's mobile inbox of the future.

This brief *Getting Started Administrator Guide* will help you install iAnywhere Mobile Office in your email environment and provides instructions on how to manage the installation, users, and configuration settings. For more detailed information about any of the features described here, go to Start > Programs > iAnywhere Mobile Office > Mobile Office Docs > Administrator Guide.

*Note: The procedures outlined in this guide are generic. Your installation may vary slightly, but the concepts are generally the same.*

## Architecture Overview

The image below is a representation of the iAnywhere Mobile Office architecture.



Mobile Office clients communicate with the server infrastructure using a secure optimized protocol for today's always-on wireless networks of all major carriers worldwide. The iAnywhere Mobile Office DMZ Proxy adds an extra layer of security. This server component deployed inside the enterprise DMZ allows secure behind-the-firewall deployment of the iAnywhere Mobile Office server. The DMZ Proxy enables the unique Mobile Office outbound connection model. The iAnywhere Mobile Office server makes outbound connections into the enterprise DMZ using the secure HTTPS protocol. When using this component, connections from all mobile devices end within the DMZ of your enterprise.

The iAnywhere Mobile Office server communicates with connected enterprise back-end applications using their native protocols. It delivers email and PIM data instantly to connected clients. No data is staged or stored within the enterprise DMZ at any time.

## Mobile Office Installation

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When you register for the iAnywhere Mobile Office server software, you will be sent an email containing the necessary configuration information to activate your installation. Be sure to have this information available as you perform the installation. Your registration email will also contain a pointer to the download page for the iAnywhere Mobile Office installation package.

### System Requirements

#### Supported Mail Server Platforms

iAnywhere Mobile Office is designed for the following mail servers:

- A Lotus Domino mail server, version 7.0.2 or higher, running on a supported Microsoft Windows Server operating system (see below). Other Domino servers can be running version 6.5 or higher on any Domino-supported operating system. For more detailed requirements, see “Domino System Requirements” in the online Help at Start > Programs > iAnywhere Mobile Office > Mobile Office Docs > Administrator Guide.
- A Microsoft Exchange mail server, Exchange 2003 SP2 or higher or Exchange 2007 SP1. For more detailed requirements for Exchange, see “Exchange System Requirements” in the online Help at Start > Programs > iAnywhere Mobile Office > Mobile Office Docs > Administrator Guide.
- An IMAP/POP3 , mail server for receiving mail and an SMTP mail server for sending mail. A single mail server often combines support for IMAP/POP3 and SMTP. The Courier mail server is the reference platform for Mobile Office.

#### Notes:

*You can install iAnywhere Mobile Office without a backend mail server. During the Mobile Office server installation, select **No Groupware** instead of a mail server platform. See [Installing the Mobile Office Server](#).*

*A single iAnywhere Mobile Office installation can only support one mail server platform at a time. If you have an environment with multiple mail server platforms, each mail server platform requires its own Mobile Office installation.*

*As of this Mobile Office release, a single iAnywhere Mobile Office server can support up to 1,000 users.*

*On Windows operating systems, the Domino server can be started as a regular application or as an NT Service. Mobile Office add-ins start up only if Domino starts up as an NT service. They do not start up if Domino is started as an application, so the iMO Domino server needs to be configured to start as an NT Service.*

### Hardware Requirements

#### *iAnywhere Mobile Office Server*

The following are hardware requirements for the iAnywhere Mobile Office Server:

- Pentium 4 Processor of 2 GHz or higher—server class machine with two or more processors will enhance performance. Should support industry standards for hard drive redundancy/failover.
- 2 GB RAM minimum—recommend 2 GB for up to 500 users, 4 GB for 500-1000 users.
- 8GB free disk space for server software plus 4 MB for each defined user. Application: 3 GB for 100 users, 15 GB for 500 users, 30 GB for 1000 users, and so forth.
- Recommend overall Data Storage capacity of 60 GB or greater, 7200 RPM minimum disk speed, and a RAID class disk array.
- TCP/IP LAN connection. 10 MB or higher connection to network recommended.

### ***iAnywhere Mobile DMZ Proxy Server***

The following are hardware requirements for the iAnywhere Mobile Office DMZ Proxy Server:

- Intel Xeon Dual Quad Core Processor with 2 GHz or higher, faster processor required for larger installations.
- 4 GB RAM minimum.
- 10 GB free disk.

### **Supported Microsoft Windows Server Operating Systems**

The following Microsoft Windows Server operating systems are supported for iAnywhere Mobile Office Server, iAnywhere Mobile Office DMZ Proxy, and the standalone administration console:

- Windows Server 2003 R2 Standard Edition and newer Service Packs
- Windows Server 2003 R2 Enterprise Edition and newer Service Packs

*Notes: Only 32-Bit operating systems are supported.*

*The iAnywhere Mobile Office server can be installed on a virtual machine provided the virtual machine meets all system requirements.*

### **Supported Microsoft Windows Workstation Operating System**

The following Microsoft Workstation operating systems are supported for the standalone administration console only:

- Windows XP Professional SP2 or higher
- Windows Vista Business (32 bit and 64 bit)

## Supported Operating Systems for iAnywhere Relay Server

The Relay Server is supported on the following operating systems:

Operating system	Processor	RAM	Disk
Microsoft Windows XP, 32 bit, SP 2, with Internet Information Services (IIS) v5.0 or v5.5	1 or more CPUs, 2 GHz or greater	2 MB	10 MB
Microsoft Windows XP, 64 bit, SP 2, with IIS v5.0 or v5.5	1 or more CPUs, 2 GHz or greater	2 MB	10 MB
Windows Server 2003 with IIS v6.0	1 or more CPUs, 2 GHz or greater	2 MB	10 MB
Red Hat Enterprise 5 with Apache 2.2.8	1 or more CPUs, 2 GHz or greater	2 MB	10 MB
SuSE Enterprise Linux 10 with Apache 2.2.8	1 or more CPUs, 2 GHz or greater	2 MB	10 MB

## Software Requirements for Client Download Site

For your Windows Mobile and Symbian users to access, download, and install the iAnywhere Mobile Office client software onto their Windows Mobile and Symbian mobile devices, you can build a web-based interface hosted on an IIS Web server. The software requirements are:

- IIS v5.0 or higher
- .NET v2.0

*Note: There are no significant hardware requirements for this installation and deployment.*

*Note: iPhone users install the iAnywhere Mobile Office client software from the App Store on their devices.*

## Supported Devices

iAnywhere Mobile Office supports the following devices:

- Windows Mobile 5, 6, 6.1 or higher (Standard and Professional)
- Symbian 9.0 or higher (Nokia Series 60 3rd and 5th Edition).
- Sony Ericsson UIQ 3.0 (limited Feature Set)
- Apple iPhone and iPod Touch 3.0 or higher

Wireless connectivity options include:

- GPRS/EDGE/HSPA
- 1xRTT/EVDO
- 802.11 (WLAN)

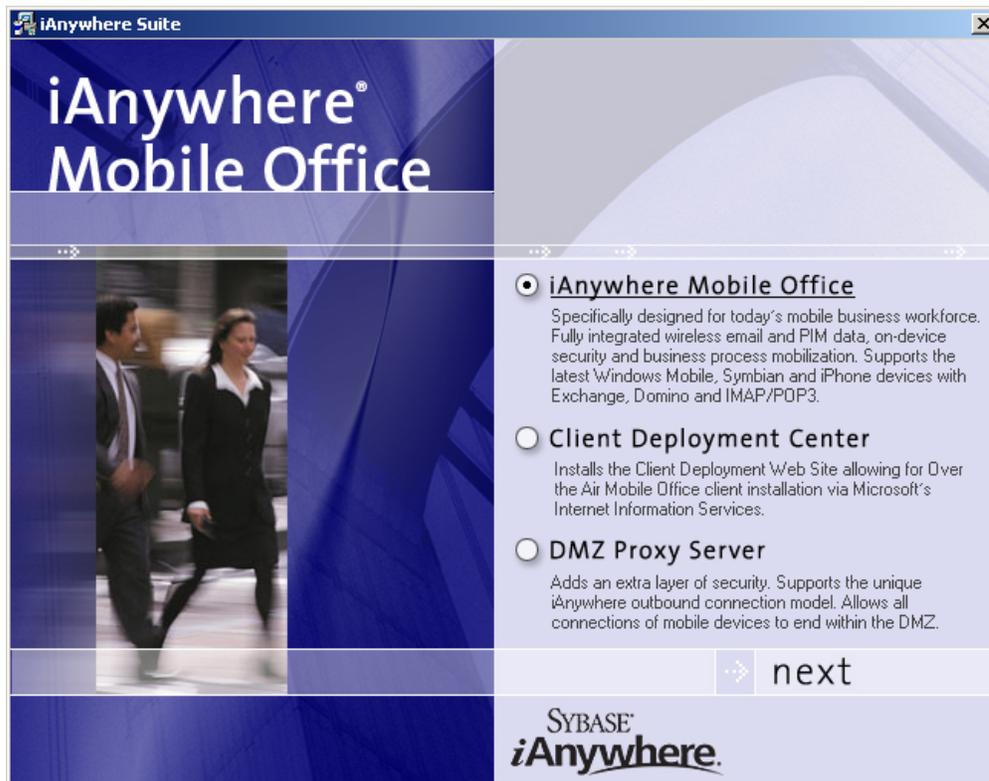
## General Notes

The iAnywhere Mobile Office server can be installed on a virtual machine provided the virtual machine meets all system requirements.

## Installing the Mobile Office Server

To install the iAnywhere Mobile Office software on your mail server:

1. Once you have downloaded and extracted the software installation package, launch the Setup.exe. In the opening screen, select **iAnywhere Mobile Office** and click **next**.



*Note: For more information about the other options available, refer to the administrator documentation within the installation package. This documentation is available from the Help button in the administration console. For simplicity, this Getting Started Guide does not provide further details.*

2. Read and accept the license agreement if you are in agreement.
3. In the **Setup Type** screen, select one of the email environments: Lotus Domino, Microsoft Exchange, or IMAP/POP3 for your mail server, or select **No Groupware** to install Mobile Office without backend groupware.
4. Click **Next**.
5. If you install for Lotus Domino, the Installer will ask you for the installation path of your local Domino server installation. If the Installer cannot detect your local installation, or if you are

running multiple servers, point the installation to the directory of the server instance where you want to install the Mobile Office add-in tasks.

During an installation for Microsoft Exchange or IMAP/POP3, there is no need to specify any installation path other than the paths for the Mobile Office Server itself as specified in the next screens.

*Note: A UNC path for the data directory of the iAnywhere Mobile Office server is not supported.*

6. Click **Next**.  
Steps are run to install Mobile Office.
7. In the **Service Configuration - License** screen, click **Update License**, enter the serial number information (contained in the activation email), and click **Next**.

**Service Configuration - License**

To enable the features of the Mobile Office Server, you must have a valid license configuration. A new license may be requested or an existing license updated from this page.

**Current License**

Available: 0 Total: 0

Expiration: <no license>

**Update License**

Serial Number:

**Use this proxy server when sending the request:**

Proxy Name:

Proxy Port:

Help Next > Cancel

8. Click **OK** in the **License Request Information** screen.

9. In the **Service Configuration - Ports & Proxy** screen, enter information for the HTTP Server and Monitor Agent. If you are connecting through a proxy server, enter your Company ID and enter a token in the Proxy Token field. Otherwise, leave 0 as the default. Click **Next**.

Please specify the ports for incoming service requests:

HTTP Server: 5001 80

Listen on multiple HTTP ports.

Monitor Agent: 5003

The following information is required when using a proxy server:

Company ID: 0

Proxy Token: Token\_0

Proxy Server	Port	Protocol

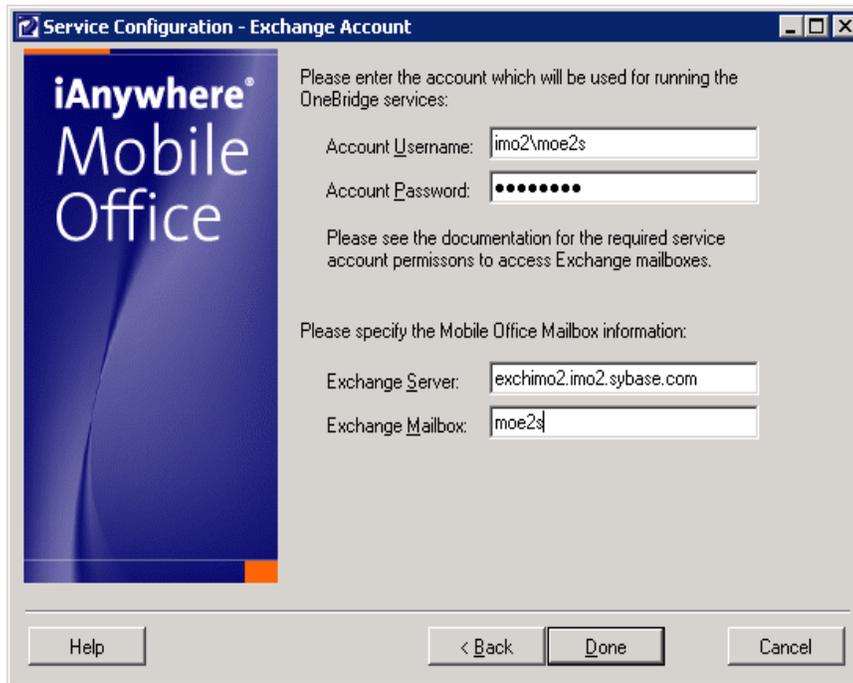
Buttons: Add, Remove, Help, < Back, Done, Cancel

10. For a Domino server or an IMAP/POP3 server installation, the **Done** button appears in this screen. Click it to continue to the completion of the installation. Go to Step 12.

For an *Exchange server* installation, the **Next** button appears in this screen. Click it to proceed to the configuration screen. Go to Step 11.

11. For *Exchange server installations only*, use the **Service Configuration - Exchange Account** screen to enter information for the following:

- Account Username
- Account Password
- Exchange Server
- Exchange Mailbox



Click **Done**.

12. In the **Service Configuration** dialog box, you will be asked if you want to start the services. Click **Yes** to allow the services.

*Note: If you click **No**, you will have to start services manually before running iAnywhere Mobile Office. See Starting and stopping services for information.*

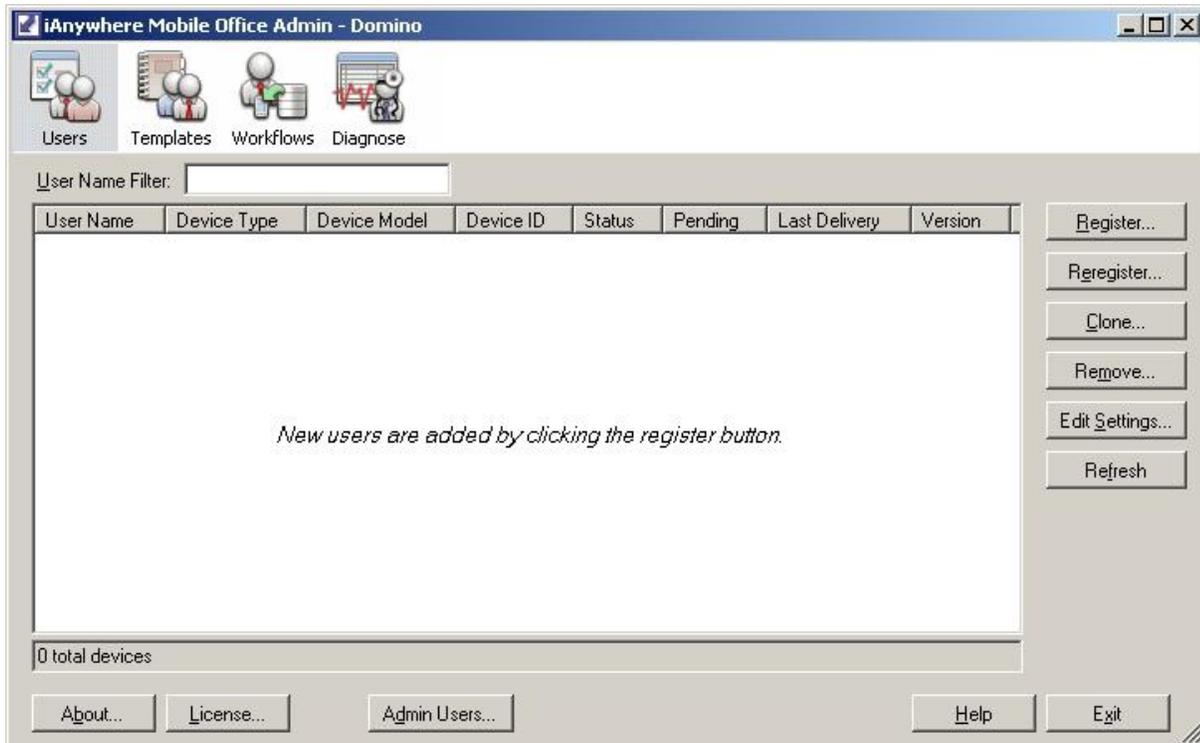
*Note: For Domino installations, the iAnywhere Mobile Office installation adds new server tasks to your local Domino Server installation. You can only register users in the iAnywhere Mobile Office Server if these tasks are running.*

To start configuring your mobile users, open the administration console:  
Start > Programs > iAnywhere Mobile Office > Admin

## Mobile Office Administration Console

iAnywhere Mobile Office administration console is the main administration tool for registering and configuring users and devices.

*Note: The title bar of this screen shows iAnywhere Mobile Office Admin – <Mail Server>, where <Mail Server> can be Domino, Exchange, or IMAP/POP3, depending on your installation. If you installed the Mobile Office server in No Groupware mode, an email platform name will not show in the title bar.*



The Admin interface includes three main panes:

- The **Users** pane allows you to register a new user or to change the settings for an existing user. The pane also lists all currently registered users, their device details, status, and the version of the iAnywhere Mobile Office software that they are using.
- The **Templates** pane lets you modify and create templates to configure different settings for specific users or user groups. When you register a user, you can select a specific template to meet the needs of the user or user group you are registering.
- The **Workflows** pane allows you to add and manage form applications that are used for data collection from within the Inbox on a device.
- The **Diagnose** pane provides a user interface to generate trace files, jump files, and error files for problem analysis and diagnosis.

The Appendix of this Guide describes the **Users** settings and functions in more detail.

## Managing Users

Adding new users and editing the settings of existing users are the primary administrative tasks. The screens in this section and the details in the Appendix briefly describe the data elements and functions available on the main **Users** pane.

*Note: An iAnywhere Mobile Office user must also be a registered user of the email environment (Domino or Exchange or IMAP/POP3).*

The **Users** pane provides the Administrator with an overview about all currently registered users. You can filter the listing of registered iAnywhere Mobile Office users with the text field above the list; however, to find an unregistered user, you must browse the email server directory.

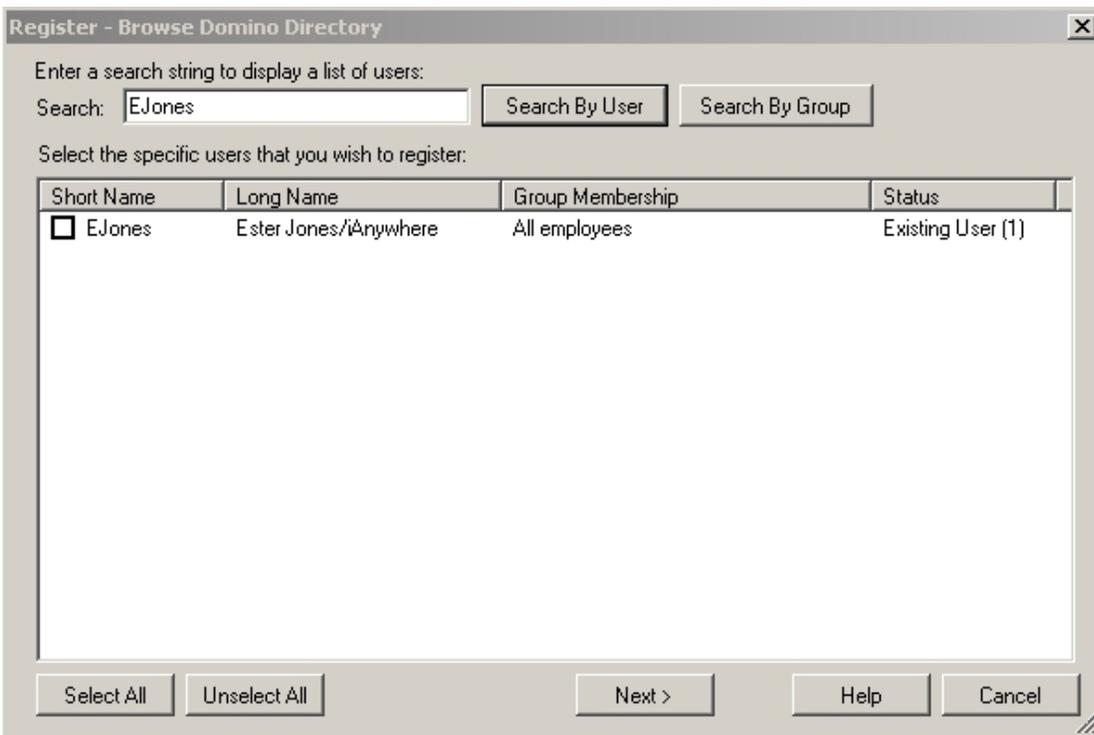
To register a new user:

1. From the **Users** tab, click **Register**.

*Note: For IMAP/POP3 users only, before you register new users, you must first register an administrator user that will be used to send out registration and error emails. For information, see the Administrator Guide from the Help button of the administration console or from the Start menu: Programs > iAnywhere Mobile Office > Mobile Office Docs > Administrator Guide.*

2. *For Domino or Exchange installations only:* In the **Register – Browse <Mail Server> Directory** screen, search your email server Directory for the user to be registered by clicking **Search By User** or **Search By Group**. In this example, using the search value EJones, an individual with the name Ester Jones was found. From this list, select the user who is to be registered. After you have selected the user or users, click **Next** to continue the registration process.

*Note: **Search By Group** is not supported in Exchange installations.*



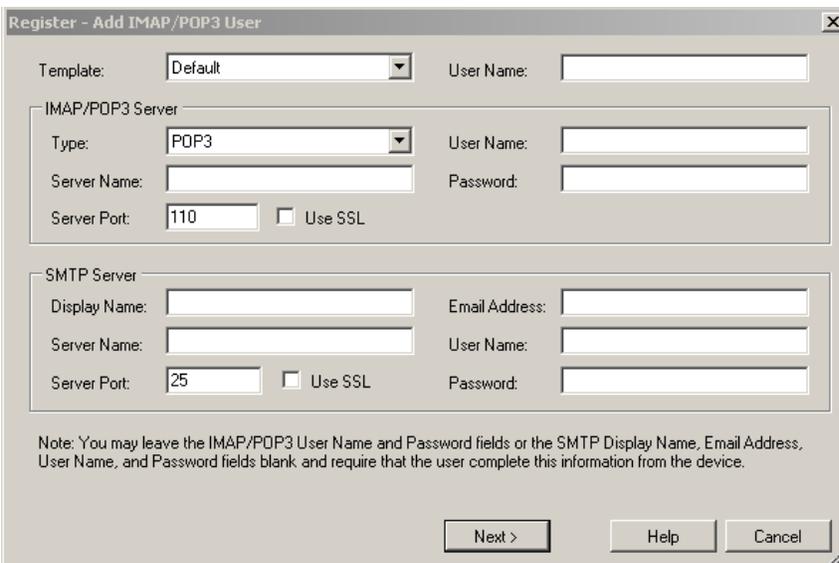
Register - Browse Domino Directory

Enter a search string to display a list of users:  
 Search:

Select the specific users that you wish to register:

Short Name	Long Name	Group Membership	Status
<input type="checkbox"/> EJones	Ester Jones/iAnywhere	All employees	Existing User (1)

For IMAP/POP3 installation only: Use the **Register - Add IMAP/POP3 User** screen to enter user information for IMAP/POP3 users:



Register - Add IMAP/POP3 User

Template:  User Name:

IMAP/POP3 Server

Type:  User Name:

Server Name:  Password:

Server Port:   Use SSL

SMTP Server

Display Name:  Email Address:

Server Name:  User Name:

Server Port:   Use SSL Password:

Note: You may leave the IMAP/POP3 User Name and Password fields or the SMTP Display Name, Email Address, User Name, and Password fields blank and require that the user complete this information from the device.

- In the **Register – Email Activation** screen, select the template you wish to use, and customize the information to be sent to the new user in the activation email. The information requested in this window is needed to configure the Mobile Office client on the device to connect to the server. You can specify an activation code that will be shown in the email. If you do not specify an activation code, a random code will be generated for you. When finished, click **Next**.

*Note: Activation codes can contain alphabetic characters A – Z, or numerals 0 – 9.*

- You can use the **Register – SMS Activation** screen to send the user a message containing instructions on downloading and activating the software. If possible, the Mobile Office client device will read the information and configure itself automatically. When you are ready, click **Register**. The activation information will be sent to the user. Once the user has completed the activation process, he will be listed as a registered user on the main **Users** pane, and detailed information about his registered device will also be displayed.

User Name	SMS Address
echavez	
ejones	
ekrauss	
fschneider	
fsmith	
lcolani	
lnottingham	

*Note: Sending an SMS message is not required.*

Once the user is registered, the iAnywhere Mobile Office server will begin to queue email and PIM data for delivery to the user's device. (The types of items that are queued are stipulated in the **Template** selected during registration.) From the **Users** pane, you can also **Edit Settings** for an individual user. Other **Users** tasks, including **Reregister** and **Clone**, operate in a similar manner using similar screens. Refer to the **Registered**

**Users List** and **Administrative User Functions** tables in the Appendix for further explanation of the **User** data elements and functions.

For information about registering a user in a No Groupware installation, see *Administrator Guide* at Start > Programs > iAnywhere Mobile Office > Mobile Office Docs > Administrator Guide.

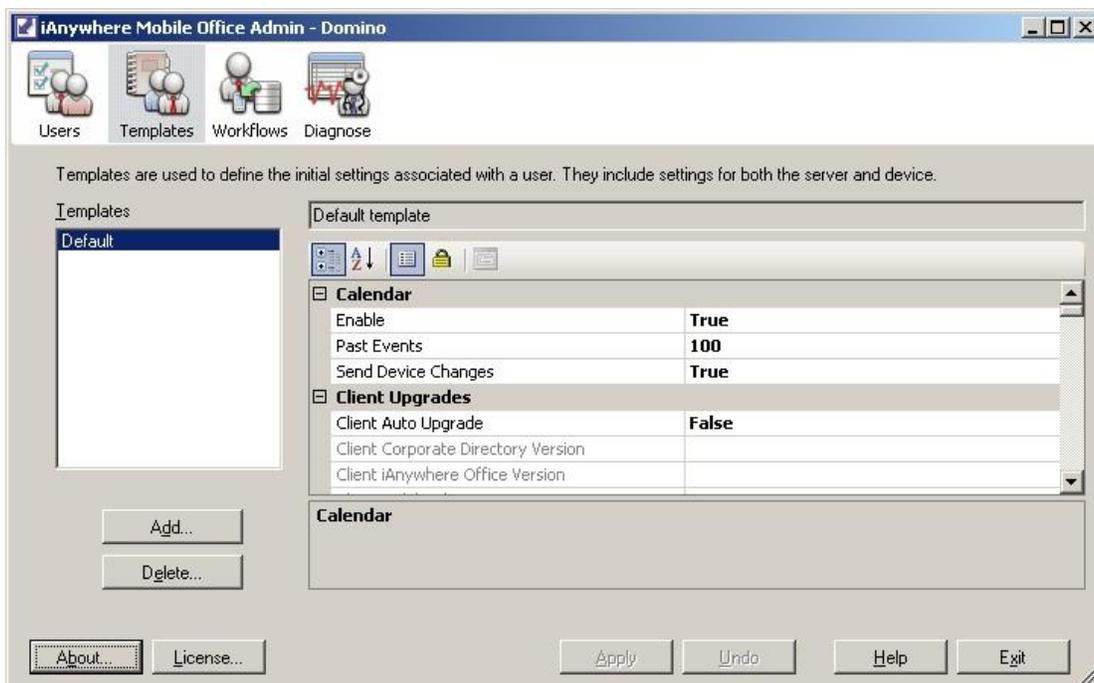
## Configuring Templates

A template is a named configuration that specifies the default settings for a user or user group registration. A single default template is created when you install the iAnywhere Mobile Office server, which you can modify and use as your standard template. The default template varies depending on your email platform and whether you selected a No Groupware installation when you installed the Mobile Office server. You can also design custom templates to meet the requirements of other users, managers, and groups within your organization.

Templates are used only for initial user registration. Subsequent changes to a template will not affect any users originally registered with that template. For example, once a user is provisioned using a Manager template, any later changes to the Manager template will not affect the user's individual settings. Also, the user's settings can be changed, if needed, using the **Edit Settings** function on the **Users** screen without affecting the template.

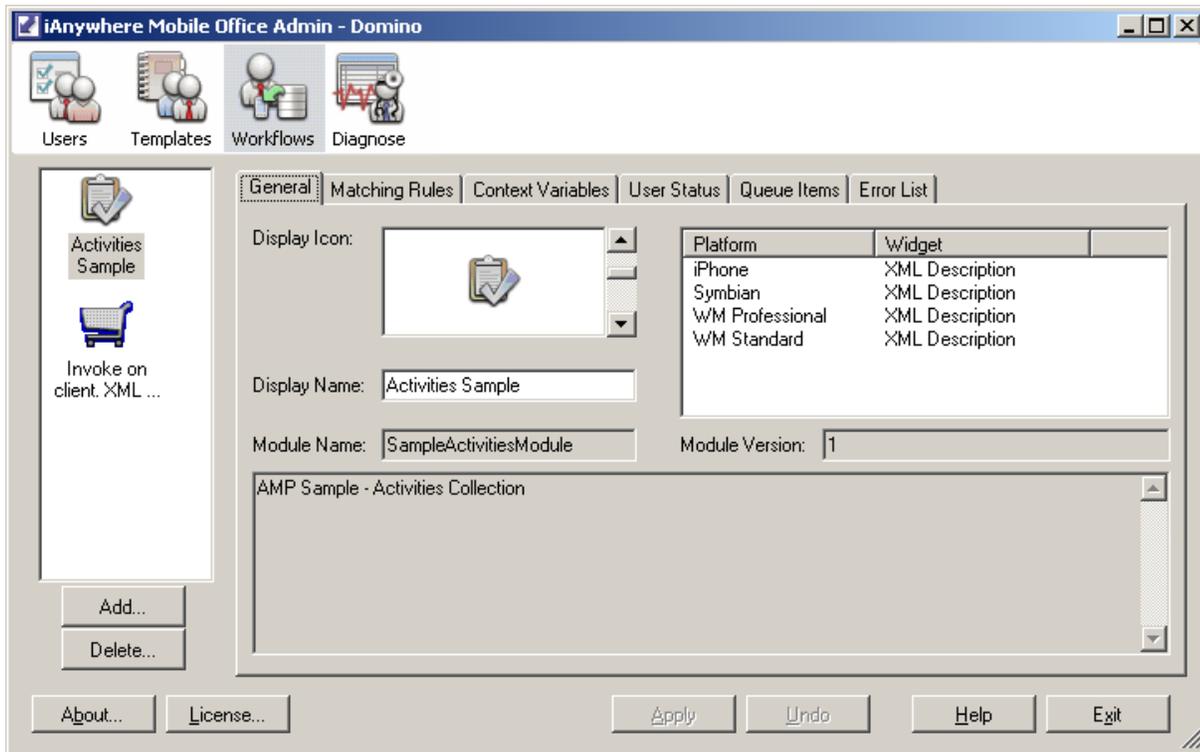
To modify the default template, open the **Templates** pane. The **Default** template will be highlighted. Scroll through the property categories, and make any necessary changes. When you select an option within any of the categories, note that its definition is displayed in a text block below the category listing. Many fields are auto-filled, and you can change other values by entering data directly, or by selecting values from drop-down menus. You can also lock a property so that it may only be viewed and not modified on the device by clicking the **Locked View** icon under the template name field.

To create a new template, click **Add** in the **Templates** pane. Enter a name and, if desired, a description for the template. Edit the template values as described above.



## Assigning and Managing Workflows

iAnywhere Mobile Office supports the extension of the E-Mail Inbox with Business Process Workflow packages. The **Workflows** pane on the administration console allows you to completely manage the Business Process Workflow packages in a Mobile Office installation.



Any email delivered to a mobile device can be transformed into a business process request on the server; this allows mobile workers to directly interact with backend systems. In addition, it is also possible to declare a Business Process Workflow package to be available on the device for user-initiated invocation. In this case, no email is transformed on the server side; the mobile worker is able to initiate a business process from within his email Inbox anywhere at any time.

Once a Business Process Workflow package is deployed into an existing installation, you can configure the Workflow package and assign it to any active user in the system.

A Business Process Workflow package consists of the server components that are targeted at specific enterprise back-end systems and components for the targeted device platforms. The server modules of all Business Process Workflow packages are hosted by the Mobile Office AMP Service. Administrators can manage the Mobile Office AMP Service via the Services Control Panel.

To deploy a Business Process Workflow package:

1. Click the **Workflows** pane on the administration console.
2. Click the **Add** button to browse for the zip package containing the business process Workflow package to be deployed.
3. Select the zip package to be deployed and click **Open** to deploy the package.

To assign users to a Workflow package:

1. In the administration console, click the **Users** tab and select the users you want to assign to a Workflow package.
2. Click the **Edit Settings** button.
3. In the **Edit Device Settings** screen, select the **Workflows** button.  
A list of deployed Workflow packages displays.
4. Check the Workflow packages you wish to assign to the user and click **OK**.
5. Click **OK** on the **Edit Device Settings** screen.

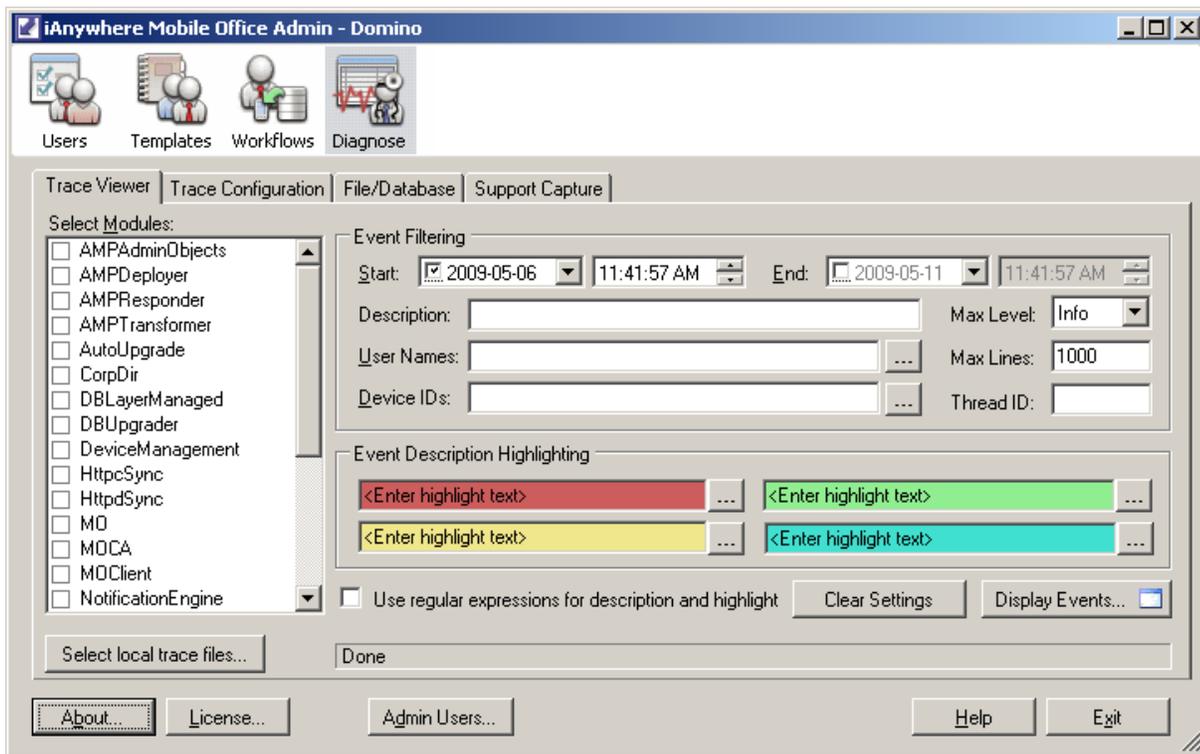
To unassign users from a Workflow package:

1. Uncheck the Workflow package in the Workflow packages list in the window on the left and click **OK**.  
When a user is unassigned from an application, the application is marked as “expired” on the device but will still function for existing emails which are on the device. The expiry time is calculated as the maximum of the “Past Days” settings for the user’s Inbox and all enabled subfolders, plus a small buffer time of 2 days. This is so that any existing emails that are linked to the application will still function while they are on the device. Once the expiry time has passed, the application will be physically removed from the device.
2. Click **OK** on the **Edit Device Settings** screen.

For information about managing Workflow packages, see the online Help in the administration console. Click the **Help** icon in the upper right corner of the console.

## Using the Diagnose Feature

The **Diagnose** tab provides a user interface for generating trace files, dump files, and error files for problem analysis and diagnosis. In **Diagnose**, you can configure trace settings, analyze trace files, display trace analysis results, and package trace files.



The **Diagnose** feature is comprised of four tabs described below.

### Trace Configuration Tab

The Trace Configuration tab allows you to configure the common trace settings shared by all the server modules, and save the trace configuration into a configuration file. The Mobile Office server reads the configuration settings from the configuration file and applies the settings to its modules to generate trace information. You can configure default settings for all modules, as well as settings for individual modules. You can also filter within the list of registered users for a specific user. The trace configuration file is TraceConfig.xml and is located relative to where you have installed Mobile Office.

### Trace Viewer Tab

The Trace Viewer tab enables trace file analysis by allowing you to select the modules you want to trace and the filter options for displayed content. These filter options include start/end date, description, user names, device IDs, trace level, maximum lines to display, and the thread ID that produced the trace entry. Because Trace Viewer allows you to view specified module activity with specified filters, you can narrow your analysis, for example, by choosing a particular module for a particular user at a particular time period.

**File/Database Tab**

The File/Database tab allows a file version check and a database schema analysis. When the file version is checked, all files installed are matched against a list of known file versions/sizes/dates, and a report displays any mismatched files. In the schema check, the current schema of the used database is checked against a known schema, and a report displays the mismatched schema.

**Support Capture Tab**

The Support Capture Tab allows you to gather existing trace files, file version and environment reports, database schema reports, common errors files, crash dumps, and the product's log data and package this data into one .zip file. You can specify which data should be packaged and you can filter the content by user name, device ID, and data age.

## Appendix

### Registered Users List

User Primary Pane Data Element	Description
<i>User Name</i>	The name of the user associated with the registered device. Typically the user's Lotus Notes short name or the Exchange Mailbox Alias or the IMAP/POP3 unique user name entered on the first wizard page.
<i>Device Type</i>	The operating system of the device, such as Windows Mobile, Symbian, or iPhone.
<i>Device Model</i>	The name of the hardware and manufacturer information.
<i>Device ID</i>	The unique device identification number.
<i>Status</i>	The current status of the client: <ul style="list-style-type: none"> <li>○ Registered: Registered but not yet activated.</li> <li>○ Expired: User did not activate within the stated activation period and the activation has expired.</li> <li>○ Online: Client is activated, connected to the server, and is processing messages.</li> <li>○ Offline: Client was activated but is currently not connected to the server.</li> </ul>
<i>Pending Items</i>	The number of queued messages on the server awaiting delivery to the device when next time connected.
<i>Last Delivery</i>	If a user is registered, this indicates the last time that the device and server exchanged data, and, provides an indication of the user's level of activity. If a user is not yet registered, this field will show N/A.
<i>Version</i>	The iAnywhere Mobile Office client version currently installed on the device.

## Administrative User Functions

User Admin Actions	Description
<i>Register</i>	<p>Add a new user or group of users to the system. The user must be a valid Domino or Exchange or IMAP/POP3 user.</p> <ul style="list-style-type: none"> <li>○ Configure activation options, such as software download address, company ID, and server address and communication port.</li> <li>○ Specify an activation code.</li> <li>○ Send an activation email to the user.</li> <li>○ Optionally send an activation SMS to the user's device.</li> </ul>
<i>Reregister</i>	<p>Reregister if user's data needs be resent to the device, or if the user failed to activate their registration within the activation period. The last known device settings are maintained, but new activation messages are sent.</p>
<i>Clone</i>	<p>Copy the settings of a registered device to a new device. All device settings and subfolder configurations are cloned to the second registration. A new activation message is sent.</p>
<i>Remove</i>	<p>Remove a registered user and its device. This operation permanently deletes all information stored for the user.</p>
<i>Edit Settings</i>	<p>Modify the stored settings for a user's device. The user can modify many settings directly on the device, but can request that the administrator edit the settings. The settings on the device are automatically updated when changes are saved.</p>
<i>Refresh</i>	<p>Refresh the list of users in the primary pane.</p>
<i>About</i>	<p>View general information about the iAnywhere Mobile Office Admin version number and copyright.</p>
<i>License</i>	<p>View information about your organization's iAnywhere Mobile Office license.</p>

