

DME version 3.5

DME Client User Guide

3.5.7

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For Apple iOS devices

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Introduction

Welcome to the user guide for the DME client version 3.5.7 for devices running Apple iOS: iPhone®, iPod touch®, and iPad® from Apple Inc.



This guide is divided into three parts:

- 1** An introduction to DME - about the company Excitor A/S, what the DME system does, installing DME, and various other aspects of DME.
- 2** A guide to DME for the Apple iOS platform. The descriptions and illustrations focus on iPhone. Naturally, all operations that involve telephony (such as calling the sender of an e-mail) only apply to iPhone.
- 3** A description of how you can get more help, a list of procedures, a glossary, and an index.

It is assumed that you already know how to operate your iOS device and are familiar with such concepts as flick, drag, and tap, and how to work with applications and the Home screen.

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About DME

DME (Dynamic Mobile Exchange) offers synchronization of push e-mail, PIM information (calendar, contacts, to-dos), and optionally files, to mobile devices. It fully integrates mobile device management with state-of-the-art security and efficient software deployment. DME is a mobile client/server solution that works with mobile phones, smartphones and PDAs using Symbian, Windows Mobile, Java or iPhone*) as operating system. DME is developed by Excitor A/S.

The solution enables large and midsize enterprises to deliver business mobility services to employees and to effectively manage and control mobile devices without compromising security. DME is device, network and operator independent and offers unparalleled TCO, unprecedented data and device security, and a very intuitive interface for users and administrators.

**) Please note that due to limitations on the iPhone platform, not all server features are supported on the DME client for iPhone.*

Features and benefits

The DME server has the following features and benefits. Only the features that apply to iPhone and other iOS devices are mentioned. For more features and benefits, see the Excitor website, or consult your DME partner.

- *Convenient for the user:* E-mail, calendar, and contacts
With DME on your iPhone, you get your most critical and often used office tools in your pocket wherever you are, whenever you need it. E-mails, appointments, and contacts are synchronized to your phone at the push of a button.
- *Quickly back in the game:* Instant service recovery
Should your phone get lost or stolen, the DME client can be downloaded to a new phone in a few minutes after you purchase a new DME supported phone – no matter where it happens.
- *Fretless security:* Mobile security policy enforcement
E-mails are encrypted over the air and on the device itself using full AES 128-bit encryption.
- *Freedom and ease-of-use:* Effective control of all devices
Gain a complete overview of your devices – regardless of make, model, or platform. Settings can be controlled centrally and can only be changed by the users to the extent this has been made possible by centrally applied security policies. Dividing the devices into groups makes it easy to change settings/features for many devices at a time.
- *Ease-of-use comes in many flavors:* Simple support and administration
New versions of DME are installed easily on iPhone by logging on to Apple AppStore. For support purposes, retrieval of device configurations and connection set-up makes it possible for you to help users who cannot connect, and a log of user actions assists you in identifying the problems and solving them. Notification of changes to server status can be sent to the DME administrators to ensure they are alerted to problems quickly.
- *Freedom of choice:* Versatility
Works on any available network (WLAN/Wi-Fi, GSM, GPRS, 3G/UMTS, EDGE...), and on most devices from leading manufacturers. Works on Lotus Domino and/or Microsoft Exchange collaboration systems.

Data security

DME has a strong focus on security. All e-mails are securely stored on the device - even if the SIM card is changed or the battery runs out after you have logged in. All data remains encrypted at all times using strong encryption, and is only decrypted to memory when it is displayed on screen.

All communication with the server is encrypted.

It is not possible to export any data from the device to be read elsewhere.

All DME-related data on the device (e-mails, calendar items, and contacts) are deleted in the following events:

- If the user name or password is entered incorrectly a number of times (set up by the DME administrator).
- If a new user logs in.

You should always contact your DME Administrator immediately if you lose your device.

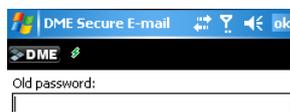
Changing mailbox passwords

Depending on your company's security policy, you must change your network password at regular intervals. If you use Exchange, your network password is the same as your mailbox password, but on Domino collaboration systems this is not necessarily so. The DME client depends on the mailbox password to gain access to synchronize your e-mail to the device.

Your mailbox password can be changed from your desktop computer or from your device. If your collaboration system is based on Active Directory, a message may pop up telling you well in advance that it is time to change your password. If you ignore the warning, your current password will eventually become invalid, and you will be unable to log on to the system.

You can either change your password from a desktop computer on the network or from the DME client.

- *If your mailbox password is changed from a desktop computer on the network, and you have exited DME (for instance in connection with a phone reboot) so that your credentials are no longer encrypted in memory, then the new password has to be verified on the server the first time you log in to the DME client. When you log in, and DME recognizes you as a user and recognizes your password, but detects that the password has been changed on the server, the following message is shown:*



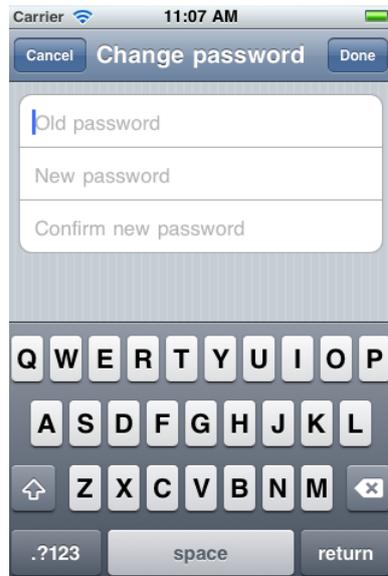
You are then asked to enter your new password.

1. Select **Yes** to verify the new password on the server.
2. Enter your old password.
3. Select **Log in**.

You can now use DME as usual.

- *If your mailbox password is changed from a desktop computer on the network, and your device still has your credentials encrypted in memory: If you are logged in, DME will log you out the first time the device communicates with the server (for instance in connection with a network push). When you log in again, you should use your new password. DME will assume that you have changed password on the server, verify your new password, and re-encrypt your credentials without you having to confirm any messages.*
- *You can change your mailbox password from the client.*
 1. Log in to the client as usual.
 2. Open the DME menu, and select **Tools > Change password**.
 3. Enter your existing password in the **Old password** field.

4. Enter a new password in the **New password** field, and retype it in the **Confirm new password** field.
5. Select **Change**.



DME sends the password change request to the server. If the server accepts the request, a message tells you that your password has been changed. If the server rejects the request, a message tells you why the command failed. If the command fails, it can be an issue with the server setup, and you should contact your DME Administrator.

Switching users

Unless forbidden by the DME Administrator, you can hand over your device to another person, even if it contains all your DME data. All e-mails, calendar items, to-do items, contacts, and synchronized files will be erased when the new user logs in.

The new user is taken through the same verification process as described in *Logging in* on page 16.

Synchronization overview

The basic idea of the DME client is to keep the e-mail, calendar system, contacts, and possibly files of your mobile device up-to-date with the corresponding items on the corporate network. To do this, the DME client is *synchronized* with the collaboration system or the file server. E-mails, calendar items, to-dos, and contacts are synchronized with the corporate collaboration system, and files are synchronized with files on the DME server or in a network location specified on the DME server. Please note that file synchronization does not apply to Apple iOS, and on other platforms it requires a special license - please consult your DME administrator for more information.

What is synchronized

In the synchronization (*sync* for short) process, DME checks the following:

- 1** Have any items been *created*? An item could be an e-mail, a contact, a calendar item, a to do, or possibly a file. If an item has been created, it is copied to the system on which it does not yet exist (for example, if an e-mail was created and sent from the mobile device, the e-mail is copied to the **Sent** folder on the collaboration system).
Furthermore, the e-mail, calendar and other items on the mobile device are synchronized with respect to the time span for which items should be shown according to the settings. This is called the *synchronization window*. For instance, the settings may specify that the e-mail application should show e-mails for the last 7 days. The sync process will then clear e-mails older than 7 days from the **Inbox** and other boxes except **Drafts** (on the mobile device only).
- 2** Have any items been *deleted*? If an item, for instance a meeting, has been deleted in the collaboration system, the deletion will be reflected on the mobile device. Note that e-mails deleted on the mobile device will not be deleted on the collaboration system, if the setting **Delete only locally** is enabled. Note also that you will not receive notification of changes when e-mails are deleted from the server.
- 3** Have any items been *edited*? If you for instance edit a spreadsheet on the mobile device, the sync process will update the spreadsheet on the DME server if file sync. is enabled. In the same way, if you edit a contact on the mobile device or on the collaboration system, the change will be synchronized.

Conflicts

In some cases, a conflict may arise. For instance, if a meeting has been moved to another time on both the collaboration system and the mobile device, DME will resolve the conflict by moving the meeting to the time indicated in the DME client, and a message will be sent to you with information about this fact.

Synchronization methods

Your device can be synchronized in two ways:

1 *Server-initiated sync (push)*

Whenever someone sends you an e-mail, a meeting invitation, or similar, it is received by the collaboration system. The DME server will check for such updates in the collaboration system at regular intervals and build a queue of messages for your device. The server will also generate a command for your device in case system settings are updated or a server command is issued.

If Apple Push Notification Services (APNS) is running on your device, and if APNS integration has been enabled on the DME server, you will receive notifications through the built-in notification framework on the device.

2 *Manual sync*

If you want to send an e-mail and the **Send immediately** setting is off (see *E-mail sync. settings* on page 72), it is possible to synchronize the client with the server manually, for instance by tapping the **Synchronize** button  in the client. You can synchronize the different item types individually, or you can choose to sync all at the same time. For more information, see the next section.

Synchronization manager

When you tap **Synchronize**  from the Desktop, DME shows a screen such as the following:



This is the **Synchronization manager**. The Sync. manager shows what resources can be synchronized (e-mail, calendar, etc.), what is in the sync. queue, or already running. Furthermore, the Sync. manager tells you at a glance if the resource you want to synchronize needs to be imported first, as is the case the first time you start using the DME client, and lets you perform the import. This is shown in the screenshot above, where the **Calendar** resource is marked with the word **Skip**. To import your calendar from the collaboration system, tap **Skip**:



Select **Replace with items on server** to wipe any existing calendar entries in DME and make a clean import from the collaboration system, or select **Export items to server** to merge any existing calendar entries in DME with the entries imported from the collaboration system. See *Importing items* on page 13 for more information. The Sync. manager will now look like this:



When you tap **Synchronize**, The resources marked by a large green dot will by synchronized, and resources marked with **Import** will be imported. The Sync. manager shows that a synchronization is in progress, and enables you to cancel the synchronization:



The resources available for synchronization depend on your license. For instance, if your DME license does not include Calendar sync., then that option will not be visible in the Sync. manager.

By default, all resources are selected for synchronization. For more information, see *Synchronization overview* on page 9.

After the synchronization is finished, the Sync. Manager will disappear from view. However, at any time during the synchronization process, you can tap the **Hide** button at the top left corner to continue working in the screen from which you chose to synchronize. The sync. process is not interrupted if you do this.

Note that several windows contain a **Synchronize** button . If you tap that, then the Sync. manager will not be shown, but DME will immediately start synchronizing the data of the type that is currently shown - e-mails when selected from the **Inbox**, calendar entries when selected from the **Calendar**, etc.

Importing items

The first time you log in to the DME client after installing it, you will be asked if you want to import e-mail from the server. When you accept to do this (*recommended*), your e-mails are imported from the DME server according to the default settings specified for the device on the server.

At any point you can choose to import items. In the DME menu, choose **Tools** > **Import** to see a list of items that can be imported:

- E-mail
- Calendar
- Contacts
- To-do
- All

The **Import all** function is a shortcut to importing all possible items according to your client settings.

If the import should be interrupted at any point, for instance by an incoming phone call, iPhone will resume the import from where it left off when you logged out of DME.

Since e-mails cannot be changed, importing or synchronizing e-mails amounts to the same thing. However, if you should find duplicate e-mail entries in your mailbox, you can choose to import your e-mail from the server to realign the synchronization.

Calendar entries, contacts, and to-dos are another matter. For these items, there is a risk that seemingly duplicate entries occur in your calendar or contacts if you synchronize, and you risk losing entries that have been entered on the device before you installed DME. There are at least three possibilities:

- 1** The device is brand new:
You can safely **import** all items, as you have never added contacts or appointments on this device.
- 2** You used to keep the device synchronized with the collaboration system using software such as MobileMe or similar:
You can assume that your contacts, calendar items and so on are up-to-date on the collaboration server. Therefore you should initially perform an **import** of these items. Doing this clears data on the device and imports data from the server, ensuring that no duplicates occur.
- 3** The device has not previously been synchronized:
 1. Perform a synchronization of the device. This matches contacts on the device with your personal contacts on the server. DME checks for duplicates, but this check is not completely reliable - for instance, if different data field is used for a contact on the device (if "Home Phone" is completed for "John Doe" on the device but not on the server, a near-duplicate will be created).
 2. Clean up your personal address book and calendar *on the collaboration system* (using Outlook or Notes). This is an important step.

3. When you are done, **import** the contacts and calendar to the device. This will erase duplicates and bring in a fresh set of calendar items and contacts from the server.
4. You can now add device specific features to the contacts, such as photos etc. These settings will not be lost when you synchronize contacts with the server (but they will if you import).

If in doubt, please consult your DME administrator before importing or synchronizing these items the first time.

Note that you can keep your personal and business contacts separate, so that importing contacts from the collaboration system does not affect contacts in the Contacts application. For more information, see *Contacts sync. settings* on page 75. The same applies to Calendar events - see *Interaction with the device Calendar* on page 49.

Installing DME on iOS devices



DME for iOS devices is installed using the standard Apple tools for application installation:

- 1 Open the Apple App Store in iTunes on your iOS device. Search for "DME 3" using the search box.

or

Go directly to the DME client download page in the App Store by typing **<http://itunes.com/app/dme3>** in the Safari browser, or by following a link sent to you by your DME Administrator.

- 2 Tap the **FREE** button. The button transforms to an **Install** button.
- 3 Tap **Install**. Enter your iTunes password when prompted, and wait for the application download to complete.

You could also download the DME app using iTunes on your PC or Mac, and then synchronize DME3 to your iOS device.

Upgrades are also handled through the Apple App Store.

Starting DME

First locate the **DME 3** icon on the **Home** screen.

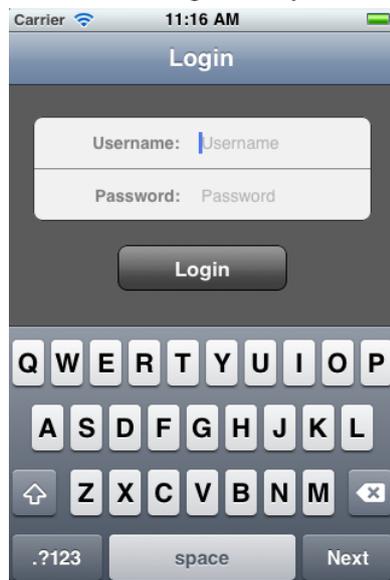


The **DME 3** icon shows the total number of unread messages in folders in your DME **Inbox**. You may have other unread messages in other mailboxes (for instance POP3/IMAP) in the standard **Mail** application.

To start DME, tap the **DME 3** icon. The first time you launch DME 3 for Apple iOS, the operating system will ask if you want to allow notifications for this program. You should enable this in order to receive notifications of new e-mails etc. via the **Apple Push Notification Services** framework. A *token* will be created for the iOS device in question, and the token will be sent to the DME server and used to identify the device which is to receive a notification when for instance a new e-mail arrives. To turn this feature off (not recommended) or adjust the notification settings, tap **Settings** on your device and then **Notifications**. Tap **DME 3**, and turn **Sounds** and/or **Warnings** on or off.

Logging in

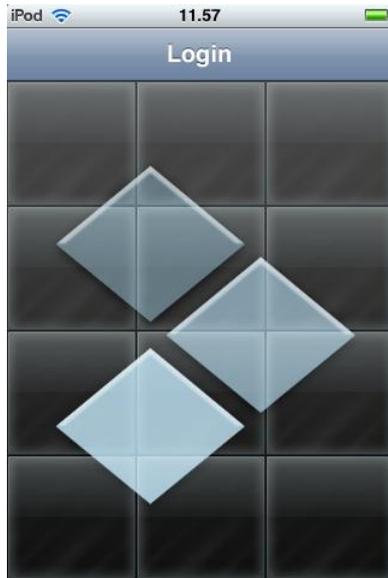
When launching DME, you are asked to enter your user name and password:



You must log in with the same user name and password that you would use for the collaboration system on your desktop computer. For Lotus Domino users, this is your "Internet password". Contact your IT department if you have problems with your user name or password.

The client remembers the user name from your last login, unless the DME administrator has disabled this feature for additional security.

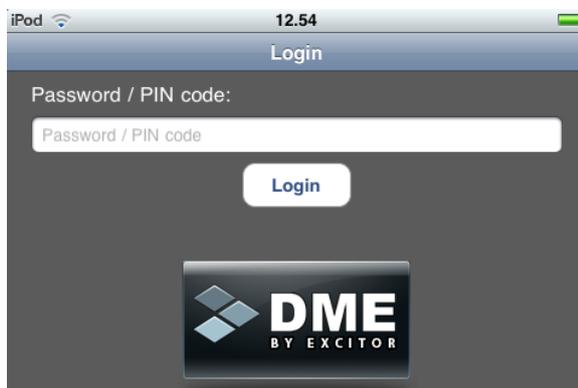
If you have defined a PIN code or a swipe code (see *Setting a PIN/swipe code* on page 68), you may log in using that rather than your LDAP password. If you have defined a swipe code, the **Login** screen will look like this:



Move your finger across the *tiles* as defined when setting the swipe code. When you release your finger, the swipe code is evaluated, and you are given access or returned to the standard **Login** screen (see above).

If you accidentally move your finger across tiles that you did not intend to touch, you can undo the current swipe by tapping another tile with another finger while *not releasing* the first finger from the screen. The screen will flash, indicating that your swipe attempt was canceled, and you can try again.

If you have not defined a swipe code, but you have defined a PIN code (or, if you have defined a swipe code *and* a PIN code, and you rotate the screen), you have a choice of entering your regular password or your PIN code in the **Login** screen, where the **Password** field is now called **Password / PIN code**.



The name of the password entry field in the **Login** screen will change back to **Password** if your PIN code expires (or if a PIN code is not defined).

First-time login

If you are logging in to the client for the first time, the login process is different.

➤ **Logging in to DME for the first time**

- 1 DME asks you for the *server path*. The server path has the form **dme.yourcompany.com:5011**, where **dme.yourcompany.com** is the host name of the server where DME is installed, and **:5011** is the port number. If you do not know the right host name, ask your DME administrator for the server path.



- **Host name:** Enter the host name in this field, for instance **dme.yourcompany.com**. Do *not* specify **http://** or **https://**; this is added automatically by DME.
- **Secure connection:** If this is **On** (default), DME is run over a secure connection (**https**). If **Off**, DME runs on standard **http**. This is hardly ever the case.
- **Port number:** The port number is by default set to **5011**. This is the port used for synchronizing data. Only change this if your DME administrator tells you to.
- **Test connection:** Tap this button to test if you have entered the server path correctly. If DME shows a "Connection successful" message, you have completed the above fields correctly.

Tap **Done** to continue.

- 2 Back at the **Login** screen, enter your user name and password as described in the previous section, and tap **Login**.
- 3 If the login process is successful (that is, DME can establish a connection to the DME server and log in using your user name and password), you are prompted whether you want to import your e-mail at this point.



This is often a good idea after your first login. See *Importing items* on page 13 for more information.

You are now ready to use DME.

Removing DME

➤ ***Uninstalling the DME client for iOS***

To remove the DME client application, simply long-press the DME application icon. When the icons begin to jitter, tap the delete badge on the DME icon, and confirm. Note that all data protected by DME will be removed along with the application.

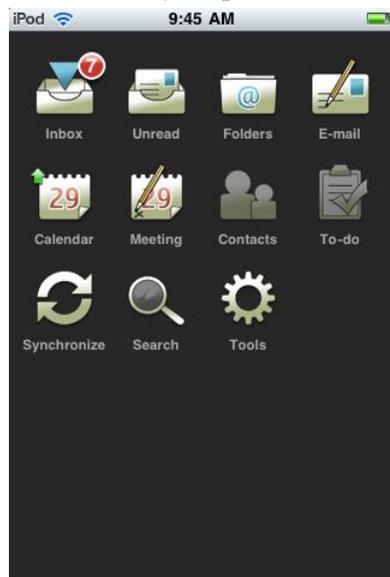
Using DME for iOS devices

The operation of the DME client for iOS conforms with Apple's standards of programming - the graphical user interface functions like any other sophisticated iOS application.

The DME client fully supports both portrait and landscape modes.

The DME Desktop

The main DME screen is the *Desktop*. The Desktop gives you quick access to the most commonly used features in DME. Depending on a setting in **General settings**, you can choose to see the Desktop or the **Inbox**, **Calendar**, or **To-do** screen after logging in, or you can choose the screen that was shown when you last closed DME. See **General settings** on page 71. Please note, however, that if you are editing an item, DME saves the spot from which you last quit DME. If you are for instance editing a calendar entry, and the phone rings so you must close DME to take the call, DME will show the calendar entry in question when you open DME again, as if you never quit DME.



Tap an icon to run the associated function.

A green arrow next to the **Inbox**, **Calendar**, or **To-do** icon means that changes have been made in DME which have not been synchronized with the server yet. For instance, there may be an unsent e-mail in the **Outbox**.

If the **Inbox**, **Calendar**, **Contacts**, or **To-do** icon appears dimmed, it means that the *initial sync* has not been run for the feature in question. For more information, see **Importing items** on page 13.

Desktop actions

The following is a brief explanation of each Desktop icon, with references to more information:

-  Go to the **Inbox** (see Navigating the folder tree). A red badge shows the number of unread e-mails in the **Inbox**.
-  Go to the **Unread** folder (see Navigating the folder tree)
-  Open the **Folders** screen (see Navigating the folder tree)
-  Create a new e-mail (see *Creating and sending e-mails* on page 35)
-  Open the internal DME Calendar (see *Calendar* on page 49)
-  Create a new meeting invitation (see *Booking meetings* on page 58)
-  Go to the Contacts application (see *Contacts* on page 64)
-  Go to the To-do folder (see *To-do* on page 66)
-  Synchronize e-mail (see *Synchronization overview* on page 9)
-  Open the **Search** menu (see *Search* on page 44)
-  Open the **Tools** menu (see *Tools* on page 67)

You can choose to start in the Desktop or the **Inbox** when you launch DME. See *General settings* on page 71.

Shaking iPhone

If you shake your device in a mailbox list view, DME changes to the Calendar.

If you shake in the Calendar, DME changes to the **Inbox** view.

Notifications

When a change occurs in the collaboration system, you will receive a notification of the fact. For instance, if someone sends you an e-mail, the DME server will detect this and try to notify you. This is called a *push* notification, because it is pushed to the device. The push mechanism of DME is adaptive, meaning that if one push fails, the server will try again using another method.

- 1 First the server attempts to notify you using the **Apple Push Notification Service** (APNS) to send the push. When a push is sent by the server using APNS, the iPhone (and iPod touch/iPad, if connected to a WiFi network) will show a message on top of whatever you are doing. The message will display the type of the push that you have received - for instance "new e-mail" or "your calendar has changed". Apart from the message, two buttons are shown: **Close** (which just dismisses the notification) and **Launch DME** (which launches the DME client for iPhone and initiates a synchronization). For more details, see below.

The first time you launch DME for iPhone, the operating system will ask if you want to allow notifications for this program (DME 3). You should allow this in order to receive notifications of new e-mails etc. via APNS. A unique *token* will be created for the iPhone or iPod touch in question. This token will be sent to the DME server and used by the server to identify the device which is to receive a notification when for instance a new e-mail arrives. You can adjust the notification settings by tapping **Settings** on your iPhone and then **Notifications**. Tap **DME 3**, and turn **Sounds** and/or **Warnings** on or off.

In **General settings** in DME, you can turn the APNS feature off (not recommended).

- 2 If Apple Push is not enabled, the DME server will send a text message (an SMS) to the device (iPhone only). The SMS contains a link. When you tap the link, DME will launch and initiate a synchronization.

Due to limitations in the iPhone operating system, DME is not allowed to delete the text message after you have clicked the link. In order to avoid running the same DME command twice, you should delete the text message yourself. Running the same DME command twice does not cause any problems as such, but is an unnecessary use of resources.

Apple Push is controlled by the device operating system. A push notification may arrive at any time, and DME's behavior in the event of a push depends on the circumstances in which the push is received, and on the user's actions. You may receive a notification when:

- 1 The screen is active, and you are using another application (not DME), and you press **Close** to dismiss the notification:
DME never receives the command to open and synchronize.
- 2 The screen is active, and you are using another application (not DME), and you press **Launch DME** to dismiss the notification:
DME receives the command to open and synchronize.
- 3 The screen is active, and you are using DME:
DME receives the command to synchronize - you do not see the notification.
- 4 The screen is off, and you slide the bottom button to view the notification:
DME receives the command to open and synchronize.
- 5 The screen is off, and you ignore the notification. The screen turns off again. When you turn on the screen, you will see the notification until you slide the bottom button:
DME never receives the command to open and synchronize.

Note that the DME server cannot tell if a client receives a notification or not using Apple Push.

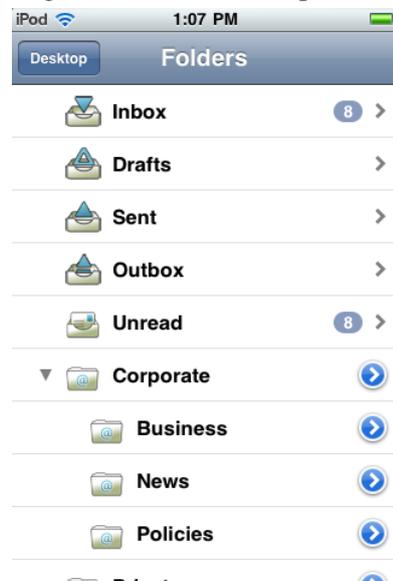
Working with folders

The DME mailbox consists of at least the following folders: **Inbox**, **Outbox**, **Drafts**, **Sent**, and **Unread**. The first four of these folders function as the corresponding folders on the collaboration system (Notes or Outlook). The **Unread** folder is a *smart folder* which shows all unread messages in any folder in the DME client. When an e-mail in the **Unread** folder is read, it disappears from view - but naturally remains in the folder from which it originated.

Apart from these standard folders, subfolders created on the collaboration system (Notes or Outlook) can be shown on the client. Subfolders from the collaboration system can be shown if the folder synchronization feature is enabled on the DME server and on the client (see *Folders settings* see "*Folder sync. settings*" on page 74). If enabled, you have access to all the e-mail folders on your collaboration system. With settings similar to the e-mail settings (see E-mail settings) you can specify how many e-mails you want to see in each folder (by age in days) and whether you want to synchronize e-mails in folders at all. This is specified as a system-wide setting. In the following section you can see how to specify different settings for each folder, including whether you want to receive a notification when a new e-mail arrives in a folder.

Navigating the folder tree

To move between e-mail folders, tap the desktop Folder icon , or tap the **Folders** button in the mailbox view. When you do this, DME shows a list of all folders in the system. Tap the desired folder to open the folder in the mailbox view, or tap **Desktop** to go back to the Desktop.



The number of unread e-mails in each folder is shown next to the folder name.

Note also that if a folder is marked with a different color, it means that it cannot be selected:



On Domino systems, you can create folders and subfolders at the same time by naming a new folder like this: **Work\Testing**. When created in this way, the parent folder (**Work**) cannot itself contain e-mails (but **Testing** can). Therefore you cannot select the parent folder here, but you can select the subfolder.

Setting folder options

In the folders settings (see *Folder sync. settings* on page 74) you can set defaults for the way e-mail folders should be synchronized between collaboration system and client. If you have many folders on the collaboration system, it is recommended that you set up very restrictive default settings for performance reasons, and loosen up on individual folders as described below.

To change synchronization options for a folder, open the folder view described above, browse to the folder you want to customize, and tap the  icon to the right of the folder name. (Note that you cannot modify the settings of the five system folders.) The following screen is shown:



- **Use default values**

If this field is set to **Yes**, the current folder uses the general settings specified (see *Folders settings* see "*Folder sync. settings*" on page 74). If **Apply to subfolders** is also selected, the default settings will be applied to all subfolders below the current folder as well, when you press **Done**. If the value in this field was **No**, and you change it to **Yes**, the settings in the remaining fields in this screen will be reset to the default values when you press **Done**.

If you want to apply other settings than the default settings to this folder, you must select **No** in this field.

- **Sync. folder**

This option can only be changed if **Use default values** above is set to **No**. If this field is set to **Enabled**, e-mails in the current folder are synchronized with the collaboration system, using the synchronization window defined in the field **Days back** below. To avoid too high load on the DME server, you should only synchronize those e-mail folders that you really need on the device. You can for example consider to not synchronize folders containing graphics-intensive newsletters etc.

- **Days back**

This option can only be changed if **Use default values** above is set to **No**. When e-mails are synchronized, e-mails from the last number of days selected here will be synchronized and available in the current folder.
- **Include in mail scan**

This option can only be changed if **Use default values** above is set to **No**. If this field is set to **Enabled**, you will receive notification when a new e-mail arrives in the current folder. New e-mail can "arrive in" subfolders by means of rules, which are set up on the collaboration system to automatically distribute new e-mails in folders.
- **Apply to subfolders**

If this field is set to **Yes**, the settings made in other fields in this screen are propagated to folders below the current folder when you press **Done**. Use this function with caution, as the setting may affect many folders. Note that you can choose this option regardless of the value of the field **Use default values** above. Tap **Done** when you have defined the settings for the folder in question.

DME for iPad

Excitor does not make a separate DME client for the iPad - all supported iOS devices use the same client software.

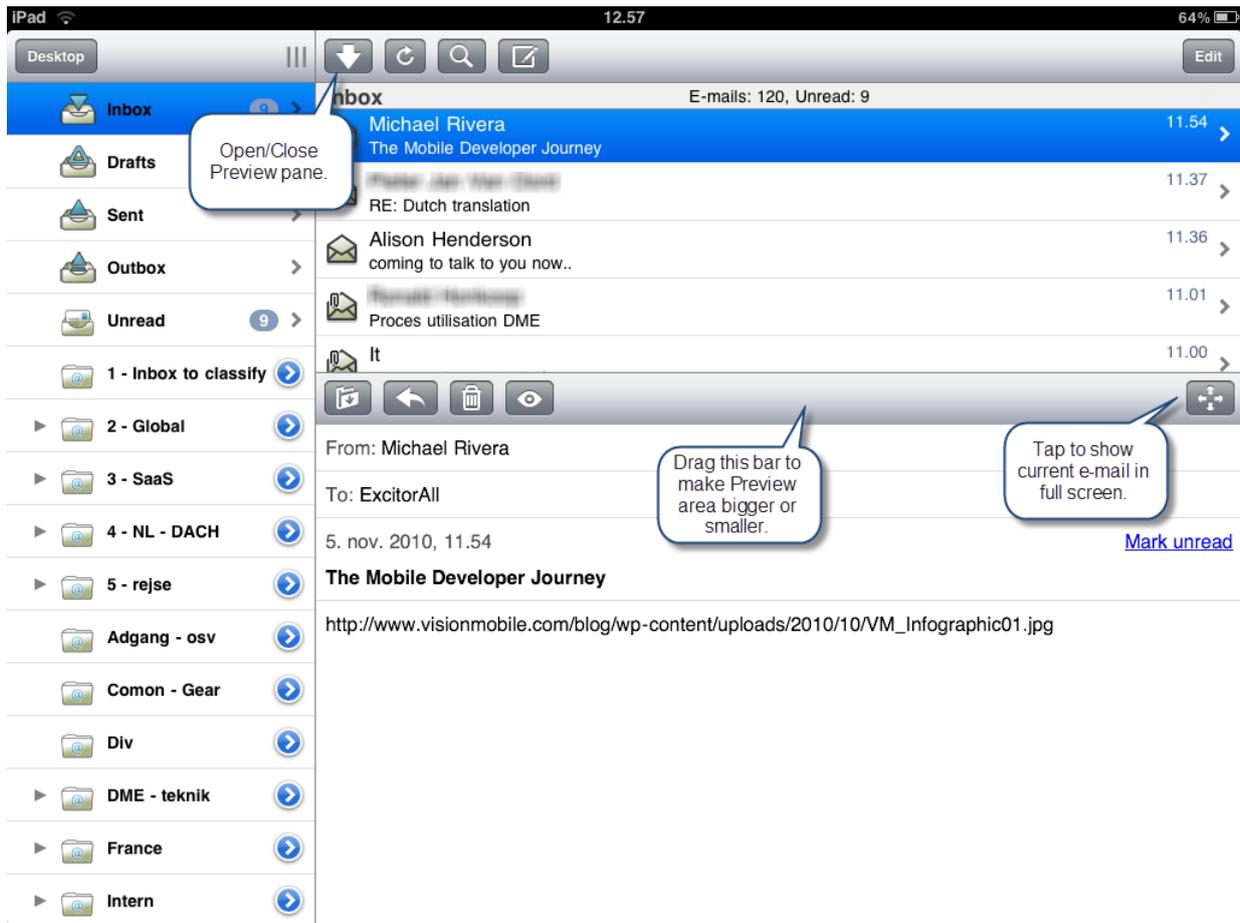
This section briefly describes the main differences between DME running on iPad and on other supported iOS devices (iPhone and iPod Touch).

- **Desktop**

The icons on the iPad are bigger than on other devices.

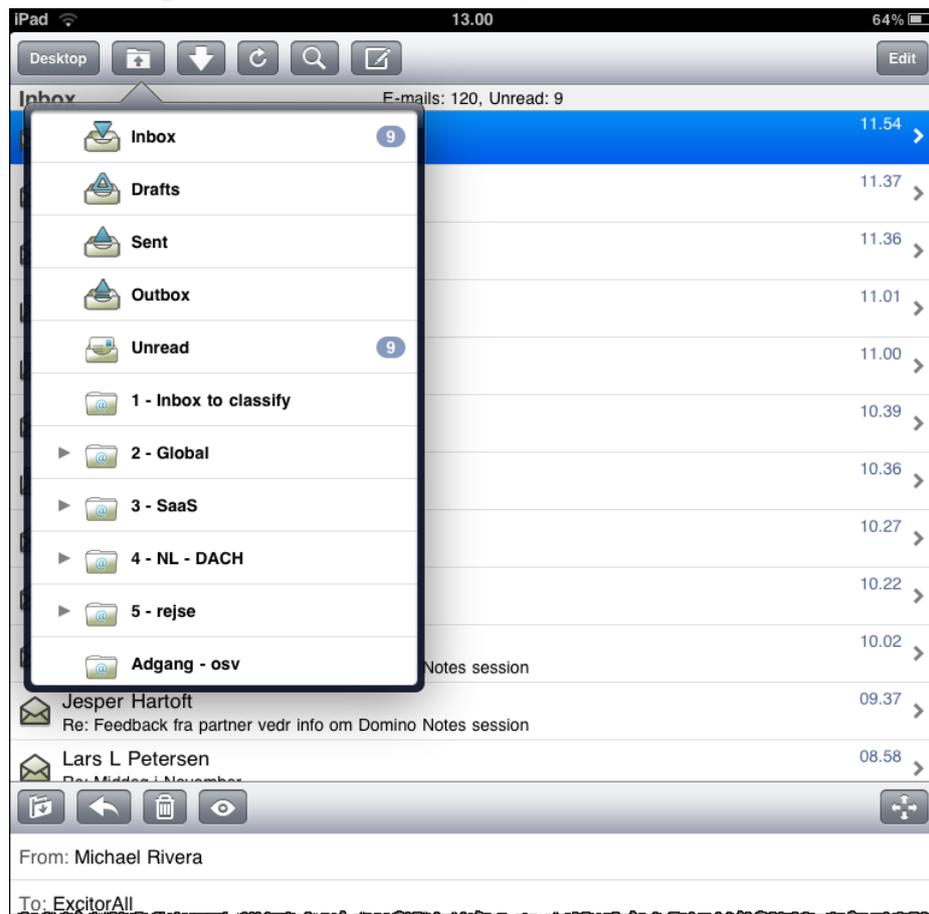
- **Folders and Inbox**

When you open the **Inbox** in *Landscape* mode, iPad shows a three-pane view of your mailbox:

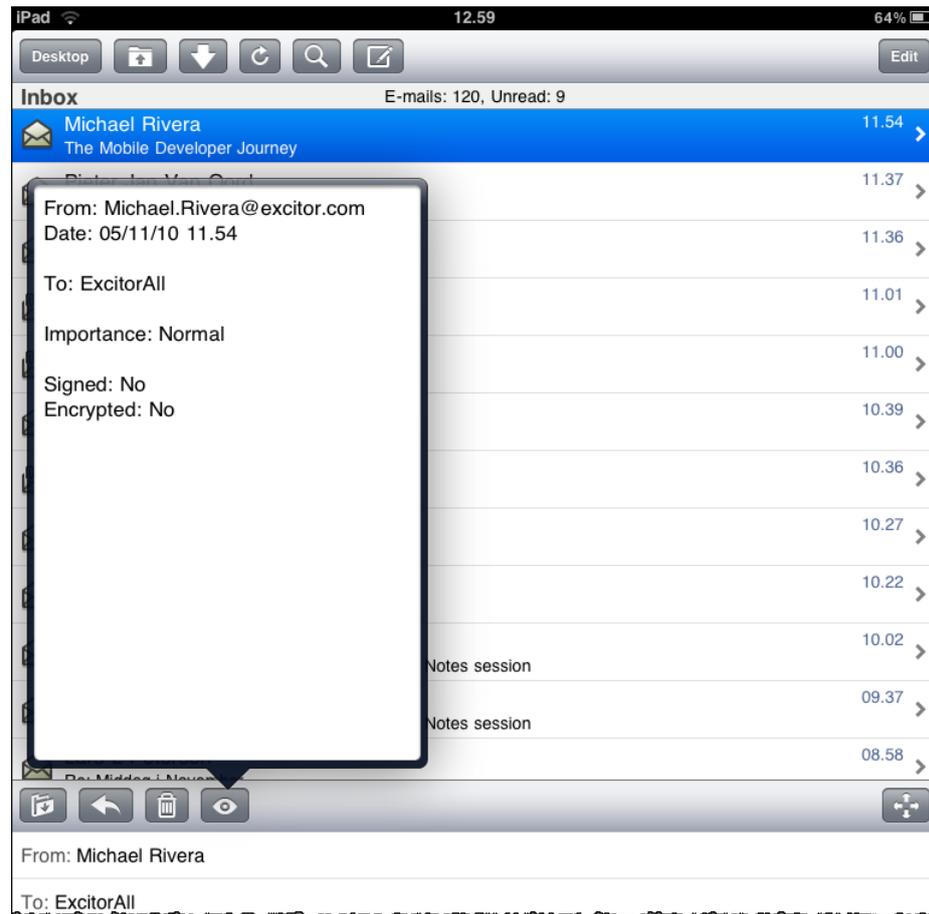


Folders are shown to the left, **e-mail list** at the top right, and **e-mail preview** at the bottom right. In E-mail sync. settings, you can decide if showing an e-mail in the Preview pane should mark the e-mail in question as read - see *E-mail sync. settings* on page 72.

In *Portrait* mode, DME shows you e-mails as a two-pane view with e-mails at the top and the Preview pane at the bottom. To go to a different folder, tap the **Folder** icon at the top, and select the e-mail folder you want to see:



In both Landscape and Portrait mode, tapping the **Details** button shows you more information about the currently displayed e-mail (in the client for iPhone this information would be shown on a separate page):



Those were the main differences between DME for iPad and DME for other iOS devices.

E-mail

The **Inbox** contains the e-mails and meeting invitations that have been synchronized to DME from the DME server. A badge on the **Inbox** icon in the Desktop shows how many unread e-mails exist in the **Inbox**.



Depending on the setting **Log in to** in **General settings**, you can choose to see the Desktop or the **Inbox** as the first screen after logging in - see *General settings* on page 71.

Just below the name of the folder, you can see the total number of e-mails in the current folder and the number of unread e-mails in the folder.



Drag up/down, or flick to see more e-mails. If the mailbox is showing the latest e-mails, you can drag down and then release to synchronize the mailbox (Twitter-style sync.):



If you rotate iPhone sideways, the mailbox view is shown in landscape orientation:



You can rotate all screens in DME in this way.

When you scroll down through a list, such as your e-mail list, you can always tap the top-center clock to return to the top of the list.

If you shake your device, DME changes to the Calendar view. See *Calendar* on page 49.

E-mail icons

On the left side of each e-mail in the mailbox view, an e-mail icon is displayed. The icon tells you quite a bit about the e-mail at a glance:



An *unread e-mail* is shown as an unopened envelope. The sender is displayed in a **boldface** font.



An already *read e-mail* is shown as an opened envelope.

In addition to this, different symbols can be superimposed on the e-mail envelope, providing you with more information:

Symbol	Meaning
	This e-mail contains one or more attachments.
	This e-mail is a meeting invitation.
	This e-mail has high priority.
	This e-mail is encrypted.
	This e-mail is signed.



An e-mail in the **Drafts** folder.



An e-mail in the **Sent** folder. The e-mail icon in both the **Drafts** and the **Sent** folders can be superimposed by the attachment, priority, encryption, or signature symbols.

Checking e-mail

To check for new e-mail, tap in the mailbox view, or drag down and then release to synchronize the mailbox (Twitter-style sync.):



For more information, see *Synchronization manager* on page 11.

Note that if **Apple Push** is enabled, you do not have to synchronize manually, as e-mails, meeting invitations, and commands are pushed to the device instantly from the DME server. However, you can still perform a manual sync. For more information, see *General settings* on page 71.

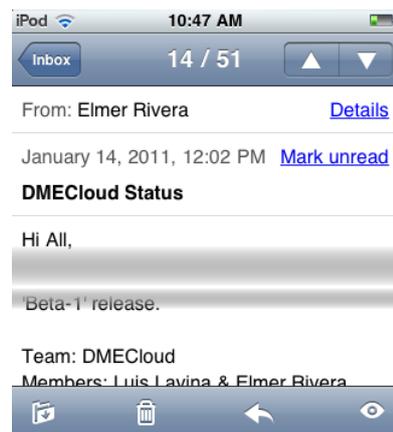
Reading e-mails

Tap an e-mail to open it. The top part of the screen is reserved for information about the e-mail and the title. By default, only the sender is visible. To see any other recipients of the e-mail, tap the **Details** link.

Pinch together and apart to change zoom level (making the text smaller or larger). Double-tap to go back to default zoom level (100%).

Tap  to see the next e-mail, or  to see the previous e-mail in the current folder.

If you want to mark the e-mail you are reading as unread, tap the **Mark unread** link next to the received date.



To return to the mailbox view, tap the top left button with the name of the current e-mail folder, for instance .

Links

E-mails and meeting invitations may contain links such as e-mail addresses, phone numbers, and web links. Whenever a link is found, it is written in blue and underlined (like links on a web page). Tap a link to see your options for the link.

When you tap a *phone number*, you can select **Add to contacts**, **Call**, or **Create SMS**.

- **Call** lets you dial the number. This naturally only applies to iPhone, not iPad touch.

An note about international calls: If a phone number is preceded by + or 00, DME will remove any initial 0 in the first set of parentheses from the number before dialling it. Otherwise, it will be dialed as it is. For instance: The number (012)-555-23421 will be sent to the phone dialer as is. The number +44(012)-555-23421 will be sent to the dialer as +44(12)-555-23421. This is in compliance with international standards.
- **Create SMS** lets you create a new text message for the person in question. Note that doing this logs you out of DME.
- **Add to contacts** copies the highlighted phone number, and opens your **Local contacts**. Here you can choose between the following options (shown immediately if you are using an iPod touch):
 - **Create new Contact** creates a new, empty contact, inserting the phone number in a phone number slot. You can now edit the contact further (see your Apple documentation).

- **Add to Existing Contact** lets you browse for an existing contact to which you want to add the information.

When you tap an *e-mail address*, you can choose between the following two options:

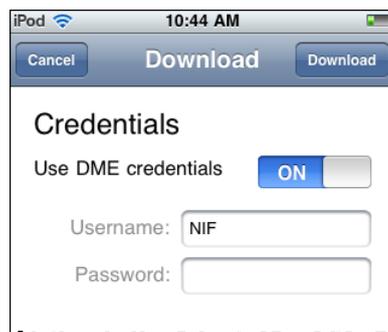
- **New e-mail** - create a new e-mail for the e-mail address in question.
- **Add to contacts** - gives you the same options as tapping a phone number (see above).

When you tap a *web address*, the link is opened in Safari. Note that doing this logs you out of DME.

SmartLinks

SmartLinks are links in the body text of e-mails, which are handled in a special way by the DME client and the DME server. SmartLinks may for instance link to Word documents, PDF files, or other binary files that are only available on, say, the corporate intranet. Such files are not usually available from outside the corporate network (without using a VPN connection). However, when you select the SmartLink, the DME client is able to download the file as if it were an attachment in the e-mail.

The use of SmartLinks requires the DME administrator to set up the DME server in such a way that the DME client recognizes certain links in the mail body text as special links. As described in the previous section, DME automatically highlights web links - that is, links starting with **http:** or **https:** or **www**. If any such link contains the text defined on the DME server, the link will be treated in a special way - instead of opening a browser window, the client will send a request to the DME server, which will then prompt the client to log in and download the requested file (if it exists). You can say that the server acts as a *proxy*.



Example: the body text of an e-mail contains two links:

1 <http://www.example.com/onepagedown>

Selecting this link will open the built-in browser and go the **onepagedown** page at **www.example.com**. This is a normal web link.

2 <http://intranet.example.com/doc?id=234>

Provided that **http://intranet.example.com** has been defined as a SmartLink site on the DME server, selecting this link issues a request to the DME server to download the document defined by the document ID **234**.

The downloaded file is opened by the associated viewer immediately. When you close the viewer, the file is deleted from the device.

Please note that the SmartLink functionality is an add-on to DME, and special documentation concerning how to set up this feature is available.

Attachments

You can view or read some types of files and images attached to messages you receive. For example, if someone sends you a PDF, Microsoft Word, or Microsoft Excel document, you can read it on iPhone.

When you receive an e-mail with an attachment, an attachment icon - a paper clip - will be superimposed on the e-mail icon in the mailbox.

Note that graphics that have been embedded into an e-mail may also be shown as attachments on the client. (This requires that you run Lotus Domino as your collaboration system.)

➤ **Opening an attachment**

- 1 Open the e-mail containing one or more attachments.
- 2 Tap the  icon at the bottom right of the toolbar in the open e-mail.
- 3 A list of the attachments to the e-mail is displayed.



- 4 Tap an attachment.
- 5 Tap **Yes** to download and open the attachment.

The attachment is stored in a temporary folder on the device disk, which is outside the secure DME area. However, it is only stored there very briefly - it is deleted from the temporary folder again as soon as the attachment has been read into the memory of the associated viewer.

To save transmission time and space on the device, attachments are not stored on the device unless you specifically choose to download them. In the attachment list, the  icon shows if the attachment is only located on the mail system server. A phone-and-clip icon  means that the attachment has already been downloaded to the device, encrypted, and stored in the secure DME area.

Note that in order to prevent memory overrun crashes caused by decrypting large attachments, DME for iPhone has a limit of 10 MB per individual attachment.

Tap the top left **Attachments** button to return to the attachments list.

➤ **Removing all attachments from the device**

You can remove all attachments that have been downloaded to the device and stored in the secure DME area in one operation.

- 1 From the mailbox view or the Desktop, tap **Tools**.
- 2 Tap **Delete all attachments**.

Note that this option is only displayed if you have in fact downloaded one or more attachments.

- 3 Tap **Yes** to confirm.

Moving an e-mail

If folder synchronization is enabled, you can move the open e-mail to another folder.

➤ **Moving an e-mail**

- 1 Tap the  icon to open the folder selection view (see Navigating the folder tree).
- 2 Tap the folder to which you want to move the current e-mail.
- 3 The e-mail is moved, and the mailbox view of the e-mail's original folder is shown.

You can also move one or a number of selected items from the mailbox view - see *Moving e-mails* on page 42.

Deleting an e-mail

When deleting an e-mail, the e-mail is removed from DME. Depending on a setting in the e-mail settings, the e-mail can also be deleted from the collaboration system at the next synchronization (see *E-mail sync. settings* on page 72).

You can also delete one or a number of selected items from the mailbox view - see *Deleting e-mails* on page 42.

➤ **Deleting an e-mail**

- 1 Open the e-mail, and tap .

Viewing e-mail details

You can see a summary of information about the e-mail you are currently reading.

➤ **Viewing e-mail details**

- 1 Open an e-mail.
- 2 Tap the  toolbar icon.
- 3 An **E-mail details** screen shows you information about the current e-mail.



The information consists of the date and time the e-mail was sent, a list of recipients of the e-mail (individual recipients and mail groups), and details about importance and security (whether the e-mail was signed or encrypted).

Creating and sending e-mails

➤ **Creating and sending an e-mail**

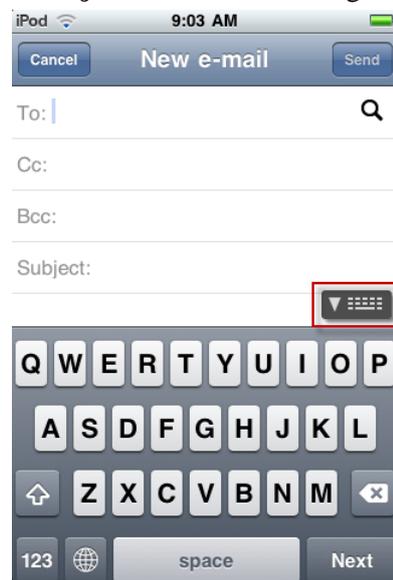
- 1 From any folder, tap . A **New message** screen appears.

- 2 Enter message details as described in *E-mail details* on page 36.
- 3 Apply any options as described in *Selecting message options* on page 38.
- 4 Tap **Send** in the top right corner.

The e-mail is now saved in the **Outbox**. Depending on the e-mail sync. settings, the e-mail is sent immediately or queued for the next synchronization (see *E-mail sync. settings* on page 72). When the e-mail has been sent, it is moved to the **Sent** folder.

E-mail details

The **New e-mail** screen contains fields for entering recipients (**To**, **Cc**, and **Bcc** fields), a **Subject** field, and a message body field.

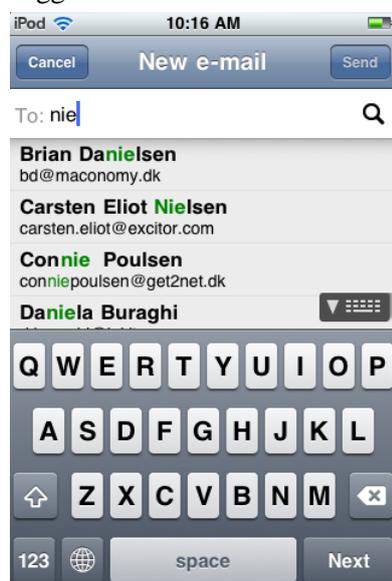


Note the small keyboard icon above the virtual keyboard. You can use this to hide the keyboard manually if you find that the keyboard gets in the way of the **Details** and **Attachments** icons at the bottom of the screen.

Tip: Some collaboration systems are able to resolve names of known users. This means that you only have to enter the short name as the e-mail recipient. For instance, you could just enter **sad** in the **Send to** field, and the collaboration system would resolve (expand) the name to **Sabine.Adelhof@excitor.com** automatically. Ask your DME administrator if this is possible in your setup.

Entering recipients

With the cursor placed in the **To**, **Cc**, or **Bcc** field, you can start typing the name of a recipient. DME will try to predict who you want to enter as a recipient, and shows suggestions in a list below the recipient field:



DME builds this list from all the e-mail addresses found in your mailbox folders, from participants in meetings where you are a participant or chair, and from those of your local contacts that have an e-mail address.

When you start typing, DME will match the typed characters with the names and e-mail addresses in the list of addresses. For instance, typing a "c" might match the following entries in the list:

- "Chris Rea <chris.rea@music.com>"
- "Hooray Carlton <hooray@freude.de>"
- "Melanie C. <melc@spice.com>"

As you type more characters, the list will grow shorter. In the example above, typing an "a" after the initial "c" will limit the list to "Hooray Carlton <hooray@freude.de>" only.

Flick through the list, and tap to add the contact or e-mail address to the recipient field. The list only shows contacts that have an e-mail address. To add another contact, type a comma, and then start typing the name of the next recipient.

The list is sorted alphabetically. If you cannot find the required contact, you can tap the search icon  to perform a search in the Global Address Book. DME will transfer the letters you have already typed in the name field to the **E-mail** field of the Global Address Search window, and execute the search immediately. Then just tap the  button to insert a name into the recipient field.

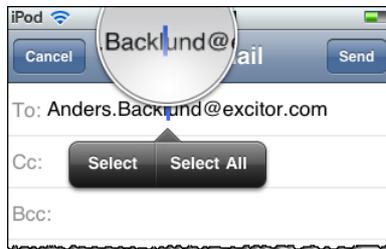


For more information about Global Address Book search, see *Global Address Book* on page 45.

➤ **Editing or removing recipients**

If you mistype a recipient, or if you want to remove a recipient from a field, you can do the following to edit the address:

- 1 Touch and hold to bring up the onscreen magnifying glass, then drag to position the insertion point.



- 2 Release the finger. Tap **Select** to display handles which you can move to select the text you need, **Select all** to select all the text in the current field, or **Paste** (if you have recently copied text). You can edit or delete the address using the keyboard.

These are standard features of the iOS operating system.

Selecting message options

Tapping the **Details** button opens the **E-mail details** screen. Here you can set specific e-mail options. You can sign, encrypt, and mark the message with high importance.

➤ **Setting message options**

- 1 Tap **Details** in the e-mail you are creating.
- 2 Tap the **Importance** setting you wish to set for this e-mail - **Low**, **Normal**, or **High**.
- 3 Tap **Encrypt** to encrypt the e-mail, and **Sign** to sign it.

Please note the following about signed and encrypted e-mail:

- When you send a *signed* e-mail, and the DME server cannot find your private key on the server, an e-mail with a notification of the error ("The DME Server could not send the signed S/MIME e-mail") is sent to you by the DME server. Your e-mail will be sent to the recipient; however, it will not be signed.
- When you send an *encrypted* e-mail, the DME server needs to know the public key of *each* of the recipients of the e-mail. If the public key of one of the recipients is unknown to the server, an e-mail with a notification of the error ("Cannot find certificate for recipient: xx") is sent to you by the DME server. The e-mail will *not* be sent to any of the recipients.

Using signed and encrypted e-mail requires special setup. Please contact your DME administrator.

Select **Done** to return to the e-mail.

Saving as draft

If you have started writing an e-mail, and you want to continue writing the e-mail at a later time, you can save the e-mail as a draft.

➤ **Saving an e-mail as a draft**

- 1 Close the e-mail by tapping **Cancel**, and select **Save** when asked if you want to save as draft.

The e-mail is saved to the **Drafts** folder, and you are returned to the mailbox. When you want to finish the e-mail, you can open it from the **Drafts** folder, edit it, and send it in the usual way.

Furthermore, if you are interrupted when writing an e-mail, for instance if you receive a call, the e-mail is automatically saved as a draft.

Responding to an e-mail

When responding to an e-mail, you have several options available, depending on whether the original e-mail was sent to you alone or to multiple recipients, and whether the e-mail contained attachments.

To see the options, open an e-mail, and tap . The illustration below shows the options available from an e-mail with attachments, sent to multiple recipients.



Replying to e-mails

➤ *Replying to an e-mail*

- 1 Open the e-mail, and tap .
- 2 Tap **Reply** or **Reply to All**.
- 3 Type a message, and tap **Send**.

For more information about sending e-mails, see *Creating and sending e-mails* on page 35. See *Sending attachments* on page 40 for information about how to work with attachments in e-mail replies.

Forwarding e-mails

➤ *Forwarding an e-mail*

- 1 Open the e-mail, and tap .
- 2 Tap **Forward** or **Forward with attachments**.
- 3 Type recipient details and a message, and tap **Send**.

For more information about sending e-mails, see *Creating and sending e-mails* on page 35. See *Sending attachments* on page 40 for information about how to work with attachments in forwarded e-mails.

Responding to a meeting invitation

Meeting invitations are marked with a  in the mailbox view. Such e-mails are special, as they represent meeting invitations created in the collaboration system. For more information, see *Responding to meeting invitations* on page 56.

Sending attachments

You can include attachments in e-mails in two different ways: by forwarding an e-mail that already contains attachments, or by adding attachments from the device to new e-mails (either original e-mails, forwarded e-mails, or replies). Furthermore, you can add attachments to meeting invitations.

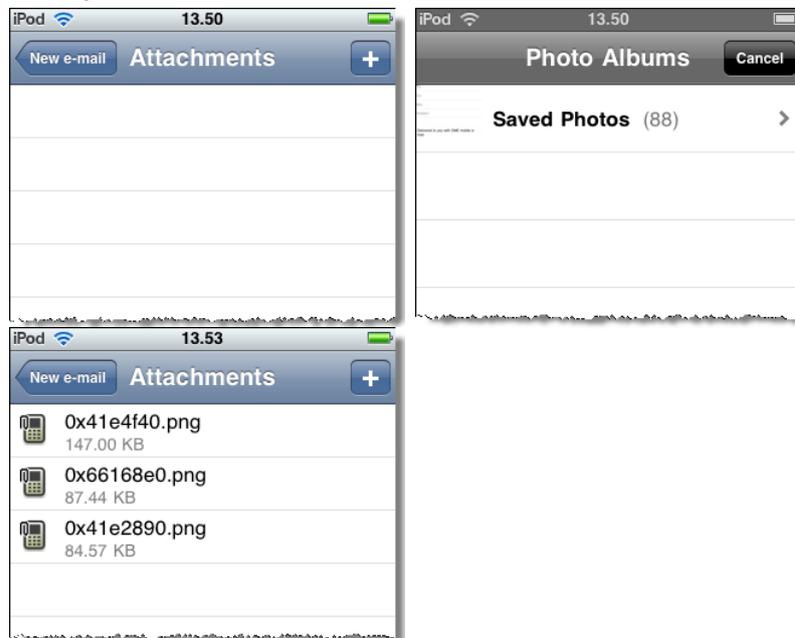
If you add your own attachments (that is, not via a forwarded e-mail), you can add pictures and videos from your **Photo Albums** folder.

➤ **Sending attachments in original e-mails and replies**

- 1 Create an e-mail (see *Creating and sending e-mails* on page 35 or *Replying to e-mails* on page 39).
- 2 Tap the  icon in the toolbar.
- 3 Tap  in the top right of the **Attachments** screen.
- 4 Select a Photo Album, and tap the picture or video (iPhone 3GS only) that you want to add.

Repeat items 3-4 to add more attachments. After adding an attachment, you can tap an attachment to view a thumbnail version of the image, and you can swipe right to delete it.

- 5 Tap the top left e-mail button when you are done to go back to the e-mail you are writing.



➤ **Sending attachments in forwarded e-mails**

- 1 Forward an e-mail (see *Forwarding e-mails* on page 39).
- 2 You can add attachments in the same way as for original e-mails (see above).

or

If the original e-mail contained one or more attachments, and you chose to include the attachments in the forwarded e-mail, you can now manage the attachments.

- 3 Tap the  icon in the toolbar to see the list of attachments that were included from the original e-mail.
- 4 You can now swipe right on one or more attachments to remove them from the e-mail, open them, or you can add more attachments in the same way as for original e-mails (see above).

Attachments in forwarded e-mails need not be downloaded to the device before they are sent. DME will pull the attachments from the collaboration system when the mail is sent, saving transfer costs.

➤ **Adding attachments to meeting invitations**

- 1 Create a meeting invitation (see *Booking meetings* on page 58).
- 2 Add attachments in the same way as for original e-mails (see above).

Note that the DME administrator may have blocked for adding new attachments from the device to e-mails. Furthermore, restrictions to the size of attachments apply. The default maximum size is 16MB, but this limit may have been increased or reduced by the DME administrator.

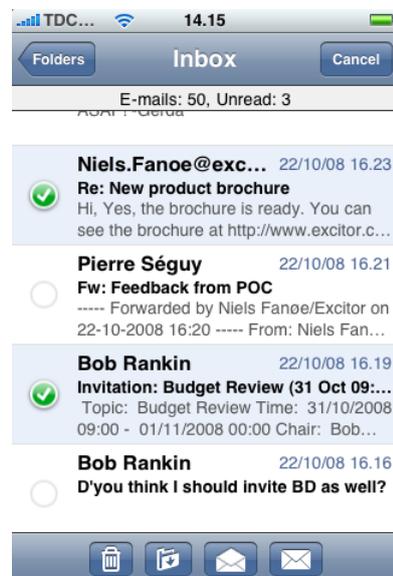
Mailbox view actions

The following sections describe actions that are available from the mailbox view, as opposed to actions available from within an individual e-mail.

Selecting multiple items

Some actions can be performed on a single e-mail or several, selected e-mails - for instance deletion or marking as read.

To select several e-mails in the mailbox view, folder, or list, tap the **Edit** button at the top right of the mailbox view. Doing this replaces the e-mail icon for each e-mail with a . You can now tap the e-mail(s) you want to select. Selected e-mails are marked with a .



The **Edit** button is changed to a **Cancel** button. Tap **Cancel** to leave Edit mode.

Deleting e-mails

When deleting an e-mail from the mailbox view, the e-mail is removed from DME. Depending on a setting in the e-mail settings, the e-mail can also be deleted from the collaboration system at the next synchronization (see *E-mail sync. settings* on page 72).

➤ *Deleting an e-mail from the mailbox view*

- 1 Swipe right over the e-mail title.



- 2 Tap **Delete** to delete the e-mail, or tap anywhere else to cancel.

➤ *Deleting multiple e-mails*

- 1 Select the e-mail or e-mails to be deleted. See *Selecting multiple items* on page 41 for information about how to select multiple e-mails.
- 2 Tap .
- 3 Tap **Delete** to confirm deletion.

Note that if you delete a large number of items (more than 20 e-mails/meeting invitations or more than 10 contacts) at a time, the next time the device synchronizes, a message will ask you if you really want to delete the items on the server. This is to prevent the accidental deletion of many items.

See *Deleting an e-mail* on page 35 for information about deleting the currently open e-mail.

Moving e-mails

If folder synchronization is enabled, you can move one or more e-mails to another folder.

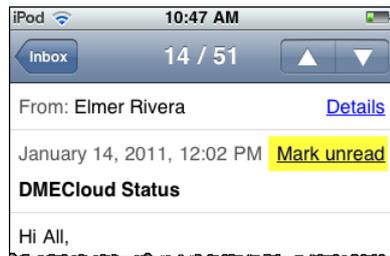
➤ *Moving multiple e-mails*

- 1 Select the e-mail or e-mails to be moved. See *Selecting multiple items* on page 41 for information about how to select multiple e-mails.
- 2 Tap the  icon to open the folder selection view (see *Navigating the folder tree*).
- 3 Tap the folder to which you want to move the selected e-mails.
- 4 The e-mails are moved, and the mailbox view of the e-mails' original folder is shown.

Marking e-mails read or unread

When you read an e-mail in the DME client, the e-mail will be marked as read - that is, the e-mail icon is shown as an open envelope instead of a closed envelope. Furthermore, the e-mail will be marked as read in the collaboration system the next time you synchronize. You can mark an e-mail as unread after reading it, for instance in order to remember reading it when you get back to the office, or you can mark unread e-mails as read.

When you read an e-mail, you can tap the link called **Mark unread** next to the received date to mark the current e-mail as unread.

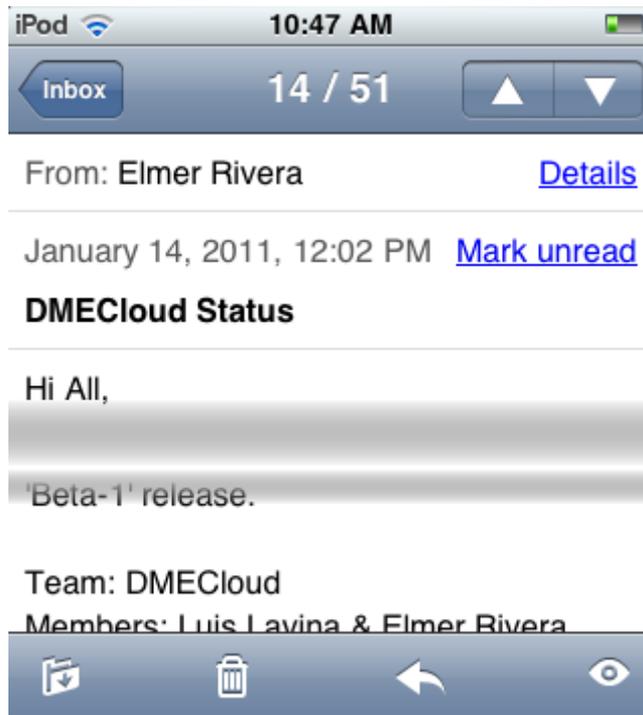


In a mailbox folder, you can apply the actions described below to a number of selected items. See *Selecting multiple items* on page 41 for information about how to select multiple items.

➤ **Marking multiple e-mails read or unread**

1 Select one or more e-mails.

2 Tap  to mark the e-mail(s) as read, *or*



Tap  to mark the e-mail(s) as unread.

Sorting e-mails

You can sort the e-mails in the mailbox view ascending or descending by date, sender name, or subject.

➤ **Sorting e-mails**

- 1 In the mailbox view or from the Desktop, tap .
- 2 Tap **Settings > E-mail sync**.
- 3 Tap **Sort order**.



- 4 Tap your choice of sort order - ascending or descending by **Date**, **Sender**, or **Subject**.
- 5 Tap **Done**.

The default sort order is **Date (Descending)**. The selected sort order applies to all folders.

Search

Using DME, you can search for contacts in the global address book on the collaboration system, search e-mails in your mailbox on the collaboration system, or search e-mails already downloaded to the device.

From the mailbox view, tap , or tap  from the Desktop. You can now choose among the following search options:



Global address book

The Global address book is the address book that you share with other users on the collaboration system.

➤ *Finding contacts in the global address book*

- 1 Tap  from the mailbox view, or  from the Desktop > **Global address book**. From a new e-mail, tap the search icon  from a recipient field. Note that a Global Address Book search is performed automatically if the recipient field is partly completed. See *Entering recipients* on page 37.



You can now search for a contact by **Name**, **E-mail** address, **Department**, **Country**, or **Title**.

- 2 Enter a search text in at least one of the available fields, and tap  (or **Search** on the keyboard).

A connection is made to the collaboration server, and the search results are displayed. Depending on a setting on the DME server, the search will either look for entries *starting with* the text you have entered, or entries *containing* the text you have entered. When searching for a name, you can enter both a first and last name separated with a space.

By default a maximum of 10 results are shown, but this can be changed by the DME administrator.

- 3 From the search results you can select contacts by tapping them. Selected contacts are marked with a checkmark to the left of the name.
- 4 Tap  to view details about individual contacts. The number of details shown depends on the back-end LDAP or AD directory.
- 5 If you opened the global address book search from a new e-mail, tap  to insert the selected contacts into the recipient field from which you chose to search for contacts.

or

If you opened the global address book search by tapping  in the mailbox view, you can tap **Copy to local address book** at the bottom of the screen to add the selected contacts to your local address book. They are then available as e-mail recipients without having to perform a global address book search.

or

You can tap **Call** to call the selected contact, if a phone number is associated with that contact.

Tap **Done** to return to the mailbox view.

E-mails (on server)

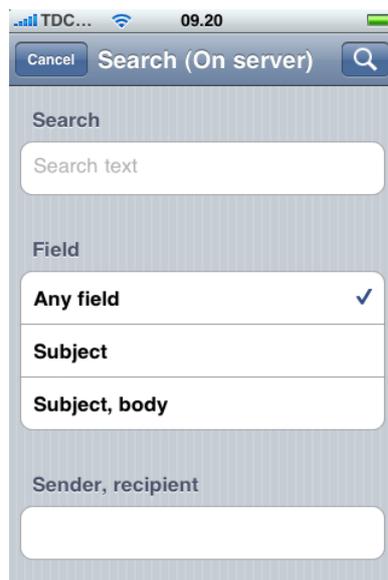
The DME client only synchronizes e-mails from the last number of days specified in the e-mail settings (see E-mail settings). This is called the e-mail synchronization *window*. Sometimes you may need to find an e-mail which is stored in a folder in your collaboration system mailbox which is not synchronized to the DME client, or which is too old to be synchronized to the client.

Using this function, you can search for any e-mail stored in any folder of your mailbox on the collaboration system.

➤ Searching for e-mails on the server

- 1 Tap  from the mailbox view, or  from the Desktop > **E-mails (on server)**.

The **Search (On server)** screen appears:



- 2 Complete the search fields in the form:
 1. **Search text:** In this field enter the text to search for.
 2. **Field:** Select the e-mail fields in which to search for the specified text. Tap either of the following options:
 - Any field:** All text fields are searched for the specified text string.
 - Subject:** Only the **Subject** field is searched.
 - Subject, body:** Both the **Subject** and the **Body** fields are searched.
 3. **Sender, recipient:** In this field enter all or part of the name of the sender of the e-mail you are looking for (or *recipient* in case you are searching your **Sent** folder).
 4. **Folder:** Choose the folder in which the e-mails to be searched are located. Tap to choose among the mail folders defined in the mailbox on the collaboration system, or choose **All folders**. If you choose a specific folder, you can also choose if you want to search in subfolders to that folder.
 5. **Date:** In the two fields **Start** and **End** you can select a range of dates. This limits the search to e-mails received within the selected time frame. If you only select a start date, e-mails are searched from that date up until today. If you only select an end date, e-mails are searched from the distant past up until that date.

3 Tap .

Note that a search can only be executed if one or more of the fields **Search text**, **Sender**, **recipient**, or **Folder** have been completed. If not completed, an error message says "Search fields cannot be blank" when you tap .

After a while, the search results are displayed in a **Search** screen. When you tap a found e-mail and then tap **Download**, it is retrieved from the server, and shown as a regular e-mail. You can then reply to the e-mail or forward it by tapping , or view more details about the e-mail by tapping .

If no results are found, DME shows a message that no matches are found, and you are returned to the search screen after confirming the message.

Tap **Done** to return to the mailbox view.

Technical details

Note that the client shows the results in the order in which they are presented by the collaboration system. If your collaboration system is based on Lotus Domino, the search results are returned in *order of relevance*. If your collaboration system is based on Microsoft Exchange, the search results are returned in *chronological order* (that is, by date).

The server sets a limit to the number of search results. By default, the limit is 100 results.

Please note that for best performance, your mailbox should be *indexed*. For more information about indexing your mailbox, see the documentation for Lotus Notes or Microsoft Outlook.

Note also that if you select a folder which contains other folders, you will get different results depending on your collaboration system:

- If you use Domino, the search for e-mails will be performed in the selected folder only.
- If you use Exchange, a message will be shown: "Do you wish to include subfolders in your search?" If you answer **Yes**, e-mails in the subfolders of the selected folder will be searched as well.

E-mails (on phone)

From any folder, you can search for a text string contained in an e-mail in DME.

➤ **Searching for a text string**

- 1 Tap  from the mailbox view, or  from the Desktop > **E-mails (on phone)**.
- 2 The **Search (On phone)** screen appears:



- 3 Complete the search fields in the form:
 1. **Search text:** In this field enter the text to search for.
 2. **Field:** Select the e-mail fields in which to search for the specified text. Tap either of the following options:
 - Any field:** All text fields are searched for the specified text string.
 - Subject:** Only the **Subject** field is searched.
 - Body:** Both the **Subject** and the **Body** fields are searched.
 - Sender, recipient:** Only **Sender** and recipient fields are searched.
 3. **Folder:** Choose the folder in which the e-mails to be searched are located. Tap to choose among the mail folders defined in the mailbox on the collaboration system, or choose **All folders**.
- 4 Tap .

Note that a search can only be executed if you have entered a search text in the field **Search text**.

The search results are displayed in a **Search** screen. You can open the found e-mails as regular e-mails, and all the usual features are available. Tap **Search** to return to the **Search** screen.

If no results are found, DME shows a message that no matches are found, and you are returned to the search screen after confirming the message.

Tap **Done** to return to the mailbox view.

Calendar

DME contains a complete, built-in calendar, which you can use to get an overview of your appointments, and from which you can create new meetings and invite other people to the meetings. Meeting invitations from other people are received in the DME **Inbox**. They are transferred to the calendar when accepted. Meetings that you create for yourself are saved directly in the Calendar. Meetings with other participants are also saved directly in your Calendar, and sent as invitations to the other participants (and resources) at the next calendar synchronization.

On iOS devices running iOS 4 and above, you will receive alarms for calendar events, even when DME is closed.

If you shake your device, DME changes to the **Inbox** view. See *E-mail* on page 29.

Interaction with the device Calendar

DME comes with a complete, built-in calendar application, which keeps your business calendar synchronized with the calendar on your collaboration system (Outlook or Lotus Notes), if calendar synchronization is enabled.

Your iOS device also comes with a calendar application, aptly named Calendar. You can use this calendar to keep personal appointments, and you can use it to synchronize with other calendar services, such as Google Calendar, Mobile Me or Mail for Exchange. In your device Calendar app, you can choose which calendar or calendars you want to see by tapping the **Calendars** button.

With DME 3.5 and later, you can choose to keep your business calendar protected by DME, and keep your private appointments separate in the device Calendar - or you can choose to mix the calendars, so that events from the DME calendar are kept synchronized with the device Calendar application and vice versa. This depends on a security option in Calendar settings called **Device Calendar**.

If you choose to mix the calendars, you can do so by degrees:

- With the option **Copy all fields**, all meetings, all-day events, and anniversaries created on the collaboration system or in the DME Calendar are also shown in the device calendar (to the extent that the device Calendar supports the features of the DME Calendar - for instance, meeting attachments are not linked to calendar entries in the native calendar). The events are then kept synchronized. This means that if you open the local Calendar, you will be able to see all information about your business appointments from Outlook/Notes also.

Personal appointments created and edited in the native calendar application are synchronized with your collaboration system. However, you cannot invite other people or perform other advanced actions.

This calendar mode is also known as **Open mode**.

- With the option **Copy time and alarm**, the event times and alarm status are copied in clear text to the device calendar, and the events are kept synchronized. Instead of the real subject, the event will say "Secured by DME", and instead of the real **Body** and **Notes**, the event will say "Please log in to the DME calendar to see the content". The information will only be shown correctly in the DME Calendar. This calendar mode is also known as **Mixed mode**, and provides a greater level of security than **Open** mode. For instance, a meeting created in DME might look like this in the device Calendar:



Subject, Body, and Location are encrypted by DME when saved to the device disk. Personal appointments created from the device calendar application will be secured in the above fashion after synchronizing with the collaboration system.

- The last option is called **Don't use**. If you choose this, then the DME calendar and the device Calendar will be kept completely separate - there is no interaction between the DME calendar and the device Calendar. This calendar mode is also known as **Secure mode**.

Switching calendar modes

If you switch calendar modes, either manually, through an upgrade, or by the DME Administrator pushing a new setting to you, DME will check your device calendar settings before applying the new mode, as some combinations of DME calendar mode choices and device calendar settings can lead to data being lost. DME will attempt to keep you from accidentally destroying private calendar events, and you should be careful when you respond to warnings and prompts from DME.

- **Switching from Secure mode to Open/Mixed mode**

If you manually (through **Tools > Settings > Calendar**) switch away from **Secure** mode, the DME client will ask for permission to use the device calendar:



If you tap **Cancel**, DME will revert to using **Secure** mode. If you tap **Allow**, DME will attempt to use the local device calendar in **Open** or **Mixed** mode.

DME will now check if the device calendar is already being synchronized by some 3rd party tool or service such as Google Calendar. If this is the case, DME will **not** use the calendar - **unless** the default calendar is a local, modifiable calendar, and the setting will be returned to **Secure**. This is true, even if the DME Administrator pushes a calendar mode setting change to your device! The reason for this is that if two calendar synchronization services (for instance Google and DME) use the same calendar, the results are unpredictable at best, and usually lead to loss of data.

If your calendar mode changes because the DME Administrator has pushed a new calendar mode setting to your device, and if that setting is *locked*, you will *not* be asked to permit access to the device calendar. However, the availability of the device calendar will be checked as outlined above, and access will be refused if DME finds that the calendar cannot be used.

If DME finds that it is OK to use the device calendar because your local calendar is the default calendar, DME counts the number of existing events in the device calendar, and asks you if you want to delete them or import them into DME:



If you tap **Cancel**, DME will revert to using **Secure** mode. If you tap **Delete**, the device calendar events will be erased before DME starts synchronizing the calendar with the collaboration system. This will make the device calendar a replica of the DME calendar as it looks now. If you tap **Import to DME**, DME will merge the existing events from the device calendar with the DME calendar before synchronizing with the server.

- **Switching from Open/Mixed mode to Secure mode**

If the DME Administrator enforces a switch to **Secure** mode, but has not *locked* the setting on the server, you will receive a notification saying that the administrator has requested that you stop using the device calendar.

If you tap **Ignore request**, the calendar mode will not be changed to **Secure**, but remain **Open** or **Mixed**. If you tap **Accept**, it is as if you selected the option to switch to Secure mode yourself from the Calendar mode setting screen. DME will then check your calendar to find the number of events that have been synchronized between DME and your device calendar. You are then given three options:

Keep in device calendar: The link to the events in the device calendar is severed, and they are no longer kept synchronized by DME.

Delete from device calendar: All events in the default device calendar are deleted. This is the more secure option, as this removes any trace of your business calendar from the device calendar. Any entries that you subsequently create in the device calendar will remain there and will not be synchronized with the collaboration system via DME, as there is no longer any interaction with the DME calendar.

Cancel: Revert to the original **Open** or **Mixed** mode.

When you switch the calendar mode, DME will process your calendar entries immediately after you have responded to the prompts mentioned above - you do not need to synchronize.

Please note that if you have many events in your calendar, switching to **Copy all fields (Open)** or **Copy time and alarm (Mixed)** may take a very long time. Make sure your device is fully charged, and leave the device until the process is complete.

Calendar views

To view the calendar entries in the DME calendar, tap  from the Desktop.

You can view your calendar entries in three different views:

- **Month view:** See an overview of your schedule for one month. This is the default view in portrait mode. Browse to the previous or next month by tapping the left or right arrows shown around the month name and year. Today's date is recessed and shown with a gray background. The week numbers are shown along the left-hand edge. Dates shown with **boldface** text contain appointments. Tap a date to show the appointments for that day. The currently selected day is shown with a blue background. Your appointments for the selected date are listed beneath the month view.

Tap  to go to the **Day** view, or rotate to landscape mode to go to the **Week** view.

- **Day view:** See all calendar entries for one day. Browse to the previous or next day by tapping the left or right arrows shown around the day name and date.

Tap  to go to the **Month** view, or rotate to landscape mode to go to the **Week** view.

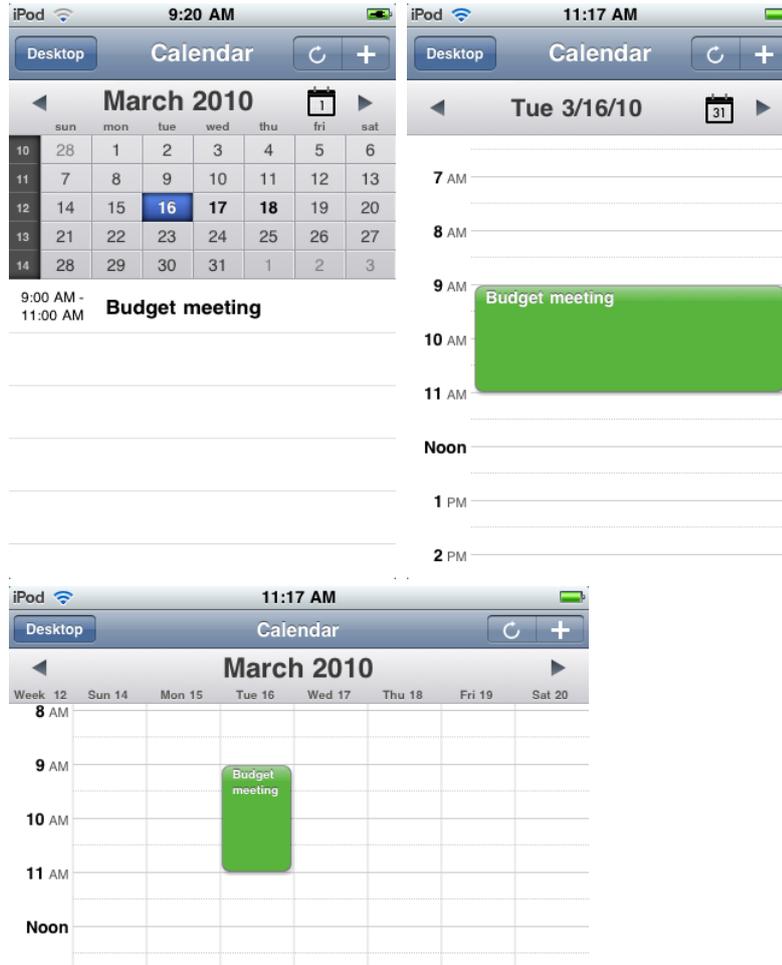
- **Week view:** Rotate to landscape mode to go to the **Week** view. Here you see all calendar entries for one week. Browse to the previous or next week by tapping the left or right arrows shown around the month name and year. The week number is shown to the far left, above the times.

Rotate to portrait mode to return to the view that was shown before you showed the **Week** view.

The appointments are shown as **Subject (Location)**. Tap an appointment to view details or edit it.

The calendar shows all the appointments and meetings (collectively known as *events*) from the beginning and till the end of your *calendar synchronization window* (the period within which DME synchronizes your calendar - see *Calendar sync. settings* on page 74).

Examples of the different calendar views are shown below.



Tap **Desktop** to return to the Desktop.

Calendar actions

From each view, you can select the following actions in the DME menu:

- **Create meeting:** Tap the  button to create a new meeting. The default date set for the new meeting is the currently viewed day. In the **Week view**, the date of the new meeting is set to the date last viewed in one of the other views, or, if you entered the **Week view** directly, the default date is set to the first day within the viewed week. If that date has passed, today's date is suggested as the meeting date. See *Booking meetings* on page 58.
- **Today:** To go to today's date in any view, tap the title bar. For instance, if today is February 16th, and the **Month view** is currently showing March 2011, tap **March 2011** to go to the month of February.
- **Synchronize:** Perform a manual calendar synchronization by tapping the  button. See *Synchronization manager* on page 11 for more information.

Viewing and editing meetings

To view details about a meeting in the calendar, tap to open it. You can now see all the fields that have been completed for this meeting, but you cannot initially change any fields.



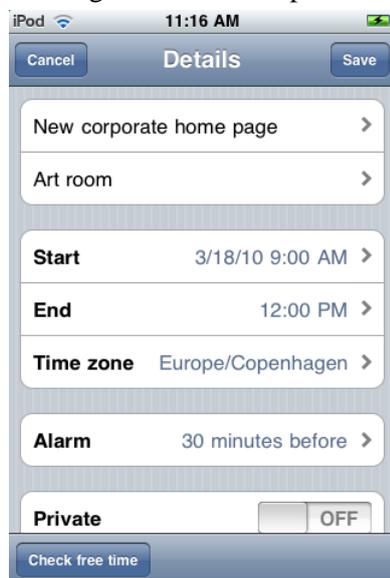
Tap [**View name**] (**March** in the illustration above) to return to the calendar view.

If a field shows a right angle bracket >, you can tap the field to see the field's information in a separate view. For information about the options in the bottom toolbar, see *Responding to meeting invitations* on page 56.

Tap **Edit** to edit details of the event. Your available options depend on whether you organized the meeting in question (you are the chair) or you were invited as a participant.

➤ *Calendar options for the meeting chair*

If you are the chair of the meeting, you can change any of the details of the meeting when you click **Edit**, including removing and adding participants. All fields in the meeting invitation are opened, and you can make any change you want.



Note: The Domino collaboration system permits the use of formatted text and attachments in the meeting description. If the description (the meeting) contains attachments, you will not be able to edit the description on the device. If there are no attachments, and you edit the **Description** field on the device, any formatting and any embedded objects in the field will be lost when the calendar event is synchronized back to the collaboration system.

When you are done, you may select **Check free time** in the DME menu to verify that all participants are free at the time in question, if you have changed the meeting time or date (corresponding to a **Reschedule** action). For more information, see *Checking free time* on page 62.

Select **Save** in the top toolbar to save your changes. If you remove a participant from the list of required participants, the participant receives a meeting cancellation notice, and the meeting will be removed from the calendar of that participant.

If you want to cancel and delete the meeting, delete it from the calendar view by swiping to the right or left. The meeting will be removed from the calendar of all participants. A cancellation notice is sent to each participant when you synchronize.

Note: If your collaboration system is Exchange 2003, DME is unable to process meeting cancellation notices. This means that if you receive a notice about a canceled meeting, you must accept the cancellation in Outlook or Outlook Web Access (the OWA webmail).

When you make any changes, DME asks you if you want to synchronize the calendar immediately.

➤ **Calendar options for meeting participants**

If you are a participant in the meeting, and not the chair, the following options are available for meetings that have been accepted:

- **Edit:** Select this option if you want to change details in the meeting. As a participant, you only have access to toggle the **Private** status of the meeting and the **Alarm** (and possibly set the alarm time). After editing these fields, select **Save** in the DME menu to save your changes.

You can also tap **Delegate** in the toolbar, or tap the **Reply**  button in the toolbar to access the options **Decline** and **Propose new time**. For information about these three options, see *Responding to meeting invitations* on page 56. Note that selecting **Delegate** or **Decline** removes the calendar entry from the calendar immediately.

Tapping  removes the calendar entry from the calendar. A cancellation notice is sent to each participant when you synchronize.

After making any changes, DME asks you if you want to synchronize the calendar.

Responding to meeting invitations

When meetings are booked on the collaboration system, all invited participants receive a meeting invitation by e-mail, containing information about the meeting.

In the DME client, a meeting invitation is recognized by a clock/e-mail icon in the **Inbox**. See *E-mail icons* on page 31 for more information.

➤ **Responding to a meeting invitation**

- 1 Open the meeting invitation. You see an overview of the meeting, with subject and time of the meeting, who organized the meeting, who have been invited (participants), and any information about location and resources involved in the meeting.
- 2 You can now choose among a number of options. Most of the options are available on all supported collaboration systems, but there may be differences, which are noted below.

Furthermore, the description of the actions pertain to the standard way of inviting to meetings. For instance, in Domino the chair can select options in the meeting invitation in Notes specifying that he or she does not want to receive responses from invitees (participants), wants to prevent counter-proposals, or wants to prevent delegation. Such options are naturally observed by DME, even if they are not mentioned in the descriptions below.

The following options may be available when you tap the **Reply** button in the toolbar:

- **Accept:** Accept the meeting invitation. The meeting is created in the calendar, and a notification of your acceptance is sent to the meeting organizer/chair.
- **Decline:** Decline the meeting invitation. Notification of this is sent to the organizer/chair and any other participants.
- **Tentatively accept:** If you want to attend the meeting, but you are not sure that you are available at the proposed time, you can tentatively accept the meeting. This way the meeting is booked in your calendar, but the time still appears free for other users. *Note:* On Exchange 2003 systems, this action is not available for recurring meetings.
- **Propose new time:** If you would like to attend, but you are not available at the proposed time, you can propose a new time (also called *countering* the meeting proposal). Selecting this option opens a new screen in which you can select a new time, date, and time zone for the meeting.



When you are done, select **Send** to suggest the new proposed time to the chair. When you send the new proposed time, the meeting chair/organizer will receive an e-mail with the subject **Countered:** and the subject of the meeting.

Please note that once the calendar entry has been accepted, you are not able to change the time zone of the calendar entry if you subsequently edit the calendar entry from your calendar to propose a new time. *Note:* On Exchange 2003 systems, this action is not available for recurring meetings.

From the toolbar, you can also choose to delegate the meeting:

- **Delegate:** If you are unable to attend the meeting, you may want to send someone else in your stead. Choose **Delegate**, and select another user from your local or global address book.



The **Delegate** field functions as other recipient fields, with the ability to choose from the local and global address books and addresses from the Inbox. See *Entering recipients* on page 37 for more information.

When you are done, tap **Send** to send the delegation, or **Check free time** to see if the new proposal conflicts with the calendars of any of the required participants. For more information, see *Checking free time* on page 62.

Please note that there is no **Delete** icon, and you are unable to delete the meeting invitation by swiping left or right or in the mailbox. To delete it, you must do so from the mailbox, or choose the **Decline** action. *Note:* On Exchange 2003 systems, you cannot delete instances of recurring meetings.

- 3 When you accept, decline, tentatively accept, propose a new time, or delegate a meeting invitation, you are given the option to add a *comment*. If you enter a comment, it is sent to the organizer/chair. *Note:* On Exchange 2003 systems, not all actions allow you to reply with comments.
- 4 When you respond to a meeting invitation by using any of the above actions, the e-mail containing the invitation is removed from your **Inbox**, and if you accepted the meeting, your calendar is updated on the collaboration system at the next calendar synchronization.

Recurring meetings

Recurring meetings created on the collaboration system are synchronized to DME as a series of individual appointments. This means that if you edit one in a series of meetings, only that instance of the meeting series will be changed. If you want to edit the entire series, you must do so in Microsoft Outlook or Lotus Notes.

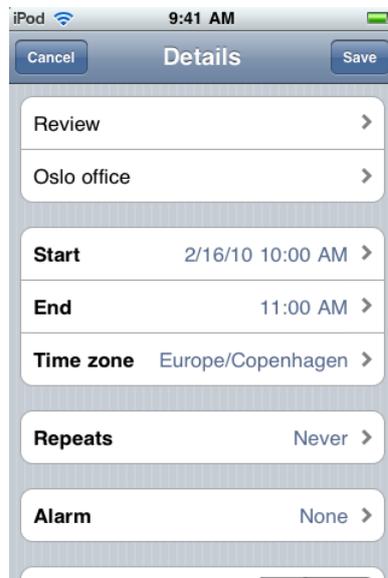
Recurring meetings created on the device are sent to the server as a true series or recurring meetings, not as individual events. If you create a recurring meeting on the device without an end date, the DME server will add an end date automatically. The end date will be five years in the future.

Booking meetings

You can book meetings in your corporate calendar from the DME client. You can invite people to attend the meeting, and you can reserve rooms and resources. This basically works the same way as booking meetings in your collaboration system.

➤ **Creating a new meeting**

- 1 To create a new meeting, tap the **+** button from the Calendar, or select the **New meeting** icon  from the Desktop.



- 2 Enter meeting details: see *Entering meeting details* on page 59.
- 3 Book a room and resources: see *Rooms and resources* on page 61.
- 4 Add participants: see *Adding participants* on page 62.
- 5 Check to see if the calendars of all participants are free at the proposed time: see *Checking free time* on page 62.
- 6 Add any notes (a description) by tapping the **Notes** field.
- 7 Add any attachments to the meeting invitation (see *Sending attachments* on page 40).
- 8 To finalize the creation of the meeting, select **Send** (if you have invited participants) or **Save** (if it is a personal appointment).

DME will prompt you to synchronize immediately. At the synchronization, meeting invitations are sent to the selected participants. The meeting is shown in your calendar whether you choose to synchronize or not.

If you tap **Cancel** during the creation of a meeting, you can choose to **Save as draft** or **Discard changes**. Selecting **Save as draft** saves the meeting as a draft in the **Drafts** folder, allowing you to interrupt your work on the meeting proposal for a later time. The **Discard changes** option closes the current meeting draft without keeping any of your edits.

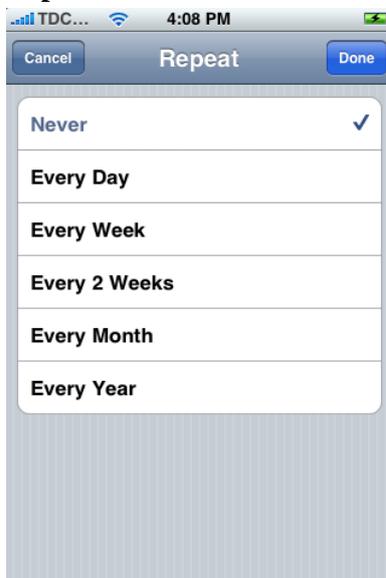
Entering meeting details

You can enter or change a number of details about the meeting.

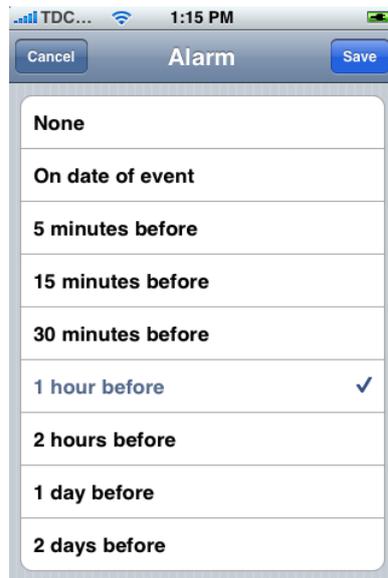
- **Subject:** Enter a subject for the meeting.
- **Location:** Here you can enter free text describing the location of the meeting - for instance an office, a country or a city.
- **Date and time:** Tap the **Start** or **End** field, and spin the wheels to select the starting and ending date and time for the appointment.
If you set the field **All day** to **On**, the appointment changes to an all-day event.



- **Time zone:** In this field you select the time zone of the location where the meeting is held. For instance, if you are based in Copenhagen, but want to call a meeting at 2 PM in London, you should enter 2 PM as the meeting start time, and **Europe/London** in this field. This way, the meeting will be placed correctly in your calendar - which is at 3 PM in local Copenhagen time. When you travel to London, and the phone changes time zone, it will be shown correctly in the calendar at 2 PM, London time.
Use the search box at the top of the screen to search for your time zone.
- **Repeats:** Tap **Repeats** if you want to define a repeat schedule for the current event. You can choose to repeat the current event at the intervals listed in the **Repeat** screen.



- **Alarm:** Enable or disable the alarm. When the alarm is enabled, you can enter a date and time for when the alarm should go off.



- **Private:** Mark the meeting as private. This means the the meeting details are not visible to other people in the collaboration system when you sync the calendar item, but your time will appear booked.
- **Notes:** Enter more information about the new appointment, such as an agenda. This will be the body text of the calendar entry.

Rooms and resources

To book a corporate meeting room or a resource (such as a projector), tap the field **Rooms** or **Resources**. The procedure for booking a room or a resource is identical - in the following, the booking of a room is described.

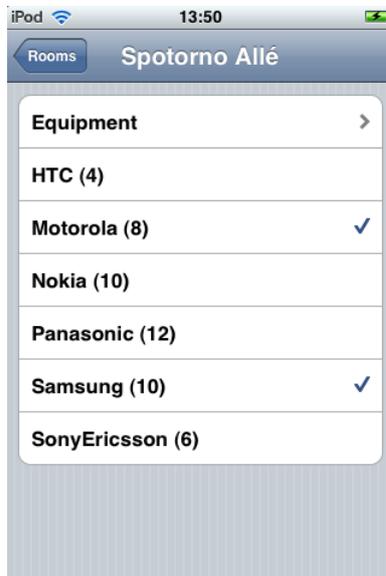
The first time you open the **Rooms** page, it is quite empty. This is because you must download the available rooms and resources from the collaboration system to your device first.

➤ **Downloading rooms and resources**

- Tap the  button to retrieve the list of rooms and resources. DME asks you to confirm your action.
You can always refresh the list of resources by tapping the  button.

➤ **Selecting rooms and resources**

- 1 The list of rooms or resources retrieved from the collaboration system may contain multiple *sites*, and you may need to choose a site before you can see the list of rooms or resources. If your organization only uses one site, the list of rooms or resources is shown directly.
- 2 Flick up and down in the list of rooms or resources, and tap to mark the rooms or resources you want to book. Note that if the people capacity of the room is entered in the collaboration system, it is also shown in the list.



- 3 Select **Rooms > Done**.

The selected rooms or resources are entered into the field in question, and you are returned to the meeting creation form.

Adding participants

To add participants to the meeting, do the following:

- 1 Tap **Required participants**.
- 2 In the **To** field, add or select participants as you would for an e-mail. See *E-mail details* on page 36 for more information.
- 3 Tap **Save** to return to the meeting creation form.

Repeat this process for **Optional participants** and **FYI** participants (also known as CC recipients).

Checking free time

When participants, rooms and resources have been added, you can check if they are available within the specified time frame.

➤ **Checking free time**

- 1 Tap **Check free time** in the toolbar.

After DME has checked on the server, you will see a message indicating whether all participants and resources are available or unavailable within the selected time frame.

If one or more participant or resource is unavailable, the following options are shown:



- 2 Tap **Available times** to show alternative time frames

or

Tap **Cancel** to keep the current time frame.

If you choose to show alternatives, you will see a list of time frames within which all participants and resources are available. The red color marks unavailable time; green marks available time.



- 3 Flick up or down, and tap to select a new time frame and return to the meeting creation form.

The meeting details are changed to reflect the update.

Contacts

As of version 3.5.4 of the client, DME contains an internal address book - the *DME Address Book*. The DME Address Book reflects your personal address book on the collaboration system. The two address books are kept synchronized with each other, if the setting **Contacts sync.** is enabled (see *Contacts sync. settings* on page 75).

By default, your DME contacts are synchronized with the contacts in the native *Contacts* application. This way, all your contacts - both business and personal - can be maintained in either DME or in the Contacts application. However, you can choose to keep your business contacts in the DME Address Book and your private contacts in *Contacts* - for reasons of security, work/life balance, or both. For more information, see *Contacts sync. settings* on page 75.

Whenever you create an e-mail or book a meeting (not client 2.x for iOS), you can choose recipients from the Global Address Book (your company directory) or from your local contacts. See *Entering recipients* on page 37 for more information.



See *Importing items* on page 13 for information about special considerations in connection with the initial synchronization or import of contacts from the collaboration system.

Adding and editing contacts

Different contact applications on different phones and phone platforms support different contact *fields*. A contact field is for instance the **First name** field or the **Telephone** field in a contact. When synchronizing the address book in MS Outlook or Lotus Notes to a mobile device, different third-party applications may map the fields in Outlook/Lotus Notes to the phone in different ways.

The DME Address Book supports a large, but fixed number of fields. By using DME for synchronizing contacts, you can be certain that everybody in the organization maps contacts from the collaboration system to their device in the same way.

When you tap  in the DME Address Book, or when you tap **Edit** when viewing a contact, DME lets you enter information into the following fields:

Account name	Fax (business)	Postal/Zip (bus.)
Anniversary	Fax (home)	Postal/Zip (home)
Assistant	File as	Push to talk
Assistant phone	First name	Radio phone
Birthday	Government ID	SIP
Carphone	IM ID	Share view
Categories	IM ID 2	Spouse
Children	IM ID 3	St./Prov. (bus.)
City	Internet tel. (bus.)	St./Prov. (home)
City (business)	Internet tel. (home)	State/Province
City (home)	Internet telephone	Street
Company	Job title	Street (business)
Company phone	Last name	Street (home)
Country/Region	Location	Suffix
Ctry./Reg. (bus.)	Manager	Tel. (business)
Ctry./Reg. (home)	Middle name	Tel. (home)
Customer ID	Mobile	Tel.2 (business)
DTMF	Mobile (business)	Tel.2 (home)
Department	Mobile (home)	Telephone
E-mail	Nickname	Title
E-mail (business)	Note	Video call
E-mail (home)	P.O. Box	Video call (bus.)
Extension	P.O. Box (bus.)	Video call (home)
Extension (bus.)	P.O. Box (home)	Web addr. (bus.)
Extension (home)	Pager	Web addr. (home)
Fax	Postal/ZIP code	Web address

Work/home scheme

Some of the fields mentioned above are special in that they function as a sort of alias for up to three distinct fields. An example of this is the field **Mobile**. When you enter a number into the **Mobile** field and synchronize, then how can DME know if the number should be placed in the **Cell phone**, **Mobile**, or **Mobile 2** in Lotus Notes, or in **Business Mobile**, **Home Mobile**, or **Other Mobile** in MS Outlook?

There is no issue if you enter values in the specific mobile number fields: **Mobile (home)** and **Mobile (business)**. These fields are directly supported by the collaboration system. The issue only exists if you use the generic **Mobile** field.

When this field (**Mobile**) is updated *on the device*, and you choose to synchronize contacts, DME considers the following *work/home scheme*. Note that each row in the table below lists all completed fields related to mobile phone numbers:

This field in the DME Address Book	maps to	this field in Notes or Outlook
Mobile	->	Work mobile
Mobile	->	Home mobile
Mobile (business)	->	Work mobile
Mobile	->	Work mobile
Mobile (home)	->	Home mobile
Mobile	->	Other mobile
Mobile (business)	->	Work mobile
Mobile (home)	->	Home mobile

Note: If you are using Lotus Notes, the last row in the table only applies if you are running Domino 8 and above. If you are running Domino 7, the value in the **Mobile** field is stored in a hidden field in DME, as Domino 7 and below only supports two mobile numbers.

DME not only employs the work/home scheme to make a qualified guess about where to place the mobile phone number, but from all of the following fields, which are of the same type as **Mobile**:

E-mail

Fax

Mobile

Tel./Telephone

Address

To-do

A to-do item is a special type of calendar item and is synchronized with your collaboration system by DME.

The **To-do** folder contains a list of the to-dos created on the collaboration system or in DME. You can filter the list to show **Incomplete** to-dos only or **All** to-dos.

For a to-do to be included in the synchronization from the collaboration system to the device, the following criteria must be fulfilled by the to-do on the collaboration system:

- 1** A due date has not been specified, and it has not been marked as complete (Domino only).
- 2** Or the to-do is overdue and not marked as complete, regardless of the values in the starting date and due date fields.
- 3** Regardless of the above, a to-do is included if either the starting date or the due date is within the time span set in To-do settings (the sync *window*).

Examples:

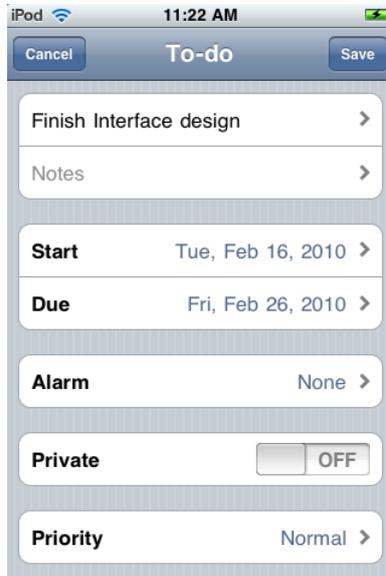
The sync window is set to 10 days in To-do settings, and today is April 15th.

- 1** A to-do on the collaboration system was created on March 23rd with a due date on April 17th. This to-do is synchronized to the device because the due date is within the 10-day sync window specified in the To-do settings.
- 2** Another to-do was created on March 3rd, with a due date of March 16th. It has not been marked as completed. This to-do is synchronized to the device. When it is marked as completed, it will no longer appear on the device.

Creating and editing to-dos

➤ *Creating a to-do*

- 1 Tap  from the **Desktop** to open the To-do list view.
- 2 Tap a task to edit it, or tap  to create a new to-do.



You can now set a due date, an alarm, and a priority for the to-do, and you can indicate that the to-do is **Private** (meaning that other people opening your calendar in the collaboration system cannot see the to-do in question). These features are similar to the corresponding calendar item features.

- 3 Set the **Completed** status. In the To-do list view, you can choose to only view incomplete to-dos.
- 4 Tap **Save** to save the to-do in the To-do list.

Tools

Tap  from the Desktop or in the toolbar of an e-mail folder to access options that apply to DME in general. The options include the following items:

- **Settings:** Control the look and feel and the operation of your DME client. See *Settings* on page 71.
- **Import:** Refresh the contents of your DME client with a new copy from the server. Care should be taken before importing contacts and calendar items. See *Importing items* on page 13.
- **Change password:** With this function, you can change your network password. See *Changing mailbox passwords* on page 8.
- **Set PIN code:** With this function, you can temporarily replace your collaboration system password by a simpler PIN code for use on the DME client. See *Logging in* on page 16 and the next section.
- **Set swipe code:** With this function, you can temporarily replace your collaboration system password by a simpler swipe code for use on the DME client. See *Logging in* on page 16 and the next section.
- **Log:** Displays the *event log*, which is kept by the DME client. The log can be useful in case of support questions, and you can send it as an e-mail by tapping the **New e-mail** icon in the Log view. You can also choose to delete the log by tapping the **Delete** icon. See *If you need further assistance*.
- **Delete all attachments:** When you download attachments to the device, the attachments will take up space. To free this space, you have the option to remove downloaded files from the device. The attachments will not be deleted on the mail system, only on the DME client. This action removes all attachments that have been downloaded to the device. Please note that this option is only shown if any attachments have in fact been downloaded to the device.
- **Remove client cert.:** If your DME system uses the "client signing" feature for added security, the DME administrator will issue a *client certificate* which is valid for your device only. This means that the device is only given access to the DME system if this certificate is installed on the device. If the administrator needs to issue a new certificate to the device for some reason (for instance if the device is given to another user), then you need to log in to DME (as the previous user), and tap **Tools > Remove client cert.** before the new user is able to connect to the DME system. The DME server will transfer the new certificate on first connect, and the DME client will install it.

If you are unable to log in as the previous user, and the device is unable to connect to DME due to a client signing error, you can enter **FLUSHKEYS** as user name at the Login screen, and tap **Login**. This will clear the old client certificate from the device. When you log in again, you will be able to connect to the DME system and receive the new client certificate.
- **Lock:** If your device is an iPhone 3GS, iPhone 4, or iPad, and you run iOS 4+, you can choose whether pressing the **Home** button should lock DME (log you out of DME) or hide (minimize) DME without logging you out. If you have chosen **Hide**, you can still log out of DME manually by tapping this option. See *General settings* on page 71.
- **About DME:** Shows the DME splash screen with the DME logo and information about the version of the DME client you are running.

Setting a PIN/swipe code

If your company maintains strict security rules, you may be required to enter a long, complex password with a mix of letters and special symbols to gain access to the network and collaboration system. This may be easy to enter on a full PC keyboard, but you might find it difficult to enter using your phone keypad.

Instead of using your collaboration system password for logging in, it is possible to substitute the password for a *PIN code* or a *swipe code*.

- A *PIN code* is another passcode of your choice. You are free to define a PIN code that is easier to enter using the keypad than the collaboration system password.
- A *swipe code* is defined by moving your finger across the iPhone screen in a certain pattern. The pattern is stored on the iPhone in a way that is equivalent to a PIN code.

The DME administrator can set a minimum length for the PIN code (4 to 10 letters and numbers). This minimum length applies to the number of tiles you must cover when entering the swipe code also. See details below.

In order to maintain high security on the device, the following special conditions apply when using the PIN code or swipe code instead of the regular password:

- The PIN or swipe code defined by you may expire after some time. The validity period of the code is set by the DME administrator, and could for instance be 8 hours, corresponding to one working day. The validity period begins when you log in to DME using your regular password. After this, you can use your PIN/swipe code to log in to DME, until the validity period runs out. Then you have to use your regular password again in order to reset the validity period. You do not have to change the PIN/swipe code.

The administrator may choose to allow a code that never expires, but this is not recommended.

- If you attempt to log in using your PIN or swipe code, but you enter the code wrong, then you have to use your regular password for your next attempt. Your PIN/swipe code is *not* invalidated, however - you can use it the next time you log in to DME.

Note that the feature may be disabled by the DME administrator for security reasons.



Important note about using this feature on iOS devices: Due to the multitasking limitations inherent in the iOS platform, DME on iOS is typically shut down more frequently than DME on other platforms. Therefore the decision was made to allow the user to keep the encrypted password in the iOS device storage, *even when DME is shut down*. If the use of PIN code is disabled, the network password is only kept in memory and not stored when the user exits DME. **The encryption of the stored password is not strong when using the PIN/swipe code feature, and it is possible for a hacker to break the password, if he gets access to the phone.** From a security point of view, it is therefore not recommended to use this feature on iOS devices.

➤ **Substituting password for swipe code**

- 1 Log in to the DME client using your regular collaboration system password.
- 2 From a mailbox, tap **Tools > Set swipe code** in the toolbar.

or

Tap  from the Desktop, and tap **Set swipe code**.

If you cannot find this option, it is because the DME administrator has disabled it.

3 The following screen is shown:



4 Now move your finger across any of the 12 *tiles* in the screen. For the pattern to become a valid swipe code, you must cover at least the number of tiles that are defined as the minimum PIN code length by the DME administrator.

5 Repeat the swipe to confirm the new swipe code.

If you accidentally move your finger across tiles that you did not intend to touch, you can undo the current swipe by tapping another tile with another finger while *not releasing* the first finger from the screen. The screen will flash, indicating that your swipe attempt was cancelled, and you can try again.

The swipe code definition screen closes, and your new swipe code is set.

➤ **Substituting password for PIN code**

1 Log in to the DME client using your regular collaboration system password.

2 From a mailbox, tap **Tools > Set PIN code** in the toolbar.

or

Tap  from the Desktop, and tap **Set PIN code**.

If you cannot find this option, it is because the DME administrator has disabled it.

3 A screen with three fields is shown:



Enter your regular password in the top field **Password**, a PIN code of your own choice in the middle field **New PIN code**, and repeat your PIN code in the bottom field **Confirm new PIN code** to make sure you entered it correctly.

The DME administrator has set a minimum length of the PIN code (between 4 and 10 letters and numbers).

- 4 Press **Done** to complete the PIN code definition.
- 5 To reset your PIN code, tap the **Delete** button, and confirm. A message shows that the PIN code has been disabled.

If you have defined both a swipe code and a PIN code, you can log in using your PIN code when you rotate the device. See *Logging in* on page 16 for information about how to use the PIN code and swipe code.

Settings

When a new device is created in DME, a set of default settings for the device is sent to the client the first time the device connects with the server, or when a new user takes over an existing device. These settings should represent your company's security policy.

Note that the DME administrator may have blocked your access to changing any or all of the settings described in the following sections. The permitted range of values is determined by the corresponding setting on the server, and you cannot make selections beyond this range.

The "Installation Best Practise" guide contains information for DME administrators about recommended settings and permitted range values.

General settings

- **Phone number**
Tap to enter the phone number of the device. The DME server needs to know your phone number for sending SMS messages to the device, and for device management purposes.
- **Server path**
This is the path to the DME server. You set this value once, the first time you start DME. The server path should rarely be changed, and only if your DME Administrator tells you to. For more information, see *First-time login* on page 17.
- **Language**
Tap to select the language of the DME interface. The language changes immediately.
- **Apple Push**
In this field you can specify whether DME for iOS should subscribe to Apple Push Notifications or not. You can choose to receive notifications (for instance about new e-mails) through the Apple Push Notification Service (APNS). This is the recommended way. For more information, see *Notifications* on page 22.
- **Log in to**
In this field you can specify which screen you want to see after logging in to the DME client. You can choose between the following two options:
 - **Last Used:** DME remembers which of the below views was active when you last logged out of DME, and starts here when you log in again.
 - **Desktop:** DME starts in the Desktop view after logging in.
 - **Inbox:** DME opens the Inbox after logging in.
 - **Calendar:** DME opens the Calendar after logging in.

- **To-do:** DME opens the To-do view after logging in.
For more information, see Using the DME client.
- **Startup sound**
If this field is set to **Enabled**, DME will play a sound when you launch the client.
- **Home button**
If your device is an iPhone 3GS, iPhone 4, or iPad, and you run iOS 4 or later, you can choose how pressing the **Home** button should affect DME.
 - **Lock:** Pressing the Home button locks DME - meaning that you are logged out of DME. When you later tap the DME 3 icon again, you are required to log in.
 - **Hide:** Pressing the Home button hides (minimizes) DME, without logging you out. When you later tap the DME 3 icon again, you are not required to log in (unless the amount of time set as **Logout timeout** has passed in the mean time), but you are immediately returned to the screen from which you pressed the Home button. In order to log out, you must go to the DME Desktop and tap **Tools > Lock**.

Security settings

- **Logout timeout (min)**
The DME client is locked automatically after the specified number of minutes of inactivity. Permitted range: 0-60 minutes.
- **Private key password**
In this field you can specify your password for your private key. Your private key is used for decrypting encrypted messages sent to you, and for signing private messages. If you do not enter a password here, you cannot read encrypted messages or sign new messages from your mobile device.
If your collaboration system is using **Notes Encryption**, you must enter the password for your *user ID file*.
If your collaboration system is using **S/MIME**, enter the password for your private key in this field. You must also upload your personal certificate to the DME server (using **myDME**).
For more information about Notes Encryption, S/MIME, and **myDME**, please contact your DME administrator.

E-mail sync. settings

- **E-mail sync.**
If you enable this setting, e-mail synchronization is enabled. This setting affects both manual and push synchronization.
If you disable this, e-mails are never synchronized.
- **Days back**
When e-mails are synchronized, e-mails from the last number of days selected here will be synchronized and available in the **Inbox**. Permitted range: 0-99 days.
- **Send immediately**
If you select **No**, e-mails are stored in the **Outbox** folder when you select **Send**, and are not sent until the next scheduled or manual synchronization.

If you select **Send only**, e-mails created on the device are sent immediately when you select **Send** from a new e-mail or meeting invitation, but any new items are not retrieved from the server. This significantly reduces the load on the server and the time it takes to synchronize.

If you select **Send & Retrieve**, e-mails created on the device are sent immediately when you select **Send** from a new e-mail or meeting invitation - that is, a regular e-mail synchronization is performed.

- **Delete only locally**

If you select **Yes/On**, e-mails deleted from the DME client will only be deleted on the device, and not on the collaboration system. This is the default.

If you select **No/Off**, e-mails deleted on the client will be removed from both the DME client and the mail system at the next scheduled or manual synchronization.

- **Sort order**

Tap this field to set the order in which e-mails in your e-mail folders should be sorted. For more information, see *Sorting e-mails* on page 43.

- **Mail alert**

In this field you can specify you will hear a sound when you receive a new mail in DME.

- **Start**

In this field you can specify the time of day after which client-initiated pull should start, if this is enabled. Spin the time selection wheels to select a time.



- **End**

In this field you can specify the time of day at which client-initiated pull should end, if this is enabled.

- **Vibrating alert**

If you enable this function, the device vibrator will buzz when you receive an e-mail in DME.

- **Signature**

Any text you enter in this field will be appended to all new e-mails sent from the DME client. You typically use it for adding a signature. Note that the DME administrator can add another text to be appended to e-mails, called an "E-mail disclaimer". DME will add the signature from this field first, and then the e-mail disclaimer will be added by the DME server at the very end of the e-mail (after any reply history).

Folder sync. settings

- **Sync. folder list**

If this field is **On**, e-mail folder synchronization is enabled. On first sync. after enabling this, DME will copy the folder structure from the collaboration system to DME on iPhone, and keep the folder structure updated. If you select **Off**, e-mail folders are never synchronized.
- **Sync. contents**

In this field you can choose to enable synchronization of e-mails in subfolders by default. The e-mails are synchronized for the number of days specified in the **Days back** field. You can change the setting for individual e-mail folders (see *Setting folder options* on page 25).

Regardless of this setting, the folder structure as such (without e-mails) is synchronized between the collaboration system and the device. You need the folder structure when choosing where to search for e-mails on the server - see E-mails (on server) and for moving e-mails to other folders.
- **Days back**

In this field you can specify how many days back the DME client should synchronize e-mails in subfolders. Note that with higher numbers, the load on the DME server will increase. This number may be changed for individual folders.
- **Apply to all folders now**

This option will always be off when you open the folder settings screen. Think of this option as an action button - if you tap it, the settings for **Days back** and **Sync. contents** made in this screen will be applied to all folders instantly, regardless of their individual settings. This is a way to apply the default settings selected here to all folders at the same time.

Calendar sync. settings

- **Calendar sync.**

If you select **Enabled**, calendar synchronization is enabled. This setting affects both manual and push synchronization.

If you select **Disabled**, calendar items are never synchronized.
- **Days back**

When items are synchronized, items from the last number of days selected here will be synchronized and available in the device. See *To-do* on page 66 for more information.
- **Days forward**

When items are synchronized, items up until the number of days selected here will be synchronized and available in the Calendar.
- **Alarm sound**

If you enable this setting, DME will play the default calendar alarm when displaying a calendar alert. Please note that this applies to devices running iOS 4 or higher only.
- **Device Calendar**

With this setting, you can change the security level of the DME Calendar's interaction with the native calendar on your device (requires DME Server 3.5). There are three options:

- **Copy all fields***: Calendar entries from DME are shown in the device calendar. Entries from the device calendar are synchronized with DME. This is also called **Open** mode.
- **Copy time and alarm***: As **Copy all fields**, but potentially sensitive information such as **Subject**, **Body**, and **Location** in the device calendar is replaced by a DME security message, saying that the fields can only be viewed in the DME calendar. The fields mentioned are furthermore encrypted before they are saved to the device. This is also called **Mixed** mode.
Choose this setting if you want high security, but you also want to make use of calendar alarms.
- **Don't use**: There is no interaction between DME and the native calendar. This is also called **Secure** mode.
When you receive calendar alarms, they will say "Log in to DME to see details".

When you change this setting, it will take effect immediately.

*) Please note that if you have many events in your calendar, changing to either of the **Copy...** modes may take a considerable amount of time. Make sure your device is fully charged before selecting either option, and leave the device until the process is complete.

See *Interaction with the device Calendar* on page 49 for important information.

To-do sync. settings

- **To-do sync.**
If you select **On**, to-do item synchronization is enabled.
If you select **Off**, to-dos are never synchronized.
- **Days back**
When to-dos are synchronized, items from the selected number of days back in time will be synchronized and available in the device. See *To-do* on page 66 for more information.
- **Days forward**
When to-dos are synchronized, items with a date up until the selected number of days ahead in time will be synchronized and available in the device.

Contacts sync. settings

- **Contacts sync.**
If you select **Enabled/On**, contact synchronization is enabled, and your list of contacts on the device will be kept in sync with your personal address book on the collaboration system.
If you select **Disabled/Off**, contacts are never synchronized.

▪ **Device Address Book**

With the settings in these fields you can choose how DME should interact with the native address book on your device - the *Contacts* application. As of version 3.5.4 of the client, DME contains an internal address book - the *DME Address Book*. You can choose to keep your business contacts in the DME Address Book and your private contacts in the native *Contacts* application - for reasons of security, work/life balance, or both. The degree of interaction can be chosen at three levels:



- **Copy all fields:** Contacts from DME are shown in the native *Contacts* application, and the two address books are kept synchronized insofar as the native contacts application supports the DME address book fields. Note that when you select this option, DME will start exporting contacts to the *Contacts* application immediately.
- **Copy name and phone numbers:** As **Copy all fields**, but only name and phone numbers from the DME Address Book are shown in the native *Contacts* application. If you edit the name or phone number in your native *Contacts* application, this information will be synchronized to the DME Address Book. However, if you add any other information to your native contacts, this information will be removed again by DME. In other words, you should use DME for maintaining your contacts. Note that when you select this option, DME will process the contacts in the *Contacts* application immediately, so they only show name and number.
- **Don't use:** There is no interaction - contacts in the DME Address Book and the native *Contacts* are kept completely separate. This lets you keep your business contacts in DME in sync with your collaboration system, while letting you synchronize your personal contacts with other applications, such as MobileMe. Note that when you select this option, DME will delete any contacts in the *Contacts* application, which are also found in the DME Address Book, immediately.

Further assistance

If you have read this guide and still have questions concerning the function and use of the DME client, please contact your Helpdesk (usually the internal IT department). Before contacting your DME administrator, be sure to have information about your DME version etc. ready.

➤ **Supplying support information**

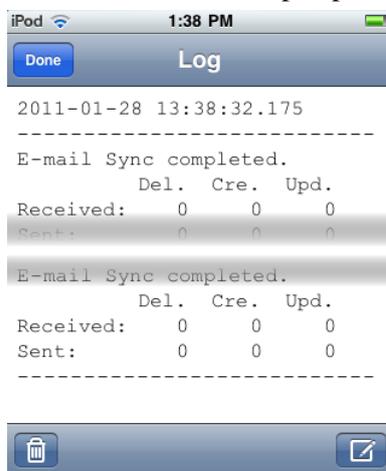
To find the version number of your DME client:

- 1 From the DME Desktop, tap **Tools > About DME**.



DME keeps a log of the events that take place in the client. Your Helpdesk may ask for this. Do the following:

- 1 From the DME Desktop, tap **Tools > Log**.



- 2 Tap **Send log**  to insert the log text into a new e-mail.
- 3 Send the log to Helpdesk.

Note that the DME administrator may also retrieve the log from the DME Server interface.

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