

## Windows Mobile – Exchange Active Sync

### Synchronize a Pocket PC with Exchange Server 2003

#### Creating a Partnership

1. Register device with carrier network.
  - a. If this is a Verizon phone dial \*228 and select option 1
  - b. If this is a device upgrade an ESN change will need to take place by calling the carrier's technical support. (either the owner of the device or the one who ordered it will need to be present to verify information with the carrier)
2. Install current version of Microsoft ActiveSync.
3. Connect cradle/cable.
4. Connect PDA/Smartphone.
5. Select **Standard partnership**.
6. Click **Next**.
7. Select **Synchronize with Microsoft Exchange Server and/or this desktop computer**.
8. Click **Next**.
9. Type *exchange.iastate.edu* in the **Enable synchronization with server** window.
10. Check **This server uses an SSL connection**.
11. Type the username, password, and domain (*iastate*). (If your phone has already been set up this should be added automatically.)
12. Check **Save Password**.
13. Click **Next**.
14. Select the information you would like synchronized wirelessly.
  - a. Windows Mobile 2003 (Inbox, Calendar, Contacts)
  - b. Windows Mobile 5 (Inbox, Calendar, Contacts, Tasks)
15. Click **Next**.

*Note: The settings button allows you to select advanced settings such as downloading attachments, limiting message sizes, and choosing the amount of weeks you wish to synchronize for calendar.*
16. Choose additional information to synchronize under **Select Synchronization Settings**.
  - a. Favorites, Files, Notes, Windows Media.
  - b. These items will be synchronized during a cradle/cable sync.
17. Set the **Wireless Sync Schedule**.
  - a. Cradle the device.
  - b. Open **ActiveSync**.
  - c. Select **Options** and **Schedule** tab in ActiveSync 3.x or **Schedule** button in ActiveSync 4.x.
  - d. Adjust **Peak Times** to desired (default is M-F 8am to 6pm).
  - e. Set to sync as desired.
    - i. Preferred is no more than Every 60 minutes to preserve battery life.
    - ii. Clients can always sync as desired manually.
18. Click **Next**.
19. Click **Finish**.

Setup is now complete and you can perform synchronization from your device by selecting ActiveSync from the Start Menu and Sync. Synchronization can be set to run on a schedule by going to the ActiveSync Options on your device and configuring it there, by clicking Options in the desktop

ActiveSync for version 3.x, or by selecting Schedule on version 4.x while your device is cradled and going under the schedule tab.

### Configure a PDA/Smartphone for Exchange ActiveSync

This will be used in the instance that a Windows Mobile device will be used for synchronization with the ITS Exchange server, but not synchronized with a workstation.

1. If this is a Smartphone device it may need registered with the carrier network.
  - a. Follow instructions provided.
2. Press the **Start Menu**.
3. Select **ActiveSync**.
  - a. If this option is not listed select **Settings** from the Start Menu.
  - b. Select **Menus**.
  - c. Check **ActiveSync** (it may be necessary to uncheck one of the other options).
  - d. Click **OK**.
  - e. Close the **Settings** window.
  - f. Select **Start**.
  - g. Select **ActiveSync**.
4. Select **Menu**.
5. Select **Configure Server**.
6. Enter *exchange.iastate.edu* as the **Server Address**.
7. Check **This server requires an encrypted (SSL) connection**.
8. Click **Next**.
9. Enter User name, password, and domain (iastate).
10. Check **Save password**.
11. Click **Next**.
12. Select the desired items to sync (E-Mail, Calendar, Contacts, Tasks).
13. Click **Finish**.

Copyright © 2004 Iowa State University (ISU) Information Technology Services. All rights reserved. No part of this document may be reproduced in any form or by any means without permission in writing from ISU Information Technology Services.

Iowa State University  
Information Technology Services  
2nd Floor ASB  
Ames, IA 50011-3601

Past and present employees of Iowa State University Information Technology Services have helped develop and maintain this document.

### **Disclaimer**

Although the contents of this document have been tested and used by the contributors and ISU Information Technology Services, neither the contributors, ISU Information Technology Services, ISU, nor the State of Iowa, express or imply any warranty as to the accuracy and functioning of the contents, any product developed using the contents, or any related material. Distribution does not constitute any such warranty; neither the contributors, ISU Information Technology Services, ISU, nor the State of Iowa assume responsibility in connection with this distribution.

It is understood that no claim will be made against the contributors, ISU Information Technology Services, ISU, or the State of Iowa in connection with this document or any related material.