



Secure Mail for iOS User Guide

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for the iPad, iPhone and iPod touch

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Chapter 1

Introduction

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This document describes the user facing functionality of Secure Mail™ for Android devices. It is intended as a guide to the different functions of the application as well as a guide to help you perform common operations with the application.

Installation and configuration of Secure Mail is covered in a separate document. Refer to the Installation and Configuration Guide for more information.

NOTE: This document assumes that you have Secure Mail installed, configured and activated for full operation.

Chapter 2

Email

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To access your Email list, tap the Email button.

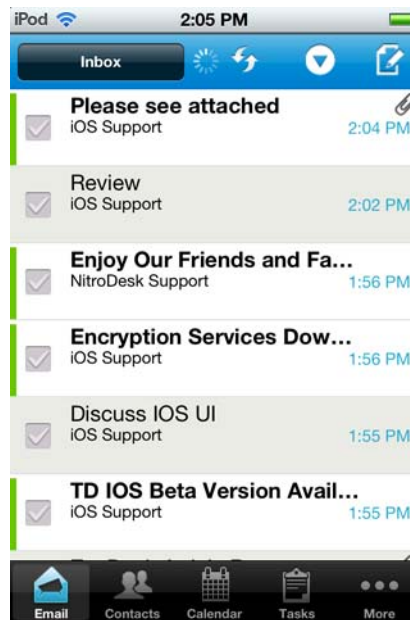


FIGURE 1. Email List

Working with Email

Tap the email to read or flick right or left to access the Email menu for that message.

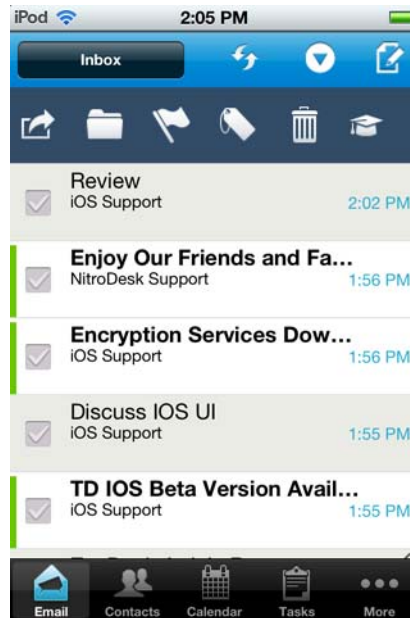


FIGURE 2. Message Menu

The following Menu options are available on the Inbox menu bar.

INBOX allows you to change folder to view messages in that folder. This only works if the folder is being synced.

REFRESH will refresh the email list. This will get any changes you have made and synchronize them with the server.

COMPOSE See “Compose Email” on page 8.


The following Menu options are available by flicking right or left on the email message.

REPLY/FORWARD will reply to sender or forward email to another recipient.

MOVE will open up a list of folders to select where to move the email.

MARK will allow you to do the following with the email:

- Mark Read/Unread
- Flag
- Flag Complete
- Clear Flag
- Categorize

CATEGORIZE allows you to add a category or create a new category for the message. 

DELETE the email from Secure Mail.

MOVE TO JUNK will move the email to the junk folder.

MAKE EVENT will create an event using the email as the subject and description.

MAKE TASK will create a task using the email as the subject and description.

The following menu is available when you select a message.

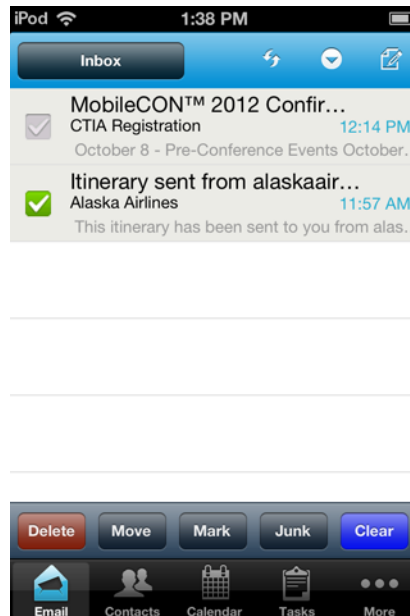


FIGURE 3. Selected Message

DELETE will delete the email from Secure Mail.

MOVE will open up a list of folders to select where to move the email.

MARK will allow you to do the following with the email:

- Mark Read/Unread
- Flag
- Flag Complete
- Clear Flag
- Categorize

JUNK moves the email to the Junk folder.


CLEAR removes the checkbox from the email so it's no longer selected.

The following menu is available with an email open.

SECURITY lets you view the security for that email.

ATTACHMENTS shows if there is an attachment.

RECIPIENTS lists the recipients for the email.

CATEGORIZE allows you to add a category or create a new category for the message. 

MOVE will open up a list of folders to select where to move the email.

DELETE will delete the email from Secure Mail.

FLAG flags the email for follow up.

REPLY will reply to sender. See “Compose Email” on page 8 for information on using the formatting toolbar and how to edit your signature.

NEW will bring up the compose email screen to create a new email.

Advanced Menu



FIGURE 4.

FILTER will display a pop-up window to select an option to filter your email list. The following options are available:

- All
- Unread
- Read
- Flagged
- With Attachments
- High Importance

Tap the option to select it. Only one filter can be applied at a time.

DIAGNOSTICS logs recent activities in Secure Mail and is a helpful troubleshooting tool. You can raise a support request at kaseya.com/support if you are having a problem with the application.

CHANGE PIN will reset the PIN. If your Exchange Server does not require you to use a PIN to log into Secure Mail, this button is grayed out.

RESET DB will remove all items from Secure Mail and repopulates with the items from your Microsoft Exchange Server.

Compose Email

Tap the Compose button to bring up the compose email screen to create a new email.

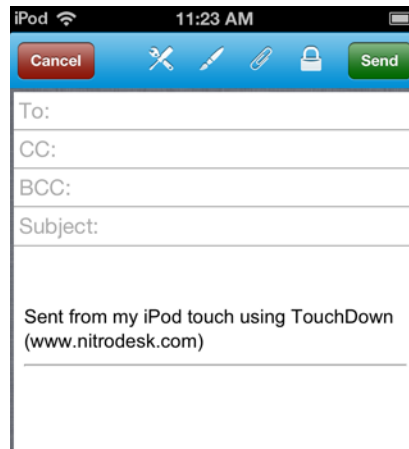


FIGURE 5.

TO will add recipients by using the Global Address List (GAL) or you can add recipients by typing the full email address.

CC are the recipients you want to copy on your email.

BCC will add a recipient whose email address does not appear in the To/From header.

MESSAGE Type your message.

When replying to a message you will see the original email below the compose area. You will also see the signature below the compose area, which you can edit.

NOTE: Original email cannot be edited or copied.

When creating or editing a message, you can press the Advanced button on the top toolbar to drop down a Formatting toolbar. Select some text and click the formatting toolbar to set things like bold, italic, underline, font and color. See “**FORMATTING TOOLBAR**” below.

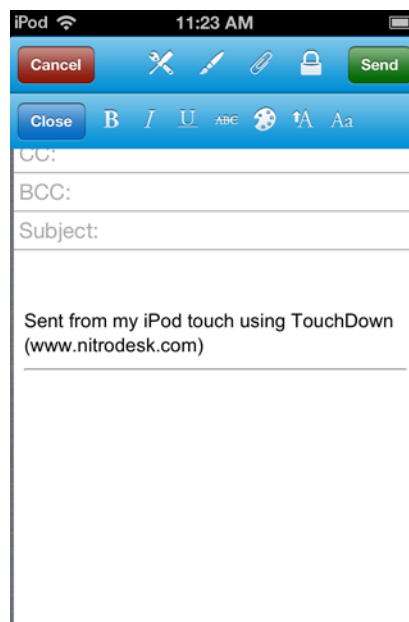




FIGURE 6. Formatting Toolbar

SETTINGS  allows you to request read receipt or delivery receipt. You can also set if you can edit inline.

FORMATTING TOOLBAR  allows you to format the text in the body of the email. The following formatting is available:

Bold, Italic, Underline

Strikethrough

Color


- Black
- Red
- Green
- Blue
- Yellow
- Gray


Font Size

- 8 pt.
- 10 pt.
- 12 pt.
- 14 pt.
- 18 pt.
- 24 pt.
- 36 pt.

Font

- Arial
- Courier
- Georgia
- Helvetica
- Trebuchet
- Times New Roman
- Verdana

ATTACHMENTS  allows you to add an attachment to the email.

SECURITY  allows you to sign or encrypt the message.

Chapter 3 Calendar

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This chapter describes the different calendar views available and how to work with events.

To access your Calendar, tap the Calendar button.

NOTE: The calendar will appear in the last view you had displayed.

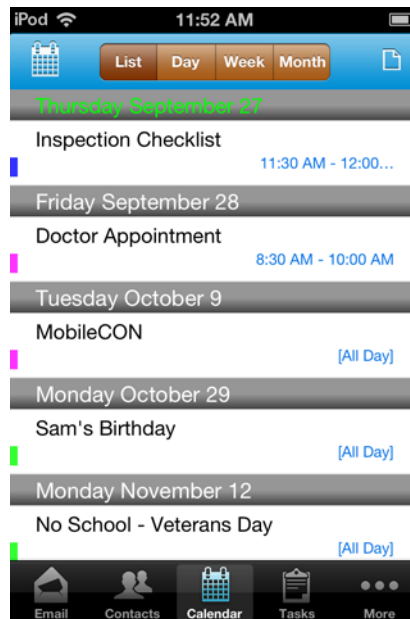


FIGURE 7. Calendar List View

List View

The List view displays current and future events. Drag up or down to scroll. The title of the event, time, date and location are shown in a list view. Most items can be accessed for view or edit by tapping on each event.

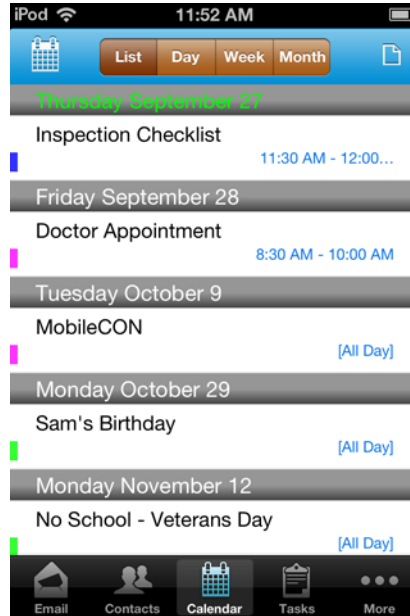


FIGURE 8. Calendar List View

Day and Week View

The Day and Week views allow you to flick left or right to view days or weeks in the past or future.

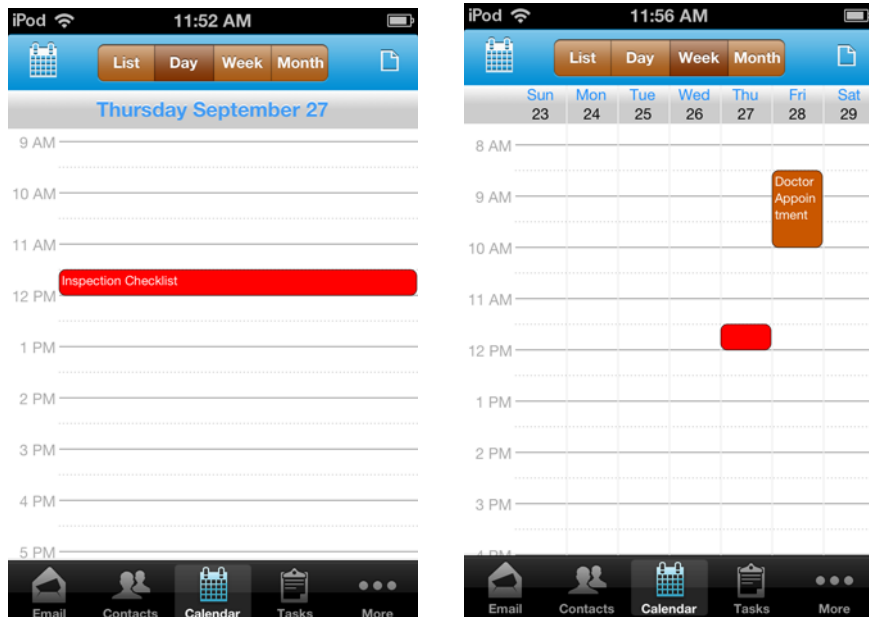


FIGURE 9. Day and Week View

Month View

The Month view is an overall look at the selected month of appointments. Flicking left or right will display past and future months. Secure Mail's default setting is to sync 2 weeks of past appointments. If you want to change the default, see Chapter 8, "Customize Secure Mail" on page 39. Tapping on a day will list the appointments for that day.

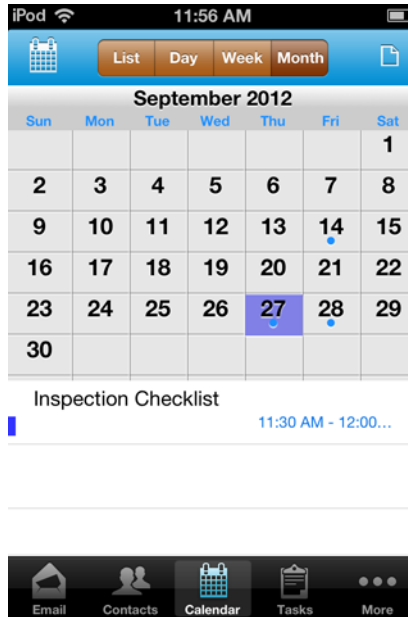


FIGURE 10. Calendar Month View

New Event

Choose this option to create your event or meeting.

To create an appointment,

- 1 Tap the Add Event icon. 
- 2 Fill out the following appointment information and tap Save.

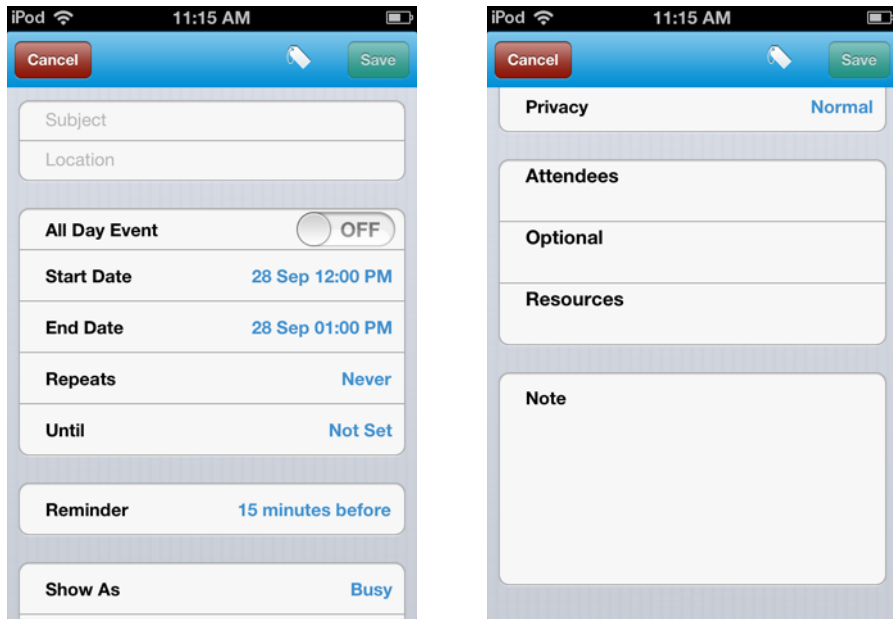


FIGURE 11. New Event Screens

SUBJECT is the title of the event. This also shows in List view.

LOCATION of the event is entered here. This also shows in List view.

ALL DAY EVENT On/Off

START DATE is the date the event begins. This also includes a time.

END DATE is the date the event ends. This also includes a time.

REPEATS sets how often the even repeats: Never, Every Day, Every Week, Every Month or Every Year.

UNTIL sets the date when the event ends.

REMINDER sets when you want to be reminded: None, At time of event, 5 minutes before, 10 minutes before, 15 minutes before, 30 minutes before, 1 hour before, 2 hours before, 1 day before or 2 days before.

SHOW AS sets how to show your availability: Busy, Free, Tentative or Out of Office.


PRIVACY sets the level of privacy: Normal, Personal, Private or Confidential.

ATTENDEES allows you to invite attendees using the Global Address List (GAL).


OPTIONAL allows you to invite optional attendees.

RESOURCES adds a resource to the event such as a conference room or off-site location.

NOTE allows you to add a message to the event.

CATEGORIZE allows you to add a category or create a new category to the event. 

To edit an event,

- 1 Tap the **Edit Event** icon. 
- 2 Edit your event and tap **Save**.

Folder Selection

You can select another folder to view tasks within that folder.

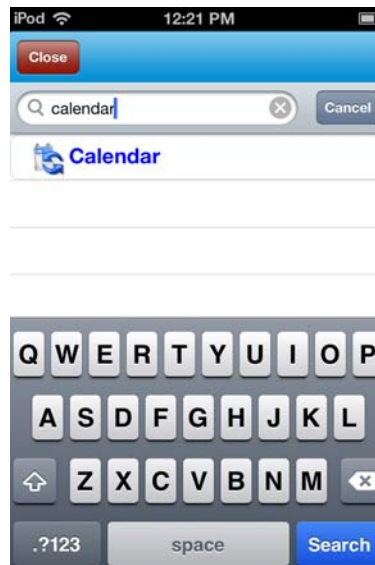


FIGURE 12. Find and Select Folder

To search for Calendar folders,

- 1 While in the Calendar, tap the Calendar icon.**
- 2 Enter your keyword search criteria.**
- 3 Click Search.**
- 4 Select Folder.**



Chapter 4

Contacts

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This chapter describes how to work with Contacts.

To access your Contacts, tap the Contacts button.




FIGURE 13. Contacts List

Create Contact

Choose this option to create your contact.

To create a new contact,

- 1 Tap the New Contact icon. 
- 2 Fill out the contact information and tap Save.

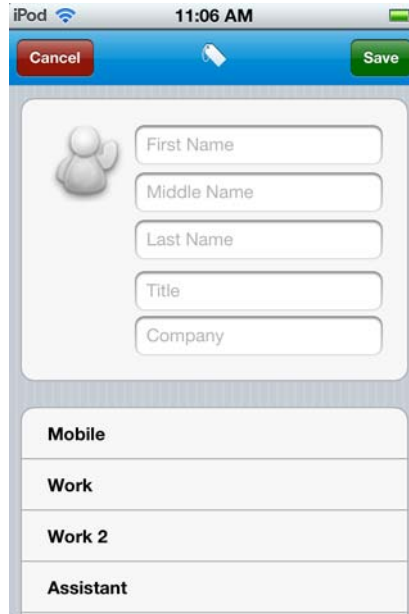



FIGURE 14. New Contact Screen

NOTE: To add a category or create a new category to the contact, tap the categorize icon. 

Working with Contacts

To work with a contact,

- 1 **Select the Contact.**
- 2 **Flick right or left to access the Contacts menu.**

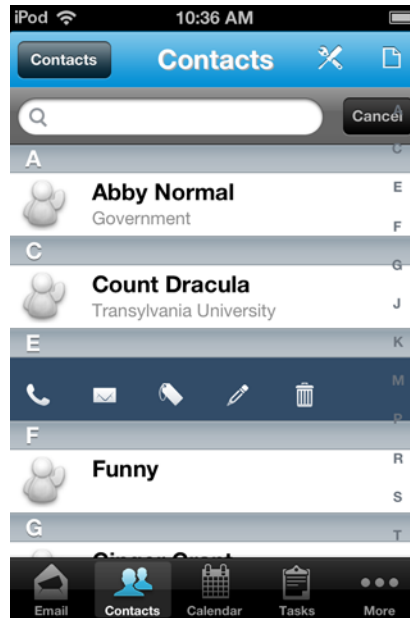






FIGURE 15. Contact Menu

CALL allows you to call the contact selected. 

EMAIL creates a new message to the contact selected. 

CATEGORIZE allows you to add a category or create a new category to the contact selected. 

EDIT allows you to edit the contact selected. 

DELETE will delete the selected contact. 

You can also select the contact by tapping on it. You will have the option to delete, add categories or edit.

To copy or clear Contacts to Phone Book, tap 

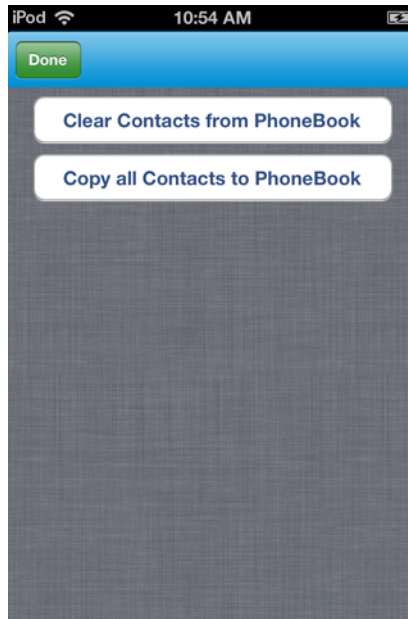


FIGURE 16. Copy Contacts to Phone Book Screen

NOTE: If the Copy all Contacts to PhoneBook option is not available, see “Contacts” on page 47 to enable Update to Phone Book option.

Search for Contacts

To search for Contacts,

- 1 Open Contacts.**
- 2 Pull Down on the Contacts bar.**
- 3 Type in your search criteria.**
- 4 Select to search Local (device) or Server (Microsoft Exchange).**

The best matches for your search criteria appear below the search bar.

To search for Contacts in other folders,

- 1 While in Contacts tap the word **Contacts** in the upper left corner of the screen.
- 2 Enter your keyword search criteria.

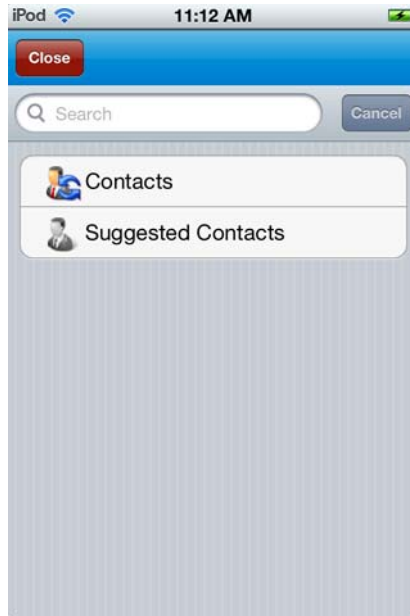


FIGURE 17. Contacts Folder Search Screen

Chapter 5

Tasks

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This chapter describes how to work with Tasks.

To access Tasks,

- 1 Open Secure Mail.
- 2 Tap the Tasks button.

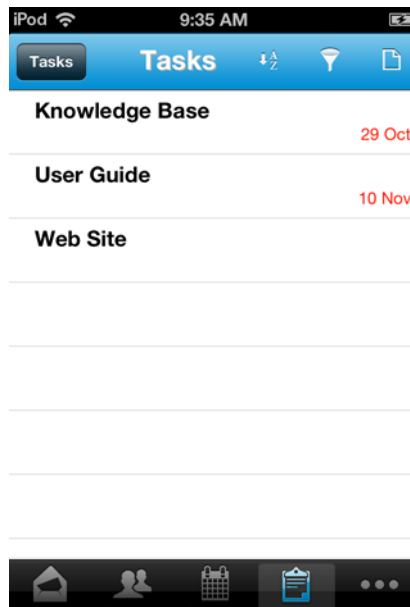




FIGURE 18. Tasks List

SORT  allows you to sort Tasks in the list by:

- Subject
- Subject (Descending)
- Start
- Start (Descending)
- Due
- Due (Descending)
- Importance
- Importance (Descending)

FILTER  helps you organize your Task list. You can filter by Folder, Category or by the following statuses:

- All
- Complete
- Pending
- Overdue
- Due Today
- Next Seven Days
- Active
- No Due
- With Due
- Today and Overdue

To search for Tasks in other folders

- 1 Tap the Tasks button.
- 2 Enter your keyword search criteria.
- 3 Click Search.

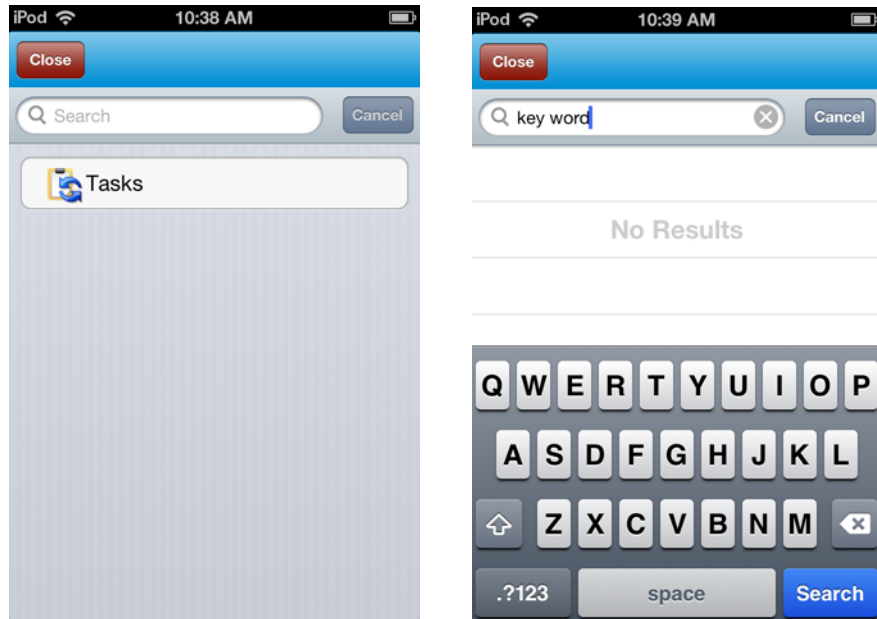


FIGURE 19. Search Tasks Screens

To search for Tasks,

- 1 Open Tasks.
- 2 Pull down on the Tasks bar.
- 3 Type in your search criteria.

The best matches for your search criteria appear below the search bar.

To create a New Task,

1 Open Secure Mail.

2 Tap the Tasks button.

3 Tap the New button. 

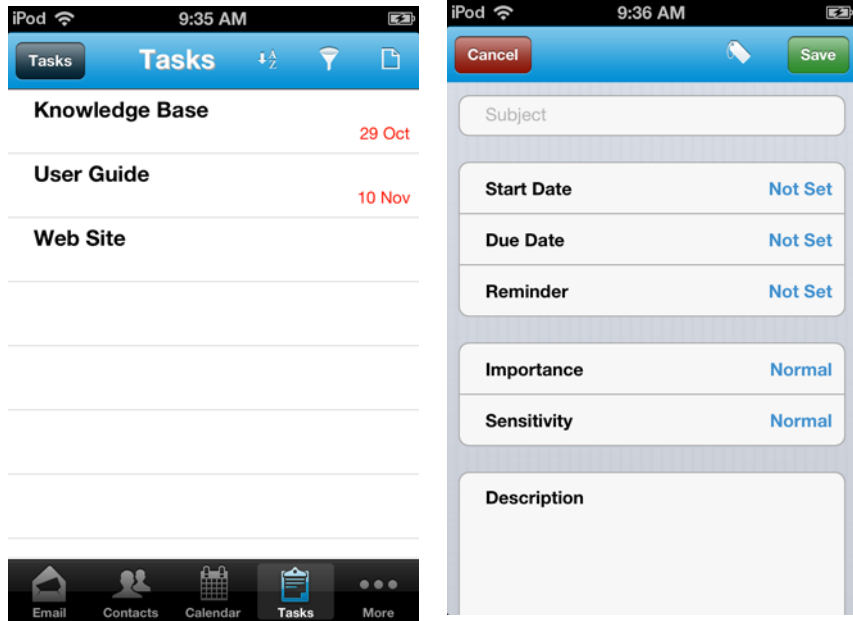



FIGURE 20. New Task Screen

CATEGORIES  lets you choose the categories for the task. See Chapter 8, “Customize Secure Mail” on page 39 for help working with categories.

SUBJECT is the title of the task.

START DATE is the date the task begins.

DUE DATE is the date that the task is due.

REMINDER specifies the time and date of the task reminder. If left blank, a reminder will not sound for this Task.

IMPORTANCE sets the level of importance: Low, Normal or High.

SENSITIVITY sets the sensitivity level: Normal, Personal, Private, or Confidential.

DESCRIPTION details the items for the task.

To edit Tasks,

- 1 **Select the Task you want to edit.**
- 2 **Flick right or left to access the Tasks menu.**

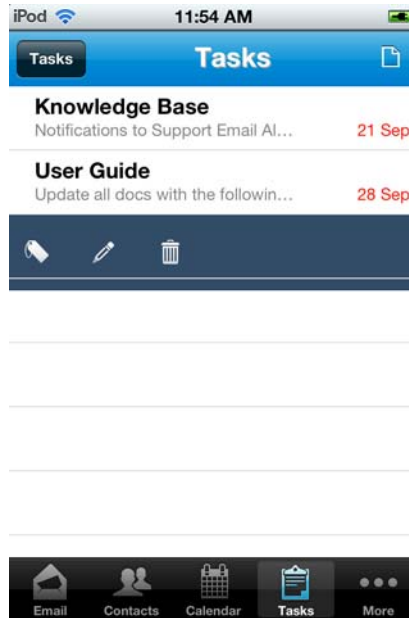





FIGURE 21. Task Menu

CATEGORIZE allows you to add a category or create a new category to the contact selected. 

EDIT allows you to edit the contact selected. 

DELETE will delete the selected contact. 

Chapter 6

Notes

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This chapter describes how to work with Notes.

To access Notes,

- 1 While in Secure Mail tap the **More** button.
- 2 Tap **Notes**

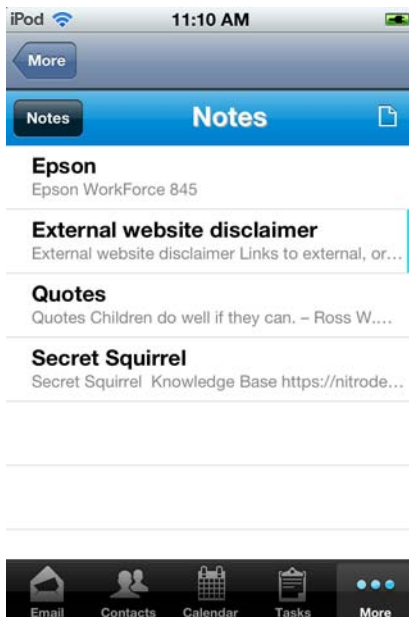


FIGURE 22. Notes Screen

To edit Notes,

- 1 Select the Note you want to edit
- 2 Flick right or left to access the Notes menu

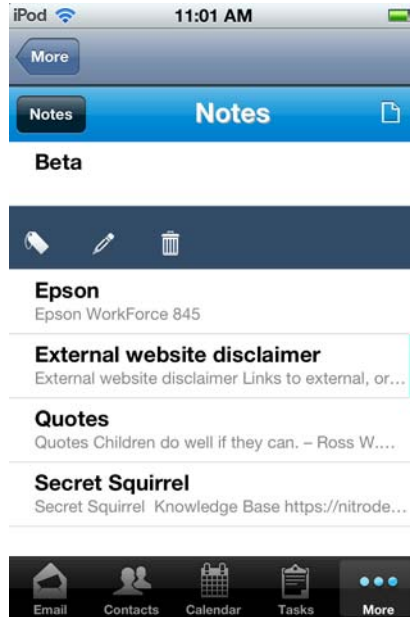





FIGURE 23. Notes Menu

CATEGORIZE allows you to add a category or create a new category to the note selected. 

EDIT allows you to edit the note selected. 

DELETE will delete the selected note. 

Search for Notes

To search for Notes,

- 1 Open Notes.**
- 2 Pull Down on the Notes bar.**
- 3 Type in your search criteria.**

The best matches for your search criteria appear below the search bar.

To search for Notes in other folders,

- 1 While in Notes tap the word Notes in the upper left corner of the screen.**
- 2 Enter your keyword search criteria.**



Chapter 7

Saved Documents

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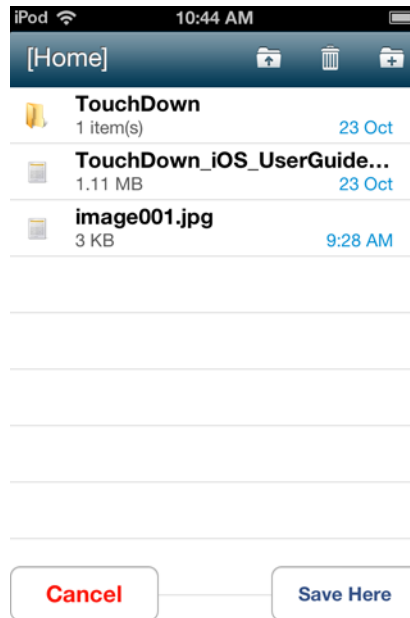
This chapter describes how to work with Saved Documents within Secure Mail.

To save an attachment to Saved Documents,

- 1 Open Secure Mail.
- 2 Open the email with the attachment you want to save.
- 3 Tap the Attachment  icon to download.
- 4 Tap the  icon to save attachment.
- 5 Tap Save Attachment.




- 6 Select the location in the Saved Documents where you want to save the file.
- 7 Tap Save Here

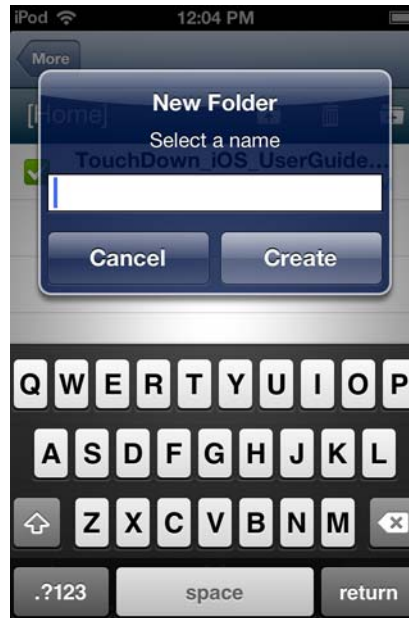


You will be returned to the Attachments screen within the open email.

To create folders in Saved Documents,

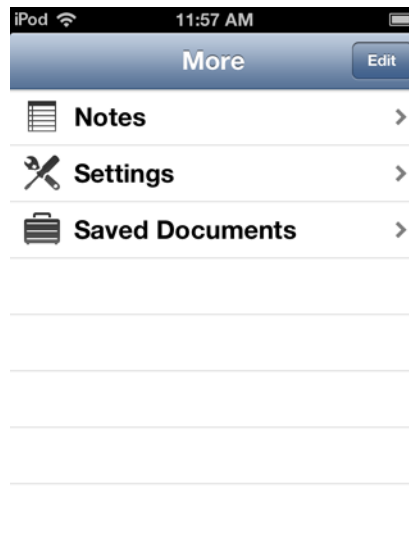
- 1 Open Secure Mail.
- 2 Tap the More button and select Saved Documents.
- 3 Tap the Create Folder icon  .

- 4 Enter name for the new folder and Tap Create.



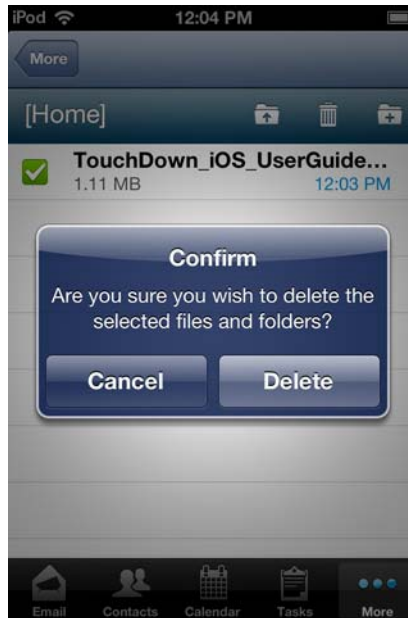
To access Saved Documents,

- 1 Open Secure Mail.
- 2 Tap the More button and select Saved Documents.



To delete attachments,

- 1 Open Secure Mail.
- 2 Tap the More button and select Saved Documents.
- 3 Tap the attachment icon (far right) on the attachment you want to delete.
- 4 Tap the delete icon.
- 5 Tap Delete to delete or Cancel to return to attachment list.



Chapter 8

Customize Secure Mail

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This chapter describes how to customize Secure Mail.

To access Settings,

- 1 Open Secure Mail.
- 2 Tap the More button and select Settings.

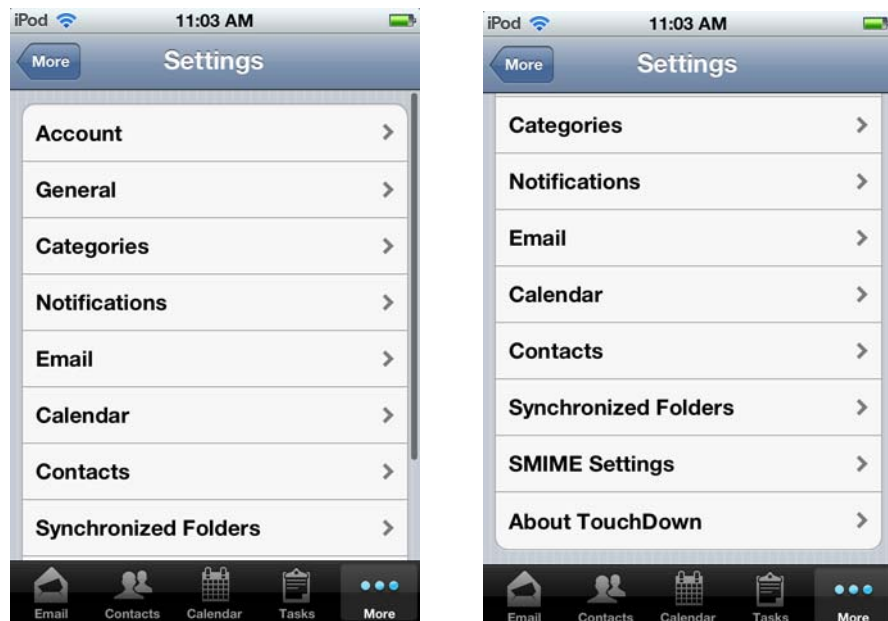


FIGURE 24. Settings Screen

Account

SERVER is the name of the server that your mobile device connects to. For some organizations, this may be different from the Outlook Web Access server. This is an example: **MOBILE.MYCOMPANY.COM**

EMAIL is entered here if it is different from your User ID.

PASSWORD is the password you use to connect your mobile device to your Microsoft® Exchange server. Note that if your password changes or expires, it will not be updated automatically in Secure Mail. You must manually update it in Secure Mail.

SECURE CONNECTION (SSL) should be set to On if you use secure connections.

ACCEPT ALL SERVER CERTS will accept all server certs if set to On.

General

ENABLE PUSH If this is turned on, any new emails or changes appearing on the server will be downloaded almost immediately to the device. This provides real time notification of new emails and other changes. When Push is off, you can only sync manually.

EMAIL HISTORY This entry specifies how many days of past emails Secure Mail keeps on the device. The default is 3 days. Setting too large a value can potentially slow down some operations if you have a lot of emails stored on the device.

The following choices are available:

- All
- 1 day
- 3 days
- 1 week
- 2 weeks
- 1 month
- 3 months
- 6 months

Secure Mail will delete emails on the device that are older than the specified email history to conserve space.

EMAIL SIZE This is the size of the email messages to download from the server during synchronization. If the email being downloaded is larger than the value specified here, when viewing the email a new button at the bottom of the email view will let you download the remaining portion of the message.

The following values are available:

- No Body
- 4 KB
- 5 KB
- 7 KB
- 10 KB
- 20 KB
- 50 KB
- 100 KB
- Full Emails

CALENDAR HISTORY specifies how many days of appointments Secure Mail keeps on the device. The default is 2 weeks. Appointments from the past will only be visible after you've begun sync appointments with Secure Mail.

The following choices are available:

- All
- 2 weeks
- 1 month
- 3 months
- 6 months

Selecting All for appointments, just as with emails, will cause your database to increase in size and can affect the speed and performance of the Secure Mail application.

KILL CODE allows you to perform a remote wipe by sending an email with a user-specified Kill Code in the subject of the email. You can specify the Kill Code in the settings. Once a Kill Code is set, Secure Mail will perform a remote wipe on receipt of the email that contains the Kill Code in the subject line, prefixed by TDKILL:.

Categories

This option lets you choose colors for each of the categories that are applicable to contacts, events and tasks. When you tap the Categories button, the following screen opens up.

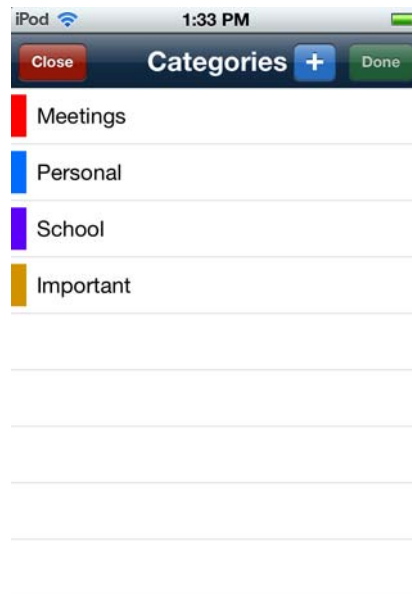


FIGURE 25. Categories Screen

When you tap a category you can move the sliders corresponding to Red Green and Blue components to set any color you wish. Once set, all items tagged with that category will display with the specified color.

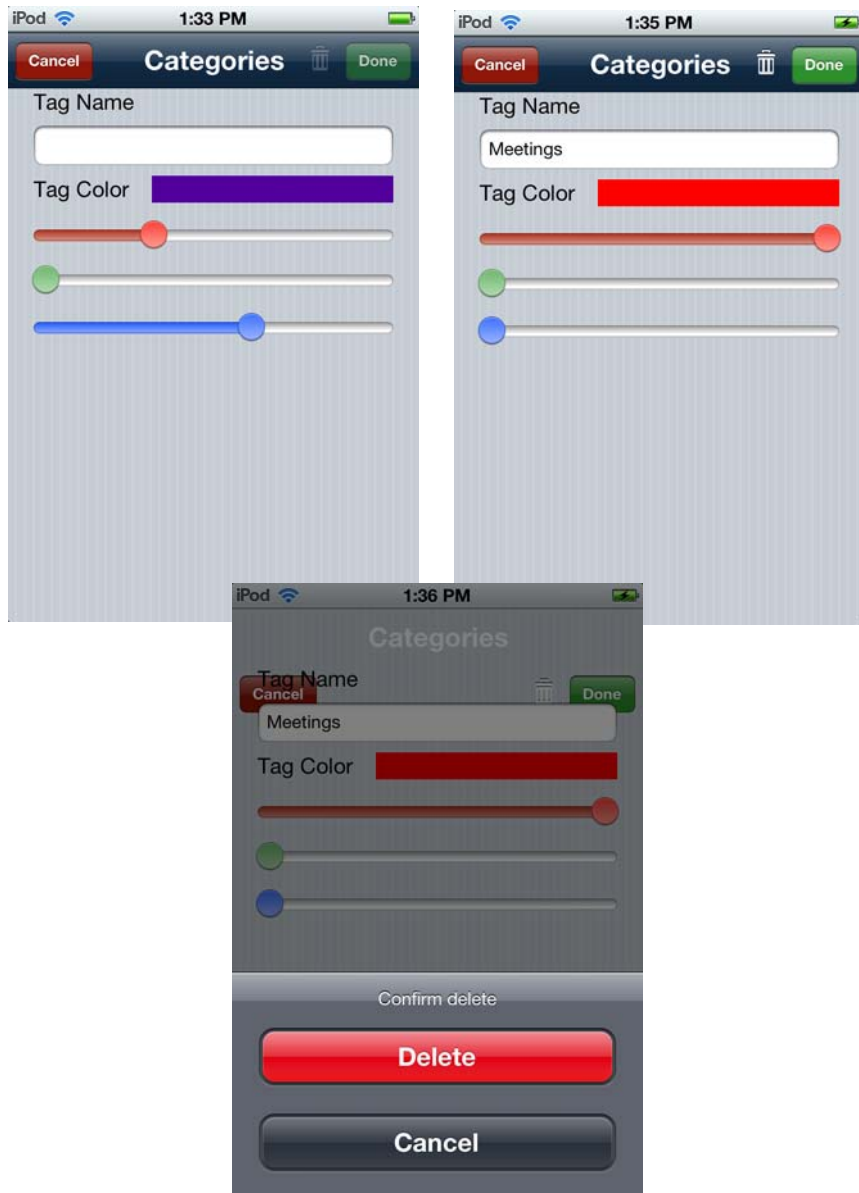


FIGURE 26. Create, Edit and Delete Categories

NOTE: Secure Mail receives category information from Items containing those categories. Therefore, some categories may not appear until at least one item associated with each category is synced. Also, ActiveSync does not provide color information for each category, so you will have to manually set your favorite colors here to match what you have in Outlook.

Notifications

NOTIFY ON NEW MAIL displays notifications in the Notification Center and alerts you to new mail, even when an app isn't running.

SOUND ON NEW MAIL plays the system notification sound, or a custom notification sound.

BADGE ON NEW MAIL displays an alert badge on the Home screen icon with a number (to indicate incoming items).

VIBRATE ON NEW MAIL enables vibration on new mail.

FLASH ON NEW MAIL sets the color of the notification light to flash. Note that the lights and colors may not work on all devices.

NOTIFY ON APPOINTMENTS displays notifications in the Notification Center and alerts you of an upcoming appointment.

NOTIFY ON TASKS displays notifications in the Notification Center and alert you to upcoming tasks, even when an app isn't running.

Email

MOVE TO ANY FOLDER will open a list of all folders to select where to move the email, even if the folders are not included in the synchronized folders list.

HIGHLIGHT SENDER makes the name of the sender of any email larger and bold as opposed to the subject.

ENABLE HTML will download and display emails in HTML format.

CONFIRM DELETES will prompt you to confirm that you want to delete the email each time you tap Delete.

CONFIRM MOVE will prompt you to confirm that you want to move an email each time you tap Move To.

CONFIRM JUNK moves the email to the Junk folder. The Junk folder must be detected for this to be available.

CONFIRM SEND will prompt you to confirm that you want to send an email each time you tap Send.

DONT DELETE FROM SERVER allows you to delete emails on the device and will not remove them from the server.

DONT MARK ON SERVER allows you to read emails or mark them as read/unread on the device but will not mark them as read/unread on the server.

AUTO MARK READ marks items as read when viewed in the Reading Pane.

AFTER DELETE specifies where to go within Secure Mail after deleting the email.

The following options are available:

- Back to List
- Previous Email
- Next Email

BCC SELF adds your configured email address to the BCC of all outgoing emails you send.

BODY STYLE This is a field that lets you specify different fonts, sizes, colors and styles to be used when composing new messages in HTML mode.

This string follows a certain formatting rule, and you should make sure that the changes you make to this string are only made to the fields that are described below.

The default for this string is:

```
font-family:Arial, Helvetica, sans-serif;font-size:small
```

The general format is as follows:

```
font-family:<FONT_NAME>;font-size:<FONT_SIZE>
```

<FONT_NAME> can be replaced with a sequence of valid font names separated by commas.

<FONT_SIZE> can be replaced with a font size. Valid values include the following:

- small
- x-small
- xx-small
- large
- x-large
- xx-large
- NNpt where NN is a point size. (For example 10pt)

HTML SIGNATURE allows you to enter HTML code signatures with a variety of fonts, colors, styles etc.

TEXT SIGNATURE adds a plain text signature.

Calendar

ZOOM option lets you display the Day and Week views in larger size and fonts. The recommended zoom size for high resolution devices is 150%.

DEFAULT REMINDER automatically places the same reminder length for each new event.

DEFAULT STATUS automatically places the same availability status for each new event.

DEFAULT PRIVACY automatically places the same privacy status for each new event.

WEEK START selects the start dates for the week. Selecting a custom week start will change the way the Week view is shown.

WEEK END selects the end dates for the week. Selecting a custom week end will change the way the Week view is shown.

WORK DAY STARTS AT option lets you specify the start of your working day. Working times are shown in a slightly different color in the Day and Week views.

WORK DAY ENDS AT option lets you specify the end of your working day. Working times are shown in a slightly different color in the Day and Week views.

Contacts

DEFAULT FILE-AS allows you to decide if you want to save your Secure Mail Exchange contacts to the phone book as:

- First Name Last Name
- Last Name, First Name
- Last Name, First Name and Middle Initial

UPDATE TO PHONEBOOK detects a contact change on the server and makes the change to the contact in the native phone book application on the device.

PHONEBOOK FORMAT allows you to decide if you want to copy your Secure Mail Exchange contacts to the phone book as:

- File-As
- Last Name, First Name and Middle Initial

LOOKUP IN PHONEBOOK searches in the device phone book as well as the Secure Mail Contacts.

AUTOMATIC GAL SEARCH adds recipients by using the Global Address List (GAL) when typing in the field and the Secure Mail Contact list will suggest a few of your favorites.

Synchronized Folders

Before Secure Mail can synchronize data from the server, you must select the folders to synchronize. You can slide the On/Off to toggle the selected state. When selected for synchronizing, the icon for the folder will display a blue refresh indicator.

NOTE: Secure Mail does not support the Outbox folder for synchronization.

S/MIME Settings

Once you have an S/MIME certificate installed, you can specify whether it should prompt for a PIN, set the PIN timeout and set an S/MIME PIN. When decrypting S/MIME messages, it will prompt you for a PIN and decrypt on demand as opposed to decrypting on receipt.

REQUIRE A PIN prompts for private key before looking up certificate.

PIN TIMEOUT retains your S/MIME PIN only for the number of minutes specified, after which you may be prompted again for using the certificate.

SMIME PIN prompts for private key before looking up the certificate.

CONFIRM PIN asks the user to confirm the PIN by entering it again here.

CHECK REVOCATION will check to see if a certificate was recalled if option is set to On.

About Secure Mail

VERSION shows the current version number and build.

BUNDLE ID shows the current bundle ID.