



Notate Productivity Suite for VMware AirWatch Administrator's Guide

September 2017

Overview

This guide will help you configure Notate, Docs, Meetings and Cards in your VMware AirWatch environment. The configuration process consists of five steps:

1. Create an AirWatch SDK Profile
2. Add Server Access Routes
3. Configure applications settings
4. Add Applications to AirWatch console
5. Configure apps on device

1.) Creating an SDK Profile for the Notate apps

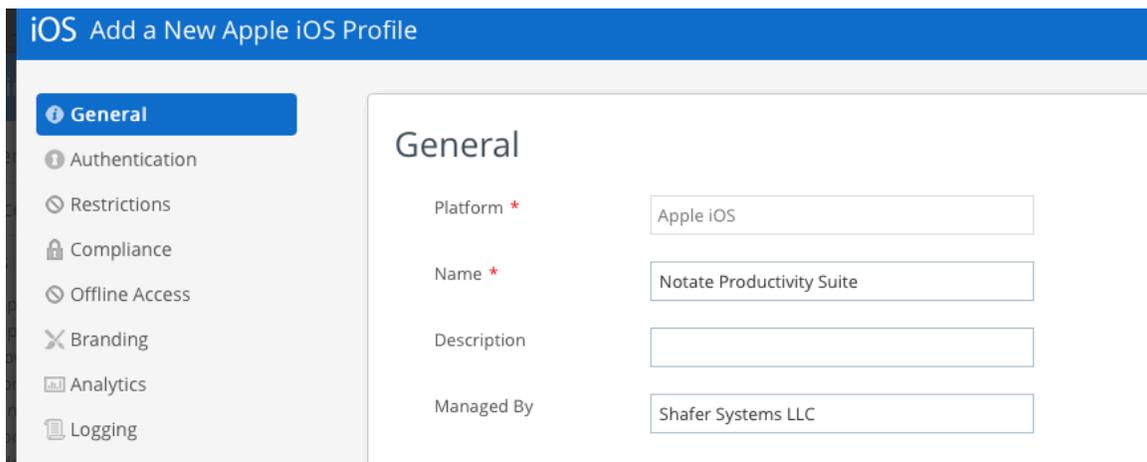
The first step to adding Notate Productivity Suite applications is to define an SDK profile on your AirWatch server. This will allow you to specify application configuration items including the licensing key.

First navigate to application profiles which can be found from:

Apps & Books / All Apps & Books Settings / Settings & Policies / Profiles

Choose “Add Profile”, and then choose “SDK Profile”, and “iOS”

You can name the Profile something descriptive such as “Notate Productivity Suite”



The screenshot shows the 'Add a New Apple iOS Profile' interface. The left sidebar contains a menu with the following items: General (selected), Authentication, Restrictions, Compliance, Offline Access, Branding, Analytics, and Logging. The main content area is titled 'General' and contains the following fields:

Platform *	Apple iOS
Name *	Notate Productivity Suite
Description	
Managed By	Shafer Systems LLC

You may choose to specify certain *restrictions for the application. Enable the camera in order to scan documents, and location services in order to GPS stamp new notes.

iOS Add a New Apple iOS Profile

The screenshot shows the 'Restrictions' configuration page for an iOS profile. On the left is a navigation menu with options: General, Authentication, Restrictions (selected), Compliance, Offline Access, Branding, Analytics, Logging, Geofencing, Proxy, Network Access, Custom Settings, Content Filtering, and Credentials. The main content area is titled 'Restrictions' and contains a list of settings with checkboxes:

- Enable Data Loss Prevention
- Enable Printing
- Enable Copy And Paste
- Enable Composing E-mail
- Enable Location Services
- Enable Data Backup
- Enable Camera
- Enable Watermark
- Restrict documents to be opened in following apps

Under the 'Restrict documents to be opened in following apps' setting, there is a list of applications:

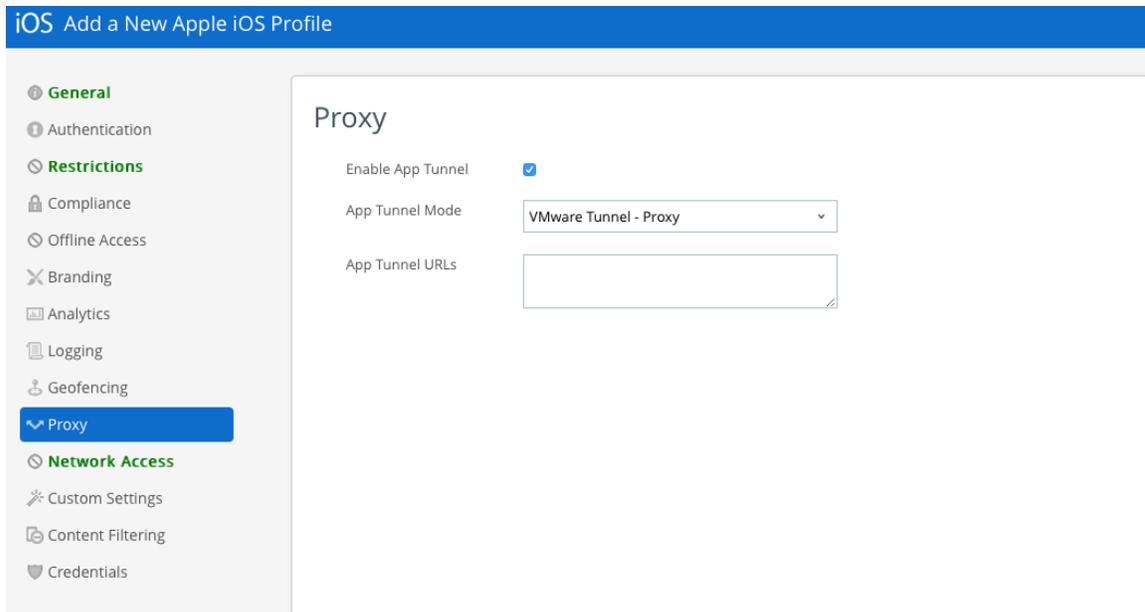
Applications	
AirWatch Inbox	<input checked="" type="checkbox"/>
Boxer Pro	<input checked="" type="checkbox"/>
Start typing to add a new app	<input type="text"/>

****IMPORTANT NOTE: There is a known issue where if restrictions are specified, "Restrict Documents Policy must be turned on, and at least one whitelisted application must be specified. This will be fixed in a future AirWatch SDK"***

2.) Adding Server Access Routes

The next step in configuring the SDK profile is to enable secure application tunneling to the behind the firewall resources, namely the Exchange Server.

Select Proxy from the Profile menu. Click on "Enable App Tunnel" and configure a secure tunnel to your Exchange server, load balancer, or CAS.



3.) Application Custom Settings

Select "Custom Settings" from the Profile menu.

Adjust the following configuration keys and values as needed. Each key may be entered on a separate line of the dialog.

Key	Description	Default Value
licensingKey	Allows for synchronization and sharing and Notate policy controls from the EMM admin portal.	Licensing key is sent via email when trial is set up or product is purchased
autodiscoveryURLs	Note: This setting is NOT required if your autodiscovery URLs are in standard locations. Server URLs are separated with a semicolon and no space. URL example: http://autodiscover.domain.com/autodiscover/autodiscover.xml;https://domain.com/autodiscover/autodiscover.svc	

exchangeURL	Allows user to synchronize notes with Exchange server. Note: This setting is NOT required unless autodiscovery is not possible for your environment. To specify the EWS URL use the format: https://server.domain.com/EWS/Exchange.asmx	
userEmail	If provided, the user won't be asked to provide their email address.	{EmailAddress}
userName	If provided, the user won't be asked to provide their username.	{EmailUserName}
disablePeerVerification	Important: Enables the user of local/private certificates on the Exchange Server	true
allowiOSEmail	A value of 0 disables use of sending notes with native iOS email. Open In is still supported.	true
annotationCompression	Handwriting and Annotations are compressed by default to save storage space. Values are: 2 = high compression, 3 = medium compression, 4 = no compression	2
allowAnnotations	Allows the use of handwriting and highlighter tools.	true
allowGeotag	User is permitted to automatically record location of notes.	true
allowHyperlinks	Allows hyperlinks to be active within notes. Safari browser is launched.	true
allowGallery	Allows the access and use of the device photo/image gallery	true
allowVoiceRecordings	Permit the use of audio recordings	true
allowCamera	Allows the user to insert photos from the device camera into notes and allows document scanning	true
allowWebClippings	Allow users to insert web clippings into notes.	true
allowSharing	Allow users to share notebooks with other users.	true

allowAttachments	Allow users to insert documents into notes.	true
allowTasks	Allow users to manage tasks in Notate.	true
allowCrashReports	Enable generic crash reports without user data to be sent to the developer.	true

Custom Settings

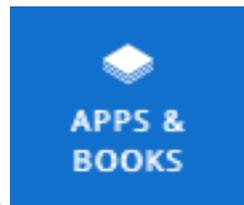
Custom Settings

```
allowExchange=true
disablePeerVerification=true
allowSharing=true
userName={EnrollmentUser}
userEmail={EmailAddress}
exchangeURL=https://exchange2010.shafersystems.com/ews/exchange.asmx
allowAnnotations=true
annotationCompression=2
allowgallery=true
allowvoicerecordings=true
allowWebClippings=true
allowCamera=false
allowAttachments=true
allowCrashReports=true
allowTasks=true
licensingkey=rflouTRlyKpLQ7kz/MPwp9pMdA/KmYgA4Tyl/
```

Sample Settings Screenshot

4.) Adding Notate Productivity Suite Apps to your Console

To set up the Notate apps for deployment on your AirWatch console, you first must add them to the console.

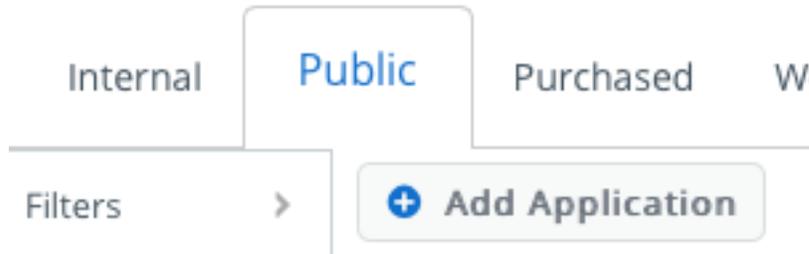


First, select Apps & Books from your console

Next, select the “Public” tab, and choose “Add Application”

Apps & Books > Applications >

List View

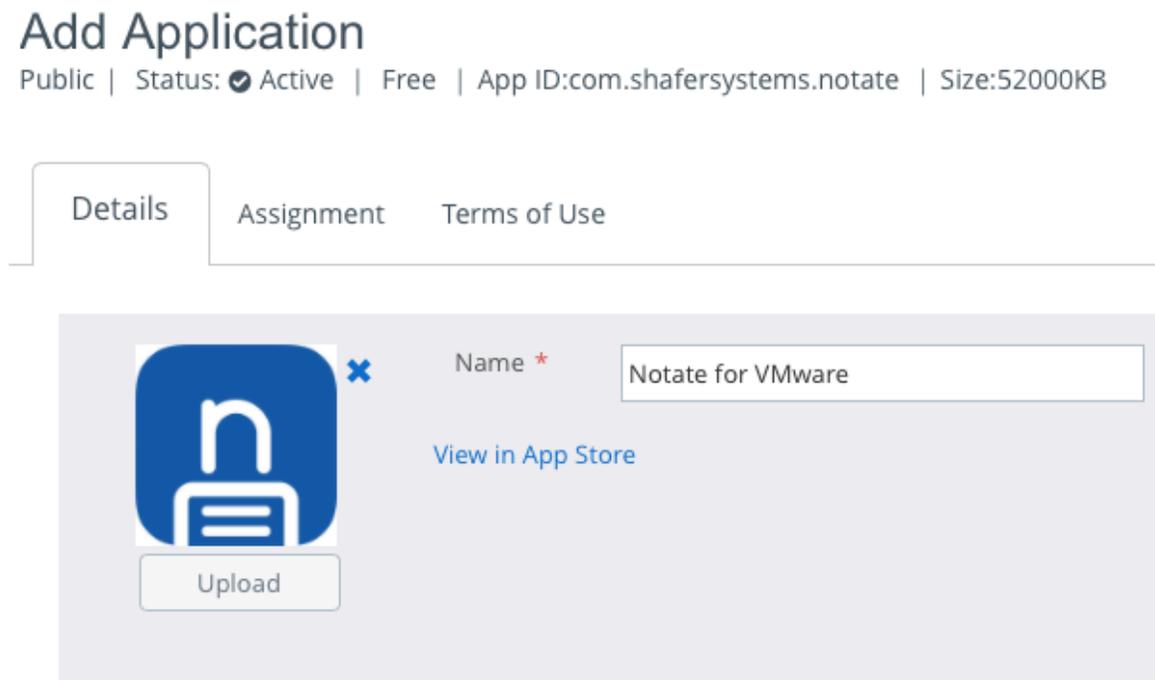


Select “Apple iOS” as the platform, and make sure “Search App Store” is selected.

You’ll follow this process four times, one for each application in the suite. The application names to search for are:

- Notate for VMware
- Notate Cards for VMware
- Notate Docs for VMware
- Notate Meetings for VMware

After selecting the appropriate app, you will see a screen similar to this:



Next, choose the assignment tab.

Choose appropriate application assignment groups for Notate deployment, and appropriate app delivery methods.

Make sure you choose “Application uses AirWatch SDK”, and select the SDK Profile that you created earlier.

Application uses AirWatch SDK Enabled Disabled ⓘ

SDK Profile *

Finally click Save and Publish, and then repeat the adding/assignment process for the other three applications.

Granting Application Access to Servers

Notate Productivity Suite applications can access the Exchange servers via the VMware AirWatch console specified proxy servers. Permissions for each application to access back-end servers must be granted. This is usually configured as a part of the SDK Profile as noted previously.

Cards also requires access to a license validation server. Card’s OCR component runs a license validation check the first time that it runs, and the application must have access to bcrs1.intsig.net in order for the license validation to be processed.

Notate also requires access to a sharing notification server api.notatepro.com if the sharing feature is enabled.

<http://support.shafer.com/customer/en/portal/articles/2303757-notate-sharing-infrastructure>

Application	Server Needed	Port
Notate	Exchange	443
Cards	Exchange	443
Meetings	Exchange	443
Docs	N/A	
Cards	(License Validation Server) bcrs1.intsig.net	443
Notate	api.notatepro.com	443

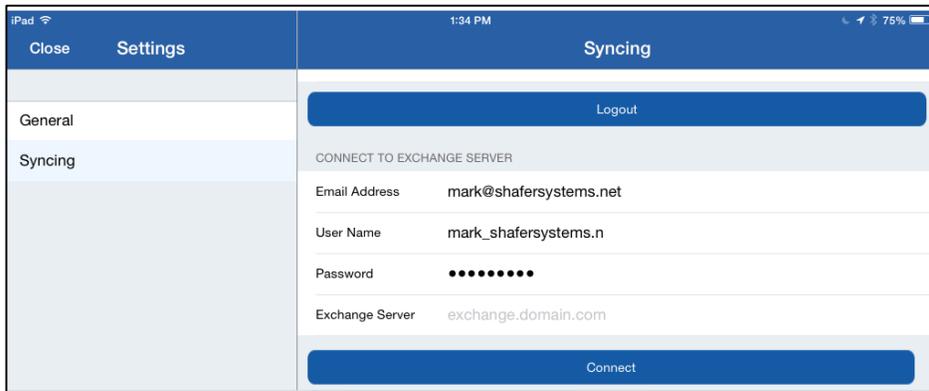
5.) Mobile Client for Configuration

The last step for configuring Notate Productivity Suite is to configure the mobile clients. If the previous steps have been followed correctly then the client configuration is very easy and can be performed directly by end users.

Exchange Synchronization set-up

Users will be requested on first launch to provide their Exchange email password. In most cases this will complete user set-up for synchronization. In some cases, the user may be prompted for their user name to complete authentication. User Name should be added as their AD Domain account name bill@ad.domain.com or the pre AD domain account name in the following format "domain\username. Note that this field may be pre-filled if you specified its format in the application policy settings.

The Exchange Server EWS URL field should be pre-populated thru the policy settings. If not pre-populated Notate will use the Exchange auto-discovery mechanism to locate the proper server. If auto-discovery fails the User will be prompted to enter the Exchange EWS URL as a final step. The URL should be entered in the following format: exchange.domain.com/EWS/Exchange.asmx



The screenshot shows the 'Settings' app on an iPad. The 'Syncing' section is selected, displaying a 'Logout' button at the top. Below it, the 'CONNECT TO EXCHANGE SERVER' section contains the following fields:

Field	Value
Email Address	mark@shafersystems.net
User Name	mark_shafersystems.n
Password	••••••••
Exchange Server	exchange.domain.com

At the bottom of the form is a 'Connect' button.

If notes do not automatically begin the sync process, confirm the Exchange EWS URL, use the pre AD domain account name for the user, and make sure that the application has been granted permission to access the Exchange server from AirWatch Console proxy settings.

KNOWN ISSUES:

- *If restrictions are specified, "Restrict Documents Policy must be turned on, and at least one whitelisted application must be specified. This will be fixed in a future AirWatch SDK.*
- *Kerberos Constrained Delegation has not been verified in this release*

For questions contact: support@shafersystems.com