



# **Notate Productivity Suite for BlackBerry Administrator's Guide**

June 2017

## **Overview**

This guide will help you configure Notate, Docs, Meetings and Cards in your BlackBerry Dynamics environment. The configuration process consists of three steps:

1. Enable applications to access back-end servers through the Good Proxy
2. Configure application policies on the Good Control Server
3. Configure applications on device

## Granting Application Access to Servers

Notate Productivity Suite applications can access the Exchange and BEMS servers via the BlackBerry Dynamics Proxy server. Permissions for each application to access back-end servers must be granted.

If notebook sharing is enabled in Notate, then Notate also requires access to api.notatepro.com on port 443 in order to send notification IDs to share recipients. No user data is ever sent or stored in the cloud. More details about how sharing notifications are processed can be found here:

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

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 via the Good Proxy server to bcrs1.intsig.net in order for the license validation to be processed. All OCR processing is done on device and no user data is ever sent to the cloud.

Application	Server Needed	Port
<b>Notate</b>	Exchange	443
<b>Notate</b>	api.notatepro.com	443
<b>Meetings</b>	Exchange	443
<b>Docs</b>	BEMS	8443
<b>Cards</b>	Exchange	443
<b>Cards</b>	(License Validation Server) <a href="http://bcrs1.intsig.net">bcrs1.intsig.net</a>	443

To grant the application access to the necessary server, open the Good Control server, choose to manage applications, and select the desired application to configure. Next click on the BlackBerry Dynamics tab, and enter the server information for the app.

For example, to grant Notate Docs the ability to access the BEMS server, the configuration screen will look something like this:

Manage Apps > Notate Docs for BlackBerry



**Notate Docs for BlackBerry**

by Shafer Systems LLC  
source: Public | GD Entitlement ID: com.shafersystems.docs.gd  
Store (Partner)  
Auto-Push Disabled

GENERAL | ANDROID | APPLE IOS | **BLACKBERRY DYNAMICS**

▼ **GD Entitlement ID** com.shafersystems.docs.gd [EDIT](#)

▼ **Policy Set Override** -- Not set -- [EDIT](#)

▼ **1 Server** [EDIT](#)

HOST NAME	PORT	PRIORITY
gems.ad.shafersystems.com	8443	Primary

Enabling access for the Exchange server is similar. You may specify the internal Exchange CAS. Here's one example of how this permission is granted on the Good Control server:

Manage Apps > Notate for BlackBerry



**Notate for BlackBerry**

by Shafer Systems LLC  
source: Public | GD Entitlement ID: com.shafersystems.notate.gd  
Store (Partner)  
Auto-Push

GENERAL | ANDROID | APPLE IOS | **GOOD DYNAMICS**

▼ **GD Entitlement ID** com.shafersystems.notate.gd [EDIT](#)

▼ **Policy Set Override** -- Not set -- [EDIT](#)

▼ **2 Servers** [EDIT](#)

HOST NAME	PORT	PRIORITY	PRIMARY GP CLUSTER	SECONDARY GP CLUSTER
autodiscover.ad.shafersystems.com	443	Primary	First	-- Not set --

## Configure Application Policies

The next step is to configure individual application policies. This guide will walk you through this configuration for each app in the Suite.

### NOTATE POLICIES

<b>Synchronization</b>	General	Tasks	About
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**EXCHANGE POLICIES**

Allow Synchronization with Exchange

Use Kerberos Authentication - (Use Kerberos instead of user credentials for authentication)

Disable Peer Verification - (Enables use of local/private certificates)

Folder Sharing - (Allow users to share notes and tasks with other users)

**USER NAME**

User Name

Leave this field blank to allow the user to enter their own username, or set it to \$USERS\$ to extract the username from the UPN, or \$UPNS\$ to fill the username with the full UPN. Lastly, you may include any additional information such as domain, by entering "MYDOMAIN\$USERS\$"

**AUTODISCOVERY**

Autodiscovery URLs

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

**EXCHANGE WEB SERVICES**

Exchange Web Services URL

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

Make sure that you check Allow Synchronization with Exchange.

Notate supports KCD authentication if it is set up in your environment. See BlackBerry documentation for details on configuring KCD. Leave this unchecked unless you are sure that you have KCD configured for BlackBerry Dynamics.

Disable Peer verification removes the requirement that your internal Exchange server present a publically verifiable certificate. Unless your Exchange server is exposed on the internet, this should usually be checked.

Folder sharing enables users to share notes and tasks with one another.

Username may be specified in order to pre-fill this information on the mobile clients so that end users are not required to enter this information. In many cases this is not required and can be left blank.

Autodiscovery, & Exchange URL -- Normally, Notate is able to authenticate using Microsoft Exchange autodiscovery methods and these fields may remain blank. They only need to be filled in when your organization uses non standard autodiscovery methods.

## Meetings, and Cards Configuration

Meetings and Cards sync with the Exchange server similar to Notate. As a result, the configuration options for Cards and Meetings are very identical to Notate. Connectivity to Exchange works in most cases without modifying the default settings.

### MEETINGS POLICIES

<b>Synchronization</b>	General	About
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**EXCHANGE POLICIES**

Use Kerberos Authentication - (Use Kerberos instead of user credentials for authentication)

Disable Peer Verification - (Enables use of local/private certificates)

**USER NAME**

User Name

Leave this field blank to allow the user to enter their own username, or set it to \$USERS\$ to extract the username from the UPN, or \$UPN\$ to fill the username with the full UPN. Lastly, you may include any additional information such as domain, by entering "MYDOMAIN\$USERS\$"

#### AUTODISCOVERY

Autodiscovery URLs

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

#### EXCHANGE WEB SERVICES

Exchange Web Services URL

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

#### DOCS POLICIES

**Synchronization**

General

About

#### BEMS POLICIES

BEMS Server URL

Specify the full URL to the BEMS server including the port, for example https://server.domain.com:8443

Since Notate Docs connects to the internal BEMS server, it's application policy must specify the internal address of the BEMS server and it's port.

## 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.

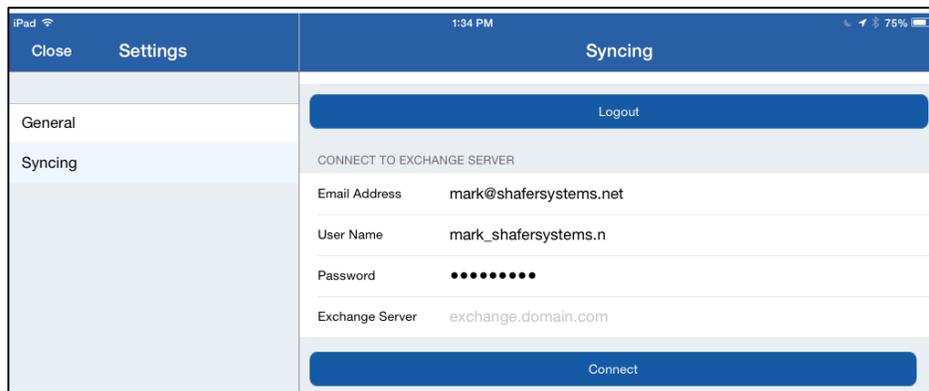
### Exchange Synchronization set-up

If KCD authentication was chosen, then a user does not have to enter any credentials and no mobile client configuration is required.

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 it’s format in the application policy settings in step 2.

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



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 Good Control.

### **BEMS set up**

Notate Docs optionally enables a connection to the BEMS server in order to allow users to open/save documents to internal sources such as SharePoint or corporate file shares. The address/port of the BEMS server is specified in the application policy settings from step 2, but end users must enter their AD password, and domain in the application itself. Domain will be pre-filled and usually is not required to be specified by the end user.

**For questions contact: [support@shafersystems.com](mailto:support@shafersystems.com)**