



# **Notate for Citrix Administrator's Guide**

September 2018

## **Overview**

This guide will help you configure Notate in your Citrix MDX environment. The configuration process consists of three steps:

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

## **Prerequisites**

- Notate for Citrix requires MDX licensing from Citrix.
- If running in MDM mode while using Notate for Citrix, additional Citrix licensing including the NetScaler Gateway may be required. An alternative for this scenario is to deploy Notate for Enterprise using App Config instead.

## Granting Application Access to Servers

Notate can access the Exchange server via the MDX mVPN. Permissions 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>

Application	Server Needed	Port
Notate	Exchange	443
Notate	api.notatepro.com	443

To grant the application access to the necessary servers please follow Citrix documentation or contact your Citrix support.

Helpful Citrix articles include:

How to add Notate for Citrix with MDX File (Section: Add an MDX app) :

<https://docs.citrix.com/en-us/xenmobile/server/apps.html>

MDX Policies at a glance:

<https://docs.citrix.com/en-us/mdx-toolkit/10/xmob-mobile-app-policy-defaults.html>

MDX mVPN Technical FAQ:

<https://support.citrix.com/article/CTX136914#Q3>

## 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.

Make sure that you check Allow Synchronization with Exchange.

Notate supports KCD authentication if it is set up in your environment. See Citrix documentation for details on configuring KCD.

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.

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. <b>Note:</b> 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.	Blank or \${user.mail}
userName	If provided, the user won't be asked to provide their username.	Blank or \${user.username} or \${user.userprincipalname}
disablePeerVerification	Important: Enables the user of local/private certificates on the Exchange Server	true
allowIOSEmail	Enable or 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

## 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.

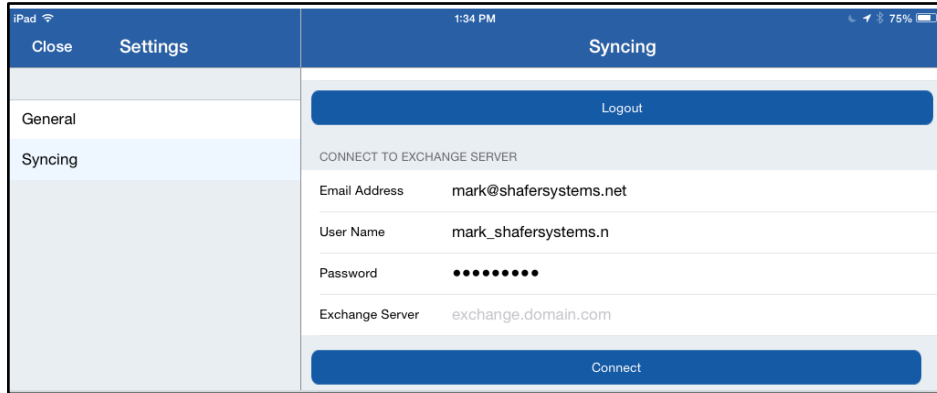
### Exchange Synchronization set-up

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 (domain\username), and make sure that the application has been granted permission to access the Exchange server from Citrix MDX.

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