

## **Notate Syncing with Exchange Q&A**

### **In general how does Notate sync with Exchange?**

Notate syncs with the Exchange server using Exchange Web Services (EWS). To the Exchange server, Notate appears just as another client like Outlook.

### **Is communications to Exchange secured?**

Yes. Communication with the Exchange server is secured in two ways. First, all communications are sent over an encrypted HTTPS channel. Secondly, all communication is routed from Notate to the Exchange server through the MDM provider's VPN-less proxy.

### **How are note objects indexed in Exchange?**

Exchange objects including emails, attachments, notes, tasks, etc. are managed and indexed directly by the Exchange server. Notate works within the normal confines of an Exchange client just like Outlook.

### **How does Notate associate objects with note content in Exchange?**

Exchange supports a flexible notion of objects. Each object supports an array of properties (metadata). These properties are used to associate objects with other objects (e.g. Emails and attachments, or Notes and handwriting/audio clips/attachments).

### **Does Notate work with Archived Notes in Exchange?**

Yes. Notate works with notes in the same way that Outlook does. Notes like other folders can be archived and restored by the Exchange server. It is possible to prevent Notes from being archived during the regular email archival process See: <http://blogs.technet.com/b/exchange/archive/2011/08/05/prevent-archiving-of-items-in-a-default-folder-in-exchange-2010.aspx>

### **Do stored notes count against the users mailbox storage limit?**

Yes. Since Notate acts as a client to Exchange, all of it's contents count against a users mailbox storage limit just like they would from within Outlook.

### **Are their specific requirements for Notate to work with Exchange?**

No. Notate works directly with Exchange without requiring any new configuration of the Exchange server.

### **What happens in Notate when the users Exchange password is reset?**

If Notate is configured to use Kerberos for authentication then nothing happens

and the password change is transparent to the user. If Notate is not configured to use Kerberos then when the user changes their Exchange password then the user must make the corresponding change in Notate Exchange configuration.

### **Why can't I see all my content in Outlook or play audio recordings?**

While the Exchange server is robust in its support for rich notes, the Outlook client is not. Outlook supports basic plain text notes only. Notes with rich content created in Notate will sync with Exchange and appear correctly within Notate for iOS, Android, Windows, and Mac, but on Outlook the note display will be limited to merely the note text.

### **How do team shared notebooks work with the Exchange server?**

Sharing is accomplished by utilizing shared folders on the Exchange server.

Notebooks in Notate map directly to folders within Exchange. Exchange provides the ability to share folders with other Exchange users. Folders have a variety of access permissions. Notate utilizes this Exchange feature in order to share notebooks between team members. When a user shares a notebook, the corresponding Exchange notes folder is shared with the designated users. The users have permissions to read and write but not delete from the shared folder.

In order for MS Outlook to discover a shared folder, all parent folders must be marked as visible to the sharing recipients. Notate avoids this potential security problem by only sharing the specified folder and not the parent folders. To do this, Notate must pass the unique folder ID to the sharing recipients. This data is passed out of bounds using the Notate server. The only information contained on the Notate server is the recipient email address and the unique folder ID. No corporate information other than a sharing recipient email address is ever sent to or stored on the Notate server. Additionally, all sharing functionality may be disabled by an IT administrator via application policy settings.

### **Do existing (legacy) Outlook Notes sync with Notate or are they stored as separate notes?**

Yes, Notate syncs all Exchange notes regardless of whether they were created in Notate or Outlook.