



Setting up “Notate for Good” for access to your
Exchange Server using the Good VPN & Proxy

For questions contact:
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Notate Settings on Good Dynamics Application Policies screen

On your Good Dynamics server make the following Notate for Good configuration:

1. Check Allow Synchronization with Exchange
2. Kerberos Authentication should only be checked when it has been set-up in Good Dynamics controls settings
3. Check Disable Peer Verification.
4. Provide Autodiscovery URL only if using a non-standard location
5. If Autodiscovery will not work in your environment, provide a direct URL to the Exchange Web Services

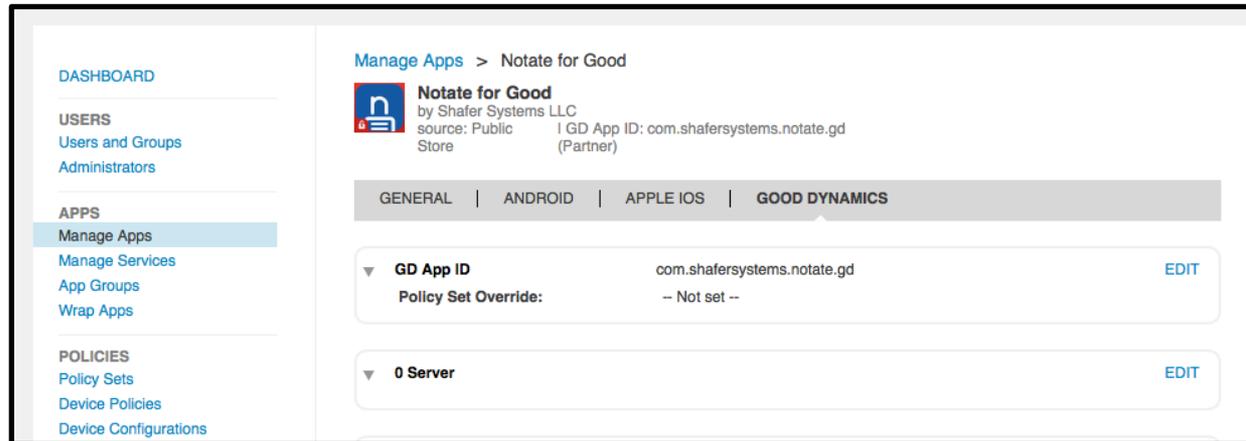
The screenshot shows the 'Synchronization' tab of the 'EXCHANGE POLICIES' configuration screen. It includes sections for 'EXCHANGE POLICIES', 'AUTODISCOVERY', and 'EXCHANGE WEB SERVICES'. The 'EXCHANGE POLICIES' section has four checkboxes: 'Allow Synchronization with Exchange' (checked), 'Use Kerberos Authentication - (Use Kerberos instead of user credentials for authentication)' (unchecked), 'Disable Peer Verification - (Enables use of local/private certificates)' (checked), and 'Folder Sharing - (Allow users to share notes and tasks with other users)' (checked). The 'AUTODISCOVERY' section has an 'Autodiscovery URLs' field containing 'http://autodiscover.shafersystems.net/autodiscover/autodiscover.xml'. Below this is a note: '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'. The 'EXCHANGE WEB SERVICES' section has an 'Exchange Web Services URL' field which is empty. Below this is a note: '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'. Blue arrows point from the numbered list on the left to the corresponding settings in the screenshot.

* To confirm the correct EWS URL

Enter it into a browser from the Good Proxy Server in order to confirm connection to Exchange EWS

Good Dynamics - Manage Applications screen

1. Navigate to Manage Apps, and select Notate. Click “Edit” on the Server label.



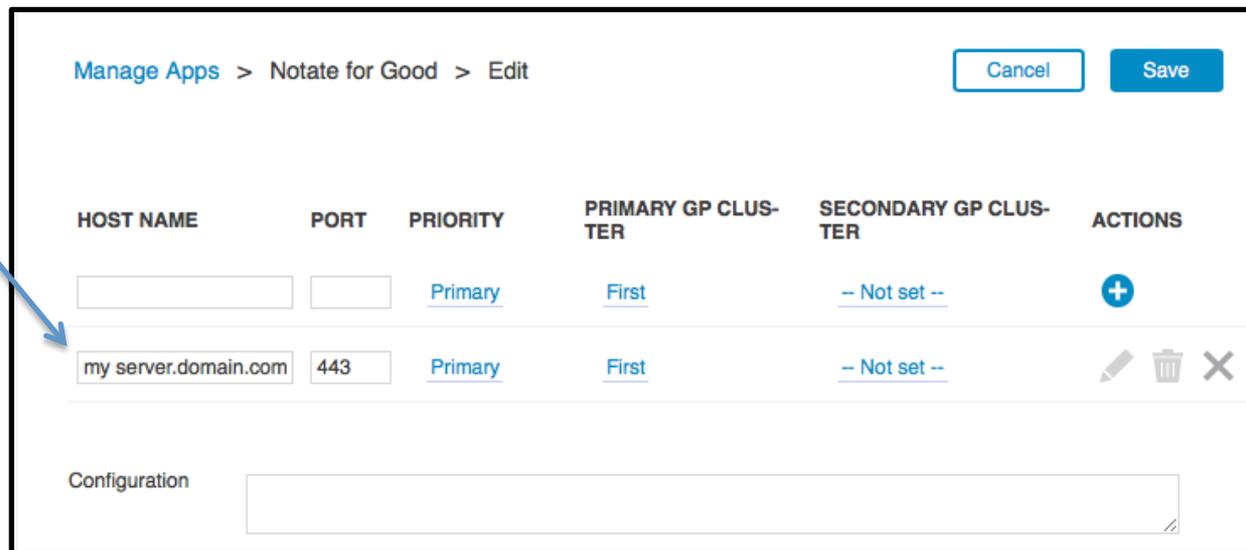
Specify the Exchange Server:
Exchange Host name and port 443 must be entered and appear in the configuration.

1. Enter the Exchange Host Name and Port. Notate uses port 443 which must be enabled as approved for access.

2. Click the plus “+” action button

3. Complete the process by clicking the save button to update the configuration

4. Double check that Host Name and Port 443 is displayed



In Notate application - Notate User Set Up for Exchange Syncing

The screenshot shows the Notate application interface on an iPad. The top status bar displays 'iPad', signal strength, '11:29 AM', and '100%' battery. The app's navigation bar is blue with 'Close' and 'Settings' on the left, and 'Syncing' on the right. A sidebar on the left contains 'General' and 'Syncing' (highlighted). The main content area is titled 'CONNECT TO EXCHANGE SERVER' and contains four input fields: 'Email Address' (pre-filled with 'user@domain.com'), 'User Name' (pre-filled with 'ad_user@domain.com'), 'Password' (masked with 10 dots), and 'Exchange Server' (pre-filled with 'https://exchange.domain.com/EWS/Exchange.asmx'). A blue 'Connect' button is at the bottom.

CONNECT TO EXCHANGE SERVER	
Email Address	user@domain.com
User Name	ad_user@domain.com
Password	●●●●●●●●●●
Exchange Server	https://exchange.domain.com/EWS/Exchange.asmx

Connect

Open your Notate application. Enter the following information for Exchange set up:

1. The user email address will be pre-populated and in most cases, the user simply has to enter their exchange email password to complete the setup.
2. In cases where autodiscovery can't connect with the email address alone, the user must add their AD Domain account name "bill@ad.domain.com" or the pre-AD domain account name in this format "domain\username"
3. In rare cases where autodiscovery fails, the user may be prompted to enter the Exchange server address. This can be pre-populated by the IT administrator by specifying the correct address in the GC console as described earlier.

Most Common Set-up Errors

1. The Exchange server EWS URL is not being used or the text string has been entered incorrectly (page 2). The URL can be confirmed by testing with a Browser
2. The Host Name and Port number have not been updated on the server (page 3). Both must be visible below the input field. The submit button is required to update the server.

Notate Support URLs

Email contact for Support: support@shafersystems.com

Good Dynamic Admin Guide:

<http://support.shafersystems.com/customer/portal/topics/582358-notate-for-good-admin-guide/articles>

Notate FAQ's:

<http://support.shafersystems.com/customer/portal/topics/582039-frequently-asked-questions/articles>