



Notate for Enterprise

Administrator's Guide

June 10, 2016
Proprietary and Confidential
Do Not Distribute

Overview

Notate is the Secure Evernote Alternative. All of your notes and tasks remain secured within your own network. No additional servers are required. Start by mobilizing your user's Outlook notes and tasks. Users can access and edit their notes securely from mobile devices. Next expand beyond basic functionality by using Notate to capture rich data while mobile including handwriting, meeting audio, photos, web clippings and more.

Application Bundle ID: com.shafersystems.notate.enterprise

App availability

If you are a first time customer, please sign up for a free trial at:
<http://notateapp.com>

Once Notate is set up, you can download Notate for Enterprise from the Apple App Store:

[<GENERAL RELEASE AVAILABLE June 30th, 2016>](#)

Notate for desktop computers can be downloaded from:

<http://notateapp.com/notate-for-desktops.html>

Device compatibility

- iOS: Notate for Enterprise is compatible with iOS 8 and above.
- Windows: Notate is compatible with Windows 7 and above.
- Mac: Notate is compatible with Mac OS X version 10.8 and above.

Configuration tasks

Use the following high-level steps to configure Notate on your EMM.

1. Add Notate to your list of EMM managed applications.
2. Add the Notate configuration settings to your EMM (consult EMM documentation).
3. Configure secure App Tunnel on your EMM to enable Notate to communicate with your Exchange Server.

The App-specific configuration

By leveraging the native APIs recommended by the App-Config Community, these configurations can be automatically set remotely by the EMM server. This simplifies the setup process for end users, and alleviates the help desk and documentation burden. An IT administrator can simply set the keys and values in the EMM provider's management console and they will be pushed to the app.

Note: The app must be distributed as a “managed” application via the EMM provider

EMM Setup

Please contact your EMM vendor for documentation specific to their system.

Notate License Key

The first step in set-up is to add the Notate license key in the App-specific configurations. This key is emailed to the Admin assigned to the Notate account. The key should be copied and pasted into section “licensingKey” in the App-specific configuration. Notate synchronization and sharing will not operate without this key. If your key is lost or misplaced contact:

support@shafersystems.com

The App Configuration Settings

Key	Description	Default Value
licensingKey	Allows for synchronization and sharing and Notate policy controls from the EMM admin portal.	
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	Enables the user of local/private certificates on the Exchange Server	false
allowIOSEmail	A value of 0 disables use of sending notes with native iOS email. Open In is still supported.	true
allowAnnotations	Allows the use of handwriting and highlighter tools.	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
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 acces 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	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
SSClipboardIsRestricted	Prevents data leakage from the app through the system clipboard	true
SSPassCodeStyle	Enables app pass code. Supported styles are: None, Digits, Alpha	None
allowCrashReports	Enable generic crash reports without user data to be sent to the developer.	true

App Tunnel support

Notate interacts with your organization's Exchange server using EWS over the secure App Tunnel.

A typical EWS connection will use a URL similar to:

https://exchange_server.yourdomain.com/EWS/Exchange.asmx

The address of your exchange server's EWS connection should be provided in the application configuration as described above.

Data loss prevention policy support

Notate supports the following DLP policies:

- the pasteboard DLP policy – controlled via SClipboardIsRestricted setting
- the Open In DLP policy – Controlled by EMM settings
- Prevent Screen Capture – Controlled by EMM settings
- Remotely Wipe App – Controlled by EMM settings
- Login PassCode – Controlled by SSPassCodeStyle setting

Secure file I/O support

Notate utilizes native iOS encryption for file I/O.

User features

Save Everything

Collect everything that matters, knowing that you will always be able to find it.

- Handwritten meeting notes
- Audio recordings
- Annotated web clippings
- Business cards and receipts
- Photos and more

Plan to be Productive

Organize tasks to help manage your week. Share tasks with other team members.

- Tasks
- Reminders
- Projects

Get Things Done Faster

Let the team share the workload or assign tasks to individuals. Harness team knowledge with shared notebooks.

- Team Projects
- Team Notebooks

Better for Business

From meeting notes to research papers, Notate keeps *your* ideas on *your* network. Always available, always secure.

For more information

- Request a Trial: <http://notateapp.com>
- Contact Sales: sales@shafersystems.com
- Notate Homepage: <http://notateapp.com>
- Support: support@shafersystems.com