itrezzoAgent Administrator

Configuration Guide

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Introduction

With the assistance of this guide, you will be able to configure itrezzoAgent Administrator to perform Personal Information Manager (PIM) synchronization and distribute information to handhelds on your company's Blackberry Enterprise Server (BES) in about 30 minutes. Please note that the itrezzoAgent Administrator, although installed as a single application, requires obtaining and installing multiple licenses for full functionality. Therefore, you may not be able to configure all of the applications documented in this guide or take advantage of all of the available features of itrezzoAgent Administrator.

This guide details a basic configuration and execution of BlackBerry Enterprise Server Performance Pack (BPP), BlackBerry PIN Extraction (BPE), and Enterprise PIM Synchronization (EPS). This guide does not detail every feature of these services and omits advanced configuration options to allow you to get the itrezzoAgent service operation for evaluation or rapid deployment purposes.

If you would like to configure BES Performance Pack only, see Chapters 1 through 3.

This manual assumes you have already followed the steps in the Quick installation guide.

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Chapter 1

Installing License Packs

Once you have installed the itrezzoAgent Administrator, the **Primary Contact** (defined during installation) will receive e-mail messages containing the temporary license pack information. There are two ways to install and activate these license packs.

Install the Licenses Automatically

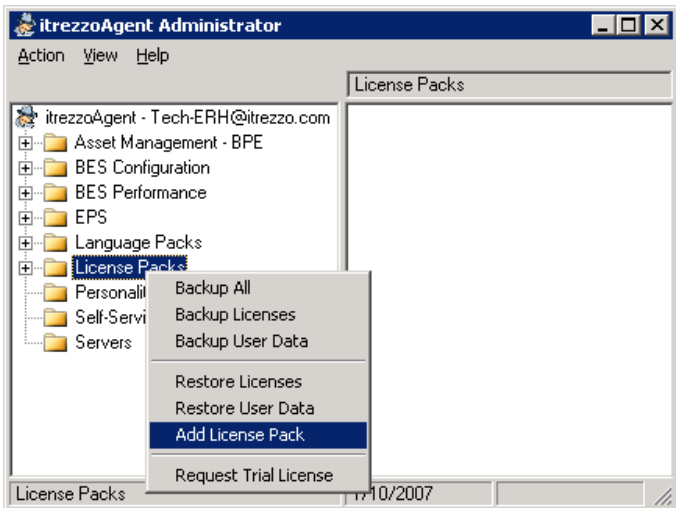
1. Forward the original emails with the license pack attachments to the service account mailbox you designated during the install process. The license packs will automatically be installed and the primary contact will receive a confirmation email (within a few moments) stating that the license pack installation was successful.

Install the Licenses Manually

1. Save the **.lic** file attachments to a network share which is accessible from the itrezzoAgent Administrator.

2. Double click the **itrezzoAgent Administrator** icon on the desktop to launch the application interface.

3. Right-click on the **License Packs** container and choose **Add License Pack**.



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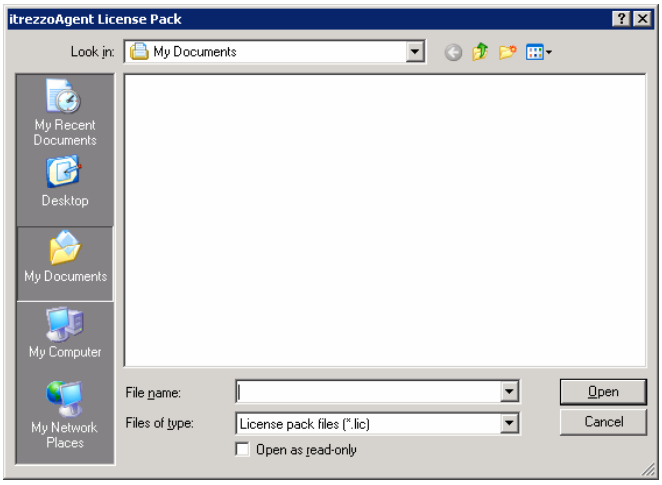
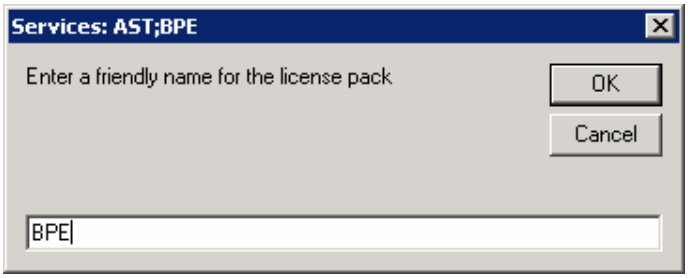
4. When the following window appears, direct the application to the location where you saved the .lic files and click **Open**. The licenses will be installed.



5. When you choose the available license pack and click open, you will be prompted to enter a friendly name. Simply type in the abbreviated name for the license pack. In this case the BPE license is being installed. Click **OK** and you will be returned to the main itrezzoAgent Administrator window.



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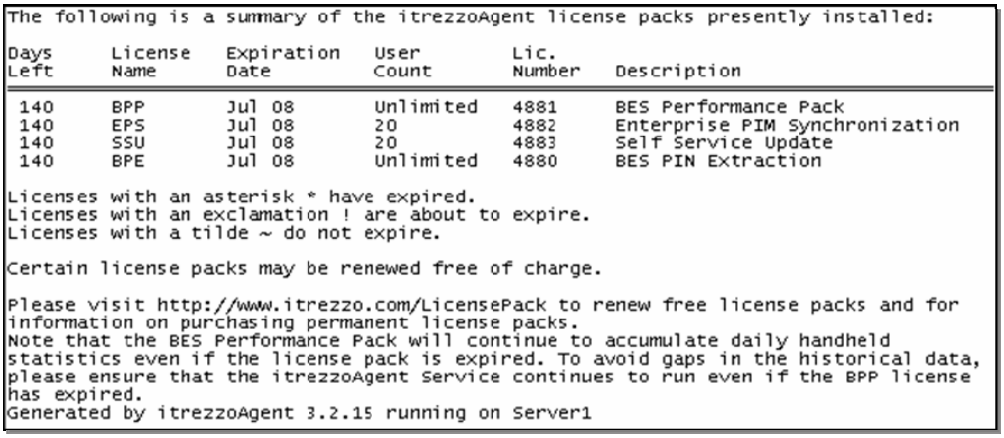
License Pack Expiration Updates

The itrezzoAgent Server will send you reminder emails like the one below every Sunday until the license packs with expiration dates are removed or replaced with perpetual licenses.



The following is a summary of the itrezzoAgent license packs presently installed:

Days Left	License Name	Expiration Date	User Count	Lic. Number	Description
140	BPP	Jul 08	Unlimited	4881	BES Performance Pack
140	EPS	Jul 08	20	4882	Enterprise PIM Synchronization
140	SSU	Jul 08	20	4883	Self Service Update
140	BPE	Jul 08	Unlimited	4880	BES PIN Extraction

Licenses with an asterisk * have expired.
Licenses with an exclamation ! are about to expire.
Licenses with a tilde ~ do not expire.

Certain license packs may be renewed free of charge.

Please visit http://www.itrezzo.com/LicensePack to renew free license packs and for information on purchasing permanent license packs.
Note that the BES Performance Pack will continue to accumulate daily handheld statistics even if the license pack is expired. To avoid gaps in the historical data, please ensure that the itrezzoAgent Service continues to run even if the BPP license has expired.
Generated by itrezzoAgent 3.2.15 running on Server1

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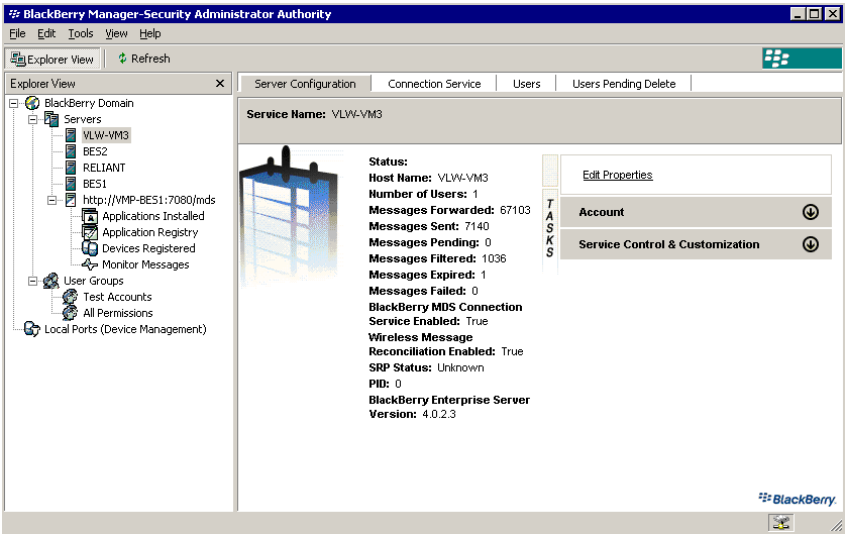
Chapter 2

Configuring Mobile Data Services (MDS)

Configuring MDS on Blackberry Manager 4.1

1. Launch the Blackberry Manager application.
2. In the left window pane, expand the **Blackberry Domain** folder and the **Servers** folder within it.



3. Click on the name of the server you would like to configure **MDS** on.
4. In the right window pane, click the **Server Configuration** tab at the top of the window.

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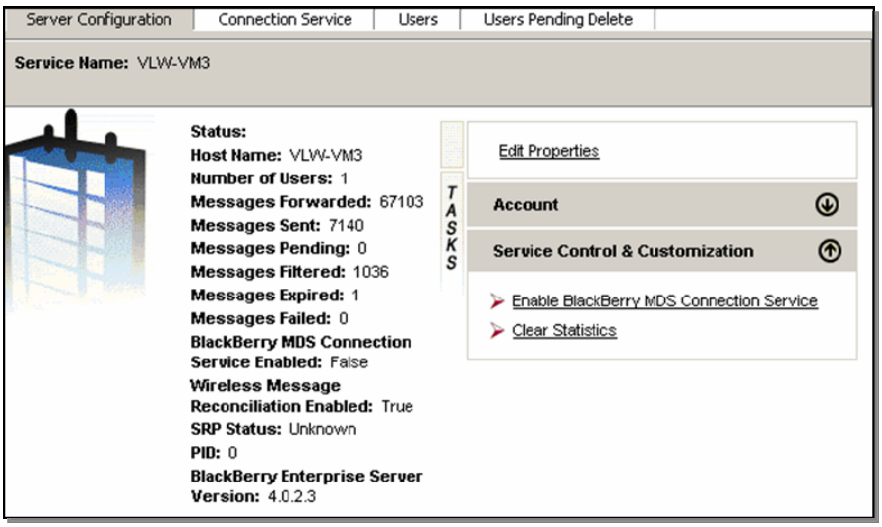
5. When the window refreshes, click on the **Service Control and Customization** link under **Tasks**.



6. When the Tasks tray slides open click **Enable Blackberry MDS Connection Service** to enable MDS. Please note that it may have already been enabled.

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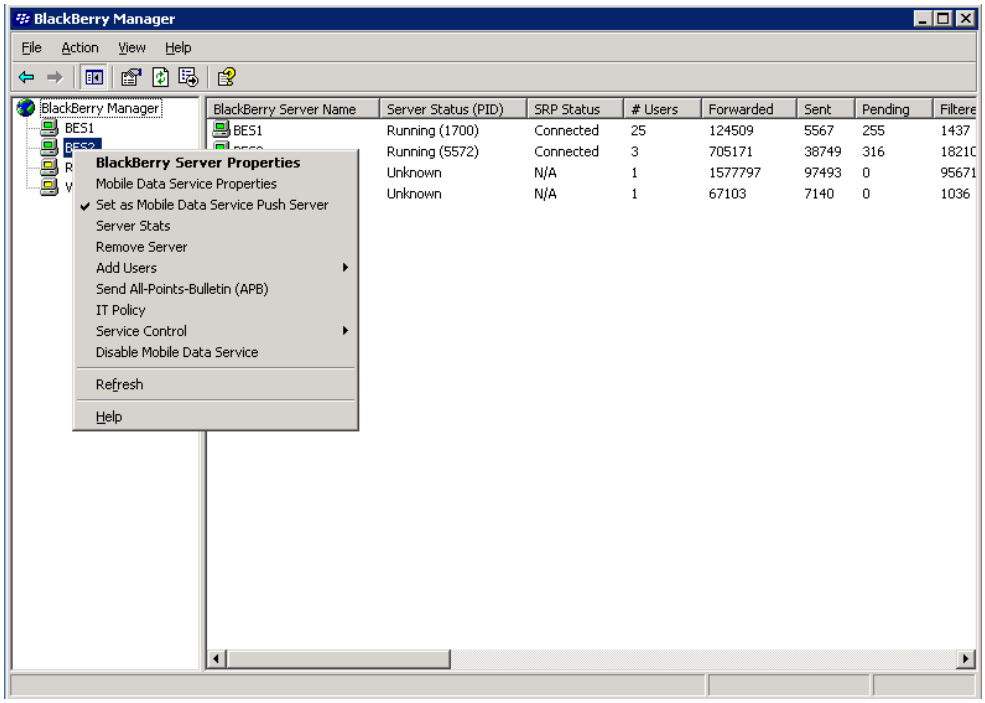
Configuring MDS on Blackberry Manager 4.0 or Earlier

1. Launch the BlackBerry Manager application.
2. Right-click on the name of the server you need to enable MDS on.
3. Click on **Set as Mobile Data Service Push Server** to enable MDS. Once you click on it, a checkmark should appear next to it in the context menu.



4. If there is already a checkmark next to **Set as Mobile Data Service Push Server**, MDS is already running.

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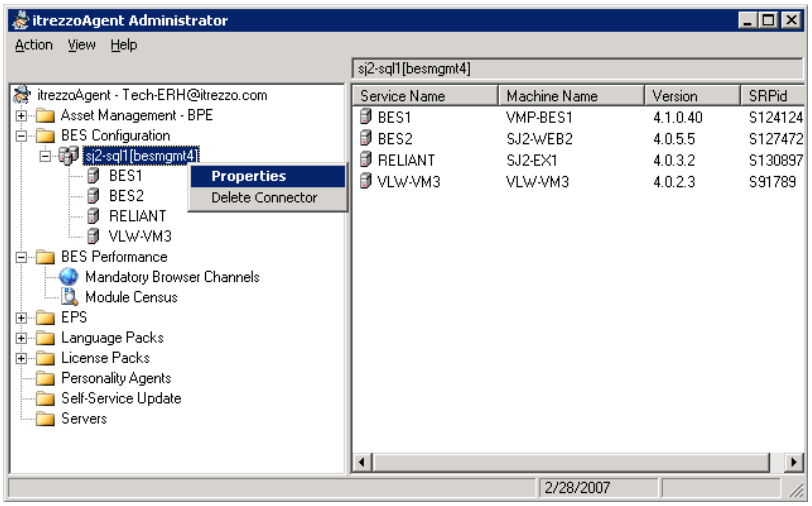
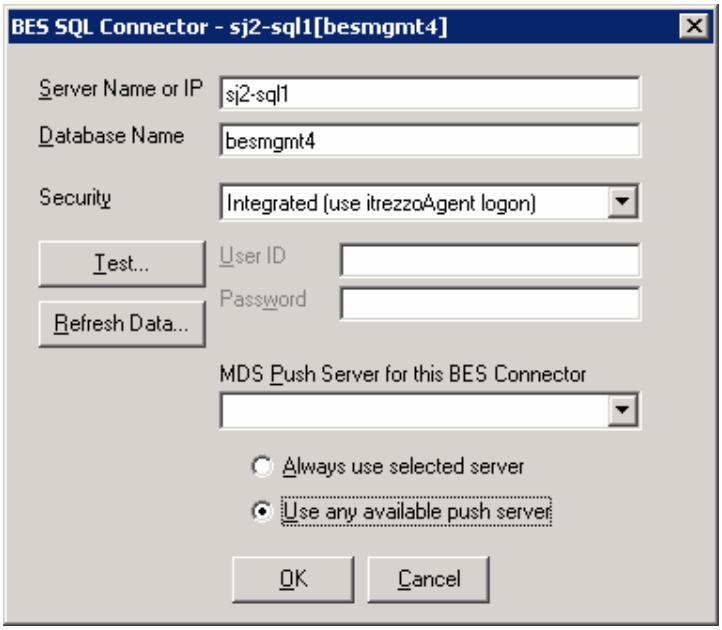
Configuring MDS in itrezzoAgent Administrator

1. Expand the **BES Configuration** container in the itrezzoAgent Administrator window.
2. Right-click on the database you configured in the **SQL Connector.**



3. On the **BES – SQL Connector** window click the radio button next to **Use any available push server**.



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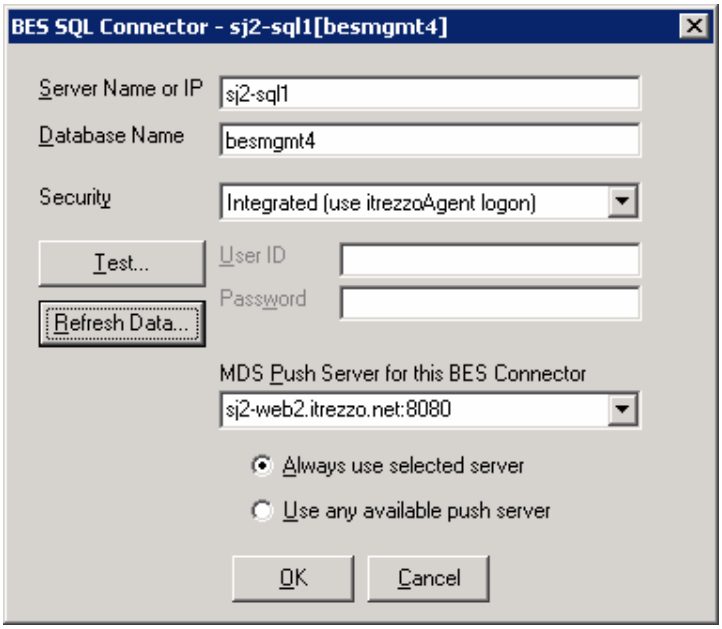
4. Click the **Refresh Data** button and a list of available MDS Push servers will appear in the drop-down menu under **MDS Push Server for this BES connector**.



5. You can choose to allow itrezzoAgent Administrator choose from the list of available MDS Push servers, or you can choose a specific server from the drop-down menu by clicking the radio button next to **Always use the selected server**.
6. Click **OK** to save the settings.

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Chapter 3

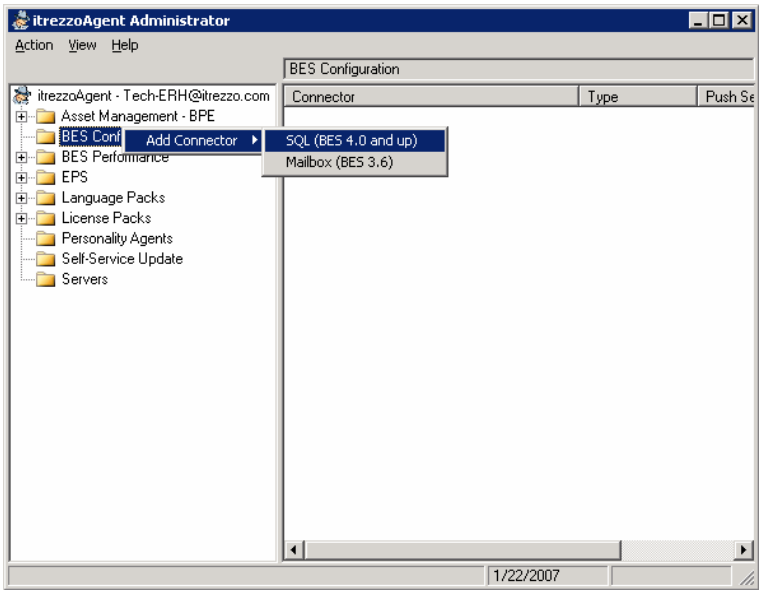
Configuring the SQL Connector

In order for the itrezzoAgent Administrator application to interface with the Blackberry Enterprise Server (BES) or other databases, the SQL connector must be configured.

1. Once itrezzoAgent Administrator and all of the license packs have been installed, double click on the itrezzoAgent Administrator icon on the desktop to launch the application.

   Note: If the itrezzoAgent administrator was already running, be sure to hit "F5" to refresh and see that license packs that the server added.

2. Right click on the **BES Configuration** container, choose **Add Connector**, then choose **SQL (BES 4.0 and up)**.



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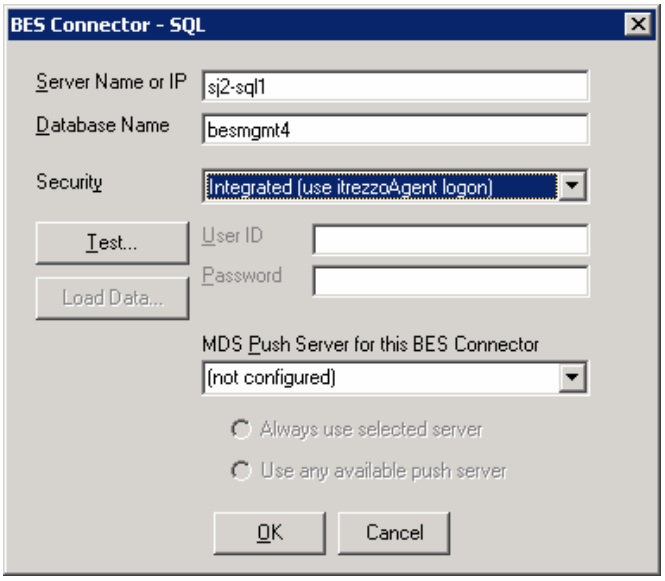
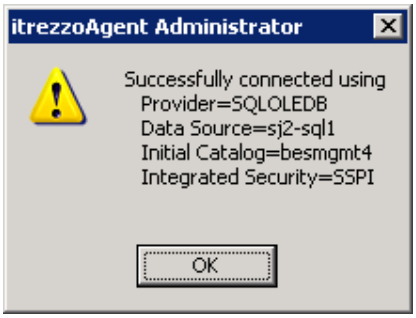
3. On the **BES Connector – SQL** window, enter the **Server Name or IP** of your Microsoft Exchange Server and the **Database Name** in their respective fields. If you are not sure of these settings, open the Windows Control Panel on the BES and you will see a BlackBerry Configuration icon. Double-click that Control Panel icon and the SQL settings can be found on the Database tab.



4. If you are not sure about the security method, choose **Integrated** Security from the drop-down menu. If your Database Administrator (DBA) has configured SQL authentication, use the credentials they have supplied you. Enter the **User ID** and **Password** in their respective fields.

5. Once you have entered the required information, click the **Test** button to test your connection to the Database on the BES. The following window should appear if the test is successful.



6. If you receive an error message, check the BES and Database names and make sure that you have entered the correct itrezzoAgent credentials then repeat the test.

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Chapter 4

Running the BlackBerry Enterprise Server (BES)Performance Pack (BPP)

1. After the SQL Connector has been configured, right click on the **BES Performance** container in the itrezzoAgent Administrator window and choose **Properties**.

2. Click on the **Statistics** tab on the **BES Performance** window.

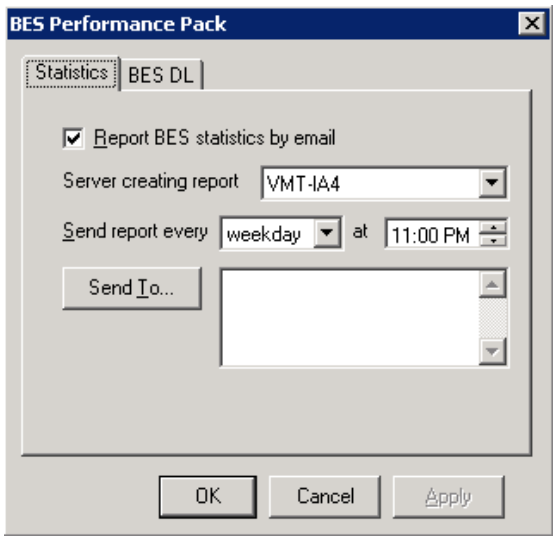
3. In order to receive email updates from BPP:

    a. Click the checkbox next to **Report BES statistics by email**.

    b. Choose the **Server creating report** from the drop-down menu.

    c. Choose the date and time you would like the report sent using their respective drop-down menus.

    d. Click the **Send To** button and choose an email address to send the update to from the available address lists.



4. Click **OK** to save the changes.

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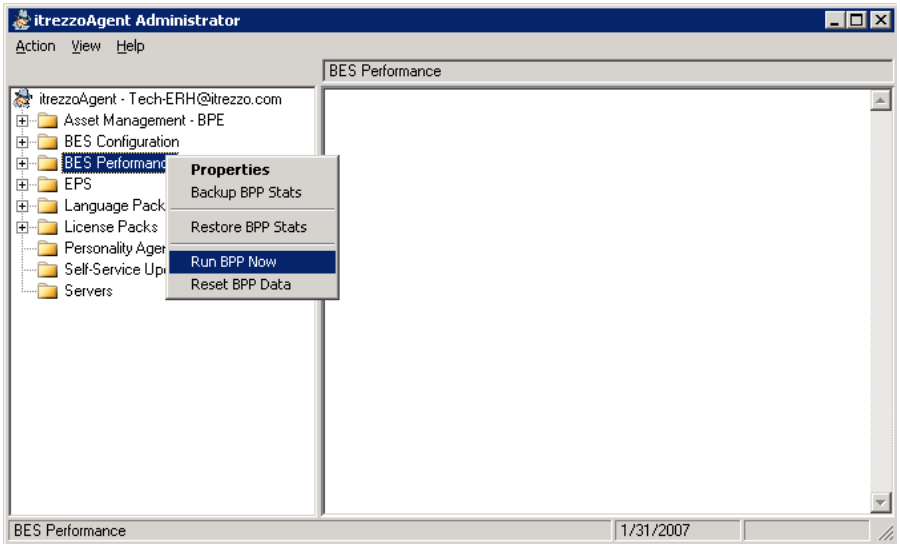
5. Choose **Run BPP Now** from the menu.



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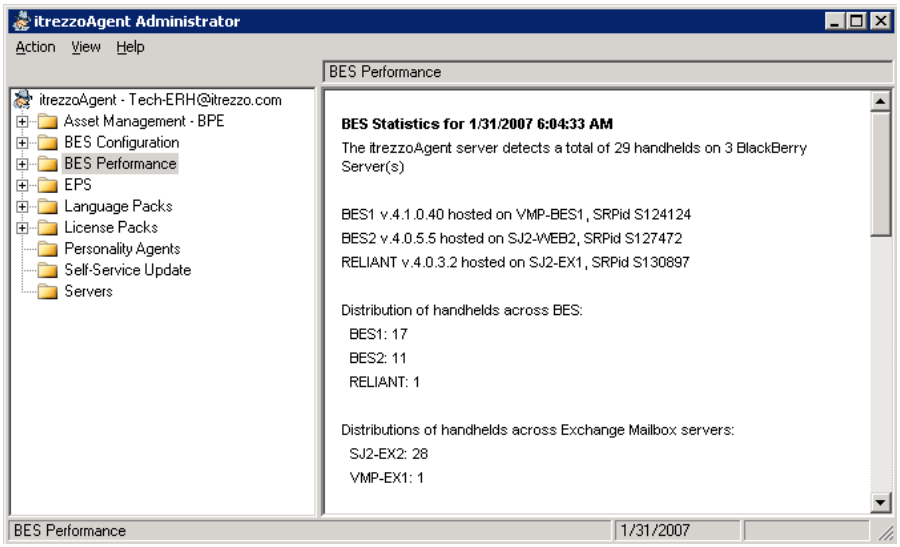
6. BPP will gather user statistics from the BES and deliver the results to the designated recipient. The results will also be displayed in the content pane of the itrezzoAgent window once complete.



7. The report should contain statistics on the BlackBerry devices and the BES servers:

```
The itrezzoAgent server detects a total of 29
handhelds on 3 BlackBerry Server(s)

BES1     v.4.1.0.40 hosted on VMP-BES1, SRPid S124124
BES2     v.4.0.5.5 hosted on SJ2-WEB2, SRPid S127472
RELIANT v.4.0.3.2 hosted on SJ2-EX1, SRPid S130897

Distribution of handhelds across BES:
  BES1: 17
  BES2: 11
  RELIANT: 1

Distributions of handhelds across Exchange Mailbox
servers:
  SJ2-EX2: 28
  VMP-EX1: 1

Breakdown of handhelds by Protocol:
  CDMA: 10%
  Datatac: 3%
  GPRS: 51%
  iDEN: 13%
  Mobitex: 0%
  WiFi: 0%
  Unknown: 20%

Total handhelds capable of Wireless PIM Sync: 29
```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8. The report will also contain a summary of user licenses and activity:

```
The itrezzoAgent has detected 1 user(s) configured for BES who
do not appear in Active Directory.

Remove these users from BES to free up CALs and improve
performance:

Joe User (xxx@itrezzo.com) - RELIANT

The following handhelds have never been activated:

Jim User (xxx@itrezzo.com)  - BES1 Jason User (xxxx@itrezzo.com)
 - BES1 Justin User (xxxxx@itrezzo.com)  - BES2
Test2 (test2@itrezzo.net)  - BES1

The following handhelds have been inactive for over 21 days:

Robert User (xxx@itrezzo.net) inactive since 2/16/2006 - BES2
Tim User (xxx@itrezzo.com) inactive since 4/24/2006 - RELIANT
Steve User (xxx@itrezzo.com) inactive since 5/4/2006 - BES1
Test3 (test3@itrezzo.net) inactive since 9/9/2006 - BES1 User
Smith (xxx@itrezzo.com) inactive since 9/29/2006 - BES1 User
Grody (xxx@itrezzo.com) inactive since 11/13/2006 - BES1 User
Omar (xxxx@itrezzo.com) inactive since 11/27/2006 - BES2 User
Barry (xxxxx@itrezzo.com) inactive since 12/12/2006 - BES1

Click here to send an email to these users asking if they still
have BlackBerry handhelds and wish to be connected to BES
http://itrezzoserver.xyz.com/iASSU/AreYouAlive.aspx

Generated by itrezzoAgent 3.2.15 running on VMT-IA4
```


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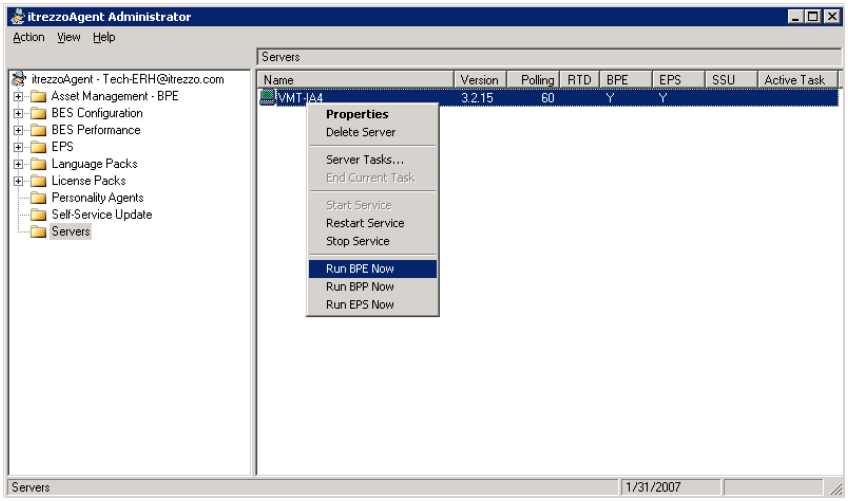
Chapter 5

Configuring BES PIN Extraction

1. Configure the SQL Connector (see Chapter 2).

2. To run BES Pin Extraction, click on the **Servers** container. Right-click on the name of the server you would like to run BES Pin Extraction on and choose **Run BPE Now**.



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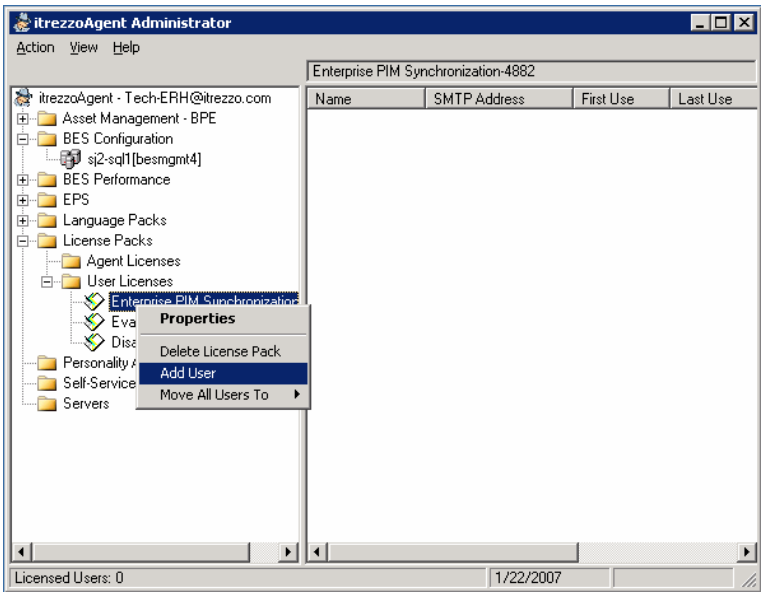
Chapter 6

Adding a Licensed User

Expand the **License Packs** container and the **User Licenses** container within it.

1. Right-click on **Enterprise PIM Synchronization** and select **Add User**.



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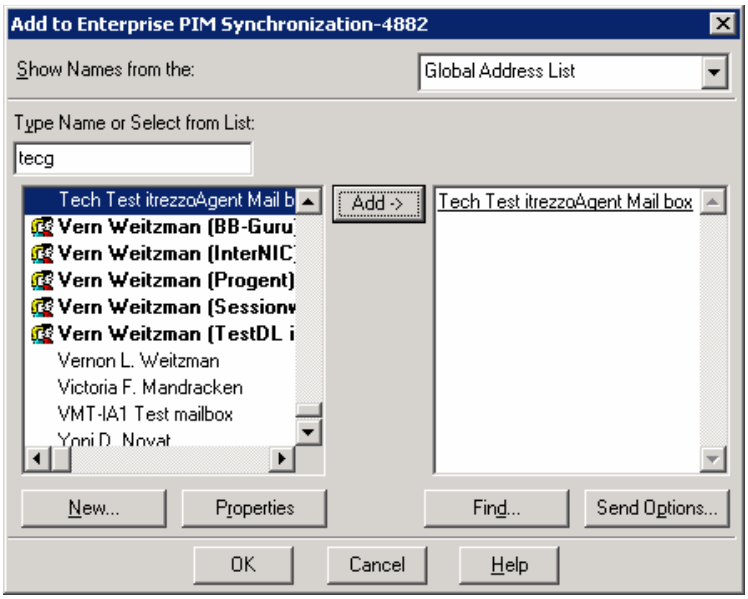
2. When the **Add to Enterprise Synchronization** window appears, Choose the name of the individual or account that you would like to add to the license from the available address lists. Once you have selected all of the user and account names you would like to add to the license, click **OK**.



3. We recommend that you add yourself or a single pilot user for testing.

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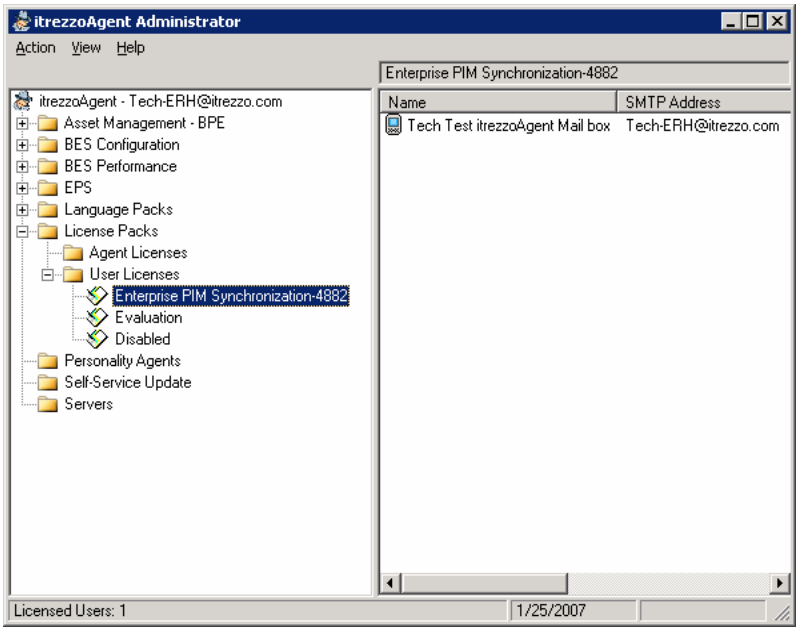
4. The users you selected will be added to the Enterprise PIM Synchronization License Pack and you should see them listed in the content pane of the itrezzoAgent Administrator window.



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Chapter 7

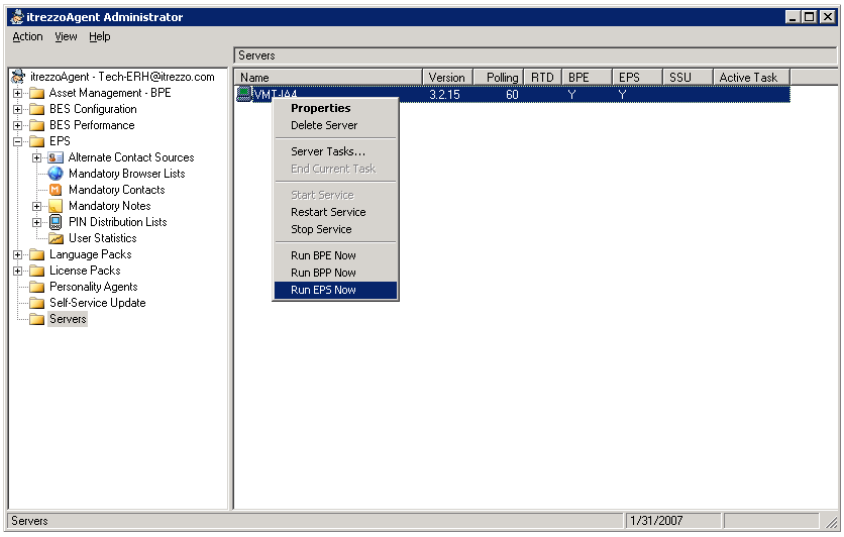
Running Enterprise PIM Synchronization (EPS)

By configuring and running EPS, you can quickly tell if the system is configured correctly and has the permissions it needs to send and receive information from the BES. It will also allow you to see how itrezzoAgent Administrator handles contact updates.

In Basic Contact Update Mode, EPS will update existing that a user already has in their primary contacts folder.

1. Once a user has been added to the EPS User License pack (see Chapter 5), open the servers container.

2. Right click on the server name and choose **Run EPS Now**.



3. Hit **F5** to refresh the window and itrezzoAgent will display that EPS is the **Active Task in the content pane**. It could take several minutes for EPS to complete.

   Note: If you open the Outlook contacts for the user being updated, you will see the updates happen in real time. To do this, switch your Outlook view to a Category view and sort by Modified date. You will see which contacts get updated.

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4. Once EPS is complete, the itrezzo Administrator will receive an email summarizing what happened when EPS ran:

```
The itrezzoAgent EPS task  has completed the contact
update for 2 mailboxes.

The mailboxes were homed on the following server(s):
   sj2-ex2

Updates were required in 1 mailboxes.

A grand total of 0 contacts were updated.

45 contacts were examined and required no changes.

0 PIN Distribution Lists were created.

0 recipients have access to one or more PIN Distribution
Lists.

0 Mandatory Notes were created or updated.

Total elapsed time: 0:00:14

The next EPS run is scheduled for Wednesday, January 31,
2007 18:00

itrezzoAgent EPS Version 3.2.15 running on VMT-IA4
```

5. The contact recipients will receive the following email summarizing the changes to their contacts list in Outlook:

```
To be prepared in an urgent situation, the itrezzoAgent
Emergency Preparedness Software service has updated one
or more of your Outlook Contacts and/or Notes.

The following 12 mandatory contact(s) are no longer
valid and were removed:

- Joe User (xxx@itrezzo.com)
- Jim User (xxxx@itrezzo.com)
- Jordan User (xxx@itrezzo.net)
- Justin User (xxxxxxx@rimdev.com)
- Test6 (test6@itrezzo.net)
- Jeremiah User (xxxx@itrezzo.com)
- Jason User (xxxxx@itrezzo.com)
- Jennifer User (xxxx@itrezzo.com)
- Jeff User (xxx@itrezzo.com)
- Jerry User (zzzzz@itrezzo.com)
- Jacob User (zzz@itrezzo.com)
- Julia User (zzz@itrezzo.com)

IMPORTANT: Please remember to synchronize your device in
the cradle so that these changes will be moved to your
handheld address book. Additionally, this update will
also permit you to "Use PIN" to send messages directly
to other BlackBerry users (in case your EMail system is
unavailable)

itrezzoAgent EPS Version 3.2.15
```

Note: This message can be customized using the Language Pack container, or may be entirely omitted.

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Chapter 8

Managing Contacts

Configuring a Mandatory Contacts List (MCL)

An MCL is a list of contacts that will be pushed out to handhelds via the contacts folder of a user mailbox that are designated by the itrezzoAgent Administrator. The contacts contain information that multiple members of an organization need to have at all times.

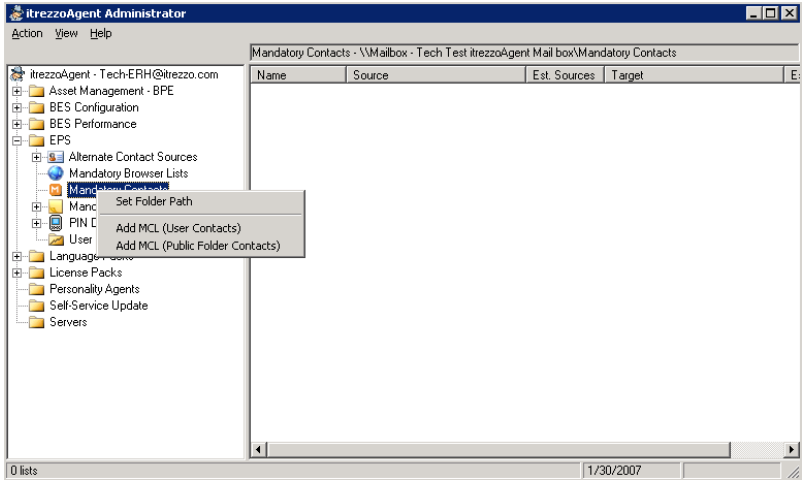
> For example, the Crisis Management Team needs to have the contact information for every member of the Emergency Response Team.

Creating an MCL ensures that employees will always have up to date contact information, even when the team is adding and changing members.

There are two types of MCLs. MCLs can be created from Directory objects, or using Alternate Contact Sources, such as public folders or SQL derived data.

To configure a Directory based MCL, follow these instructions:

1. Expand the **EPS** container.
2. Right-click on **Mandatory Contacts** and choose **Add MCL (User Contacts)**.



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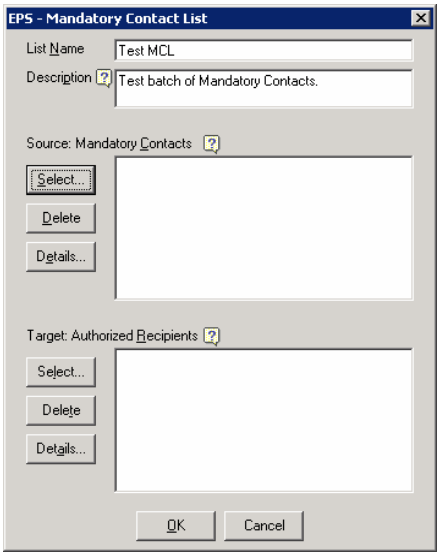
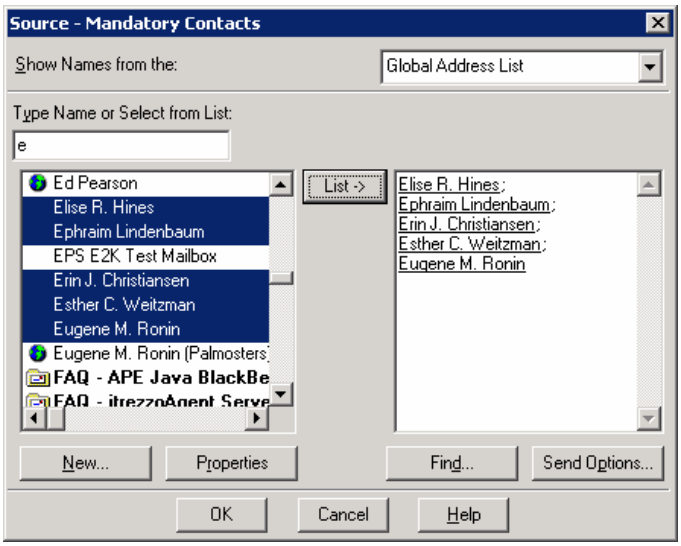
3. When the **EPS – Mandatory Contact List** window opens, enter a name and description for your new Mandatory Contact List.



4. Click the **Select** button under **Source: Mandatory Contacts** to pick contacts from the Global Address List.



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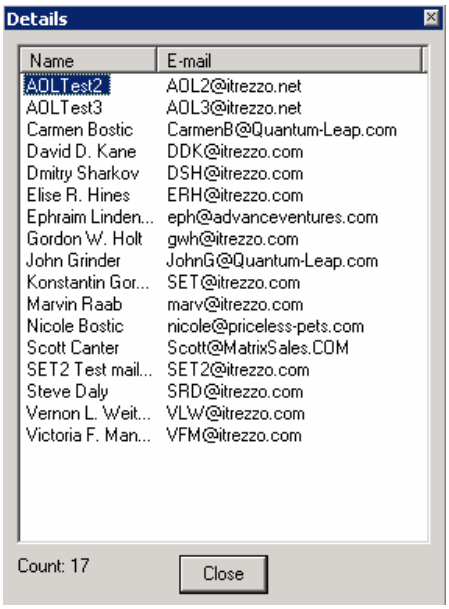
5. If you would prefer to use a distribution list, choose the desired distribution list from the available address lists and click **OK**. Once you have added the desired distribution list, click its name once to highlight it in the **Source: Mandatory Contacts** list box and click the **Details** button to show the contents of the distribution list. Click the **Close** button to close the window once you have verified that the distribution list has the contacts you would like to distribute.



Note: The DL Expansion could include hundreds or thousands of contacts and take several minutes to fully display.

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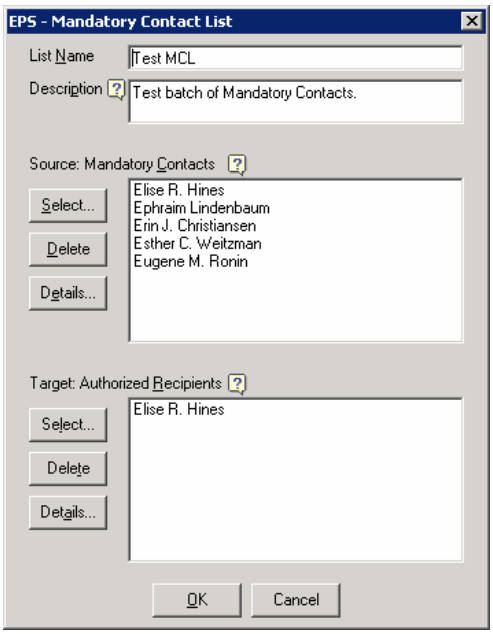
6. Once you have chosen the contacts and/or distribution lists you desire, click the **OK** button to return to the **Mandatory Contact List** window.
   Click the **Select** button under **Target: Mandatory Contacts** to pick contacts or distribution lists from the available address lists who will receive the contents in the Master Contact List. Once you have chosen the target contacts click **OK** to return to the **Mandatory Contacts** window.



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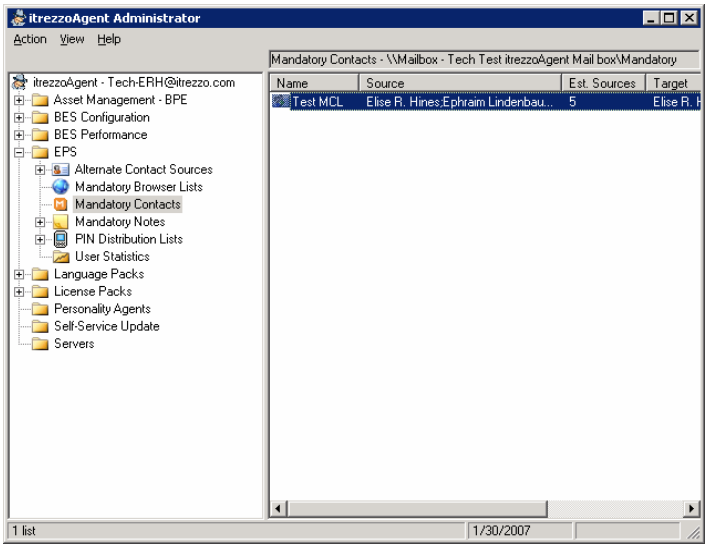
7. Click OK to return to the itrezzoAgent Administrator window. Hit F5 to refresh the window and you should see the mandatory contacts list you just created listed in the content pane.



8. If you want to test your MCL, run EPS. Once EPS completes, you will see the Mandatory Contacts in your Outlook Address Book. Make certain that your test mailbox is a licensed EPS user and a member of the target list. They will be sorted into categories beginning with **MCL:**.

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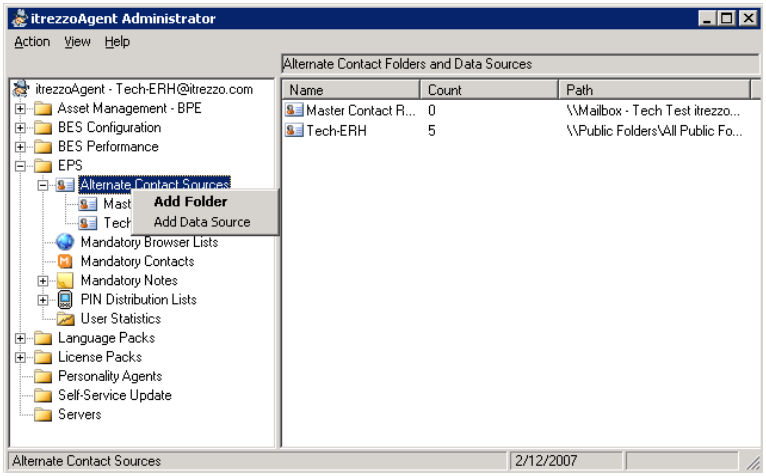
Configuring an Alternate Contacts List

Alternate Contact folders allow you to add trusted information from a public folder that will be used when EPS updates mailboxes.

Please be aware that even though the itrezzoAgent service account (or BESadmin service account) has permissions to open mailboxes, it can not open public folders unless permissions explicitly granted. When possible, give the itrezzoAgent service account (and mailbox if it is different) editor permissions on a designated public contacts folder.

1. Expand the **EPS** container.

2. Right-click on **Alternate Contact Sources** and choose **Add Folder**.



3. When the **EPS – Alternate Contact Folder** window appears, click the **Select** button and navigate through the **Public Folders** structure on your Microsoft Exchange server to the contact list of your choice.

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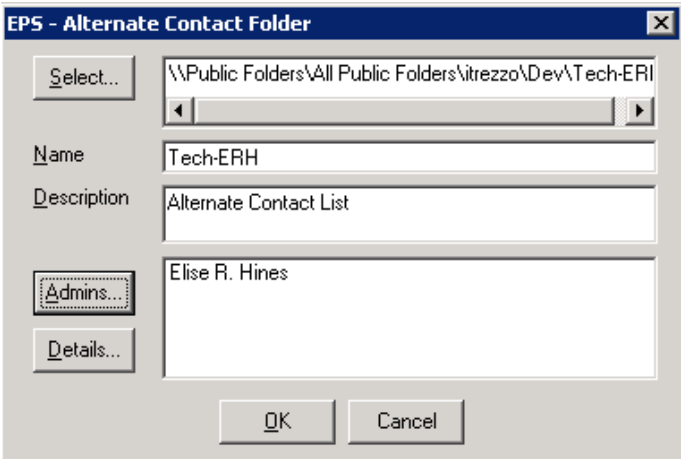
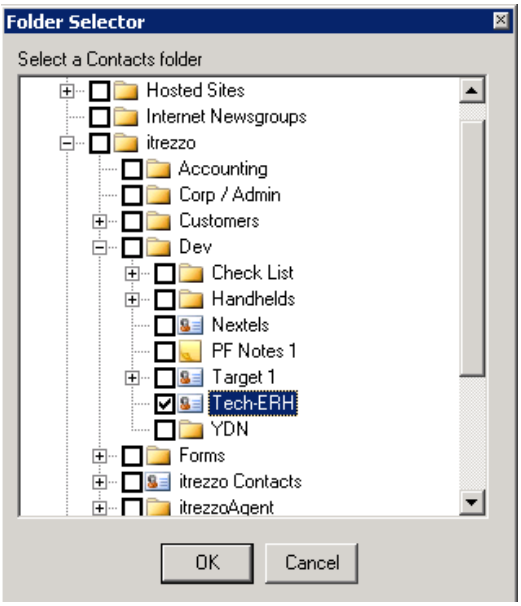


4. Once you have found the contact list you would like to add as an Alternate Contact Folder, click the checkbox next to it and click **OK**.



5. Fill out the rest of the information on the **EPS – Alternate Contact Folder** window including the **Name**, **Description**, and **Admins**. Click **OK** to save the list.

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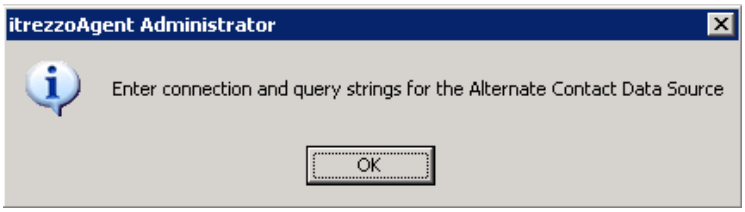
Adding Trusted Data from a SQL Database

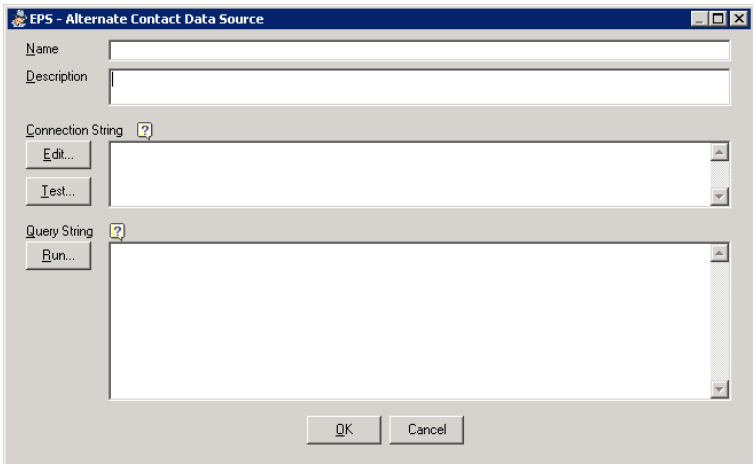
Alternatively, contact information can be added as an Alternate Contacts list from other data sources including external SQL databases.

1. To add user information to an Alternate Contacts List from a SQL database, right-click on **Alternate Contact Sources** and choose **Add Data Source**.

2. Click **OK** when you are prompted to **Enter connection and query strings for the Alternate Contact Data Source**.



3. On the **EPS – Alternate Contact Data Source** screen fill out the **Name**, **Description**, and **Connection String** then click the **Test** button to verify that itrezzoAgent Administrator is connecting to the remote database.



4. Once the correct connection settings have been entered, enter the desired **SQL Query String** into the **Query String** box and click the **Run** button to see the results of the query.

5. Once the query results have been finalized, click **OK** to save the **SQL Query** as an Alternate Contacts List.

Comment [KR1]: There is a post in the FAQ folder for the field mapping details. This could be an appendix on this document

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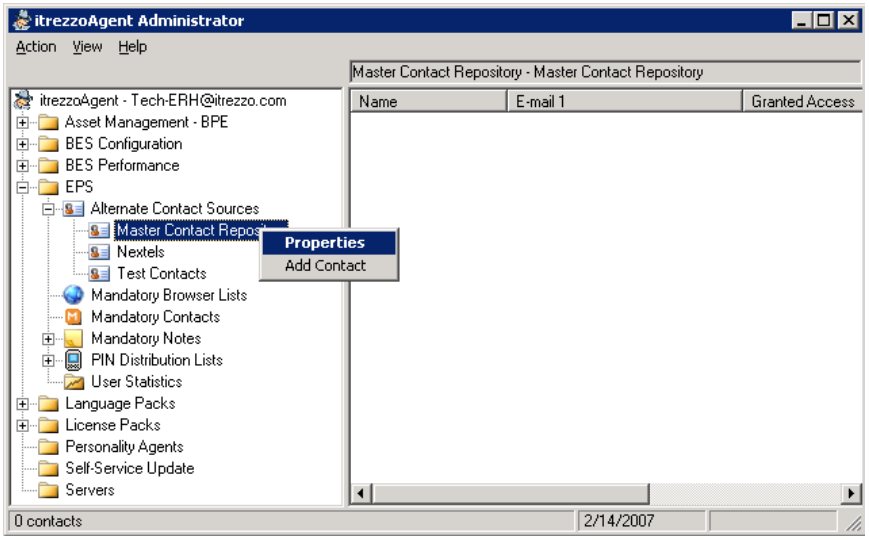
Defining a Master Contact Repository (MCR)

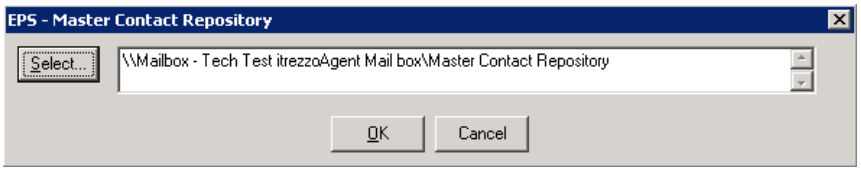
The MCR is used to hold the most trusted information that EPS will have about a user. It is generally collected via Self Service Updates (SSU). By default, the MCR is store in the itrezzoAgent service account mailbox. It may be desirable to move this data to a public folder where is could also be viewed and updated via one or more Microsoft Outlook users.

1. Expand the **EPS** container and the **Alternate Contact Sources** container in the itrezzoAgent Administrator navigation pane.

2. Right-click on **Master Contact Repository** and choose **Properties**.



3. When the **EPS – Master Contact Repository** window appears click the **Select** button.



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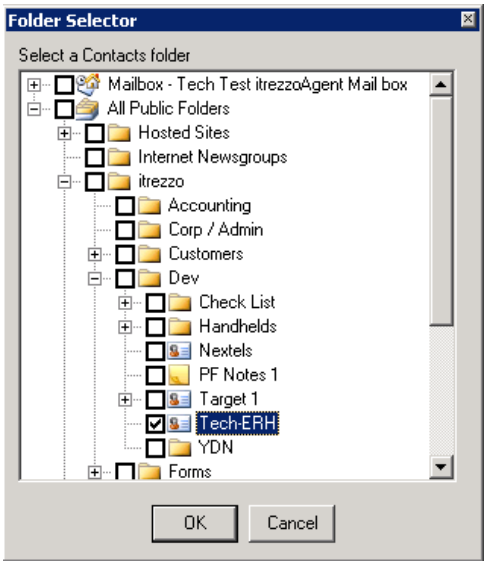
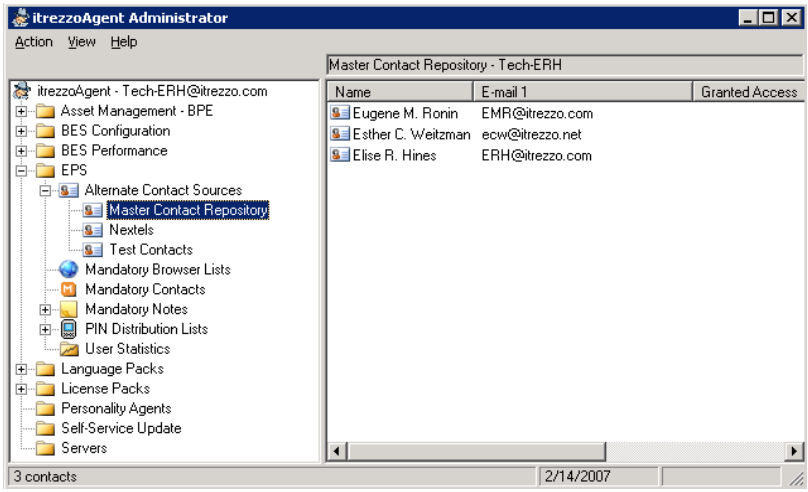
4. Navigate through your Microsoft Exchange server's Public Folders structure using the **Folder Selector** window. When you find the folder you would like to use, click the checkbox next to its name.



5. Click **OK** to save your selection.

6. Click **OK** on the **EPS – Master Contact Repository** window to return to the itrezzoAgent Administrator. You should see the contacts in your Master Contacts Repository in the content pane.



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7. Changes to this Master Contact Repository made outside of the itrezzoAgent Administrator application will be reflected here.

8. If you would like to add additional contacts, right-click on **Master Contact Repository** and choose **Add Contact**. A window will appear allowing you to add additional contacts from the available address lists.

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The Trusted Sources Hierarchy

The itrezzoAgent Server pulls user information from several sources and merges it into a Virtual Contact Repository. This contact information is then pushed to the BlackBerry handhelds of specified recipients. There are several contact lists that itrezzoAgent Server parses to provide information to users (from most to least trusted):

- **BlackBerry Enterprise Server**: The BES only ranks higher than the Master Contact Repository for specific fields. The fields that are pulled directly from the BlackBerry Handheld once an Enterprise Activation has been performed are the Public Telephone Number (PTN), PIN, Nextel Direct Connect ID, and IMEI.

- **Master Contact Repository**: This is the most trusted source of contact information on a company's network. This information is reviewed and updated by employees on a regular basis and is assumed to be highly accurate.

- **Alternate Contact Lists**: Alternate contact lists can be located in Public Folders within your company's Exchange structure, or can be information queried from an SQL server. You may have multiple Alternate contact lists and moderate their degrees of trust.

- **Global Address List (GAL)**: The GAL is assumed to be the least trusted source of contact information. In mid to large companies, it is not always updated regularly as it is tedious to gather new information and enter it into the individual contact records.

Once the itrezzoAgent Administrator has been configured and all of the contact lists have been designated, itrezzoAgent will push the most trusted contact information to the designated targets of the Master Contacts List. At no point in time does itrezzoAgent Server write over entries in the GAL, the Master Contact Repository, or to any of the Alternate Contact Lists so company data will be preserved.

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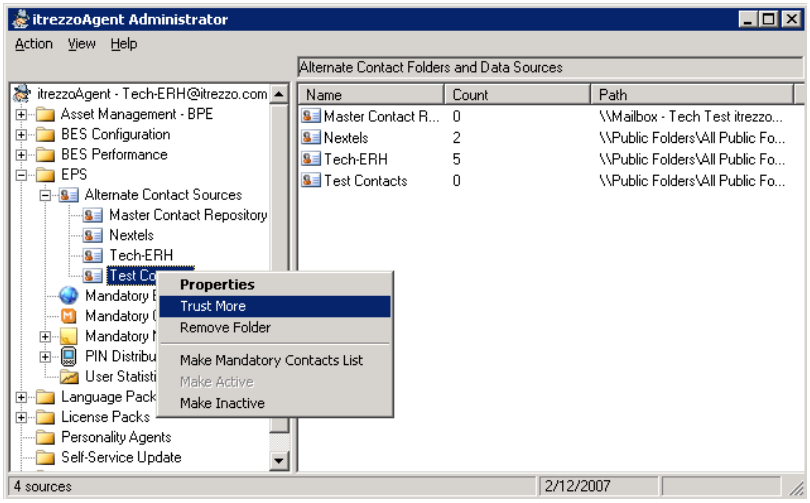
Editing the Trusted Sources Hierarchy

1. To change the trust level on **Alternate Contact Sources**, you can right-click on any of the sources that have been set up and choose **Trust More** or **Trust Less** to move them up and down in the Trust Hierarchy. Please note that the trust level of the Master Contact Repository cannot be edited.



2. To remove an item from the Alternate Contact Source list, you can right-click on it and choose **Make Inactive**. You will preserve the list, but it will not be parsed by **EPS**.

3. You can also choose **Remove Folder** from the context menu to remove the contact list from itrezzo.

4. In order to override the BES Mobile Phone Number entry as the most trusted source, you can change how the Mobile Phone number field is handled in the **EPS – Properties** dialogue. Right-click on the **EPS** container and choose **Properties.**

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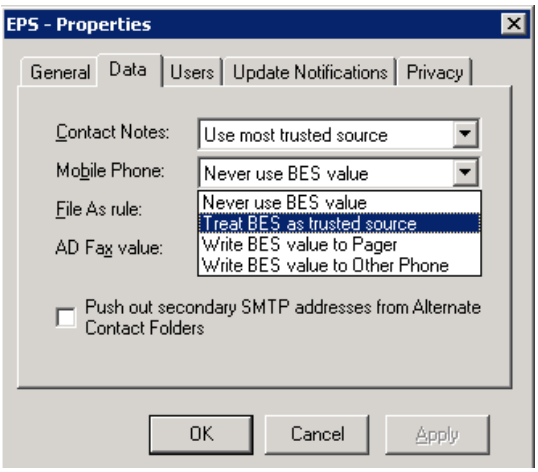
5. In the properties window, click on the **Data** tab. You can choose to ignore the Mobile Phone number from the BES, write the number to an alternate field (**Pager** or **Other Phone**) within Outlook, or continue to treat the BES as a trusted source.



6. Once you have configured the trust settings the data will be pushed out to the handhelds of the designated recipients the next time EPS is run.

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Chapter 9

Pushing Mandatory Notes to Wireless Handhelds

There are two methods for the itrezzoAgent Administrator to push Memo Notes:

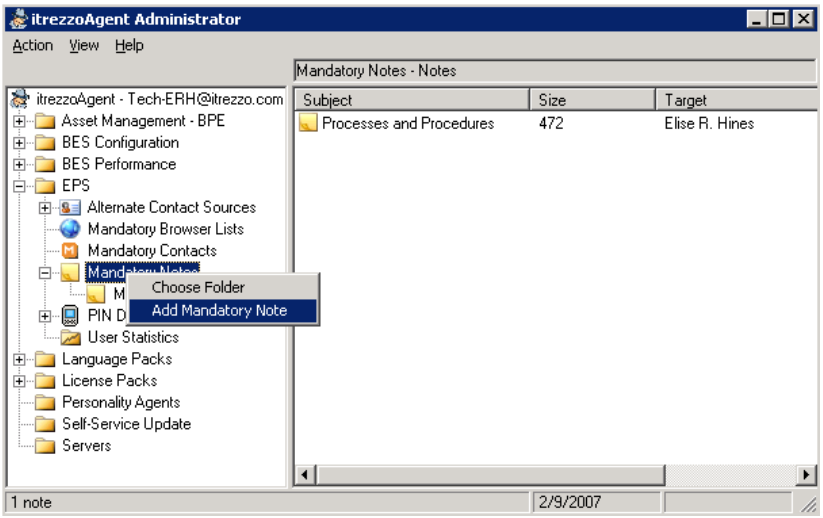
- An individual memo note pushed to one or more users.
- A public folder with one or more notes can be pushed to a set of target users.

The itrezzoAgent only operates on Memo Notes that it creates. It ignores all existing user notes. It will neither modify nor delete these notes.

If a user changes a mandatory note, all of their modifications will be lost. The source memo note must be updated to have changes pushed out.

1. Expand the **EPS** container.

2. Right-click on **Mandatory Notes**.



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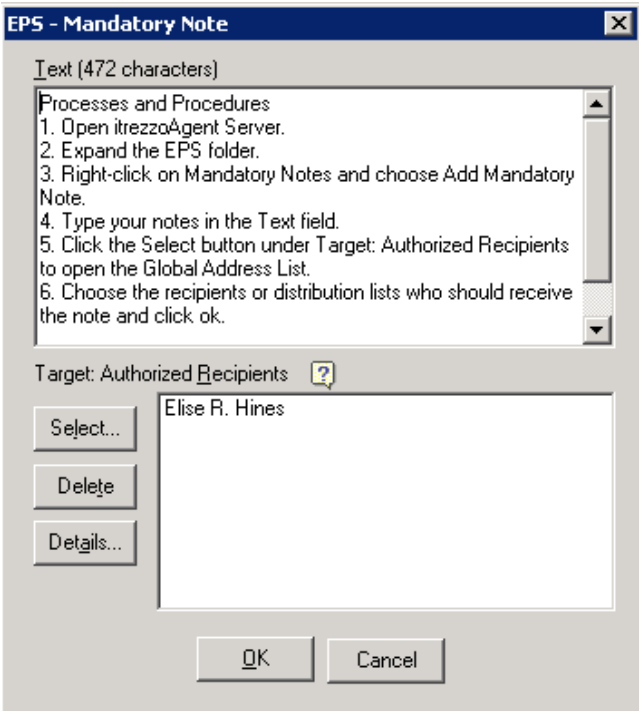
3. Type the message you would like pushed to the recipients in the **Text** field. The first line of text in the **Text** field will be the name of **Subject** of the note (just as though it were saved from the Handheld or from Microsoft Outlook).



4. Click the Select button under **Target: Authorized Recipients** to open the **Target – Authorized Recipients** window. Choose the DLs and individual recipients you would like to push the note to from the available address lists.

5. Click **OK** to add the recipients to the Mandatory Note. Once you have confirmed that all of the desired targets have been chosen and the text of the note is complete, click **OK** to save the note.

6. The next time that **EPS** is run, the note will be pushed out to the handheld.

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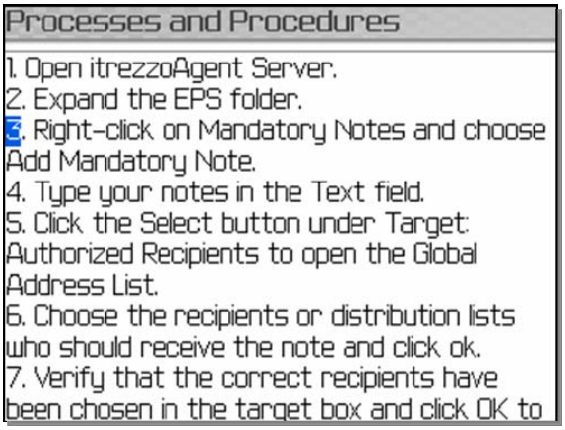
7. Open the **Memo Pad** application on the handheld and you should see the Mandatory Note that was configured.



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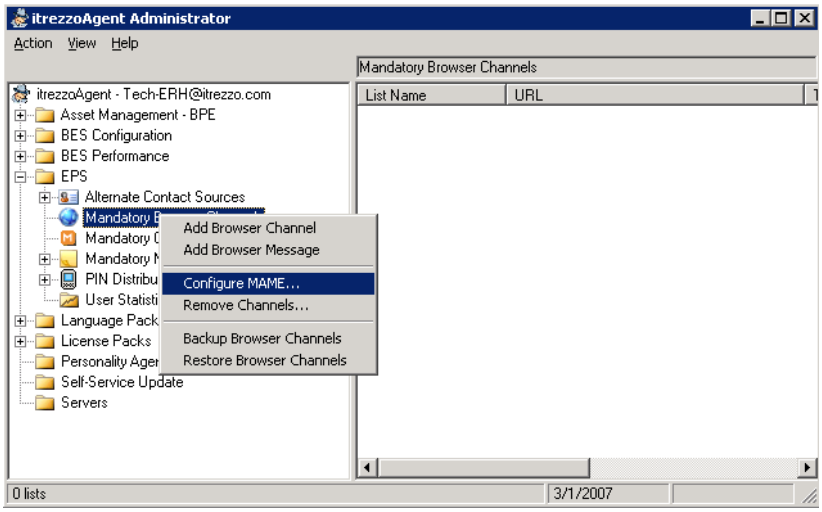
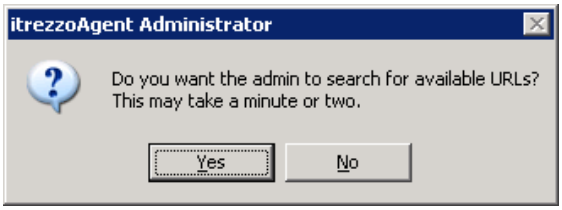
Chapter 10

Configuring Mandatory Browser Channels

1. Expand the **EPS** container.
2. Right-click on **Mandatory Browser Channels** and choose **Configure MAME** (Mobile Application Matrix Engine).



3. itrezzoAgent Administrator will prompt you to search for available URLs. Click the **Yes** button. The search may take a few minutes to complete.



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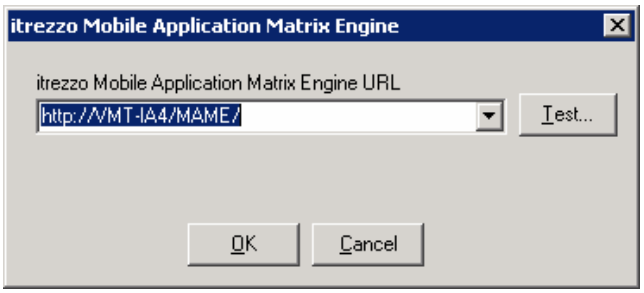
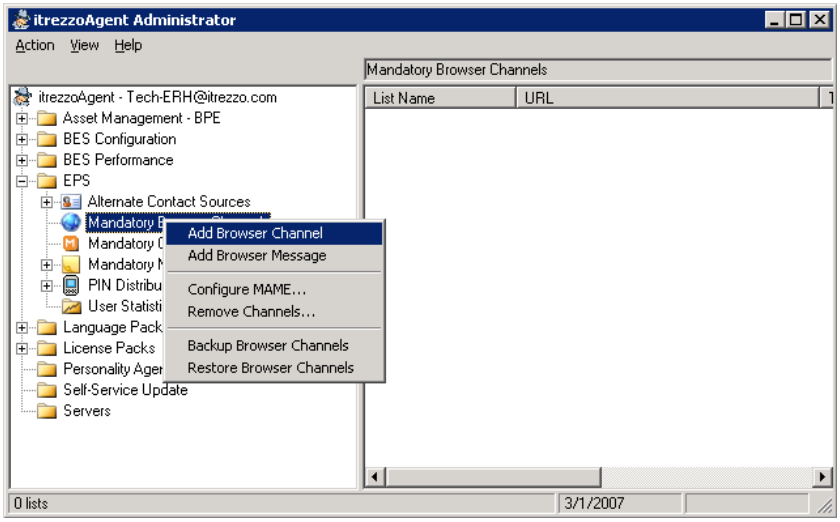
4. When the search has completed, the MAME URL will be displayed as illustrated below. If a URL is not displayed, type your server's MAME URL (http://servername/MAME/) in the drop-down box and click the **Test** button.
5. Click **OK** to save the settings once the correct MAME URL is displayed.



6. Right-click on **Mandatory Browser Channel** and choose **Add Browser Channel**.



7. When the **Mandatory Browser Channel** window appears, fill in the **List Name**, **URL**, and **Title**. You can also choose to upload **Read** and **Unread** icons for the browser channel.
8. If you would like to cache content on the recipient's handhelds, click the checkmark next to **Push content to browser cache**, and set the number of days to wait before the cached information expires.
9. To choose the **Authorized Recipients** of this browser channel, click the **Select** button and choose recipients from the available address lists.
10. Click the checkbox next to **Push to handhelds on next run** at the top of the window if you would like the browser channel pushed out the next time EPS is run.Click **OK** to save the settings.

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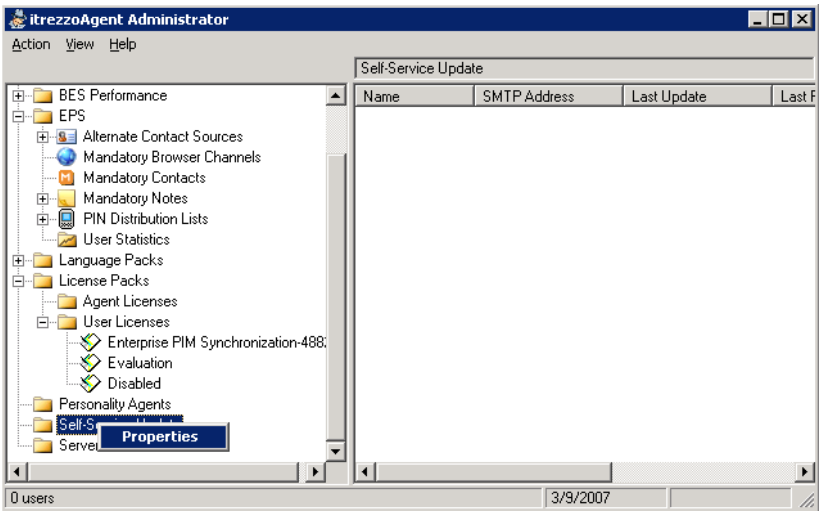
Chapter 11

Configuring Self-Service Updates (SSU)

1. Right-click on the **Self-Service Updates** container and choose **Properties**.



2. Adjust the frequency of required updates and of reminders using the drop-down menus on the **Configuration** tab of the Self-Service Updates Properties window.

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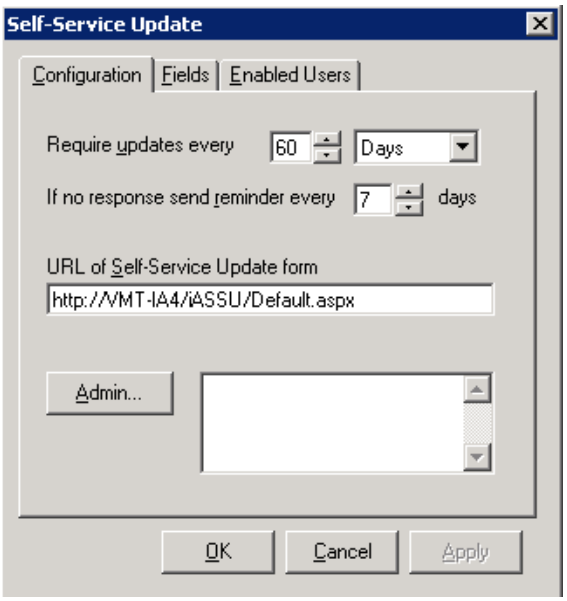
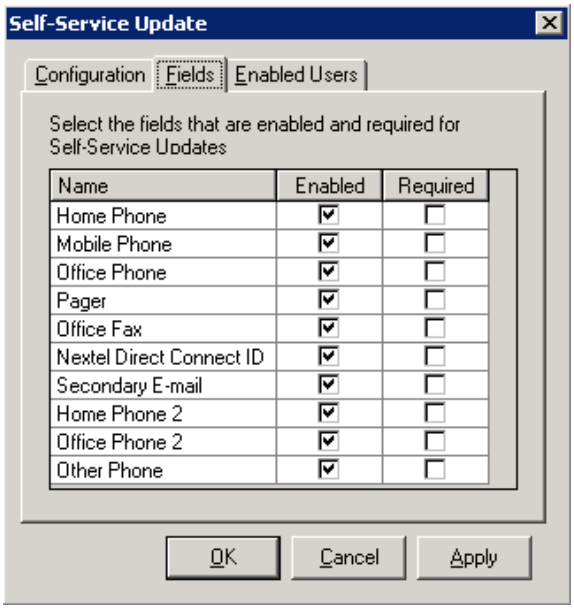


3. Click the **Admin** button and choose a Self-Service Updates Administrator from the available address lists.
4. Click on the **Fields** tab.
5. Click the checkmarks under the **Required** column that correspond with fields which are required to be updated.



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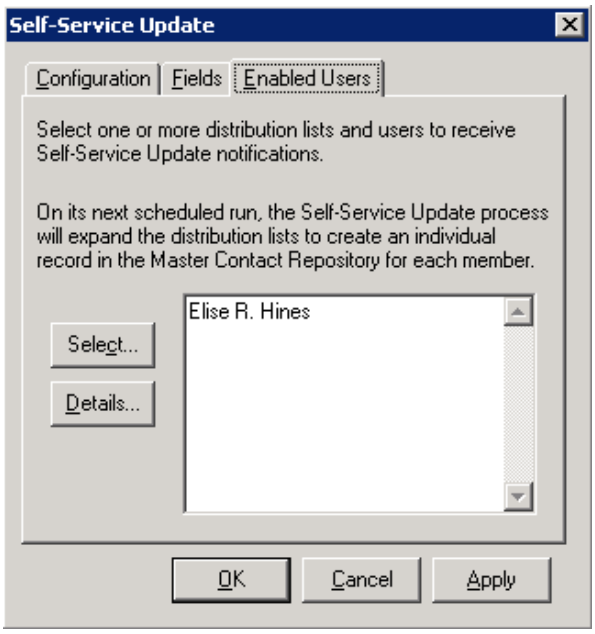
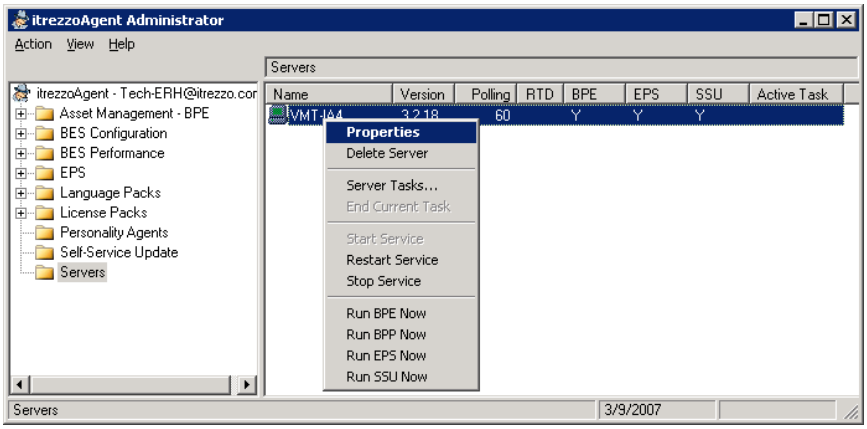
6. Click on the **Enabled Users** tab.
7. Click the **Select** button and choose users or distribution lists of individuals who will receive Self-Service Updates.



8. Click **OK** to save the settings.
9. Click on the **Servers** container. The list of available servers will be displayed in the Content pane of the itrezzoAgent Administrator.



10. Right-click on the name of the server you would like to run **SSU** on and choose **Properties**.

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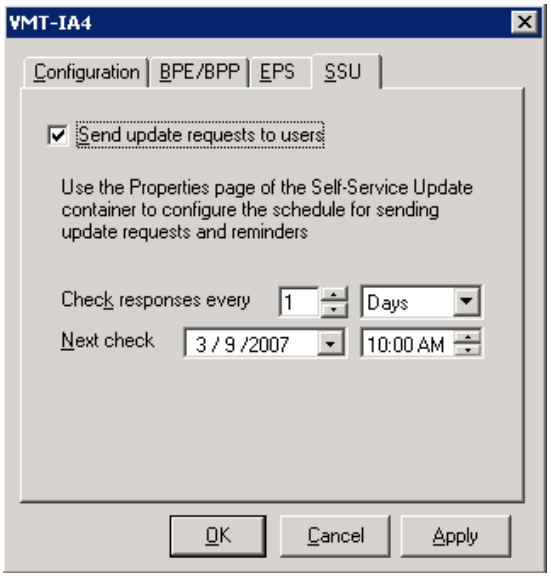
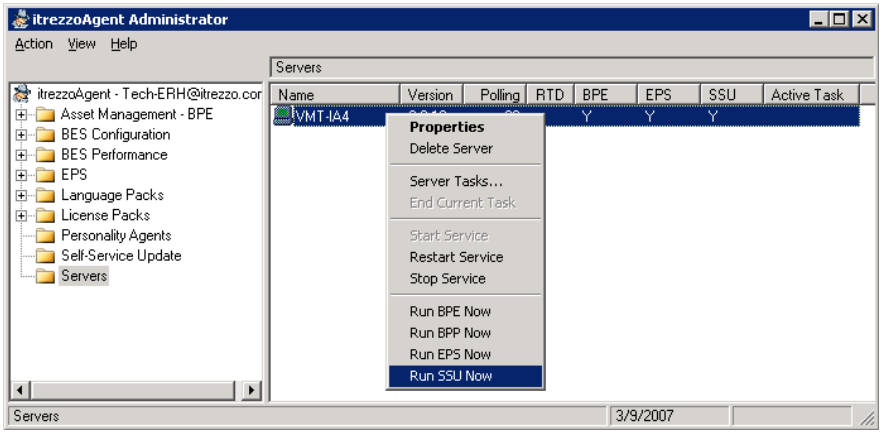
11. Click on the **SSU** tab, and click the checkbox next to **Send update requests to users**.



12. Adjust the settings for how often the responses are checked and when the next check will occur using the available drop-down menus.
13. Click the **OK** button to save the settings.
14. Right-click on the server you configured SSU to run on and choose **Run SSU Now**.



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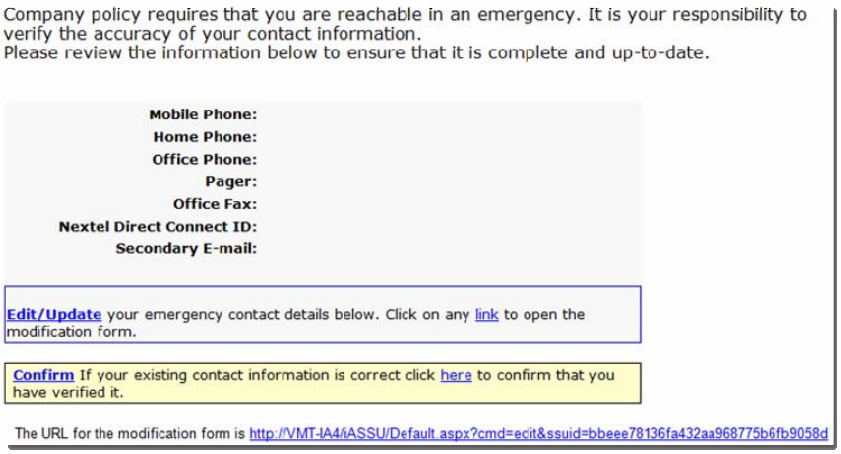
15. When SSU is run, all of the **Enabled Users** will receive an automated SSU email message like the one below.



Company policy requires that you are reachable in an emergency. It is your responsibility to verify the accuracy of your contact information.
Please review the information below to ensure that it is complete and up-to-date.

Mobile Phone:	
Home Phone:	
Office Phone:	
Pager:	
Office Fax:	
Nextel Direct Connect ID:	
Secondary E-mail:	

Edit/Update your emergency contact details below. Click on any link to open the modification form.

Confirm If your existing contact information is correct click here to confirm that you have verified it.

The URL for the modification form is http://VMT-IA4/iASSU/Default.aspx?cmd=ecit&ssuid=bbeee78136fa432aa968775b6fb9058d

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