

iPhone in Business

How-To Setup Guide for Users

iPhone is ready for business. It supports Microsoft Exchange ActiveSync, as well as standards-based services, delivering email, calendars, and contacts over-the-air. And it gives mobile users secure access to corporate resources through support for established VPN protocols and WPA2 Enterprise networks. This guide provides step-by-step instructions for setting up access to these services on iPhone.

Using This Guide

This guide can be used to create customized materials that support the deployment of iPhone within your company. It's organized by chapter and can be tailored to suit the needs of your users or the specific technologies you support. In addition, custom entry fields are provided so that you can insert your company's server and account settings in each step. A notes area at the bottom of each page can be used to help guide your users along the way.

When customized, this guide serves as a quick reference for users who are setting up access to corporate services on iPhone for the first time. It can be delivered to your users in print or PDF format, or it can be hosted on your company's internal support website.

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Microsoft Exchange ActiveSync Setup

With support for Microsoft Exchange ActiveSync, you can wirelessly push company email, calendar events, and contacts from Microsoft Exchange Server 2003 and 2007 to iPhone. To set up iPhone to access your Exchange server, follow the steps in this chapter.



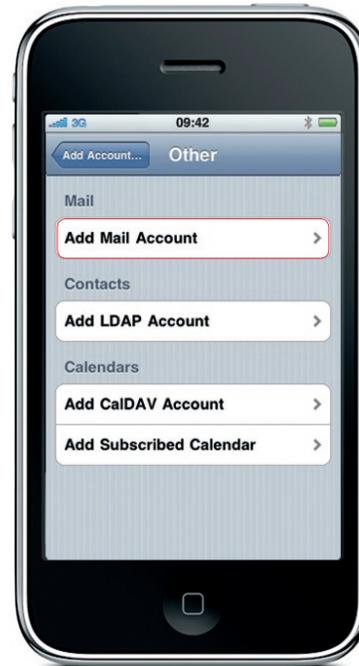
Go to the Microsoft Exchange setup screen



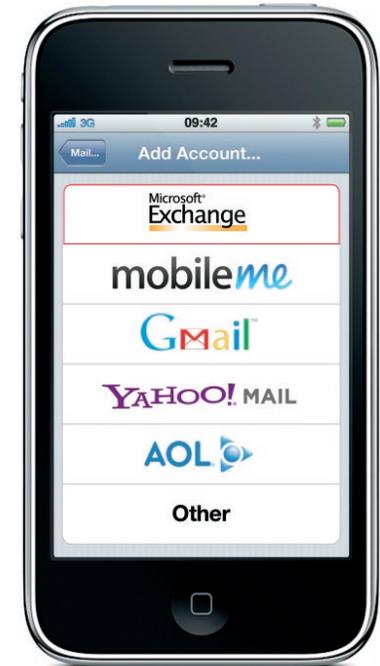
> On the Home screen, tap **Settings**.



> Tap **Mail, Contacts, Calendars**.



> Tap **Add Mail Account**.



> Tap **Microsoft Exchange**.



Enter Exchange ActiveSync account and server information



- > Enter your **Email**, **Domain**, **Username**, **Password**, and **Description**. The description field is automatically populated with your email address but can be modified to include any description you'd like, for example, "My Corporate Email." Tap **Next** when you're done.



- > If **Autodiscover*** isn't enabled, a dialog will appear stating that the Autodiscover certificate could not be verified. Choose **Accept** to ignore the dialog and to continue with the setup.

*The Autodiscover service is a feature of Microsoft Exchange Server 2007 that simplifies the setup and provisioning of your mobile device by returning the required system settings after you enter your email address and password. By default, the Autodiscover service is enabled in Exchange 2007.



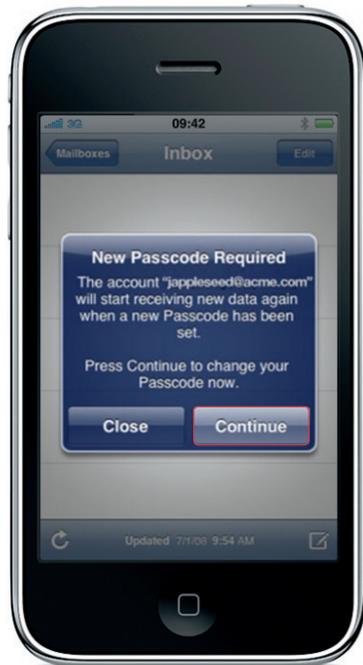
- > Enter your server information in the **Server** field and tap **Next** to complete the setup.



Synchronize with Microsoft Exchange



> When the setup is complete, iPhone displays a list of data types to sync with Exchange. Choose from the list and tap **Done** to initiate the first sync.



> **If your company enforces a passcode policy**, you'll be prompted to establish a device passcode.



> Enter the passcode a second time and tap **Next**.

You are now configured to access your corporate email, calendar, and contacts. Proceed to the next step to configure additional options.



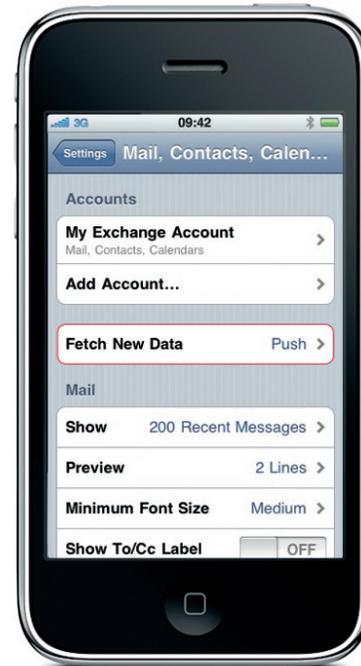
Configure additional settings



> Once your account is set up, you can configure additional settings and display options.



> Tap your account in the Account list to set account synchronization options, such as the number of days to keep mail on your device, or specific folders on your Exchange account for which you would like to receive push updates.



> To configure push behavior go back to **Mail, Contacts, Calendars**, and then tap **Fetch New Data**.



> From here, you can turn off push services or set how frequently data is fetched from the Exchange server when push is disabled.



Virtual Private Network (VPN) Setup

With support for virtual private networking (VPN), you can access private information securely over a non private network. You may need VPN, for example, to visit internal websites hosted on your corporate intranet.

iPhone can connect to your company's VPN using the Cisco IPSec, L2TP, or PPTP protocols. VPN on iPhone works over both Wi-Fi and cellular data network connections, and users can authenticate via password, two-factor token, or digital certificate.

To set up iPhone to access your VPN, follow the steps in this chapter.



Go to the network setup screen



> On the Home screen, tap **Settings**.



> Tap **General**.



> Tap **Network**.



> Tap **VPN**. Then tap **Add VPN Configuration** to get started.



Add a new L2TP VPN setup



- > Make sure **L2TP** is selected before proceeding.

Description: Enter a description that identifies this VPN configuration, for example "My VPN."



- > **Server:** Enter the DNS name or IP address of the VPN server you're connecting to.



- > **Account:** Enter your user name.



- > **Password:** Enter the password or PIN of your VPN login account. Leave the Password field blank for RSA SecurID and CRYPTO-Card authentication or if you're required to enter the password manually with every connection attempt.



Add a new L2TP VPN setup (continued)



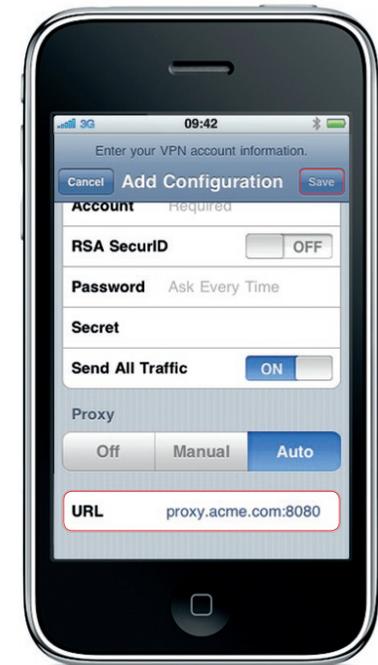
- > **RSA SecurID:** Turn on this option if you're using a RSA SecurID token. Once enabled, the password field is hidden.



- > **Secret:** Enter the group's shared secret.



- > **Send All Traffic:** Turn off this option to enable split tunneling.



- > Tap **Save** once you've entered all your information and settings.
- > **Proxy:** If applicable, enter the information for your proxy server, or location of your proxy auto-configuration file. Tap **Save** once you've entered all your information and settings.



Add a new PPTP VPN setup



- > Make sure **PPTP** is selected before proceeding.

Description: Enter a description that identifies this VPN configuration, for example "My VPN."



- > **Server:** Enter the DNS name or IP address of the VPN server you're connecting to.



- > **Account:** Enter your user name.



- > **Password:** Enter the password or PIN of your VPN login account. Leave the Password field blank for RSA SecurID and CRYPTO-Card authentication or if you're required to enter the password manually with every connection attempt.



Add a new PPTP VPN setup (continued)



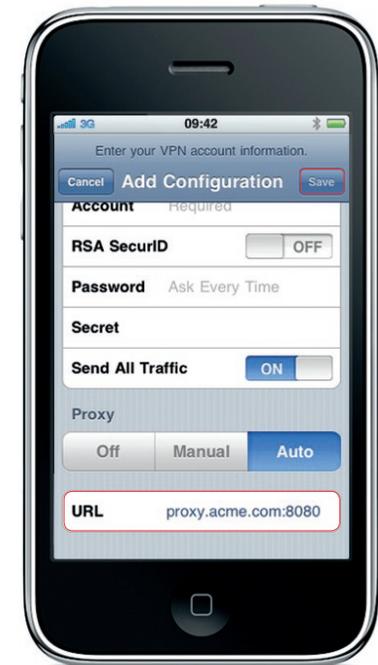
- > **RSA SecurID:** Turn on this option if you're using a RSA SecurID token. Once enabled, the password field is hidden.



- > **Encryption Level:** Choose the encryption level for your network. Auto is the default, which selects the highest encryption level available.



- > **Send All Traffic:** Turn off this option to enable split tunneling.



- > Tap **Save** once you've entered all your information and settings.
- > **Proxy:** If applicable, enter the information for your proxy server, or location of your proxy auto-configuration file. Tap **Save** once you've entered all your information and settings.



Add a new Cisco IPSec VPN setup



- > Make sure **IPSec** is selected before proceeding.

Description: Enter a description that identifies this VPN configuration, for example "My VPN."



- > **Server:** Enter the DNS name or IP address of the VPN server you're connecting to.



- > **Account:** Enter your user name.



- > **Password:** Enter the password or PIN of your VPN login account. Leave the Password field blank for RSA SecurID and CRYPTO-Card authentication or if you're required to enter the password manually with every connection attempt.



Add a new Cisco IPSec VPN setup (continued)



- > **Use Certificate:** Turn on this option if your VPN uses a certificate for authentication. When Use Certificate is on, the Group Name and Secret fields are replaced with a certificate menu that lets you choose from a list of installed identities.



- > **Group Name:** Enter the name of the group as defined on the VPN server.



- > **Secret:** Enter the group's shared secret.



- > Tap **Save** once you've entered all your information and settings.
- > **Proxy:** If applicable, enter the information for your proxy server, or location of your proxy auto-configuration file. Tap **Save** once you've entered all your information and settings.



Connecting and disconnecting from VPN



> Now that you have configured your iPhone for VPN, the **VPN** switch at the top of the VPN Configurations list can be used to turn VPN on or off. **Status** shows network connection and disconnection as well as the time connected while active.



> Future connections can also be made with a single touch directly from the **Settings** menu. A VPN badge is also placed in the status bar at the top of the screen, so you always know when you're connected to VPN services.



Wireless Network (Wi-Fi) Setup

iPhone can use local Wi-Fi networks to connect to the Internet. If no Wi-Fi networks are available or if you've turned off Wi-Fi, iPhone connects to the Internet via your cellular data network, when available. iPhone also supports WPA2 Enterprise with 802.1X authentication—the standard for enterprise Wi-Fi network protection. These features help provide safe access to company information on iPhone.

For quick setup of iPhone for WPA2 Enterprise, security and authentication settings can be configured using configuration profiles. For more information, see the chapter, "Configuration Profile and Certificate Installation."

To set up iPhone for Wi-Fi access, follow the steps in this chapter.



Go to the Wi-Fi settings screen



> On the Home screen, tap **Settings**.



> Tap **Wi-Fi**.



> Make sure **Wi-Fi** is on.



> Choose the Wi-Fi network from the list of the available networks. Networks that require a password appear with a lock icon.



Join a Wi-Fi network



- > If necessary, enter a password and tap **Join**.



- > Your iPhone is now connected to a Wi-Fi network. The Wi-Fi icon in the status bar at the top of the screen shows signal strength.



- > Once you've joined a network manually, iPhone automatically joins it whenever the network is in range. If more than one previously used network is in range, iPhone joins the most recently used network.



Join a closed Wi-Fi network



- > To join a closed Wi-Fi network (one not shown in the list of scanned networks), choose **Wi-Fi > Other**.

You must already know the network name, password, and security type to connect to a closed Wi-Fi network.



- > Enter the name of the closed network. If the network requires a password, tap **Security**.



- > Tap the type of security the network uses. Navigate back to **Other Network**.



- > Enter your **Username** and **Password**.



Configure additional settings



> To forget a network you've joined previously so that iPhone doesn't join it automatically, choose Wi-Fi and tap the blue advance arrow next to that network.



> Tap **Forget this Network**.



> Tap **Forget Network** to confirm.



> You can also set iPhone to ask if you want to join new networks that are within range. Choose Wi-Fi and turn on or off **Ask to Join Networks**. If "Ask to Join Networks" is turned off, you must manually join a network to connect to the Internet when a previously used or cellular data network isn't available.



Standards-Based Services (IMAP, CalDAV, LDAP)

iPhone supports standards-based servers for mail, calendar, and contacts integration. You can sync with IMAP mail servers and search the mail server from your iPhone. You can also get access to common CalDAV-compliant calendar servers like iCal Server, Oracle Beehive, Kerio, and Zimbra. And find colleagues fast by searching LDAP servers from either the mail or contacts app on your iPhone.

To setup iPhone to access your corporate email via IMAP, access your calendar via CalDAV, or access a corporate address list via LDAP, follow the steps in this chapter.



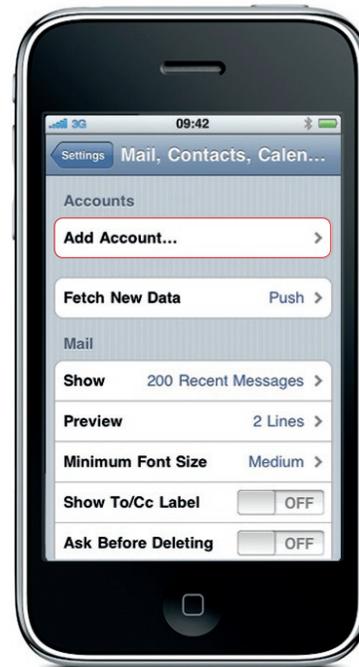
Go to the Mail, Calendar, Contacts account settings



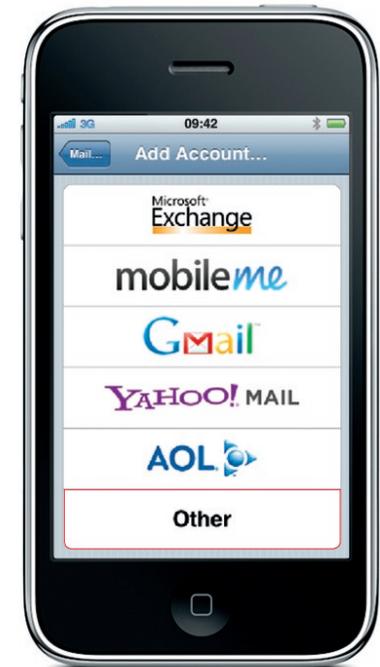
> On the Home screen, tap **Settings**.



> Tap **Mail, Contacts, Calendars**.



> Tap **Add Account**.



> Tap **Other**.



IMAP Mail Setup: Enter account and server information



> Select the service you want to configure from the list of options. To setup an IMAP account select "Add Mail Account".



> **Name:** Enter your full name, for example "John Appleseed."



> **Address:** Enter your email address.



IMAP Mail Setup: Enter account and server information (continued)



> **Password:** Enter your password.



> **Description:** Enter a description for your account. This field is automatically populated with your email address but can be modified to include any description you'd like, for example, "My Corporate Email."

> Tap **Save** to advance.



IMAP Mail Setup: Configure incoming server information



> Make sure **IMAP** is selected before proceeding.



> **Host Name:** Enter your primary mail server, typically in the format "mail.company.com."



> **User Name:** Enter your email user name—typically the part of your address that precedes "@company.com."



> **Password:** Enter the password to access your email account.



IMAP Mail Setup: Configure outgoing server information



> **Host Name:** Enter your primary outbound SMTP server, typically in the format “smtp.company.com.”



> **User Name:** Enter your email user name—typically the part of your address that precedes “@company.com.”



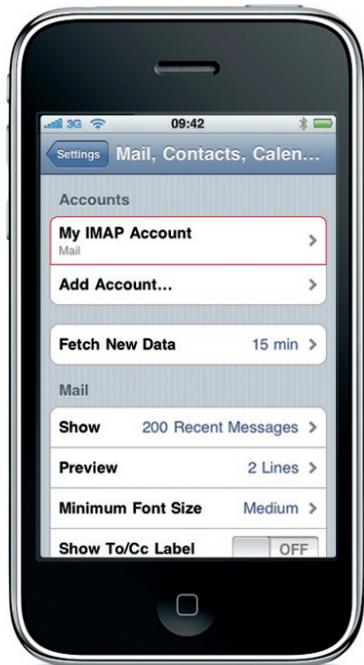
> **Password:** Enter the password to authenticate your account for sending email. This typically matches your password for incoming email.



> Tap **Save** to complete the setup.



IMAP Mail Setup: Configure additional settings

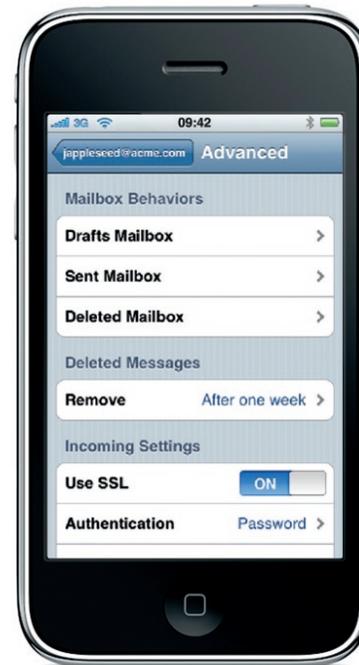


- Once the account is validated, the account settings screen is displayed.

Although most users leave the default settings unchanged, you may want to adjust them. To access additional account settings, tap the account in the active accounts list.



- Scroll to the bottom of the screen and tap **Advanced**.

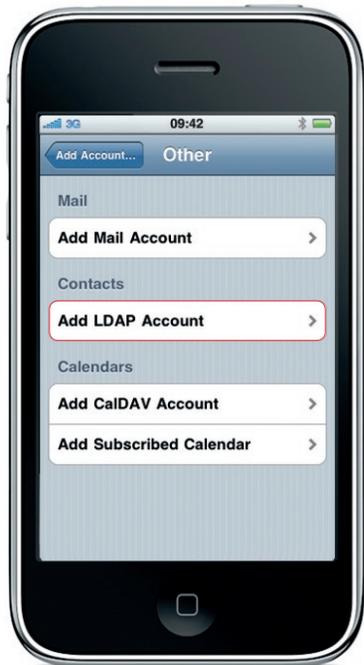


- On the advanced settings screen, you can specify which server-side folders are used to store your email messages, how long to keep email stored on your iPhone before it's deleted, or define preferences for authentication and SSL.

Important: Mail on iPhone automatically detects the server's settings, including requirements for SSL, so check with your administrator before adjusting any of these settings.



LDAP Directory Setup: Enter account and server information



> To setup a new service, navigate back to the Mail, Contacts, and Calendar settings menu and select **Add Account**. From the menu, select **Other** to configure standards-based services. To setup an LDAP directory account select "Add LDAP Account".



> Enter your **Server** address, and **User Name** and **Password** if required. The **Description** field is automatically populated with your LDAP server information but can be modified to include any description you'd like, for example "My LDAP Directory." Tap **Next** when you're done.



> **If your company directory does not use SSL*** you will be prompted with a message stating that iPhone cannot connect using SSL. Tap **Continue** to proceed with setup.

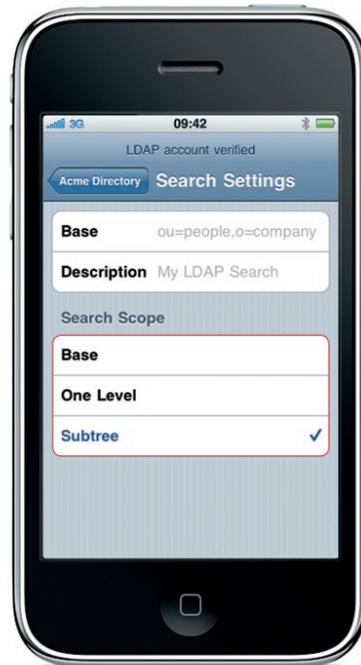
*SSL is a protocol used to encrypt data in transit. Before proceeding you should always verify that you are connecting to corporate services with the correct level of security for your organization.



LDAP Directory Setup: Enter account and server information (continued)



- > When the LDAP setup has been verified, most likely you'll need to enter LDAP **Search Settings** to your configuration.



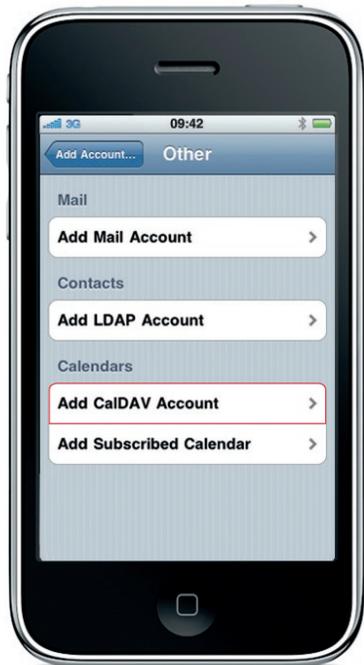
- > Within Search Settings, add your company settings for **Base**, **Description**, and **Scope**. The default search scope is Subtree.



- > Once your search settings have been entered, tap **Save** to complete the setup. You are now configured to access your company's LDAP corporate directory. You can search the directory within the contacts application, or auto-address outbound email messages.



CalDAV Calendar Setup: Enter account and server information



> To setup a new service, navigate back to the Mail, Contacts, and Calendar settings menu and select **Add Account**. From the menu, select **Other** to configure standards-based services. To setup an LDAP directory account select **"Add CalDAV Account."**



> Enter your **Server** address, and **User Name** and **Password**. The **Description** field is automatically populated with your CalDAV server information but can be modified to include any description you'd like, for example "My CalDAV Calendar." Tap **Next** when you're done.

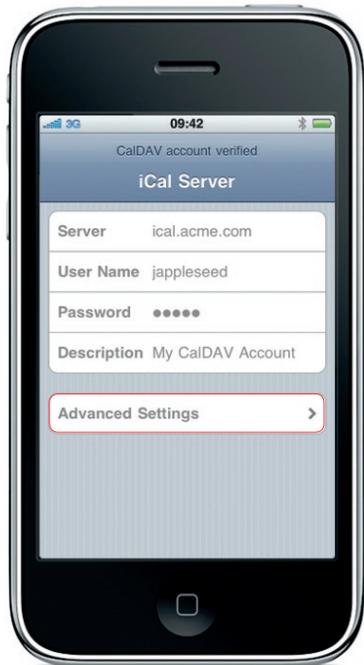


> **If your company directory does not use SSL*** you will be prompted with a message stating that iPhone cannot connect using SSL. Tap **Continue** to proceed with setup.

*SSL is a protocol used to encrypt data in transit. Before proceeding you should always verify that you are connecting to corporate services with the correct level of security for your organization.



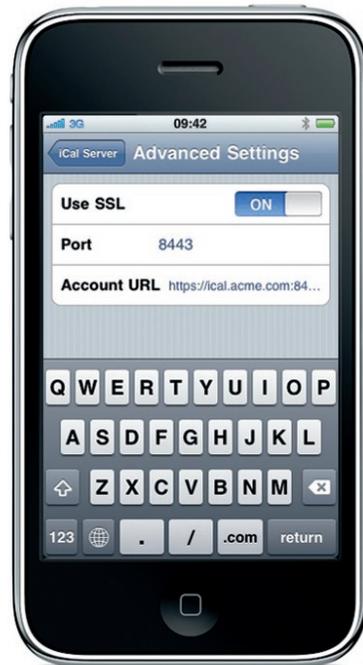
CalDAV Calendar Setup: Enter account and server information (continued)



- > Once the account is verified, setup is complete.

You now have access to your corporate CalDAV calendar on iPhone.

To configure non-standard port settings, or to enable or disable SSL, tap **Advanced Settings**.



- > On the advanced settings screen, you can specify specific port configurations or account URLs for your CalDAV server. Check with your administrator before adjusting any of these settings.



Configuration Profile and Certificate Installation

In an enterprise environment, you can set up accounts and other items on your iPhone by installing a configuration profile. Configuration profiles allow system administrators to quickly set up your iPhone to work with the information systems at your company, school, or organization. For example, a configuration profile might set up your iPhone to access your Microsoft Exchange servers at work.

Configuration profiles can also contain certificates for secure access to your company's network and information. Both root and identity certificates can be installed independently of a configuration profile, using the same basic installation process.

To install a configuration profile or certificate on your iPhone, follow the steps in this chapter.



Install a configuration profile or certificate



> Using iPhone, open the email provided by your administrator. Tap the profile or certificate to open it.



> Alternatively, you can download the configuration profile or certificate from the website provided by your administrator. Tap the profile or certificate to open it.



> When the configuration profile or certificate opens, verify that you've received it from a trusted source. If it's unsigned, a red "unsigned" badge will be displayed next to the install button. Check with your administrator before proceeding with installation. check with your system administrator before proceeding with installation.

Once you've verified that it's from a trusted source, tap **Install**.



> During installation, you may be asked to enter certain information, such as your Exchange account password and other information as required by the services included in your configuration profile. Enter passwords and other information as requested.



Remove configuration profiles and certificates



- > The profile or certificate is now installed on your device. Any services included in your profile are now configured. Your configuration profile or certificate is also listed in **Settings > General > Profile**.



- > Settings provided by a configuration profile can't be altered. To change these settings, first remove the configuration profile or install an updated configuration profile provided by your administrator.

Important: Removing a configuration profile removes policies and all of the email or Exchange account's data stored on the device, as well as VPN settings, certificates, and other information associated with the profile.



