ISEC7 Mobile Exchange Delegate

iOS User Documentation

Minimum Requirements

ISEC7 Mobile Exchange Delegate requires iOS 8.1 or higher.

Installation

ISEC7 Mobile Exchange Delegate is available on the Apple App Store.

In addition to the standard version there are separate versions for different Mobile Device Management platforms available.

ISEC7 Mobile Exchange Delegate:

https://itunes.apple.com/us/app/isec7-mobile-exchange-delegate/id1045017598

ISEC7 Mobile Exchange Delegate for BlackBerry:

https://itunes.apple.com/us/app/isec7-mobile-exchange-delegate-for-blackberry/id1076960891

ISEC7 Mobile Exchange Delegate for AirWatch:

https://itunes.apple.com/us/app/isec7-mobile-exchange-delegate-for-airwatch/id1078896180

ISEC7 Mobile Exchange Delegate (MIAC):

https://itunes.apple.com/us/app/isec7-mobility-for-sap-miac/id672778125

1 License/Subscription

ISEC7 Mobile Exchange Delegate is available for free in the App Store. The free version is limited in functionality. You can unlock the full features by activating a company license or purchasing a premium subscription in the app.

1.1 Free version

- only one master account
- only one delegate access
- only 3 default folders for the master account (inbox, contacts, calendar)
- only 3 default folders for the delegate access (inbox, contacts, calendar)
- no access to public folders
- no action possible, such as create/forward/delete e-mails; create/delete appointments and contacts
- only the last 10 emails are displayed
- in the calendar, only the current week is available
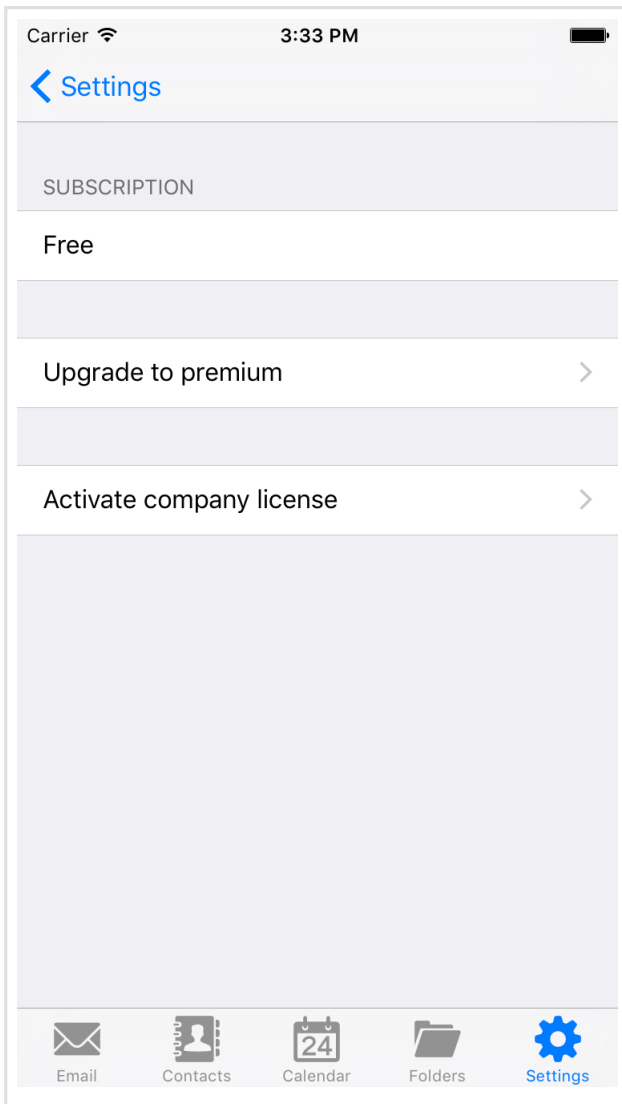
1.2 Activating company account

	Free	Premium
Carrier 3:32 PM		
Close **Subscription** Subscribe		

Subscribe to Premium to experience the full functionality of ISEC7 Mobile Exchange Delegate

	Free	Premium
Accounts	✔ (Only 1)	✔
Delegate access	✔ (Only 1)	✔
Standard folders (Inbox, Contacts, Calendar)	✔	✔
Additional folders	✖	✔
Public folders	✖	✔
Email list	✔ (Latest 10 mails)	✔
Calendar view	✔ (current week)	✔
Compose, reply to, forward and delete emails	✖	✔
Create, edit and delete contacts	✖	✔
Create, edit and delete meetings, accept meeting requests	✖	✔

- On first application startup a popup is presenting the differences between free and premium version.
- Click the "Subscribe" button in the top right. The subscription options will open.

Carrier 🔋   3:33 PM

‹ Settings

SUBSCRIPTION

Free

Upgrade to premium   ›

Activate company license   ›

| Email | Contacts | Calendar | Folders | Settings |

- Click "Activate company license". The company license setting will open.

Carrier 🔋 3:33 PM ▬

< Back **Company license**

ISEC7 Mobile Exchange Delegate 1.0.0.2

License state

Last successful check ---

COMPANY LICENSE ID

Company license ID

Save and check

q w e r t z u i o p ü

a s d f g h j k l ö ä

⇧ y x c v b n m ⌫

123 🌐 Leerzeichen Fertig

- Enter company license ID and click "Save and check"
- If necessary a proxy can be enabled for the license check, including optional authentication credentials
- Leave subscription settings and add a master account in the settings
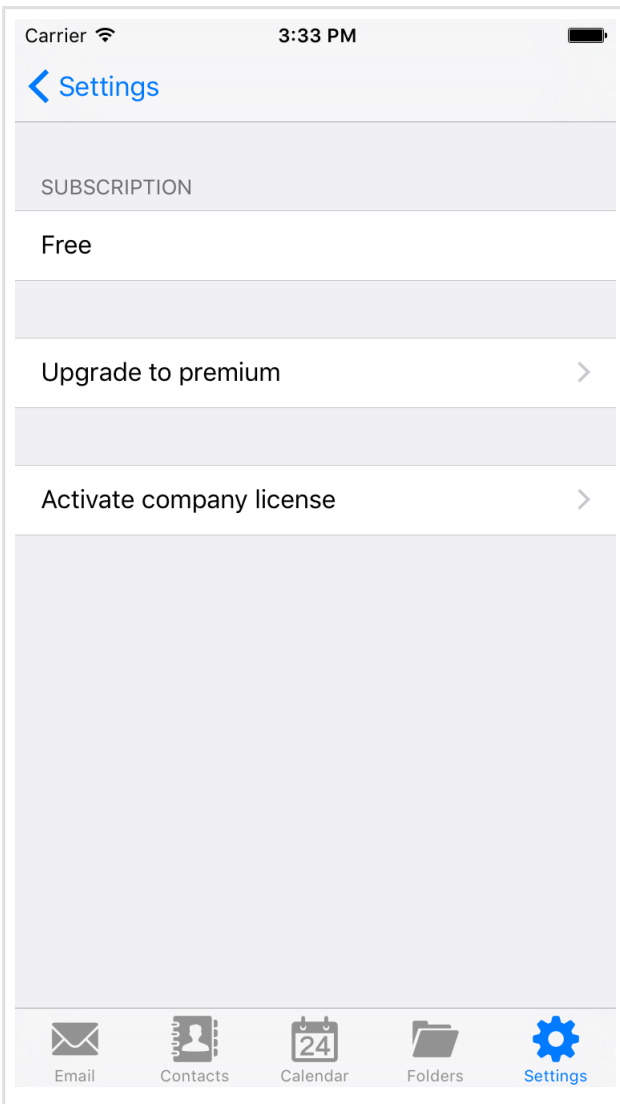
1.3 Premium Subscription

	Carrier 🔋	3:32 PM		
Close		**Subscription**		Subscribe

Subscribe to Premium to experience the full functionality of ISEC7 Mobile Exchange Delegate

	Free	Premium
Accounts	✔ (Only 1)	✔
Delegate access	✔ (Only 1)	✔
Standard folders (Inbox, Contacts, Calendar)	✔	✔
Additional folders	✖	✔
Public folders	✖	✔
Email list	✔ (Latest 10 mails)	✔
Calendar view	✔ (current week)	✔
Compose, reply to, forward and delete emails	✖	✔
Create, edit and delete contacts	✖	✔
Create, edit and delete meetings, accept meeting requests	✖	✔

- On first application startup a popup is presenting the differences between free and premium version.
- Click the "Subscribe" button in the top right. The subscription options will open.

Carrier 📶   3:33 PM

‹ Settings

SUBSCRIPTION

Free

Upgrade to premium   ›

Activate company license   ›

| Email | Contacts | Calendar | Folders | Settings |

- Click "Upgrade to premium". The subscription options will open.

••●○○ o2-de 🔋   3:57 PM   ❄ ▬▬)

‹ Back

Subscribe to Premium to experience the full functionality of ISEC7 Mobile Exchange Delegate

Yearly subscription			€19,99

Subscribe now

	Free	Premium
Accounts	✔ (Only 1)	✔
Delegate access	✔ (Only 1)	✔
Standard folders (Inbox, Contacts, Calendar)	✔	✔
Additional folders	✖	✔
Public folders	✖	✔
Email list	✔ (Latest 10 mails)	✔
Calendar view	✔ (current week)	✔
Compose, reply to, forward and delete emails	✖	✔
Create, edit and delete contacts	✖	✔
Create, edit and delete meetings, accept meeting requests	✖	✔

✉ Email	👤 Contacts	📅 Calendar	📁 Folders	⚙ Settings

- Click "Subscribe now". Processing will start.

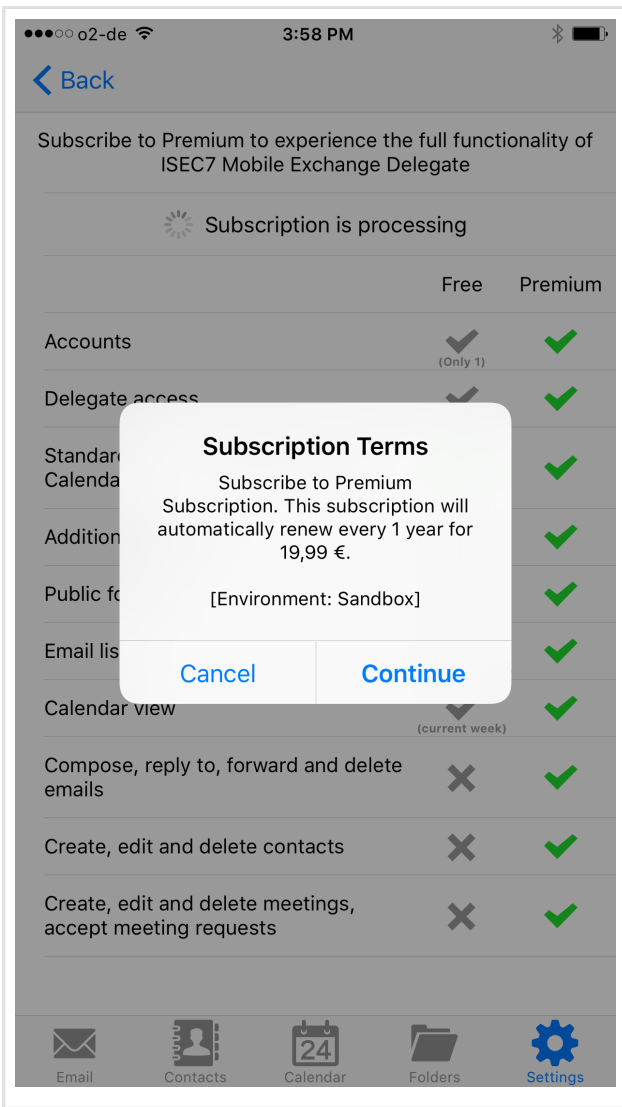●●●○○ o2-de 🔒   3:58 PM   ∦ ▬▬

< Back

Subscribe to Premium to experience the full functionality of
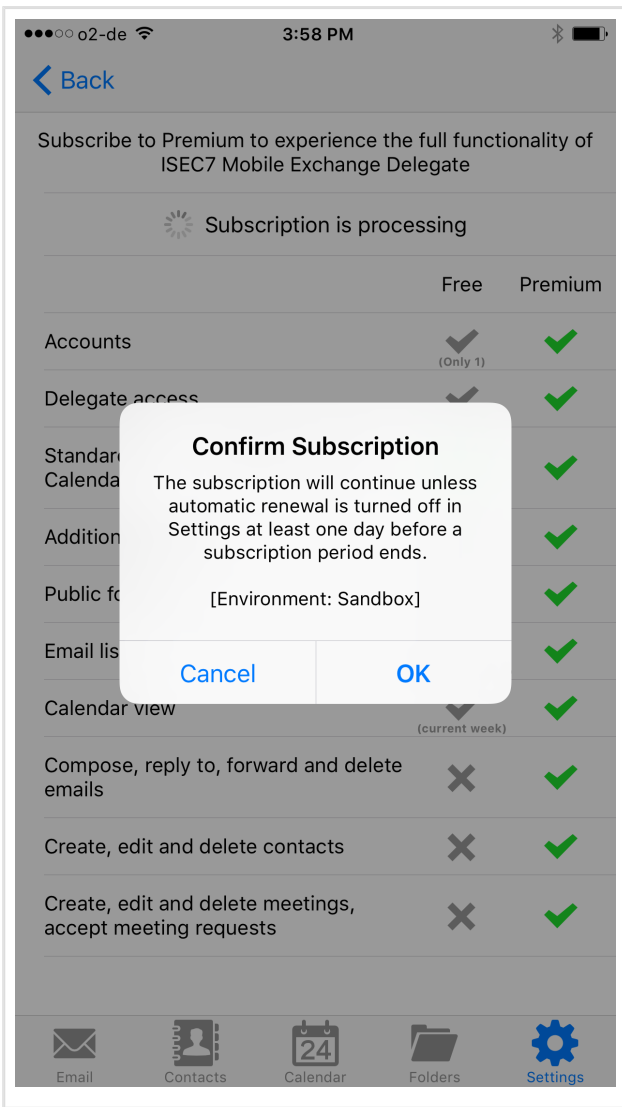ISEC7 Mobile Exchange Delegate

⟳ Subscription is processing

	Free	Premium
Accounts	✓ (Only 1)	✓
Delegate access	✓ (Only 1)	✓
Standard folders (Inbox, Contacts, Calendar)	✓	✓
Additional folders	✗	✓
Public folders	✗	✓
Email list	✓ (Latest 10 mails)	✓
Calendar view	✓ (current week)	✓
Compose, reply to, forward and delete emails	✗	✓
Create, edit and delete contacts	✗	✓
Create, edit and delete meetings, accept meeting requests	✗	✓

| ✉ Email | 👥 Contacts | 📅 Calendar | 📁 Folders | ⚙ Settings |

- Login to your App Store account if needed.
- Subscription Terms will be shown.

●●●○○ o2-de 🤙 3:58 PM ⚹ 🔋

‹ Back

Subscribe to Premium to experience the full functionality of ISEC7 Mobile Exchange Delegate

🔄 Subscription is processing

	Free	Premium
Accounts	✔ (Only 1)	✔
Delegate access	✔	✔
Standard Calenda	✔	✔
Addition	✔	✔
Public fc	✔	✔
Email lis	✔	✔
Calendar view	✔ (current week)	✔
Compose, reply to, forward and delete emails	✖	✔
Create, edit and delete contacts	✖	✔
Create, edit and delete meetings, accept meeting requests	✖	✔

Subscription Terms

Subscribe to Premium Subscription. This subscription will automatically renew every 1 year for 19,99 €.

[Environment: Sandbox]

Cancel | **Continue**

Email   Contacts   Calendar   Folders   Settings

- Click "Continue" to subscribe.

●●●○○ o2-de 🛜   3:58 PM   ⚹ ▬

< Back

Subscribe to Premium to experience the full functionality of ISEC7 Mobile Exchange Delegate

🔄 Subscription is processing

	Free	Premium
Accounts	✔ (Only 1)	✔
Delegate access	✔	✔
Standard Calenda		✔
Addition		✔
Public fo		✔
Email lis		✔
Calendar view	✔ (current week)	✔
Compose, reply to, forward and delete emails	✖	✔
Create, edit and delete contacts	✖	✔
Create, edit and delete meetings, accept meeting requests	✖	✔

Confirm Subscription

The subscription will continue unless automatic renewal is turned off in Settings at least one day before a subscription period ends.

[Environment: Sandbox]

Cancel   OK

✉ Email   📇 Contacts   📅 Calendar   📁 Folders   ⚙ Settings

- Click "OK" to confirm subscription. Subscription confirmation will show up.

●●●○○ o2-de 🔇   3:58 PM   ❄ ▬▬▷

❮ Back

Subscribe to Premium to experience the full functionality of ISEC7 Mobile Exchange Delegate

Subscripton has been purchased

	Free	Premium
Accounts	✔ (Only 1)	✔
Delegate		✔
Standard Calenda		✔
Addition		✔
Public f		✔
Email lis		✔
Calenda		✔ (current week)
Compose, reply to, forward and delete emails	✖	✔
Create, edit and delete contacts	✖	✔
Create, edit and delete meetings, accept meeting requests	✖	✔

You're currently subscribed to this.

Your 1-year subscription renews on 17 December 2015 for 19,99 €. To review subscription settings or cancel auto-renewal, tap Manage.

[Environment: Sandbox]

Manage   OK

Email   Contacts   Calendar   Folders   Settings

- Click "OK" to close confirmation.

●●●○○ o2-de 📶 3:59 PM 🔋

 Back

Subscribe to Premium to experience the full functionality of
ISEC7 Mobile Exchange Delegate

Subscripton has been purchased

	Free	Premium
Accounts	✓ (Only 1)	✓
Delegate access	✓ (Only 1)	✓
Standard folders (Inbox, Contacts, Calendar)	✓	✓
Additional folders	✗	✓
Public folders	✗	✓
Email list	✓ (Latest 10 mails)	✓
Calendar view	✓ (current week)	✓
Compose, reply to, forward and delete emails	✗	✓
Create, edit and delete contacts	✗	✓
Create, edit and delete meetings, accept meeting requests	✗	✓

Email   Contacts   Calendar   Folders   Settings

- Premium subscription is now available.
- Leave subscription settings and add a master account in the settings

2 Create Master Account

The account generation will take the user through the necessary steps and is started automatically when the application is run for the first time.

Carrier 2:52 PM **‹ Settings** **Add account** ACCOUNT Beate.Musterfrau@isec7.com bmusterfrau Password Please enter your email address and account credentials. **Continue** **Manual configuration** Mail Contacts Calendar Folders **Settings**	• Enter your email address, username and password and press "Continue".

Carrier 📶   2:53 PM

‹ Settings   **Add account**

ACCOUNT

Beate.Musterfrau@isec7.com

bmusterfrau

••••••••••••

Please enter your email address and account credentials.

Continue

Account validated	⬤	All
Mail	⬤	✓
Calendar	⬤	✓
Contacts	⬤	✓

Choose the folders you want to add.

Further folders or public folders can be added later in the folders section.

| Mail | Contacts | Calendar | Folders | Settings |

- The application will try to configure itself automatically by using the auto-discover service of the Exchange server or Office 365 server.
- If the automatic configuration fails you will be asked to enter the server address manually.
- The account is now being validated. You can select the default folders if you want to add them to MED.

Carrier 2:53 PM

‹ Settings **Add account**

ACCOUNT

Beate.Musterfrau@isec7.com

bmusterfrau

••••••••••••

Please enter your email address and account credentials.

Save

Add available delegate access

Sally Sample ⊕

John Doe ⊕

Max Mustermann ⊕

Mail Contacts Calendar Folders Settings
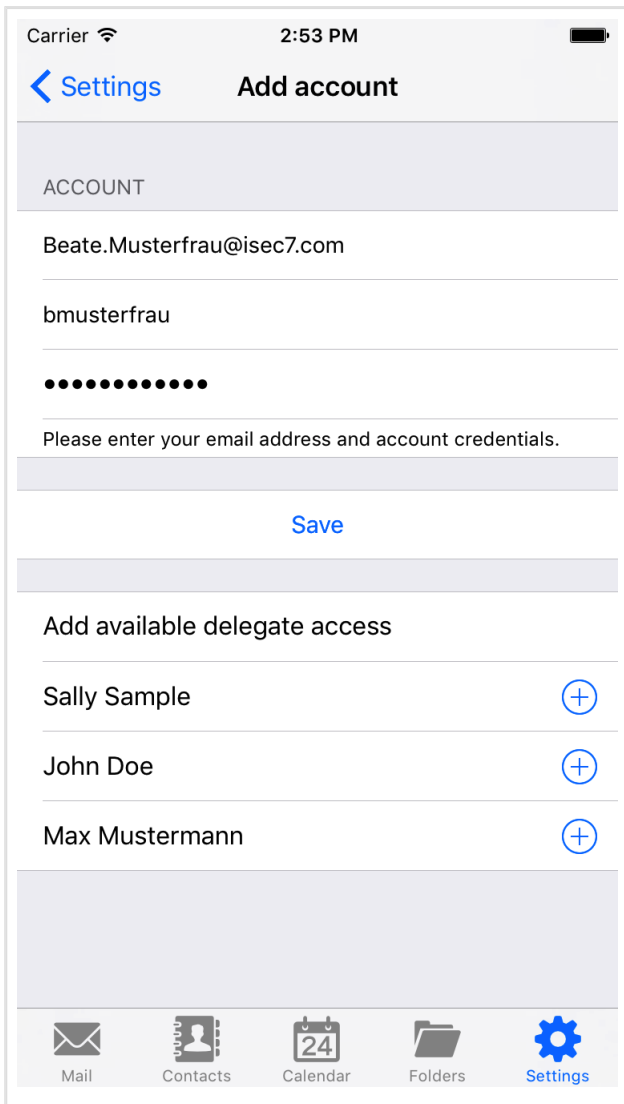
- If the configuration was done automatically via auto-discover all delegate accounts with full access are offered to be added to MED in an additional step.
- Other delegate accounts can be added later.
- Finish the configuration by pressing "Save".

To edit or remove your own account you can select it from the settings.

3 Add Delegate Access

After your own account has been created, delegate accesses can be added.
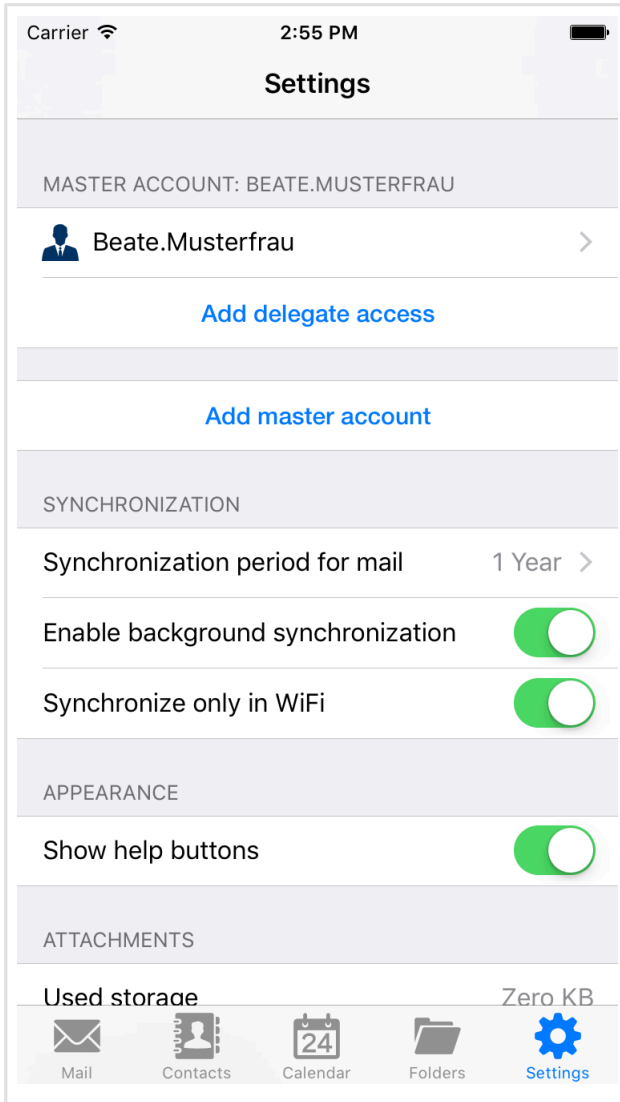
- Click "Add delegate access" for the master account.

Carrier 📶 2:56 PM 🔋

‹ Settings Add delegate access

MAILBOX

Max Mustermann

Max.Mustermann@isec7.com ⊗

Enter the data for the remote mailbox.

Mark as read ✅

Unread emails you read will automatically be marked as read.

Move sent emails to folder ⬜

No folder selected

Continue

Mail | Contacts | Calendar | Folders | Settings
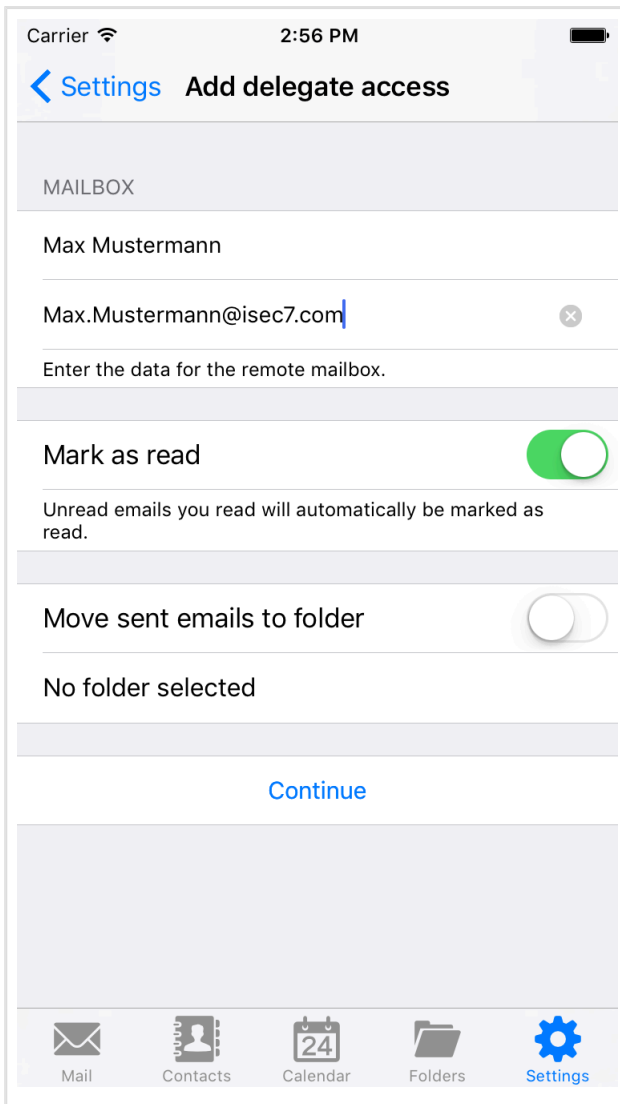
- Enter the name and email of the delegate access.

Carrier 📶 2:56 PM 🔋

< Settings **Add delegate access**

Max.Mustermann@isec7.com

Enter the data for the remote mailbox.

Mark as read ⬤

Unread emails you read will automatically be marked as read.

Move sent emails to folder ◯

No folder selected

Save

Account validated ⬤ All

Mail ⬤ ✓

Calendar ⬤ ✓

Contacts ⬤ ✓

| Mail | Contacts | Calendar | Folders | Settings |

- If an error occurs when validating the account check the settings and the permissions of the mailbox.
- You can select the default folders if you want to add them to MED.

4 Add Shared Calendars

ISEC7 Mobile Exchange Delegate provides you the possibility to access shared calendars of other users.

Carrier 🛜	2:58 PM	🔋
Cancel	**Add folder**	ⓘ

👤	Beate.Musterfrau	›
👥	Max Mustermann	›
📅	Add a shared calendar	›
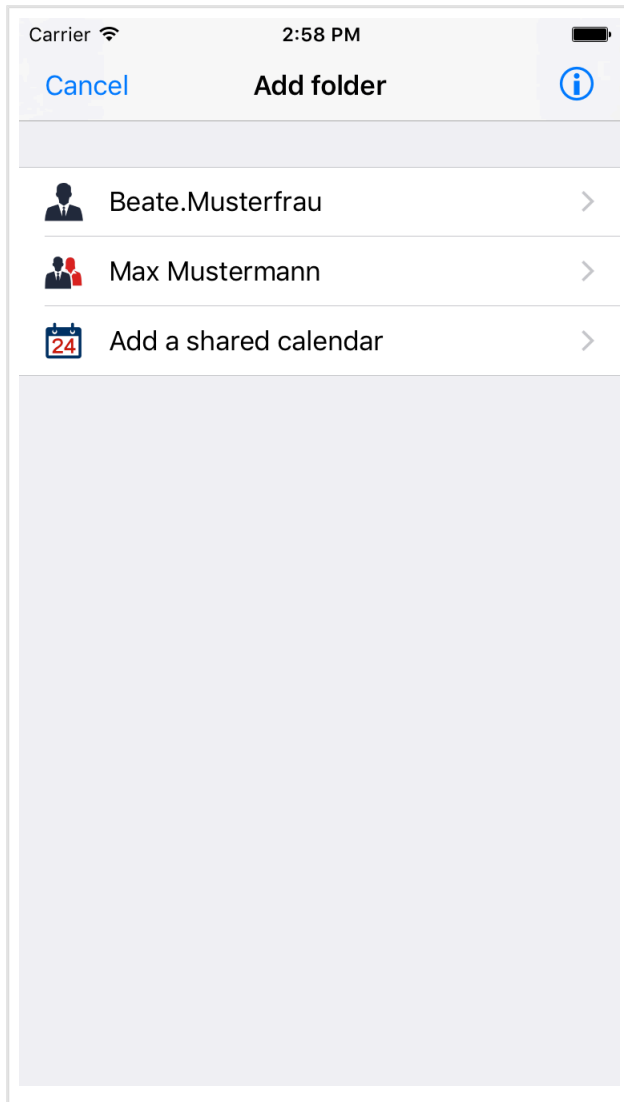
- Select "Folders" on the tab bar or select "Calendar" on the tab bar and press the folder button.
- Press the "+" button to add a folder.
- Access to shared calendars is configured by selecting "Add a shared calendar".

Carrier 📶 2:58 PM ▬

Back **Add a shared calendar**

Name

Email

Please enter the data for the shared calendar.

Continue

- In the name field enter any name you want to give the shared calendar in MED.
- Enter the email address of the person granting you access to his calendar.
- In the next step ISEC7 Mobile Exchange Delegate verifies your permissions to access the shared calendar.
- In the case of an error please check your settings and your permissions to access the shared calendar.

Please note that shared calendars cannot be synchronized and are automatically loaded on-demand when the calendar view is opened. Consequently calendar notifications are not available for shared calendars. Currently loaded data is cached for offline access.

5 Synchronization

It is recommended to run the first synchronization of a folder with more than 1000 objects in a WiFi connected environment.

Emails, contacts and calendar are synched when opened. You can start the synchronization for emails and contacts by scrolling to the top of the list. The calendar can be synched by pressing the sync button at the top.

After a successful initial synchronization all further calls will transfer only new or changed items (delta-synchronization). If background synchronization is enabled, those calls are periodically executed in the background. The exact time when synchronization in the background will be performed cannot be configured and will be determined automatically by the iOS operating system.

On Exchange 2010 or higher new items are synchronized first.
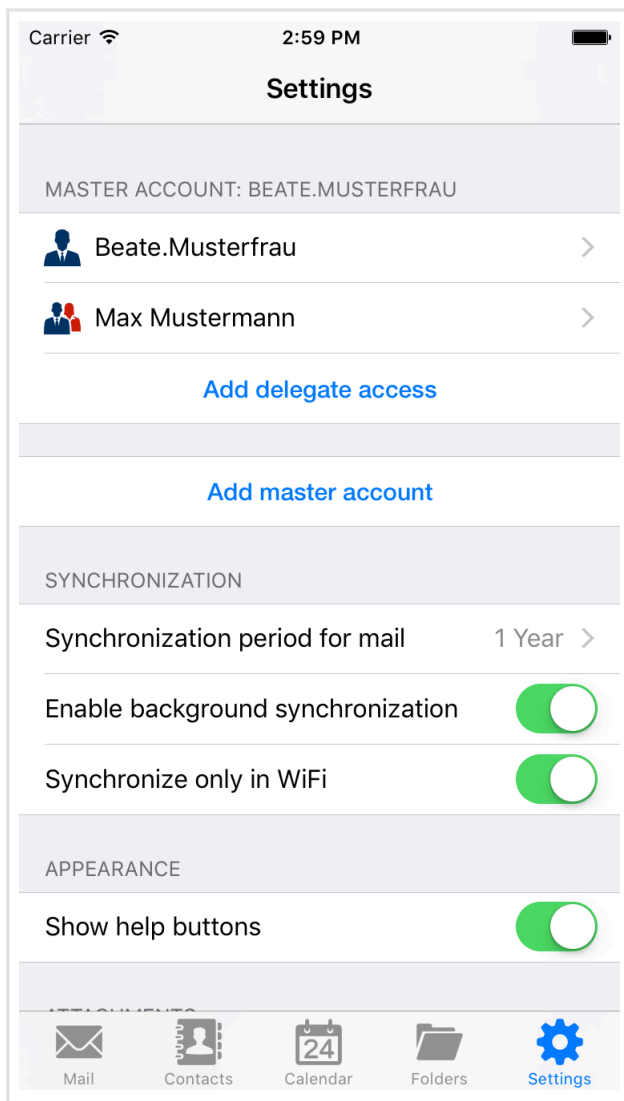
- The synchronization configuration can be accessed in the settings.
- You can configure the synchronization period for mail. This specifies the time period for which synchronized messages are stored inside the app. A shorter synchronization period can make database access inside the app faster and more efficient. The default value is 1 year.
- Furthermore, you can enable or disable background synchronization here.
- Moreover, you can limit background synchronization to WiFi networks.

In addition to the above, background synchronization can also be enabled or disabled for single folders. See section "Managing Folders" for more information about this.

6 Managing Folders

In the different sections (mail, contact, calendar) folders of different accounts can be combined into a single view.
You can manage these folders with the "Folder" action in each section or use the Folder section to manage all folders.
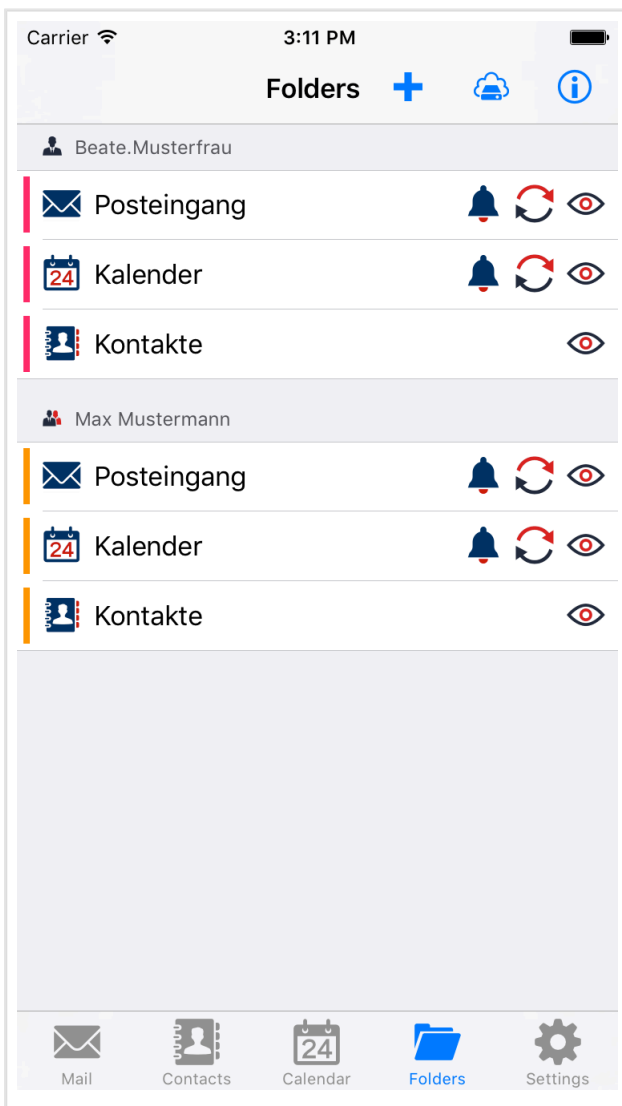
6.1 Folder section
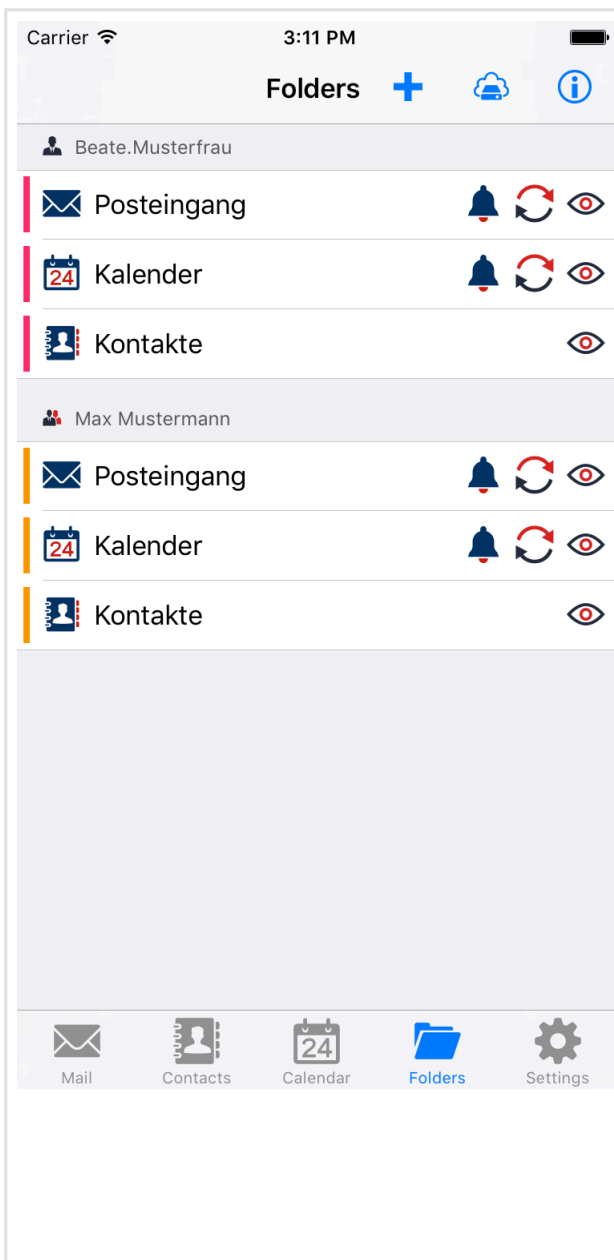
- To go to the folders section select "Folders" on the tab bar.
- From other sections press the folders button 📁.
- You can open a single folder view by clicking on a folder.
- Swipe from right to left on a folder to delete it. All synchronized data will be removed.
- Moreover, you can change the folder color by clicking on the left colored line in front of the folder. Every element is marked with its folder color. In front of every email and every contact the folder color is shown. Every appointment is completely covered with the folder color.
- The following options can be changed by clicking on the icons:
    - 👁 visible in the combined view
    - 🔄 synchronized in the background
    - 🔔 notifications for new emails and for events which have reminders set
- To open a server folder in an online view select the cloud ☁ button.
    - Items in the online view will be displayed directly without synchronizing the elements to the device.

6.2 Adding folder

Carrier 🔶 3:11 PM 🔋	• To add a folder click the "+" button at the top.

- To add a folder click the "+" button at the top.

Carrier 🔋	3:12 PM	▬
Cancel	**Add folder**	ⓘ

👤	Beate.Musterfrau	›
👥	Max Mustermann	›
📅	Add a shared calendar	›

- If there are multiple accounts choose one.

Carrier 🗢	3:12 PM	🔋
‹ Back	**Add folder**	ⓘ

✅ ✉ Entwürfe

⊕ ✉ Gelöschte Elemente

⊕ ✉ Gesendete Elemente

⊕ ✉ Junk-E-Mail

    📇 Kontakte   ›

⊕ ✉ Postausgang

⊕ ✉ Synchronisierungsprobleme   ›

⊕ ✉ testordner

Public folders

⊕ ✉ ISEC7 AU   ›

⊕ ✉ MED   ›

⊕ ✉ Servicedesk   ›

Cancel   Add 1 folders
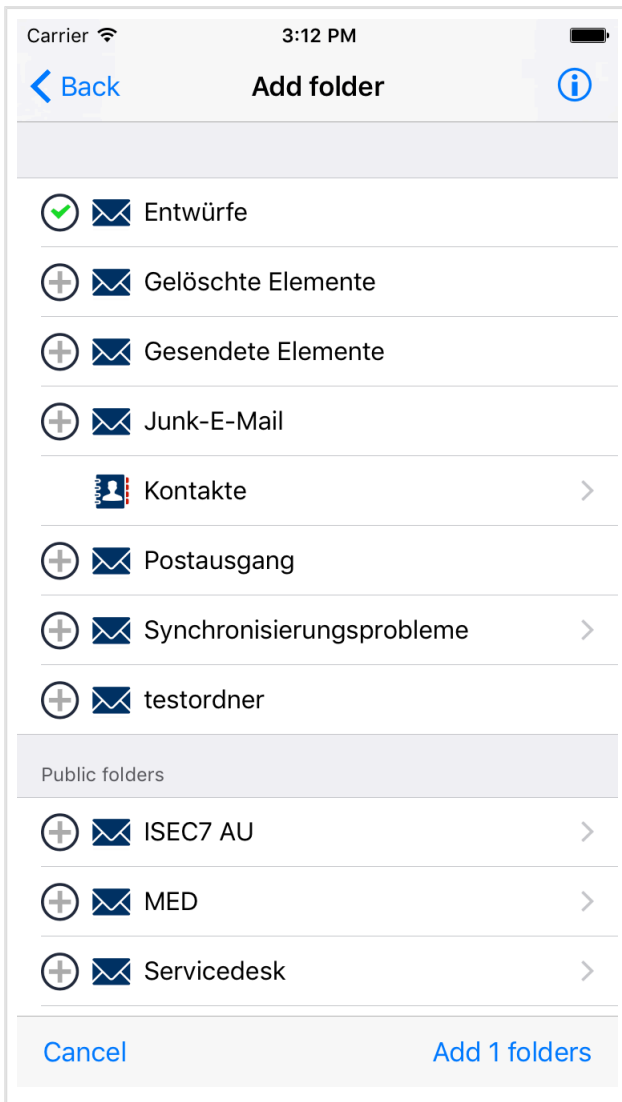
- The list of available folders will be displayed. Already added folders will be filtered out.
- Add folders by clicking the left button.
- Folders with subfolders have an indicator. Click those folders to open.
- When all folders that should get added are selected click the "Add x folders" button at the bottom right.

7 Move Items
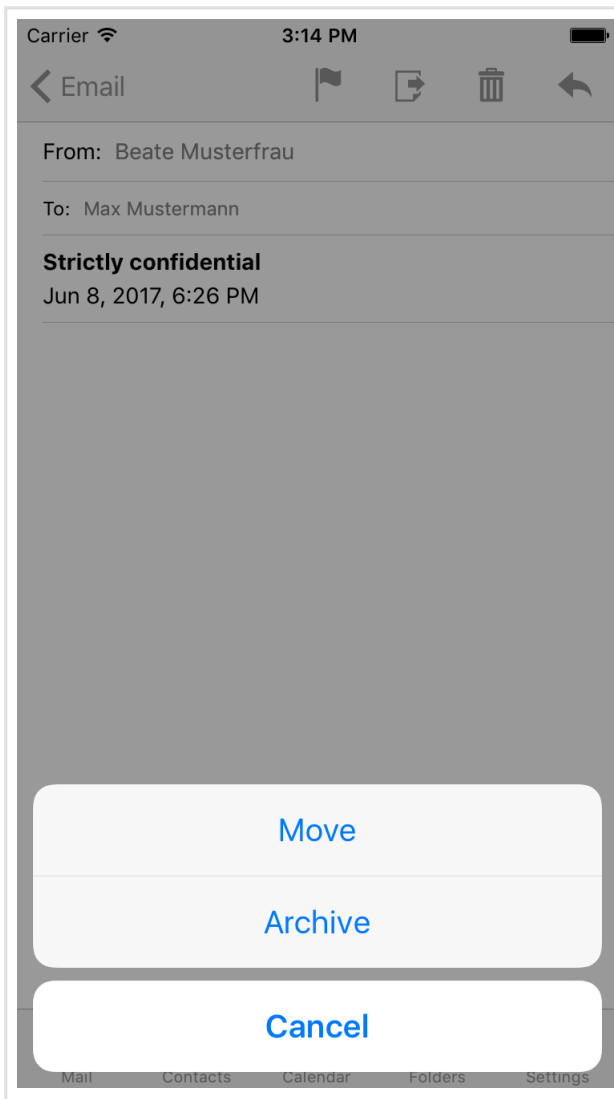
- To move an item press the move button and select "Move" from the menu.

Carrier 🛜   3:15 PM

❮ Back   **Move message**   ⓘ

✉ Entwürfe

✉ Gelöschte Elemente

✉ Gesendete Elemente

✉ Junk-E-Mail

📁 Kontakte   ›

✉ Postausgang

✉ Posteingang

✉ Synchronisierungsprobleme   ›

✉ testordner

Public folders

✉ ISEC7 AU   ›

✉ MED   ›

Cancel
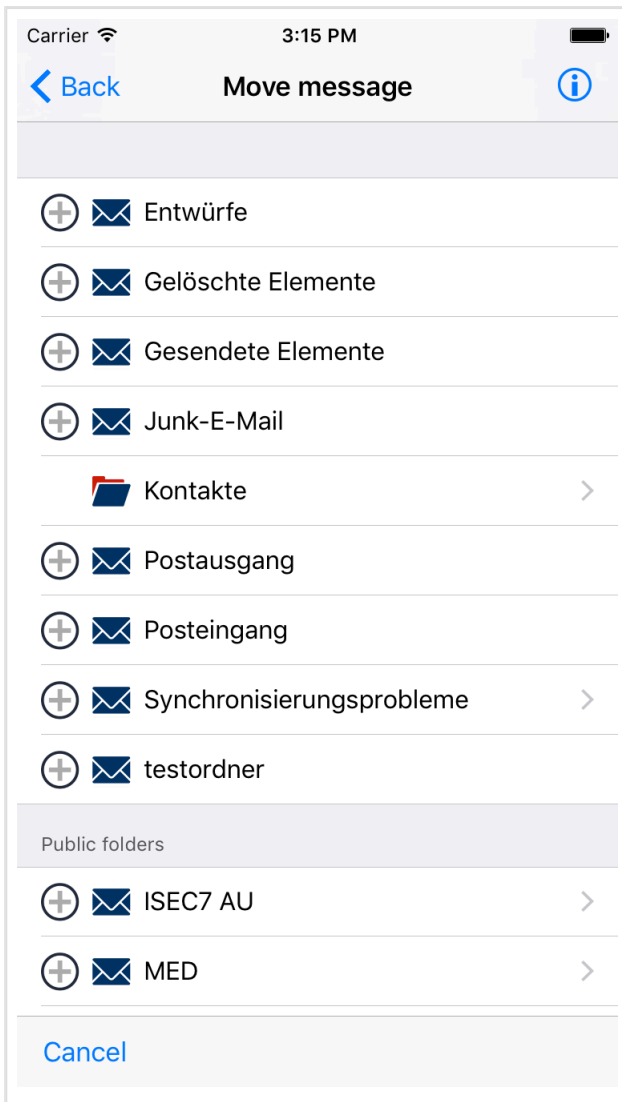
- You can now choose the target account and folder.
- Moving between accounts on the same server is supported.
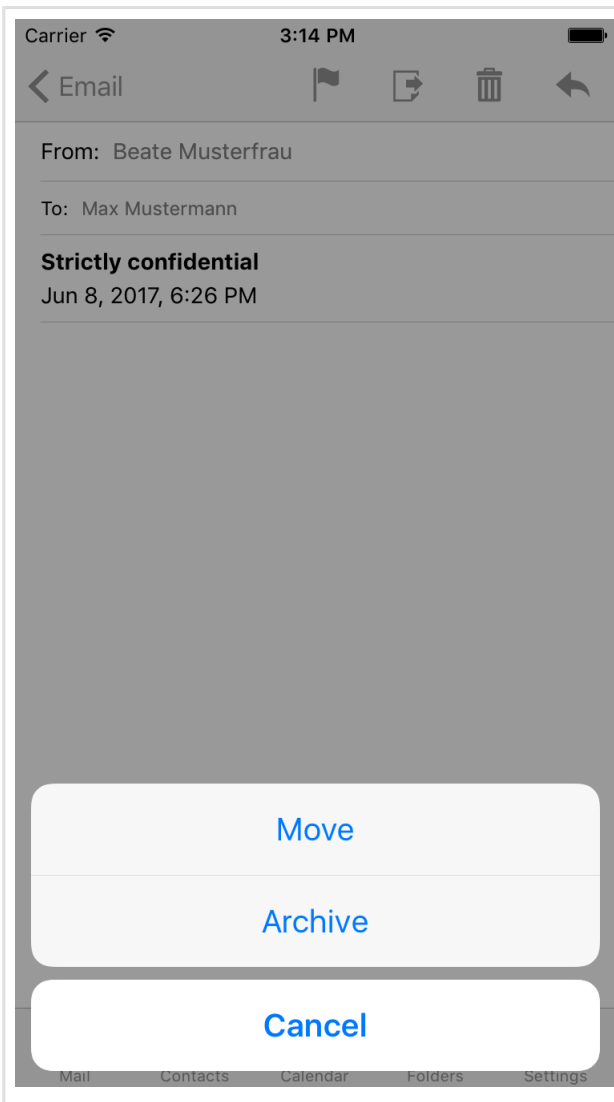
- Mails that belong to an account that has archive functionality can be moved to the archive by pressing the move button and select "Archive" from the menu.

8 Categorize Items

Categories are supported with Exchange 2010 or higher.

The category list for each user is refreshed with each synchronization.

As the category list is stored in the user's calendar folder you need at least read permissions on this folder.

Editing of categories is not supported in MED, you can edit them in Outlook and MED will retrieve the changes with the next synchronization.

Categories are shown in lists and detail views.
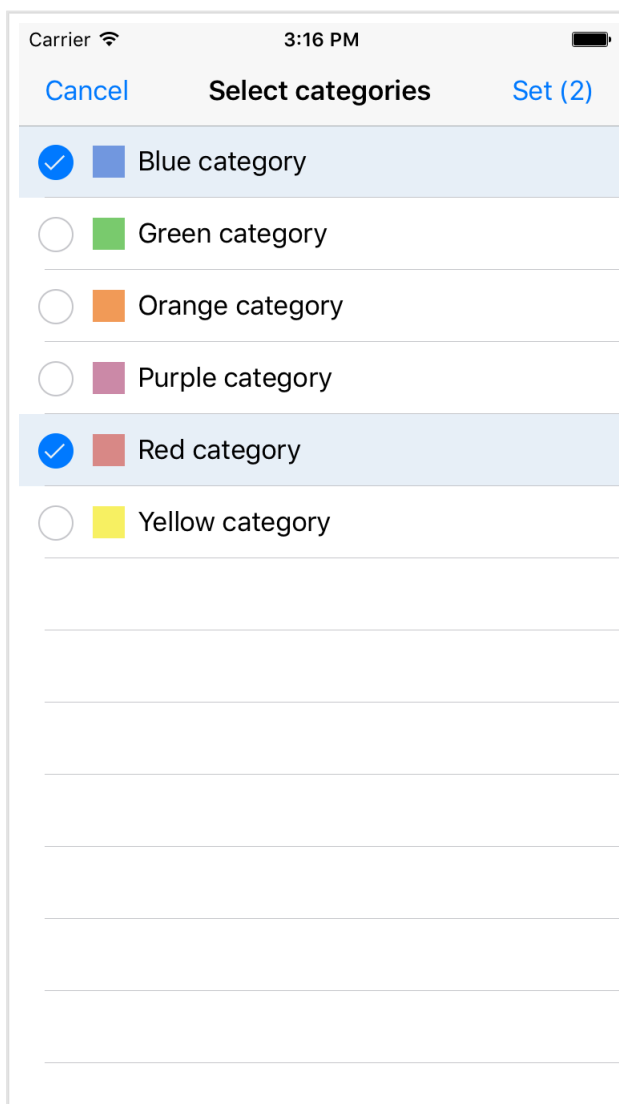
- To categorize a message press the flag button and select "Categorize" from the menu.
- To categorize a contact or an event press the edit button and select "Categories".

9 Configure a Sent Items Folder

When an email is sent using ISEC7 Mobile Exchange Delegate then the sent email is stored in the sent items folder of a master account. While this reflects the default behavior of Outlook it may be useful in various situations to move the sent email to another folder.

- To achieve this there is an additional option in the configuration pane of each account (both master accounts and delegate accesses). There is a switch "Move sent emails to folder". When this switch is enabled a folder can be selected to which sent emails will from now on be moved. It is also possible to choose a folder of another account. Furthermore, it is possible to choose a public folder. The account of the selected folder only has to be on the same server. Emails cannot be moved between different servers.

- All subsequently sent emails of that account will be moved to the selected folder without further interaction.

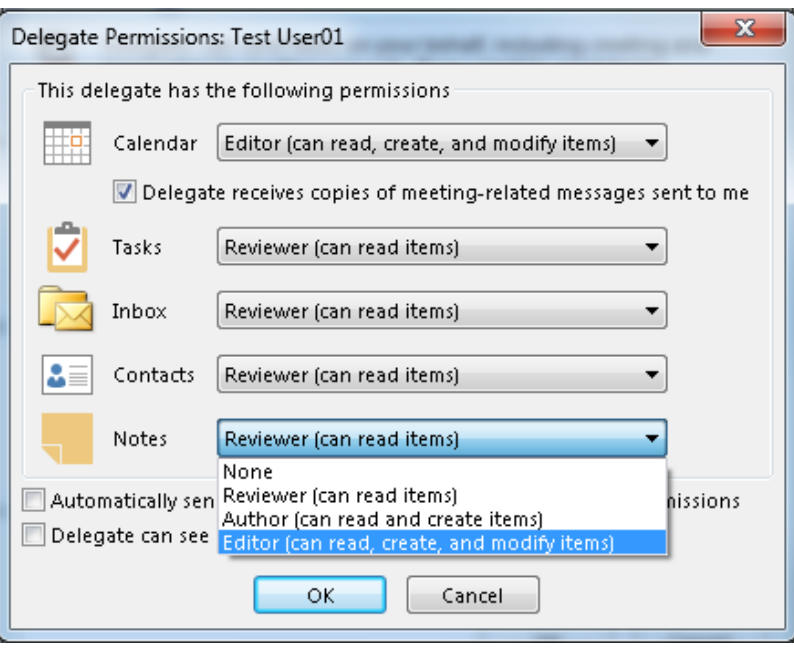# 10 Microsoft Outlook Documentation
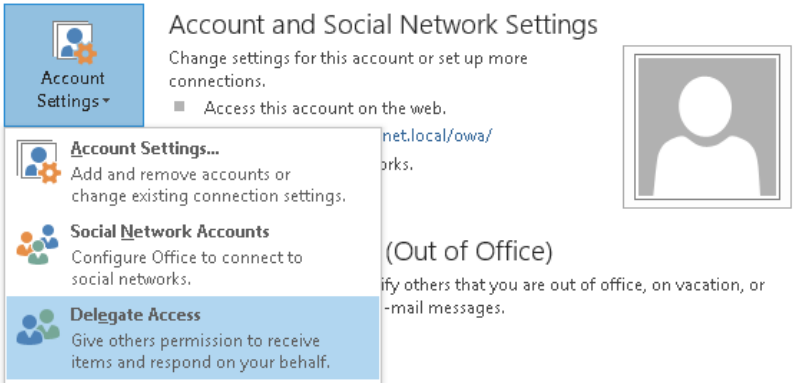
10.1 Delegate permissions

To give other users access to your folders, permissions in your Outlook have to be configured accordingly.

Please mind that private items are only supported for your own account. Accessing items marked as private in folders of delegate accounts is not possible.
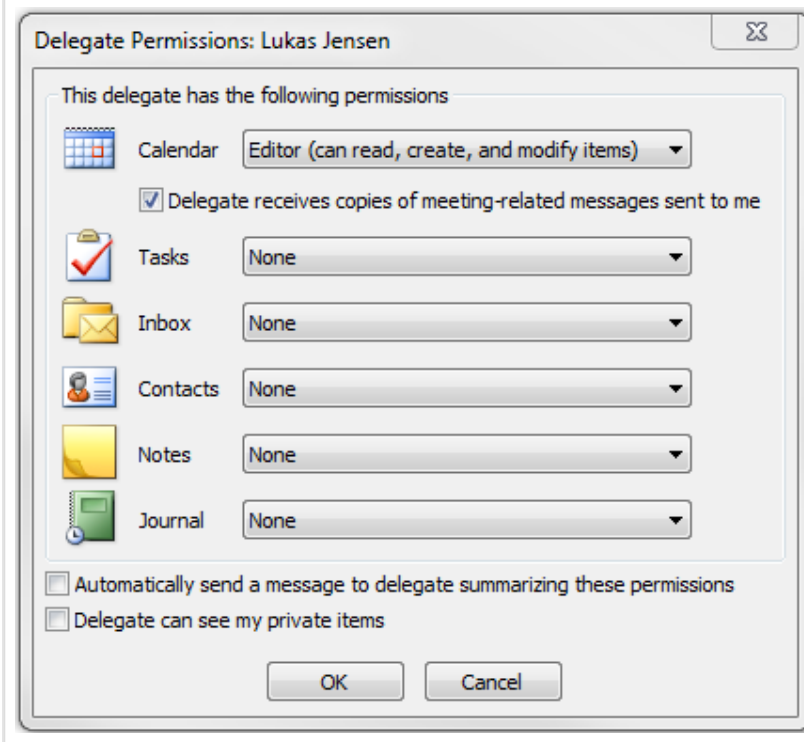
10.1.1 Outlook 2013 & 2016

- Select "Info" under "File" and modify the account settings for "Delegate Access".

- The minimal level is "Reviewer".
- If the delegate should be able to create, edit and delete items the level should be set to "Editor".

10.1.2 Outlook 2003 / 2007 & 2010
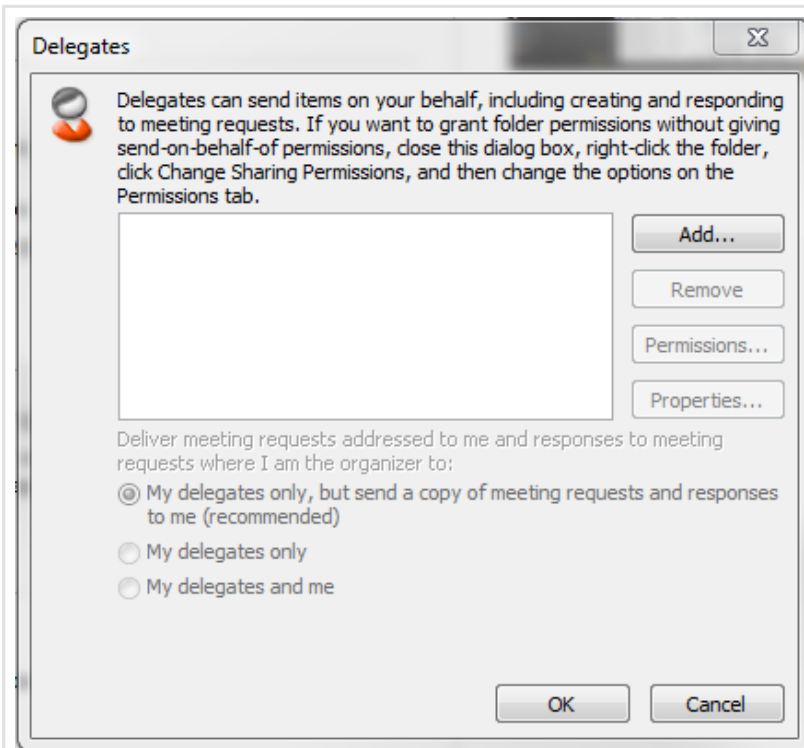
- To configure these permissions, open Settings in Outlook and navigate to Delegates


- Click "Add" and choose the person you would like to grant access to your calendar and set the desired access level.

10.2 Additional folders

To access other folders the permissions have to be set separately. The topmost folder (Outlook Today or MsgFolderRoot) has to be visible for the accessing user, in addition to the accessed folders, if folders other than the default folders (inbox, calendar) are to be shared. All folders that delegates have access to, have to be visible and have at least read access.
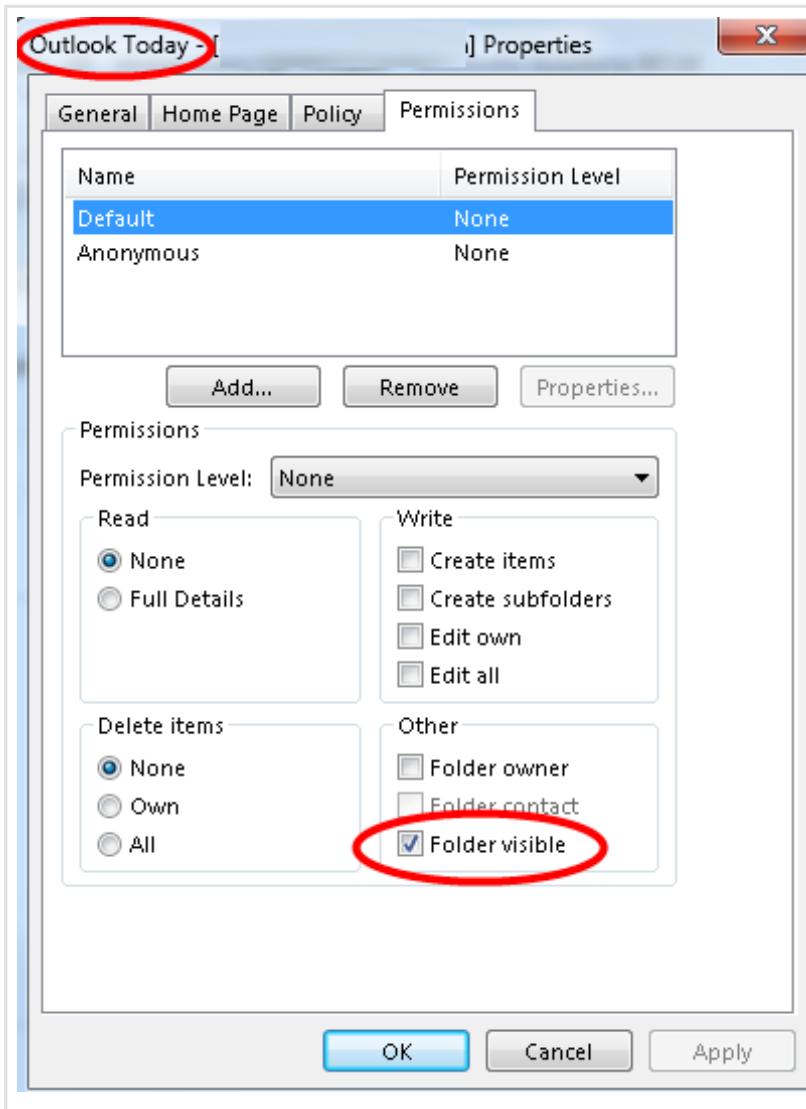
- You can change permissions by right clicking a folder, properties or folder permissions, permissions.
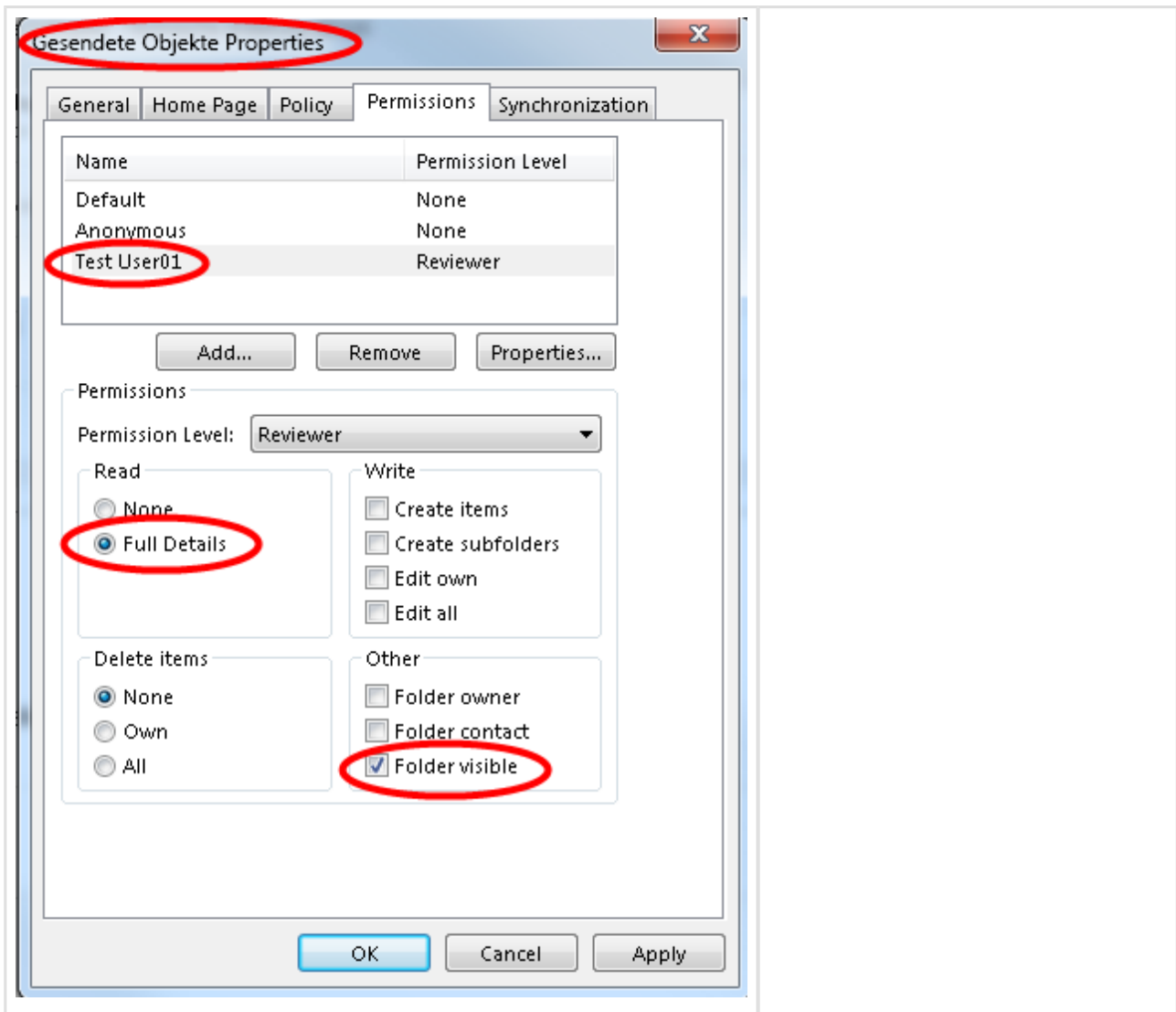
Public folders are always accessed with the own account. Access to public folders with delegate permissions is not possible.

10.3 Shared calendar

A calendar can be shared without giving delegate permissions. Then only the calendar can be accessed. Sharing a calendar is not only limited to the default folder calendar. Additional calendar folders can be created and shared.

Every appointment can be marked as private so that others cannot see it in the shared calendar.

To share a calendar an email containing a sharing invitation is sent. The sharing invitation grants the recipient access to your Calendar. Optionally the email can contain a request for the permissions to view the recipient's Calendar.

10.3.1 How to share a calendar

	• In Outlook go to Calendar. • In the navigation area click on Share Calendar.
	• Now, you can create the email containing the sharing invitation. • The receiver of this email is the person you want to give access to your Calendar. In the To-field enter the name of that person. • Furthermore, you can request the permission to view the recipients Calendar.