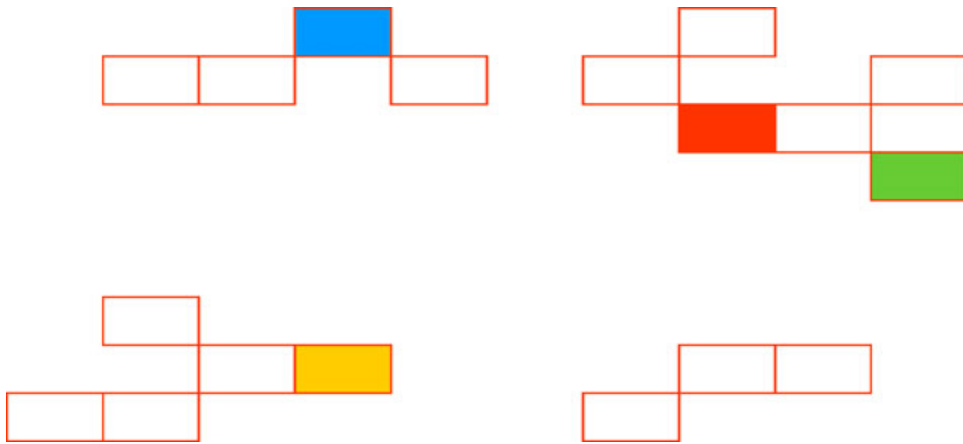


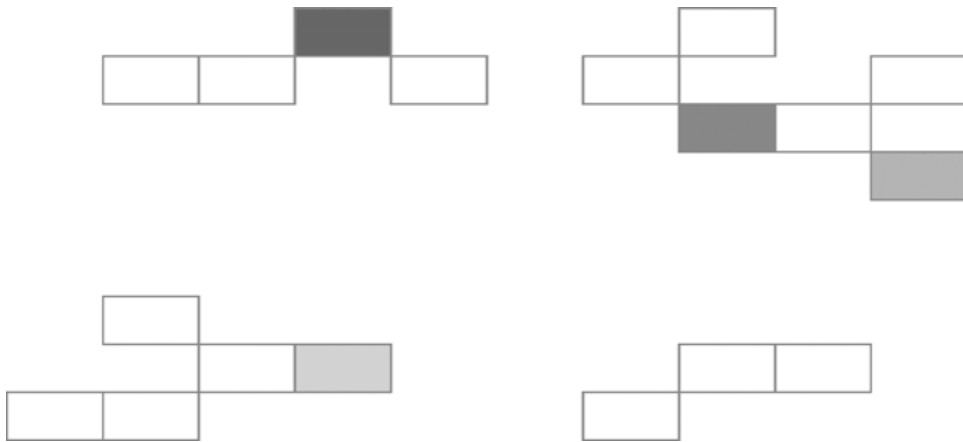
How to Install Microsoft Mobile Information Server 2002 Server ActiveSync



Joey Masterson

Microsoft®

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Introduction

This paper describes how to install Server ActiveSync®, a new component of the Microsoft® Outlook® Mobile Access application included with Microsoft Mobile Information Server 2002. Server ActiveSync allows users to wirelessly synchronize their Exchange 2000 data with their Pocket PC 2002 devices. In contrast, under a full deployment of Mobile Information Server 2002, users can browse corporate information on a variety of devices, including Wireless Application Protocol (WAP) 1.x phones. Mobile Information Server 2002 can also enable users to have important information sent to their wireless devices as custom notifications.

To have the full capabilities of Mobile Information Server 2002, however, you must update the Active Directory® directory service using Mobile Information Server DomainPrep and ForestPrep. Installing Server ActiveSync alone, by contrast, does not require changes to Active Directory. Therefore, the administrative overhead of a stand-alone Server ActiveSync deployment is much lower than that of a full Mobile Information Server 2002 deployment, both in terms of domain controller administration in the Microsoft Windows® 2000 forest as well as postinstallation configuration.

Use this paper to find out how to install and configure Server ActiveSync in your organization.

Note The information in this document describes a first-time deployment of Mobile Information Server 2002 Server ActiveSync only. If you are upgrading from Mobile Information Server 2001, and you want to install Server ActiveSync only, follow the upgrade instructions in the Mobile Information Server 2002 documentation.

1

Understanding Server ActiveSync

When you install Server ActiveSync in your network environment, users can wirelessly synchronize their Microsoft Exchange 2000 data with their Pocket PC 2002 device. Understanding how users synchronize their devices using your corporate network is important when considering how adding wireless access to your corporation affects network security and authentication.

Server ActiveSync Network Traffic

Server ActiveSync allows users to synchronize the data on their Exchange 2000 server mailboxes to their Pocket PC 2002 devices. The information that users can access from their devices includes:

- E-mail
- Calendar appointments
- Contacts

When a synchronization request arrives at the Server ActiveSync computer, Internet Information Services (IIS) authenticates the user and verifies in Active Directory that the user's account is enabled for synchronization. The synchronization request is then processed by Server ActiveSync, which synchronizes any changes between the data on the user's Pocket PC and his or her Exchange mailbox.

Server ActiveSync Deployment Scenarios

When using the Server ActiveSync features of Mobile Information Server 2002 alone, it is not necessary to expose the Server ActiveSync computer to Internet traffic. Instead, you can locate the server within the corporate network. Figure 1.1 shows this kind of deployment.

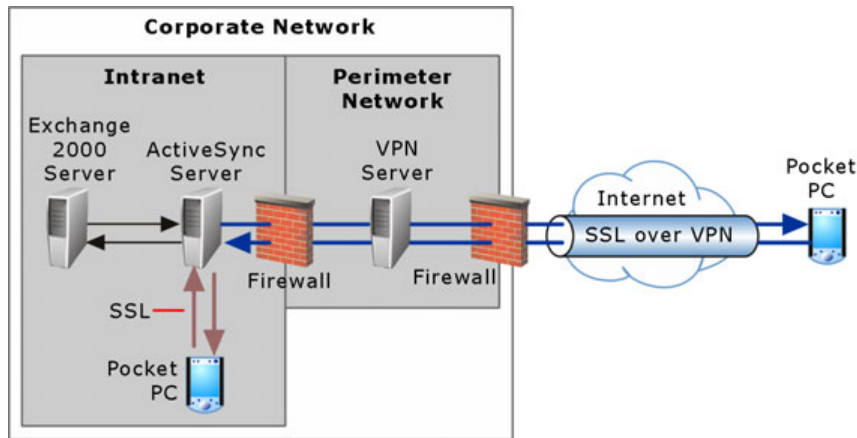


Figure 1.1 Server ActiveSync behind a perimeter network

Locating the Mobile Information Server computer with Server ActiveSync only allows you to keep the computer within the corporate network and greatly enhances security, because the Mobile Information Server computer is not directly exposed to Internet traffic.

Traffic generated from Pocket PC 2002 devices over the intranet to the computer running Server ActiveSync is protected with Secure Sockets Layer (SSL) encryption. Pocket PC 2002 devices that are located outside of the corporate network establish a virtual private network (VPN) connection using SSL through the Internet, but Pocket PC 2002 devices within the corporate network connect directly to the Server ActiveSync computer using SSL. Although data traveling between the device and the Server ActiveSync computer is protected, information sent between the Server ActiveSync computer and the Exchange server is not protected. For this reason, you should implement IPSec from the Server ActiveSync computer to the Exchange servers. For information about IPSec and Mobile Information Server, see “Using IPSec with Mobile Information Server 2002,” which can be found at (<http://go.microsoft.com/fwlink/?LinkId=12231>). For more information about IPSec, see the Windows 2000 Server documentation.

You can also install Server ActiveSync on a computer located within the perimeter network (also known as DMZ, demilitarized zone, and screened subnet). Figure 1.2 shows this kind of deployment.

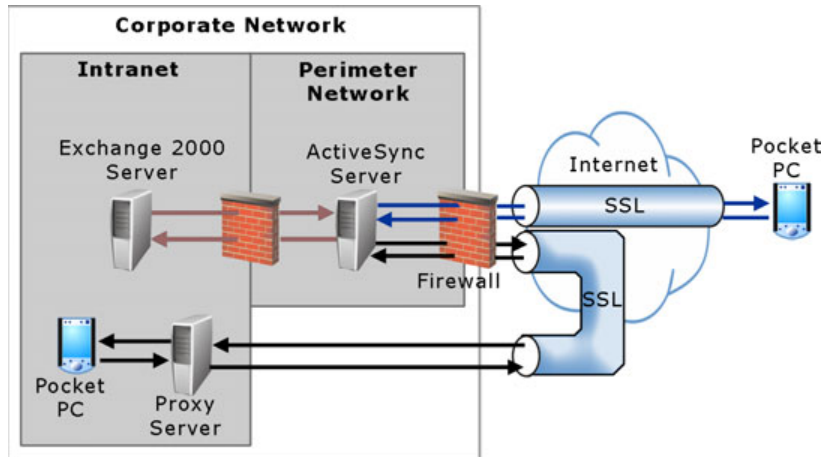


Figure 1.2 Server ActiveSync located within a perimeter network

In this deployment, devices with both intranet and Internet connections connect to the Server ActiveSync computer through the Internet. Devices with an intranet connection connect by using a proxy server to route the synchronization request out to the Internet, where the request can reach the Server ActiveSync computer. Devices with an Internet connection can connect directly to the Server ActiveSync computer. As noted previously, all traffic between the device and the Server ActiveSync computer is encrypted using SSL.

Note If you decide to deploy your Server ActiveSync computer within the perimeter network, it is important to set up IPSec between the Server ActiveSync computer and the Exchange 2000 servers that communicate with it.

When the synchronization request arrives on the Server ActiveSync computer, IIS authenticates the user and confirms that the user's account is enabled for server synchronization by verifying information in Active Directory. The synchronization request is then processed by Server ActiveSync, which synchronizes any changes between the data on the Pocket PC and the user's Exchange mailbox.

Server ActiveSync Security

When you deploy Server ActiveSync in your internal network, you enable remote access to internal corporate information, which should be planned carefully. Before you deploy Server ActiveSync, therefore, familiarize yourself with the information in this section.

Using SSL with Server ActiveSync

Server ActiveSync handles synchronization traffic between the enterprise network and the device. Because data sent between the Pocket PC 2002 device and the Server ActiveSync computer is sent across the Internet, it is important that you encrypt this data. SSL, used by Server ActiveSync, is the industry standard for encrypting data on the Internet.

To encrypt your data, install an SSL certificate on the computer that will run Server ActiveSync. Pocket PC 2002 devices support only certificates issued by trusted certification authorities (CAs); you must therefore use an SSL certificate provided by one of the following CAs:

- Verisign/RSA Secure Server
- Verisign Class 1 Public Primary CA
- Verisign Class 2 Public Primary CA
- Verisign Class 3 Public Primary CA
- Verisign Class 3 Public Primary CA (2028)
- GTE Cybertrust ROOT
- GTE Cybertrust Solutions ROOT
- Thawte Server CA
- Thawte Premium Server CA
- Entrust.net Secure Server
- Entrust.net CA (2048 bit)

Important If the Server ActiveSync computer has an SSL certificate issued by a CA other than those installed by default, users receive an **Internet_45** error when attempting to synchronize using Server ActiveSync.

Data traveling between the Server ActiveSync computer and the device is encrypted using SSL; however, data traveling between the Server ActiveSync computer and the servers running Exchange is unencrypted by default. You can encrypt this data as well by implementing IPSec from the Server ActiveSync computer to the Exchange servers. For the highest levels of security, use IPSec to encrypt synchronization traffic.

Disabling SSL Certificate Validation for a Test Environment

If you want to deploy Server ActiveSync in a test environment before you deploy Server ActiveSync in your internal network, you can disable SSL certificate validation on the device by running a special .cab file on the Pocket PC 2002 device. This .cab file, called AS_CERT_OFF.cab, is available on the Mobile Information Server CD in the \Support\Tools\Disable SSL directory. Instructions on using the .cab file to disable certificate validation are available in the Readme file in the same directory.

Important Disabling certificate validation is provided for testing purposes and, for security reasons, is not recommended in a production environment.

Server ActiveSync Authentication

Before Pocket PC users can synchronize with the Exchange server, they must provide their Windows user name and password. These credentials are always the standard domain user name and password for the user, even when separate wireless accounts are used for browsing with Mobile Information Server. When the synchronization request arrives at the Server ActiveSync computer, IIS authenticates the user and confirms that the user's account is enabled for server synchronization by verifying that the user is a member of the **MIS Mobile Users** group.

Note User passwords are encrypted with either Kerberos version 5 or NTLM authentication protocols between the Server ActiveSync computer and the Exchange server at the enterprise.

Virtual Directory Security

Server ActiveSync uses a special virtual directory called MSAS, which is installed in IIS when you install Server ActiveSync. The MSAS virtual directory enables wireless-enabled Pocket PC 2002 device users to synchronize e-mail, calendar, and contacts data to their Exchange 2000 server securely and directly. The following IIS virtual directory settings are necessary in order to use Server ActiveSync.

Table 1.1 MSAS virtual directory settings

Virtual directory	Description	Authentication settings	Domain and IP settings
MSAS	Synchronizes data between Pocket PC 2002 devices and Exchange 2000 servers	Basic Authentication	All IP addresses granted access

Server ActiveSync Port Security

If you are locating the Server ActiveSync computer within the perimeter network, you must configure your external and internal firewalls for network traffic generated by Server ActiveSync.

Server ActiveSync Port Requirements for the Internal Firewall

For Server ActiveSync computers to function in a perimeter network, the following ports on the internal firewall between the Server ActiveSync computer and the intranet must be open in both directions.

Table 1.2 Server ActiveSync port requirements

Source	Source port	Destination port	Protocol	Description
Exchange 2000	80	Any	TCP	HTTP

Using IPSec Through the Internal Firewall for Server ActiveSync

Alternatively, you can configure IPSec on the Server ActiveSync computer and the Exchange 2000 servers that communicate with it. In this case, you only need to open the following ports to and from the Server ActiveSync computer and the Exchange 2000 servers.

Table 1.3 Server ActiveSync IPSec port requirements through the internal firewall

Source port	Destination port	Protocol	Description
Any	50	IP	Encapsulating Security Protocol
Any	51	IP	Authentication Header Protocol
Any	500	UDP	ISAKMP
50	Any	IP	Encapsulating Security Protocol
51	Any	IP	Authentication Header Protocol

Server ActiveSync Port Requirements for the External Firewall

For Server ActiveSync to function in a perimeter network, the following ports must be open to and from the external firewall and the Server ActiveSync computer.

Table 1.4 Server ActiveSync port requirements through the external firewall

Source port	Destination port	Protocol	Description
Any	443	TCP	HTTPS

MIS Mobile Users Security Group

During installation of Server ActiveSync, Setup creates a new security group called **MIS Mobile Users**. Members of this group can synchronize data on their Pocket PC using Server ActiveSync. In a full deployment of Mobile Information Server, you use the **Wireless Mobility** tab in **Active Directory Users and Computers** to configure users. However, the **Wireless Mobility** tab is not available in the Server ActiveSync stand-alone installation. Instead, you use the Enterprise Device Setup tool to add multiple users to the **MIS Mobile Users** group. You can also add users to the group manually by using Active Directory Users and Computers.

2

Configuration Requirements for Server ActiveSync

Before you install Server ActiveSync on a computer, make sure that the computer meets the following configuration requirements:

- The computer meets minimum hardware requirements.
- The computer runs the correct version of Windows 2000 Server.
- IIS components are installed.
- The SSL certificate is installed and configured.

These requirements are discussed in the following sections.

Minimum Hardware Requirements

The computer running Server ActiveSync must meet the following minimum requirements:

- 500 MHz or faster Pentium II-compatible CPU. Dual processors are recommended.
- 256 MB RAM. 512 MB to 1 GB RAM is recommended.
- 50 MB of available hard disk space.
- One IP address for synchronization traffic.
- NTFS file system (NTFS).

Windows 2000 Server Requirements

A Server ActiveSync-only deployment requires:

- Windows 2000 Server Service Pack 2 (SP2) or later
- or-
- Windows 2000 Advanced Server SP2 or later.

For information about installing and configuring Windows 2000 Server or Windows 2000 Advanced Server, see the Windows 2000 documentation.

Installing IIS Components

Server ActiveSync uses the IIS components SMTP Service and World Wide Web Server. These components are installed by default when you install Windows 2000 Server or Windows 2000 Advanced Server. If these components were not installed during Windows 2000 setup, you must manually add these components.

► To manually add IIS components

1. Insert the Windows 2000 Server CD into the computer's CD-ROM drive.
2. On the **Start** menu, point to **Settings**, and then click **Control Panel**.
3. Double-click **Add/Remove Programs**, and then click **Add/Remove Windows Components**.
4. On the **Windows Component** page, select **Internet Information Services (IIS)**, and then click **Details**.
5. Select the **SMTP Service** and **World Wide Web Server** check boxes, and then click **OK**.
6. Click **Next**.

Installing and Configuring an SSL Certificate

Synchronization traffic must be secured with SSL on your Server ActiveSync computer. If you plan to use SSL to secure synchronization traffic, you must install an SSL certificate on your Server ActiveSync computers. The certificate must be from a certification authority (CA) that is recognized by Pocket PC 2002 devices. For a complete list of trusted CAs for Pocket PC 2002 devices, see "Using SSL with Server ActiveSync" earlier in this paper. If you deploy your own certificates, users will not be able to synchronize.

Upgrading Your Exchange 2000 Servers

Before you install Server ActiveSync, you must upgrade your Exchange servers to Exchange Server Service Pack 2 or later. For information about downloading the latest service pack for Exchange 2000 Server, go to the Exchange Server Web site (<http://www.microsoft.com/exchange>). For information about how to deploy Exchange 2000 Service Pack 2, see the Exchange 2000 Service Pack 2 Deployment Guide (<http://go.microsoft.com/fwlink/?LinkId=12232>).

3

Installing Server ActiveSync

This section describes the necessary permissions required for completing administrative tasks associated with Server ActiveSync and the process for installing Server ActiveSync.

Permissions Summary

The following table describes the necessary permissions associated with installing and configuring Server ActiveSync. For a complete list of the permissions associated with Mobile Information Server 2002, see the Mobile Information Server 2002 documentation.

Table 3.1 Required permissions for installing and configuring Server ActiveSync

Task	Permissions
Install Server ActiveSync	Administrator (local)
Install administrative tools	Administrator (local)
Grant synchronization access to Pocket PC 2002 users	Account operators

► To install Server ActiveSync

1. Insert the Mobile Information Server 2002 CD into the computer's CD-ROM drive.
2. Click **Start**, click **Run**, type **e:\Setup /vMSAS=1**, where **e:** is your CD-ROM drive, and then click **OK**.
3. On the **Welcome** page, click **Next**.
4. On the **Licensing Agreement** page, read the End User License Agreement. If you agree, click **I accept the terms in the license agreement**, and then click **Next**.
5. On the per-seat **Licensing Agreement** page, if you accept the terms of the license agreement, click **I have read and accept the terms in the license agreement**, and then click **Next**.

6. On the **Product Identification** page, type the 25-digit CD key. You can find the CD key on the back of the product CD case. Click **Next**.
7. On the **Component Selection** page, Microsoft Server ActiveSync Components and User Configuration Administrative Tools are selected by default. Do not change these settings.
8. If you want to change the installation path, click **Change**, type the new path in the **Folder name** field, and then click **OK**.
9. Click **Next**.
10. On the **Ready to Install the Program** page, click **Install**.
11. On the **InstallShield Wizard Completed** page, click **Finish**.
12. After installation completes, click **Finish**.

After you finish installing Server ActiveSync, you can grant users synchronization access by using the Enterprise Device Setup tool or by using Active Directory Users and Computers to manually add individual users to the MIS Mobile Users security group. The next section describes how to grant users synchronization access.

4

Configuring Users

This section describes how to enable synchronization access for Pocket PC users. You grant Pocket PC 2002 users synchronization access by adding them to the MIS Mobile Users security group. There are two ways to add users to the MIS Mobile Users group:

- Use the Enterprise Device Setup tool.
- Use Active Directory Users and Computers.

Providing Mobile Device Documentation to Your Users

Before your users begin using ActiveSync on their Pocket PC 2002 devices, distribute the Mobile Device documentation file, UserHelp.chm. The UserHelp.chm file is located in the *<language>*\Docs directory of your Mobile Information Server 2002 CD. This information describes how to use ActiveSync on a Pocket PC 2002 device to synchronize Exchange 2000 data.

Using the Enterprise Device Setup Tool

The Enterprise Device Setup tool allows you to grant synchronization access for a user or group of users.

Important You cannot use all of the features of the Enterprise Device Setup tool in a Server ActiveSync-only installation. Only the synchronization features are available.

► **To grant users synchronization access using the Enterprise Device Setup tool**

1. Click **Start**, point to **Programs**, point to **MMIS**, and then click **MIS Enterprise Device Setup**.
2. On the **Connect to Domain** page, type or select from the drop-down list the fully qualified domain name of the domain that contains the users you want to grant synchronization access to, and then click **OK**.
3. Open an existing job file or create a new job file, and then import a list of users to grant synchronization access to. For complete instructions on how to use the Enterprise Device Setup Tool, see “Using Enterprise Device Setup to Configure Users,” in the Mobile Information Server 2002 documentation.
4. Set the **Sync** fields for individual users or for all users in the job file:
5. To grant synchronization access for an individual user, click their **Sync** field in the user table, and then select **Enable** from the drop-down menu.
6. To grant synchronization access for all users in the job file, click **Set Default Values**, select **Enable**, and then click **OK**.
7. After you set the **Sync** field for the users for whom you want to grant synchronization access, in the **Tasks** window, click **Configure Users**.

The users with **Sync** fields set to **Enable** are added to the MIS Mobile Users group and will be able to use Server ActiveSync to synchronize their Pocket PC data with their Exchange 2000 server.

Note For complete instructions on how to use the Enterprise Device Setup tool, see “Using Enterprise Device Setup to Configure Users,” in the Mobile Information Server 2002 documentation.

Using Active Directory Users and Computers

Use Active Directory Users and Computers to add users manually to the MIS Mobile Users group.

- **To grant users synchronization access using Active Directory Users and Computers**
1. Click **Start**, point to **Programs**, point to **Administrative Tools**, and then click **Active Directory Users and Computers**.
 2. Expand the domain node, and in the console tree, click **Users** (or, if you do not use the default Users folder, click the folder that contains your mobile device users).
 3. In the Details pane for your users folder (either Users or a custom folder), right-click the **MIS Mobile Users** group, and then click **Properties**.
 4. On the user's **Properties** page, click the **Members** tab, and then click **Add**.
 5. There are two ways to select the users to grant synchronization access:
Select users from the **Name** column, and then click **Add**.
-or-
Type the users' names in the lower pane.
 6. Click **OK**.

The users you added to the **MIS Mobile Users** group can synchronize data from their Pocket PC devices with their Exchange 2000 server using Server ActiveSync.

Updating User Devices

Before your users can use their Pocket PC 2002 devices to synchronize Exchange data, you must provide your users with the Server ActiveSync software update located in \<language>\PocketPC directory of your Mobile Information Server 2002 CD. Included in this directory are the Server ActiveSync software update instructions, which you should distribute to your users. These instructions contain complete details on how to update their devices with the Server ActiveSync software update.

Information for European HP Jornada Pocket PC 2002 Users

Important HP Jornada Model 56X users must follow these instructions before installing the Server ActiveSync update.

If you are using a European (non-English language) HP Jornada Pocket PC with one of the following model numbers, you must update the firmware of your HP Jornada Pocket PC before you install the ActiveSync ROM update:

HP Jornada 564
HP Jornada 565
HP Jornada 567
HP Jornada 568

If you install the Server ActiveSync software update before you update the HP Jornada Pocket PC 56X firmware, your Jornada will not operate properly. Therefore, do not install the Server ActiveSync software update until you have updated the firmware. To download the firmware updates, go to the HP Web site (<http://www.hp.com/cposupport/software.html>).

After you have installed the latest firmware updates, you can install the Server ActiveSync software update.

► **To determine whether a Jornada Pocket PC 2002 device requires this update**

1. On your Pocket PC 2002 device, tap **Start** and then tap **ActiveSync**.
2. On the ActiveSync screen, tap **Tools** and then tap **Options**.
3. If you see a tab called **Server** on the bottom of the screen, your device is ready to synchronize with an Exchange 2000 server using Mobile Information Server 2002.
4. If the **Server** tab is missing, you must update your device with the Server ActiveSync software update.

5

Installation Checklists

The following sections provide checklists for deploying Server ActiveSync. The preinstallation checklist covers the requirements that must be met before you install Server ActiveSync. Use the installation checklist to properly install Server ActiveSync. Finally, use the postinstallation checklist to ensure that all necessary procedures are completed before your users use Server ActiveSync.

Preinstallation Checklist

Steps	Section
<input type="checkbox"/> Verify that your computer meets the minimum Hardware Requirements.	See "Minimum Hardware Requirements."
<input type="checkbox"/> Verify that your computer is running Windows 2000 Server SP2 or Windows 2000 Advanced Server SP2 or later.	See "Windows 2000 Server Requirements."
<input type="checkbox"/> Install Internet Information Services (IIS) components.	See "Installing IIS Components."
<input type="checkbox"/> Install an SSL certificate using a provider from the list of trusted certification authorities (CAs).	See "Installing and Configuring an SSL Certificate."
<input type="checkbox"/> Upgrade your Exchange 2000 mail servers.	See "Upgrade Your Exchange 2000 Servers."

Preinstallation Checklist (continued)

Steps	Section
<input type="checkbox"/> If you are installing Server ActiveSync in a perimeter network, open the necessary internal and external firewall ports.	See “Server ActiveSync Port Security.”
<input type="checkbox"/> If you are installing ActiveSync in a perimeter network, configure IPSec from the Server ActiveSync computer to any Exchange 2000 servers in your network.	See “Server ActiveSync Port Security.”

Installation Checklist

Steps	Section
<input type="checkbox"/> Run Mobile Information Server 2002 Server ActiveSync-only setup.	See “Installing Server ActiveSync.”

Postinstallation Checklist

Steps	Section
<input type="checkbox"/> Distribute the Mobile Device documentation to your users. Tell them to use this information to install the Server ActiveSync software update and learn how to use Server ActiveSync.	See “Provide Mobile Device Documentation to Your Users.”
<input type="checkbox"/> Add users to the MIS Mobile Users security group using the Enterprise Device Setup tool or Active Directory Users and Computers.	See “Configuring Users.”

Postinstallation Checklist (continued)

Steps	Section
<p><input type="checkbox"/> Update the firmware of any European HP Jornada Pocket PC 2002 devices with model numbers 56X before installing Server ActiveSync software update:</p> <ul style="list-style-type: none">HP Jornada 564HP Jornada 565HP Jornada 567HP Jornada 568 <p>The upgrade instructions for their devices are at: (http://www.hp.com/cposupport/software.html)</p>	See "Updating User Devices."

Conclusion

Deploy the Mobile Information Server 2002 Server ActiveSync component of Outlook Mobile Access in your network environment so that your users can synchronize Pocket PC 2002 devices with their Exchange 2000 data. There is no need to install a complete Mobile Information Server 2002 deployment; because Server ActiveSync does not require you to run Mobile Information Server 2002, your total administrative overhead will be lower.

For more information

Microsoft Mobile Information Server Web site (<http://www.microsoft.com/miserver>)

Microsoft Exchange Server Web site (<http://www.microsoft.com/exchange>)

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