



INFOTRIEVER

User Guide

Corporate Deployment

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Infotriever Corporate Deployment

Overview

Infotriever's web service and desktop software seamlessly integrate and update information from websites, emails and back-end systems into personal information managers (PIMs), such as Microsoft® Outlook®, Lotus Notes®, and Palm OS™, and through sync into numerous PDAs and mobile devices. Hundreds of thousands of mobile professionals in thousands of companies worldwide use Infotriever to save time, improve their productivity and stay in control of their personal information. For more information, please visit www.infotriever.com.

The Infotriever Desktop Software Client

Infotriever is a client-server solution that uses the Infotriever Client desktop software to deliver information directly into PIMs, as supported by Infotriever. The Infotriever desktop software is available for free download from Infotriever, or from Infotriever-enabled partner websites and emails. The software will install on demand when users first attempt to download Infotriever-enabled information from an Infotriever partner website or email.



Privacy

Infotriever may be installed and used anonymously. In this case, no personal or corporate information is shared with Infotriever. In some cases, individual users may opt to personalize their Infotriever software in order to access added features, such as ExecAssist, or the ability to become re-connected to previously downloaded events and contacts when reinstalling Infotriever. Infotriever does not sell or share users' personal information. Infotriever is a member of BBB Online, and Infotriever's TRUST-e certified privacy policy may be viewed at <http://www.infotriever.com/privacy.asp>. Please contact privacy@infotriever.com if you have any questions.

Security

Security is built in to all aspects of the Infotriever service. Infotriever delivers data using HTTPS and minimum 128-bit encryption. Communications between the Infotriever Client desktop software and the Infotriever Communication Server utilizes a mutual authentication protocol with a digital signature to ensure the security of all data. The Infotriever Communication Server is located at Q9, a tier-1 hosting facility, and is protected by multiple hardware and software firewalls. All network traffic is monitored 24x7 to prevent and detect malicious attacks on the Infotriever network. For more information, please view <http://www.infotriever.com/security.asp>, or email security@infotriever.com.

System Requirements

System Configuration

The Infotriever desktop client software supports the following system configurations:

Operating Systems	Organizers	Browsers
<ul style="list-style-type: none"> • Windows 7 • Windows Vista • Windows XP • Windows 2000 • Windows NT 	<ul style="list-style-type: none"> • Microsoft Outlook 2007 / 2003 / XP (2002) / 2000 • Lotus Notes 8.x / 7.x / 6.x / 5.x 	<ul style="list-style-type: none"> • Microsoft Internet Explorer 8.0 / 7.0 / 6.0 • Firefox 3.x / 2.x / 1.5

In addition, users with PDAs or mobile devices that synchronize with the PIMs listed above – such as Blackberry, Palm, Pocket PC or mobile phones – will be able to synchronize their downloaded information into their mobile device.

Firewall

To fully utilize the Infotriever service, please ensure that the following domains are accessible from your corporate environment:

Domain	IP Address	Traffic	Ports
my.infotriever.com	65.110.161.228	Outbound	80 (HTTP) & 443 (HTTPS)
download.infotriever.com	65.110.161.230	Outbound	80 (HTTP)

Administrative Access

In some companies, individual users may be restricted from downloading and installing software. To install and use Infotriever on a computer, the following rights and permissions are required:

- The ability to create directories and files. By default Infotriever will be installed under the default “Program Files” folder, but can be installed to a different folder, if necessary.
- The ability to create registry entries. Administrative rights are required during installation but then Infotriever will run with user rights.
- Permission to install web browser plug-ins (ActiveX for Internet Explorer and Netscape browser plugin for Netscape).
- The ability to display pop-up browser windows from <http://my.infotriever.com> and the Infotriever partner website from which the user wishes to download information. These windows are used to display status information but may be affected by pop-up blocker software and Windows built-in security.

VPN

Some VPN technologies may interfere with the Infotriever Client’s ability to establish HTTP/HTTPS communication with the Infotriever Server. If you experience issues with the installation or usage of Infotriever while connected to your VPN, please try installing and using Infotriever after disconnecting from your VPN.

Pop-Up Blockers

Infotriever does NOT serve up pop-up ads, but we use similar technology to download information to the PIM. Pop-up blockers are included in Internet Explorer, and many toolbars such as those provided by Google, Yahoo! and MSN. In order for Infotriever to

function properly, please either disable the pop-up blocker or configure the pop-up blocking software on your system to allow pop-ups from:

- <http://my.infotriever.com>
- The Infotriever partner website from which the user wishes to download information

For more information, please search our knowledgebase at <http://www.infotriever.com/service.asp>.

Internet Explorer Protected Mode

Internet Explorer 7.0 and 8.0 include features which will prompt users when browser add-ons are called to process items from within the browser. This will cause an information dialog to be displayed during Infotriever web captures.

Corporate Deployment Instructions

Introduction

Infotriever is used by hundreds of thousands of mobile professionals in many of the largest companies worldwide. The instructions below are provided for System Administrators and IT Professionals to deploy the Infotriever Client software to multiple users in corporate environments and to install the software for users with restricted access.

The stand-alone installer is designed for use in environments where:

- applications require IT certification
- individual users may face restrictions with downloading and installing programs

The stand-alone installer contains all the Infotriever files in a single executable and can be used to deploy to multiple users, either individually or through mass deployment methods, such as image files or MSI.

Windows XP / 2000 / NT Requirements

To install Infotriever, the following rights and permissions are required:

- ability to create directories and files. By default, the installer will install to the default Windows Program Files folder (recommended) but this can be changed to another folder, if necessary. If your site restricts writing to the default Program Files folder, it is recommended to change the install path.
- ability to create registry entries
- permission to install web browser plugins (ActiveX for Internet Explorer and browser plugin for Netscape/Mozilla)

Windows 7 / Vista Requirements

With 7 / Vista, Microsoft recommends that normal users use a standard user account with User Account Control (UAC) enabled. Infotriever supports the following user account configurations:

	UAC On	UAC Off
Administrator User	<ul style="list-style-type: none"> • Program Install/Uninstall with UAC prompts • Program execution 	<ul style="list-style-type: none"> • Program Install/Uninstall with UAC prompts • Program execution
Standard User	<ul style="list-style-type: none"> • Program Install/Uninstall with admin approval • Program execution 	<ul style="list-style-type: none"> • Not supported

To install Infotriever, the following rights and permissions are required:

- with User Account Control (UAC) approval, the ability to create directories and files. The installer will install the program executables to the default Windows Program Files folder (recommended). We do not recommend changing the destination folder path for 7 / Vista.
- with User Account Control (UAC) approval, ability to create registry entries
- with User Account Control (UAC) approval, permission to install web browser plugins (ActiveX for Internet Explorer and browser plugin for Netscape/Mozilla)

Instructions - Overview**(To be performed by Company's System Administrator)**

There are two stages to the Infotriever corporate deployment process:

1. File download and image creation – performed by company System Administrator;
2. Individual user configuration and assignment of unique Infotriever client ID – MUST be performed by each individual user.

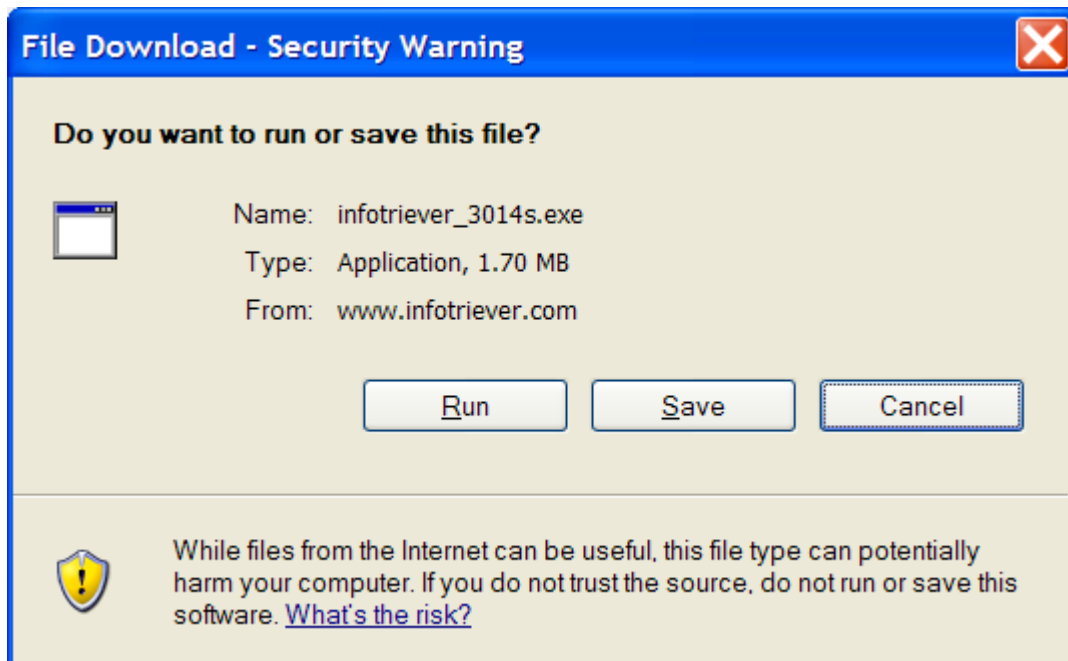
Detailed instructions for the two stages are provided below.

Individual Install Instructions – Windows XP / 2000 / NT**Stage 1: File Download and Extraction****(To be performed by Company's System Administrator)**

Follow these instructions, to use the standalone installer to install the Infotriever software on a single user's system running Windows XP/2000/NT. If you will be performing mass deployments based on creation of an image the please refer to the Mass Deployment Instructions.

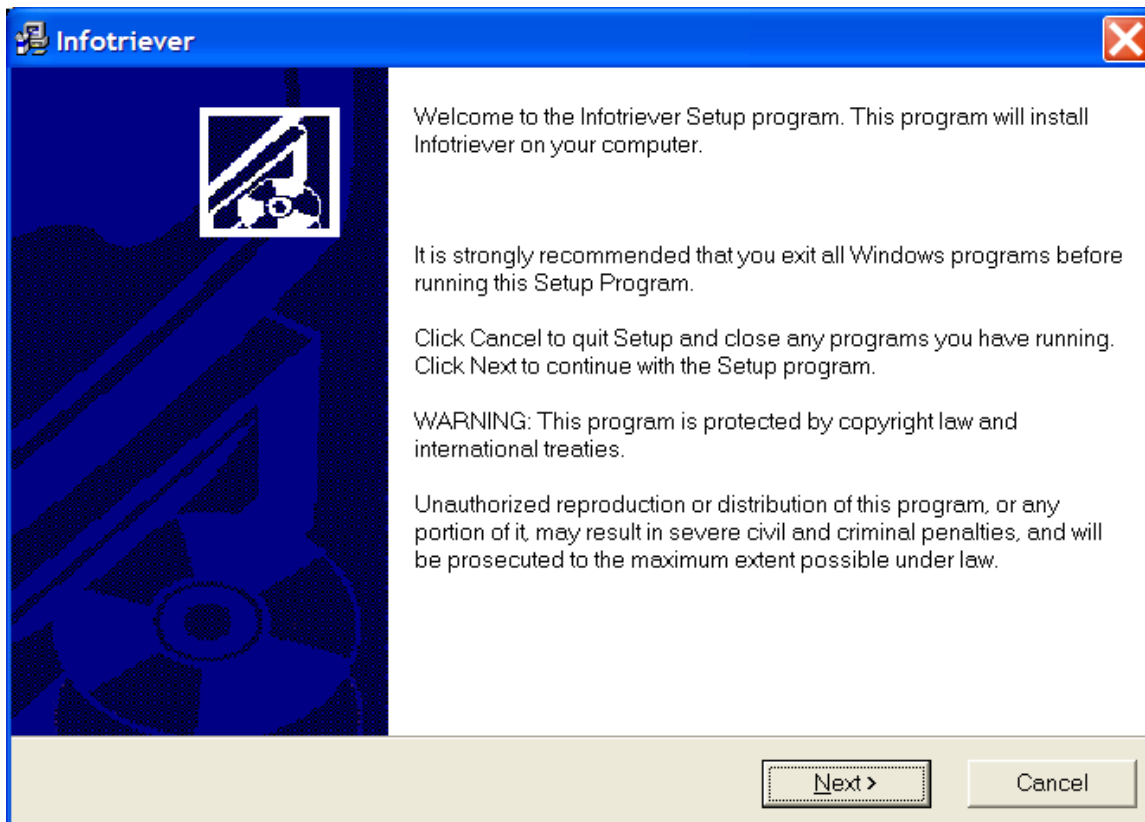
Stage 1 of the deployment process is to be conducted by a System Administrator.

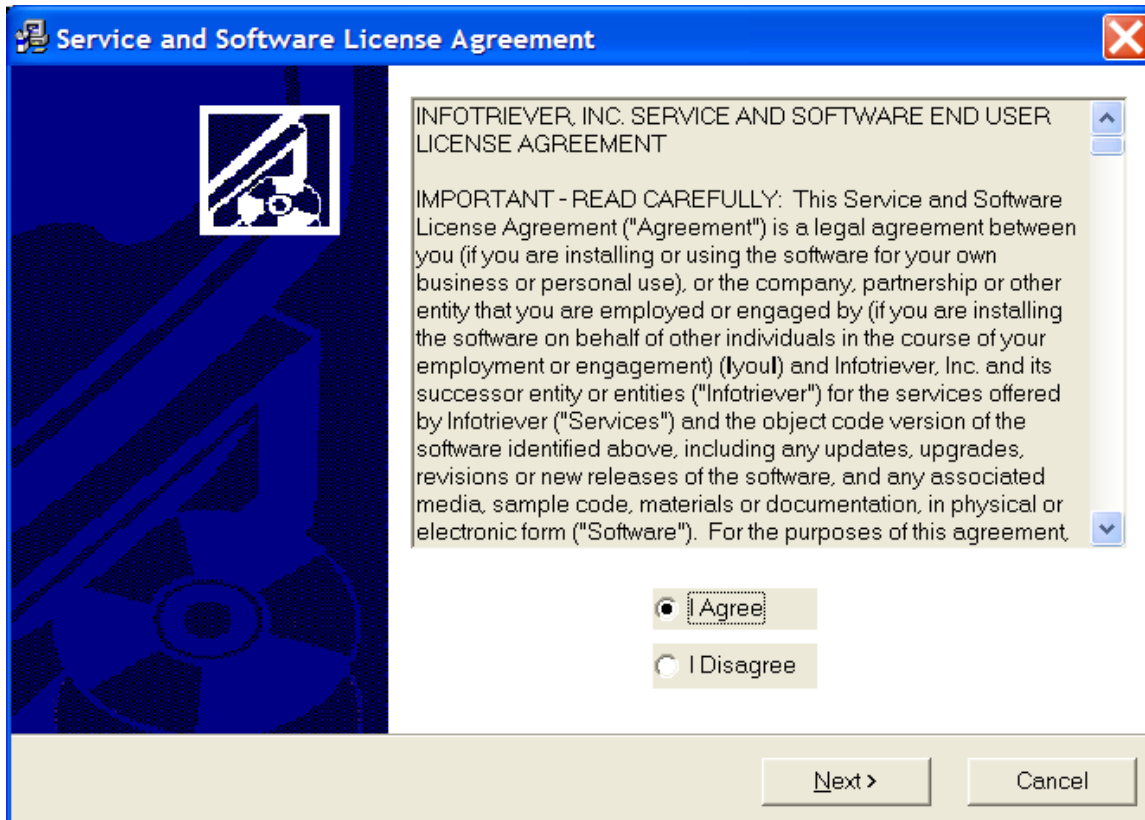
1. On the user's system, download the Infotriever executable from http://www.infotriever.com/download/infotriever_3100S.exe.



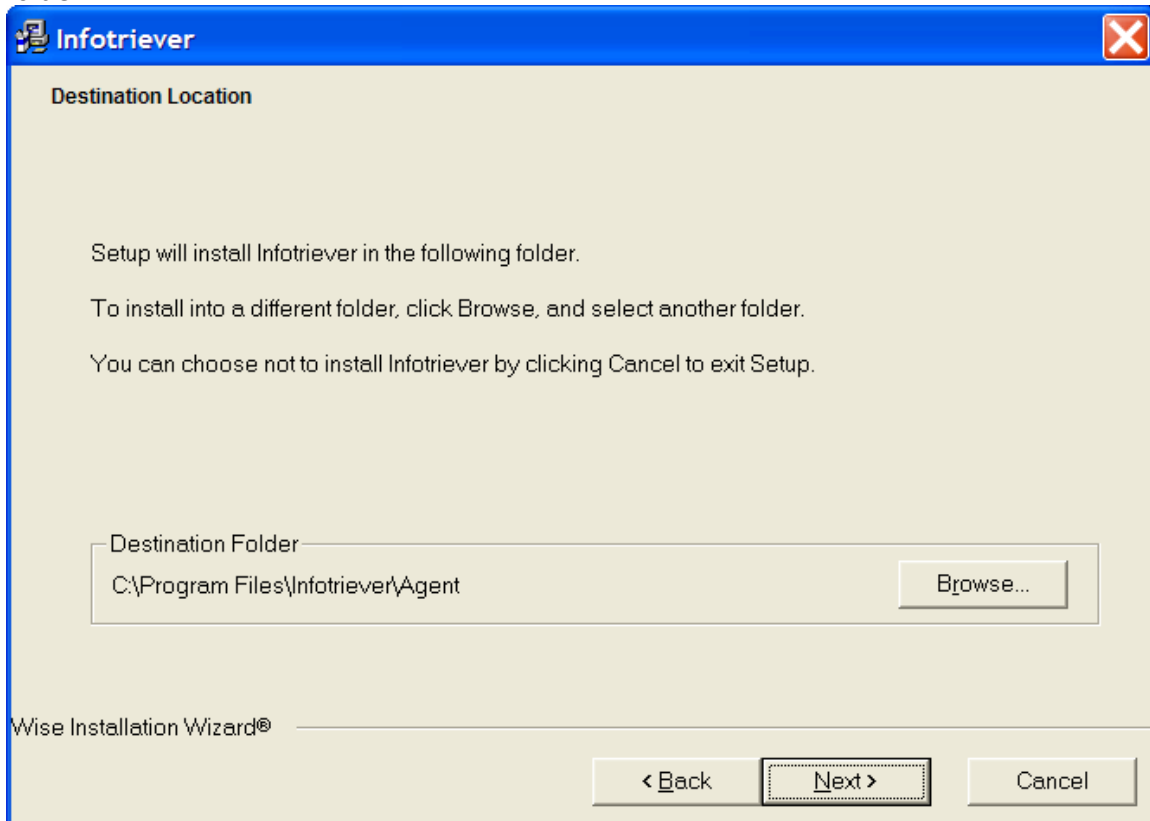


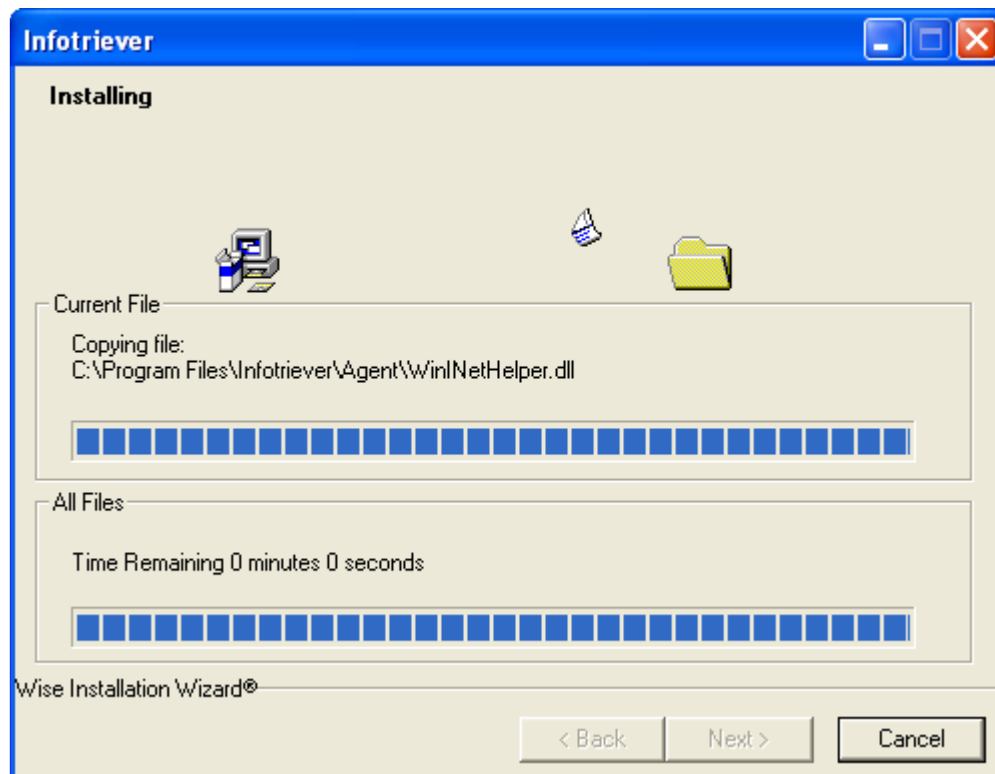
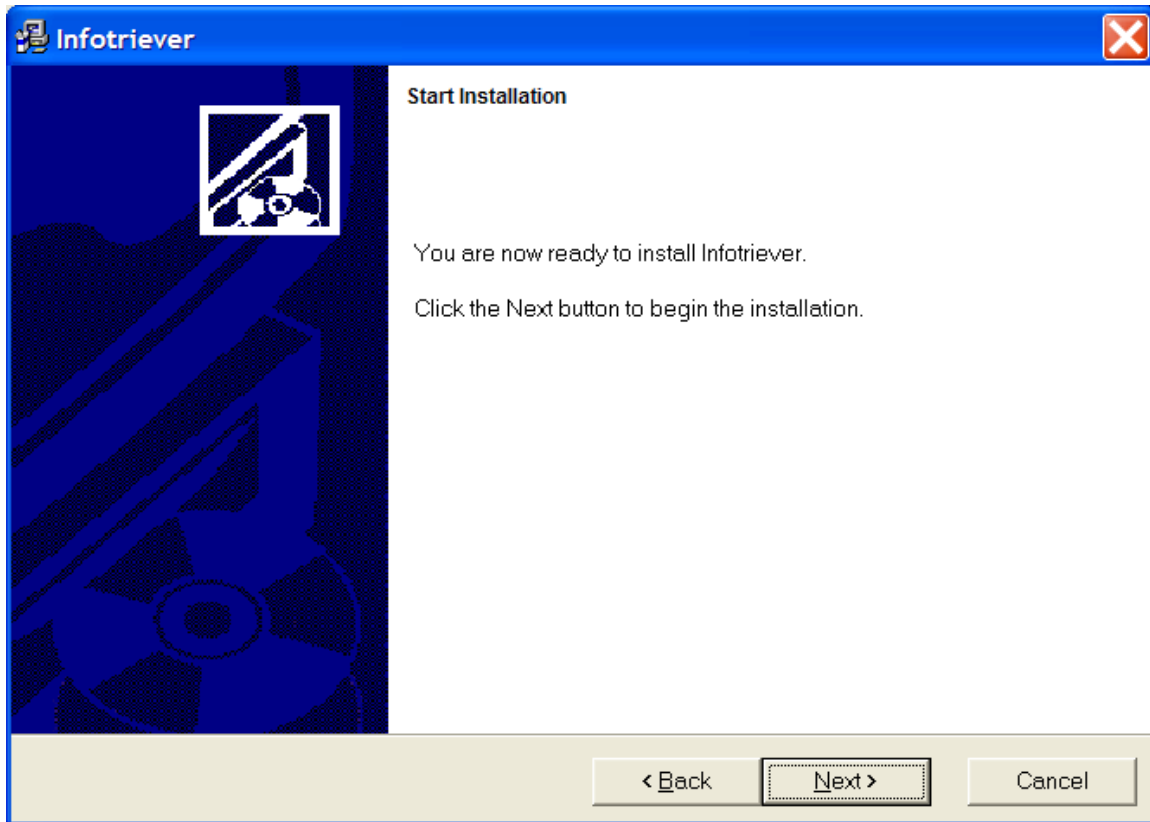
2. Before running the Infotriever installer, ensure that the Windows login has administrative rights. If you are running the standalone installer to install the software for a user, the installer must be run with administrative rights temporarily assigned to the user's login. Note: that the Windows XP "Run As" feature is not compatible with the standalone installer
3. Run the Infotriever installer interactively by double-clicking on the installer executable (infotriever_3100S.exe). The following screens will be displayed during the install.

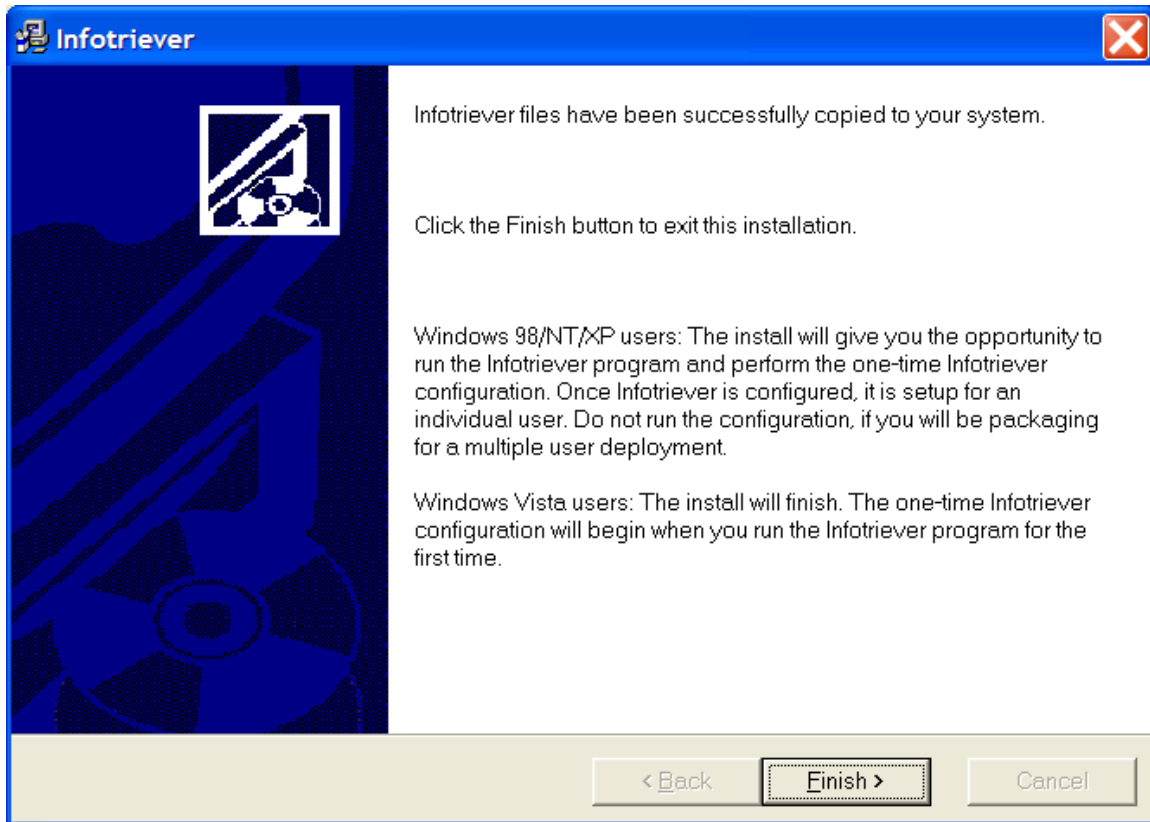




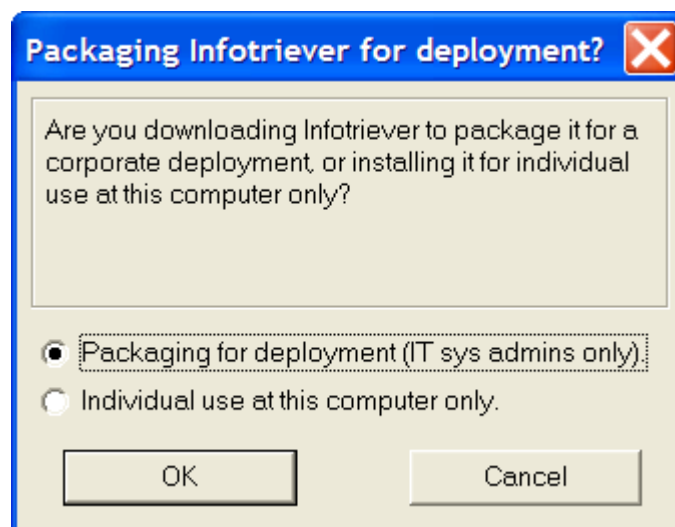
- The default installation folder is to the Infotriever\Agent under the Windows Program Files. To run properly, Infotriever requires write access to the installation directory. If you restrict access to the Program Files folder, please select a different installation folder.







5. At the end of the installation, select "Individual use at this computer only" and click OK to allow Infotriever to run and perform the initial configuration. This step will create a unique Infotriever account for the user.

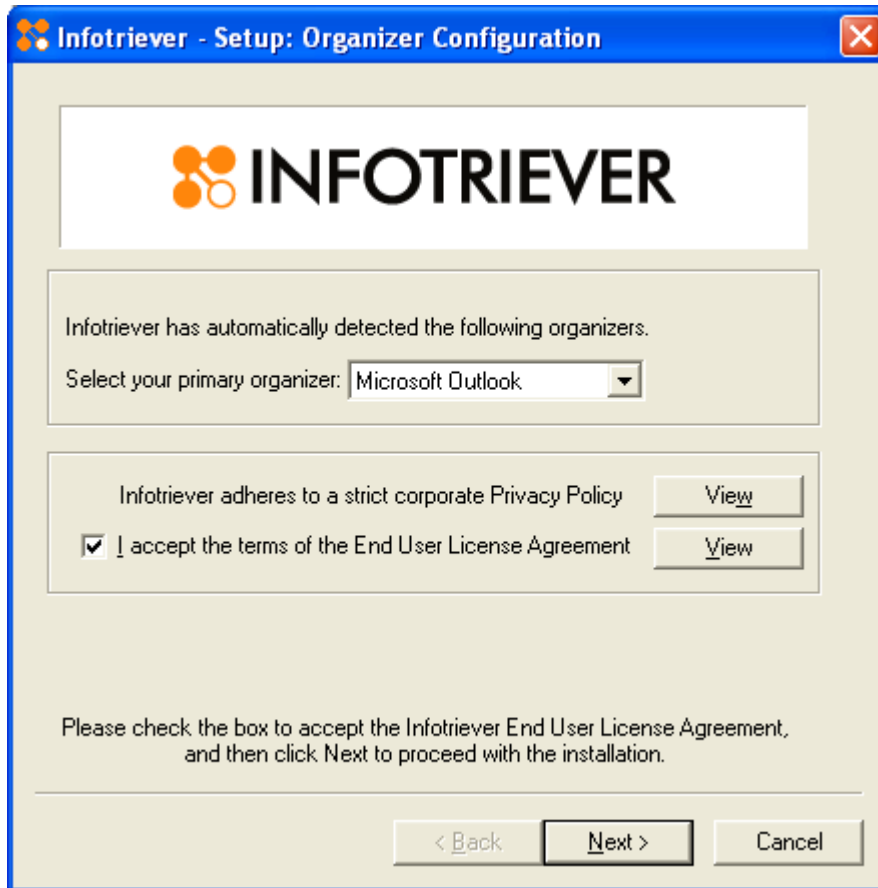


Stage 2: Individual User Configuration and Assignment of Unique Infotriever Client ID

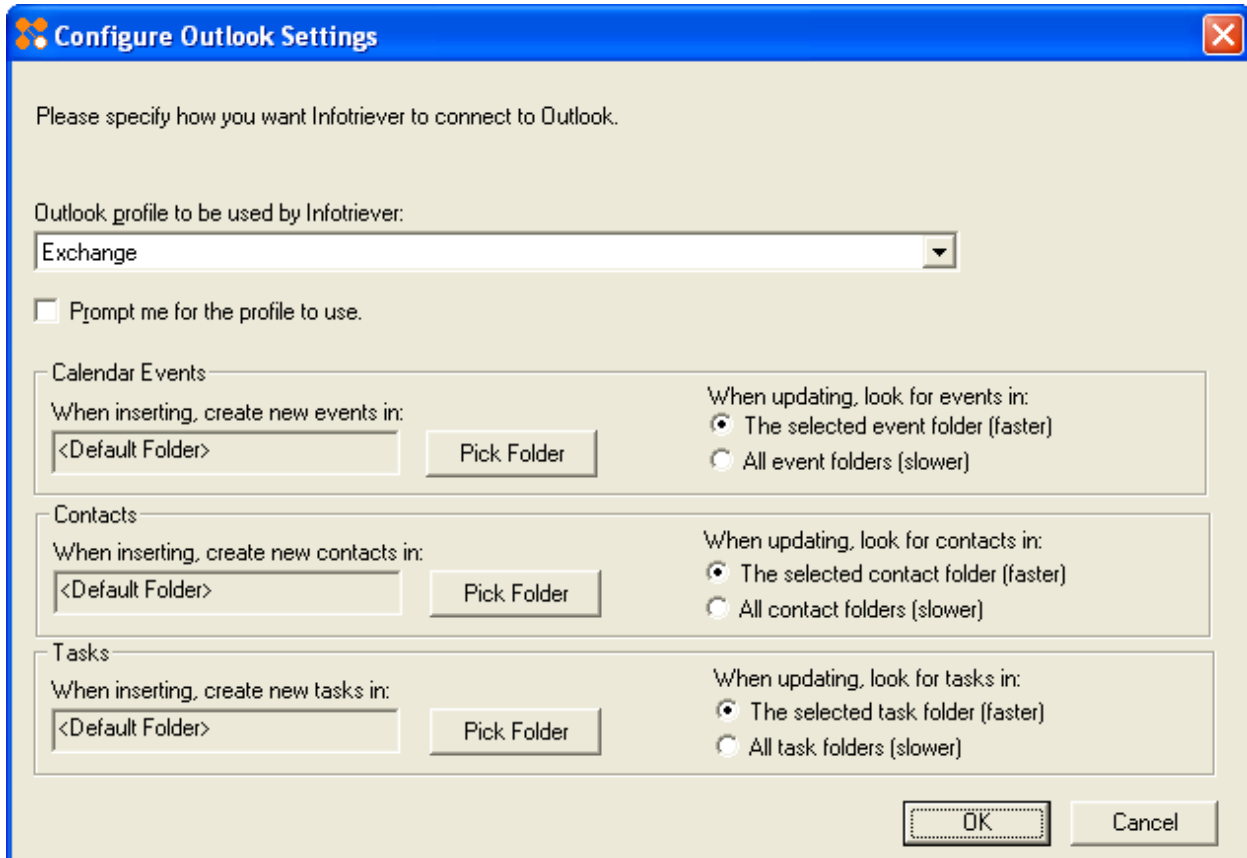
Stage 2 of the deployment process is the individual configuration and assignment of the unique Infotriever client ID. Each user must go through this stage on their own, or a

system administrator may perform this step on behalf of the user at the user's computer to choose their PIM and set up their unique Infotriever account. If your IT staff will not be completing this step, please document the configuration steps for your users.

1. If you are not performing the user configuration automatically after the install, you will need to start Infotriever by browsing to the Infotriever installation folder and double-clicking on infoclient.exe. Infotriever will automatically detect the supported organizers on your computer. Select the organizer into which you wish Infotriever to deliver your event and contact downloads and updates, check to accept the terms of the End User License Agreement and click Next.



- Depending on the configuration of the organizer you selected, you may see a screen like this (Outlook example shown) requesting additional information. For example, if you have more than one Outlook profile, select the one that you wish to be used by Infotriever. Also, decide if you want to be prompted for which Outlook profile to be used every time you download, and tick or untick the box as appropriate. For the bottom sections, we recommend that you use the default settings. Click OK when you are done.



Configure Outlook Settings

Please specify how you want Infotriever to connect to Outlook.

Outlook profile to be used by Infotriever:
Exchange

Prompt me for the profile to use.

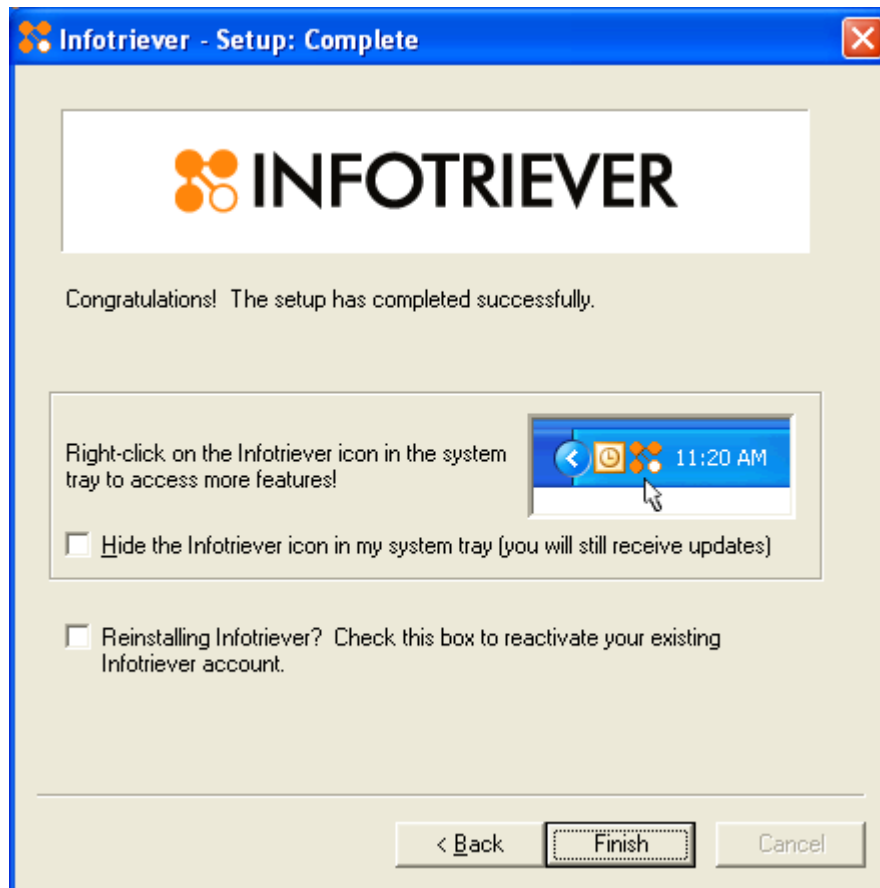
Calendar Events
When inserting, create new events in:
<Default Folder> Pick Folder
When updating, look for events in:
 The selected event folder (faster)
 All event folders (slower)

Contacts
When inserting, create new contacts in:
<Default Folder> Pick Folder
When updating, look for contacts in:
 The selected contact folder (faster)
 All contact folders (slower)

Tasks
When inserting, create new tasks in:
<Default Folder> Pick Folder
When updating, look for tasks in:
 The selected task folder (faster)
 All task folders (slower)

OK Cancel

3. When you reach the end of the install process, simply leave the bottom box below unchecked (unless you are reinstalling Infotriever for a user with an existing Infotriever account), and click Finish.

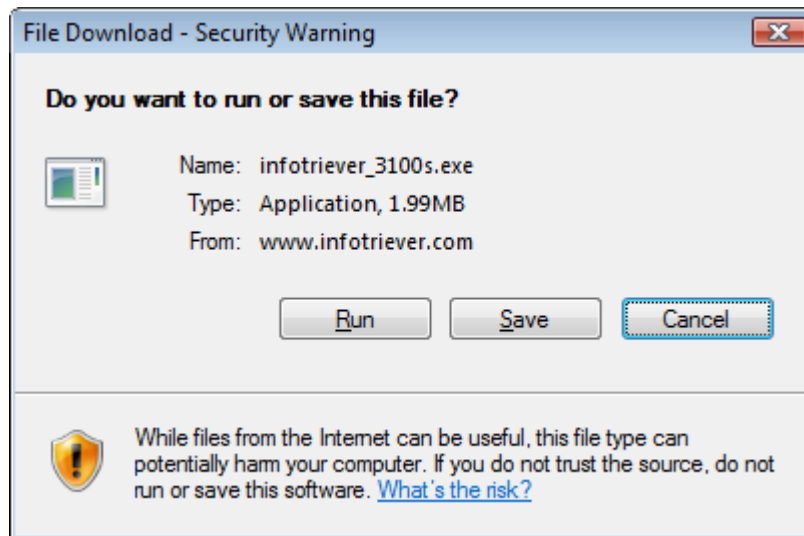


Individual Install Instructions – Windows 7 / Vista**Stage 1: File Download and Extraction
(To be performed by Company's System Administrator)**

Follow these instructions, to use the standalone installer to install the Infotriever software on a single user's system running Windows 7 / Vista. If you will be performing mass deployments based on creation of an image the please refer to the Mass Deployment Instructions.

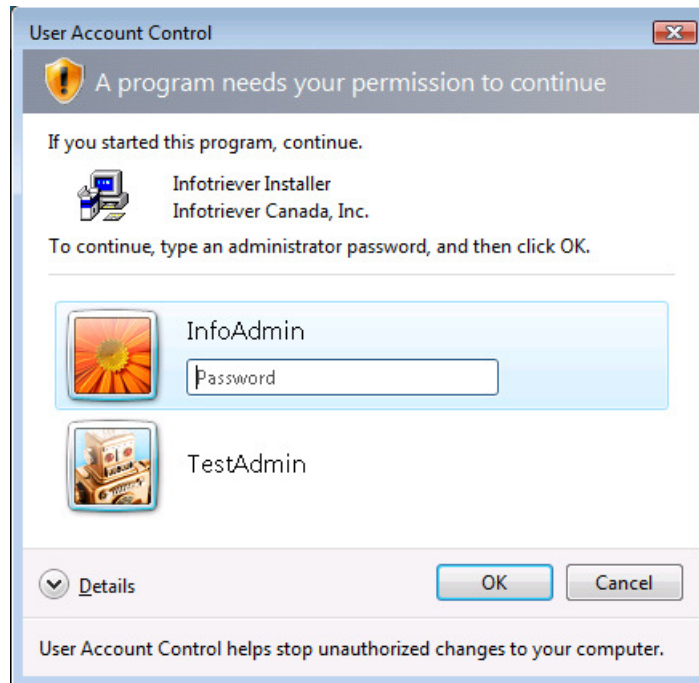
Stage 1 of the deployment process is recommended to be performed by a System Administrator but may also be performed by the user if they have administrative privileges from User Account Control (UAC) elevation.

1. Download and run the Infotriever installer from http://www.infotriever.com/download/infotriever_3100S.exe.

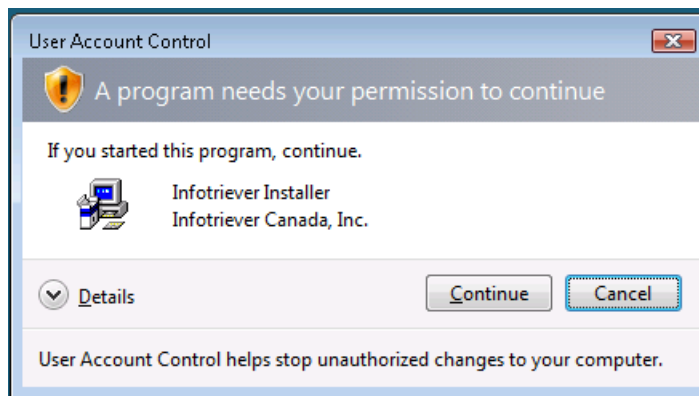


2. In order to run the installer, you will need to respond to one of the following UAC approval dialogs, which one you see will depend on whether you are logged in with a standard or administrator account.

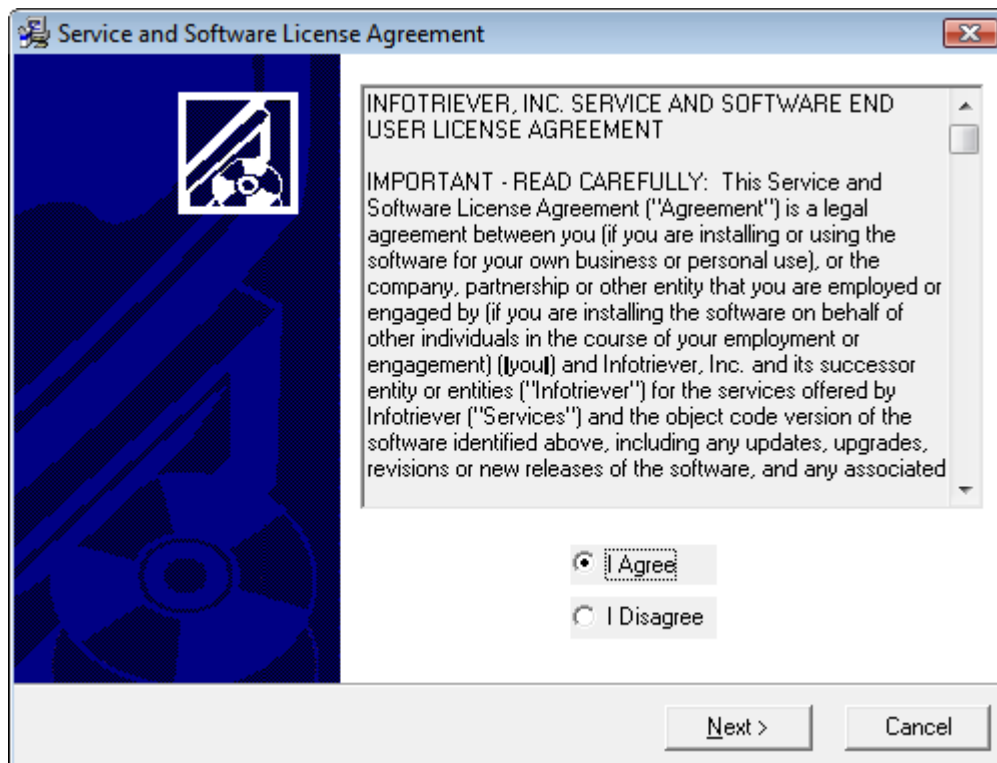
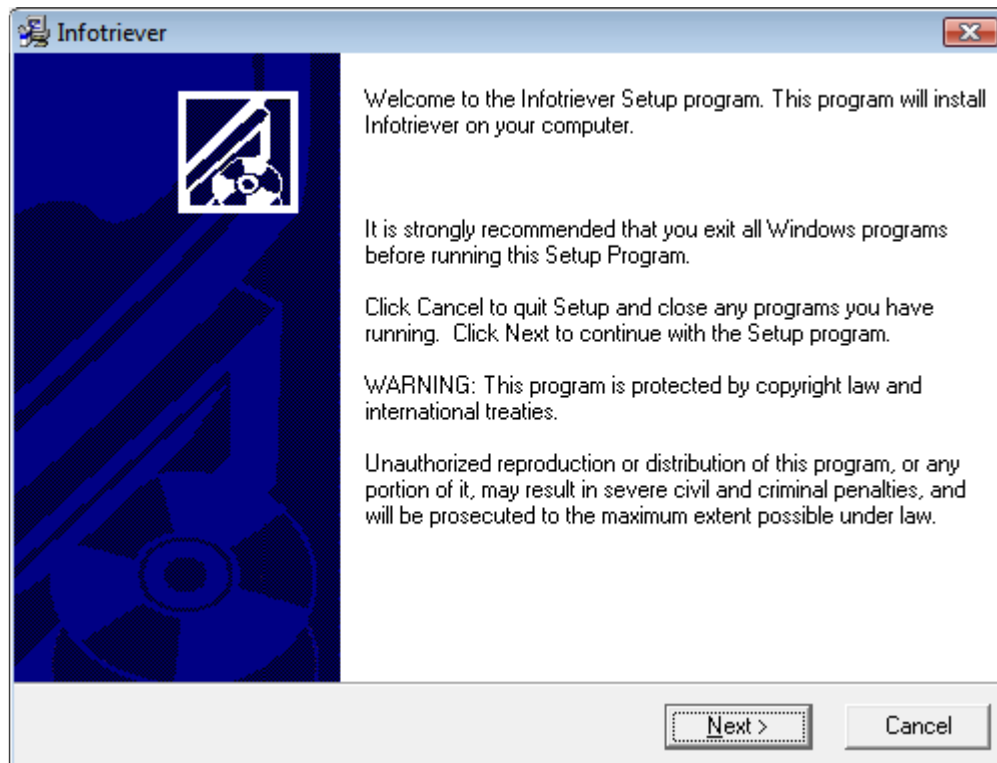
The following dialog is shown when running as a standard user and will prompt for an administrator user's password to allow the installer to proceed.



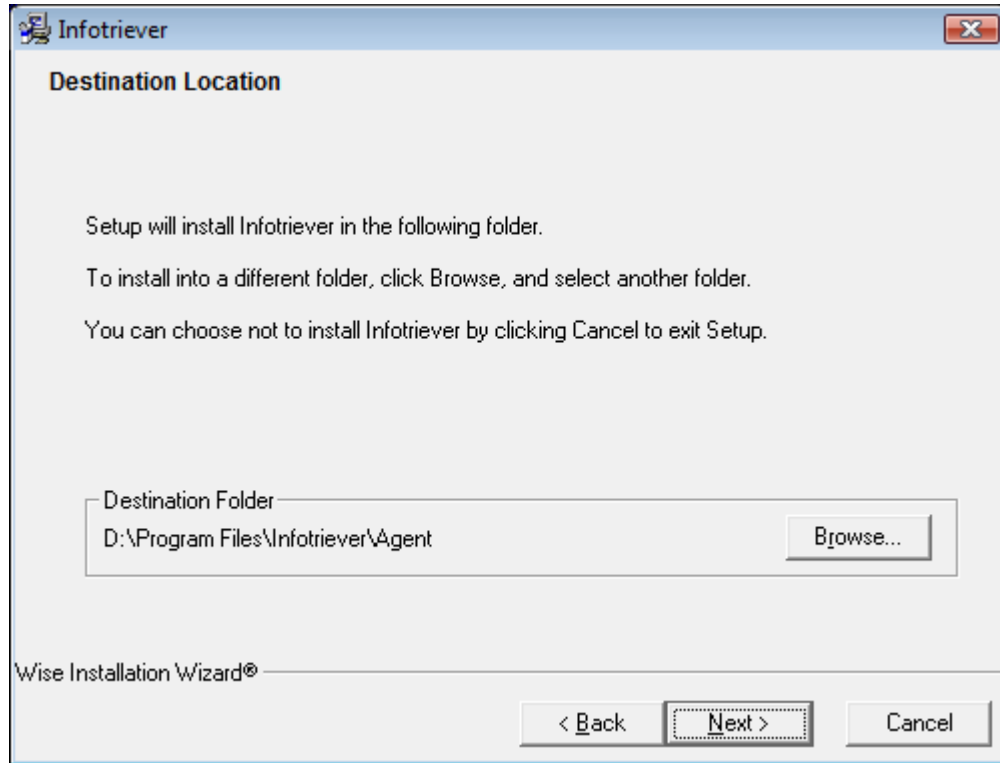
The following dialog is show when running as an administrator user and prompts from permission to allow the installer to proceed.

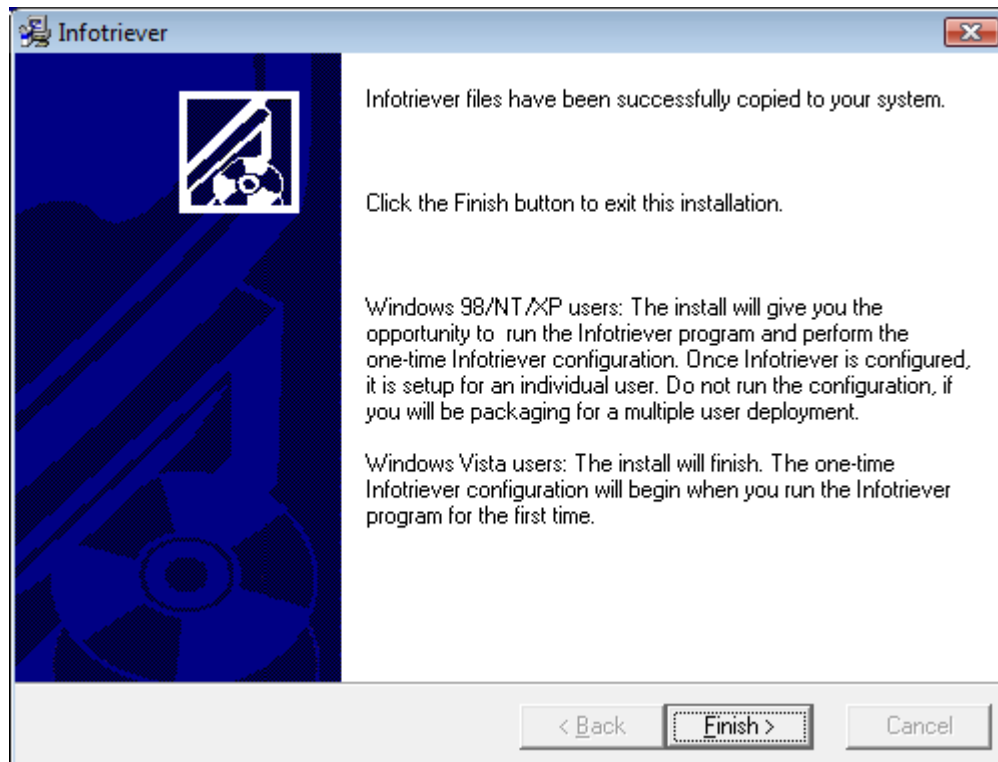
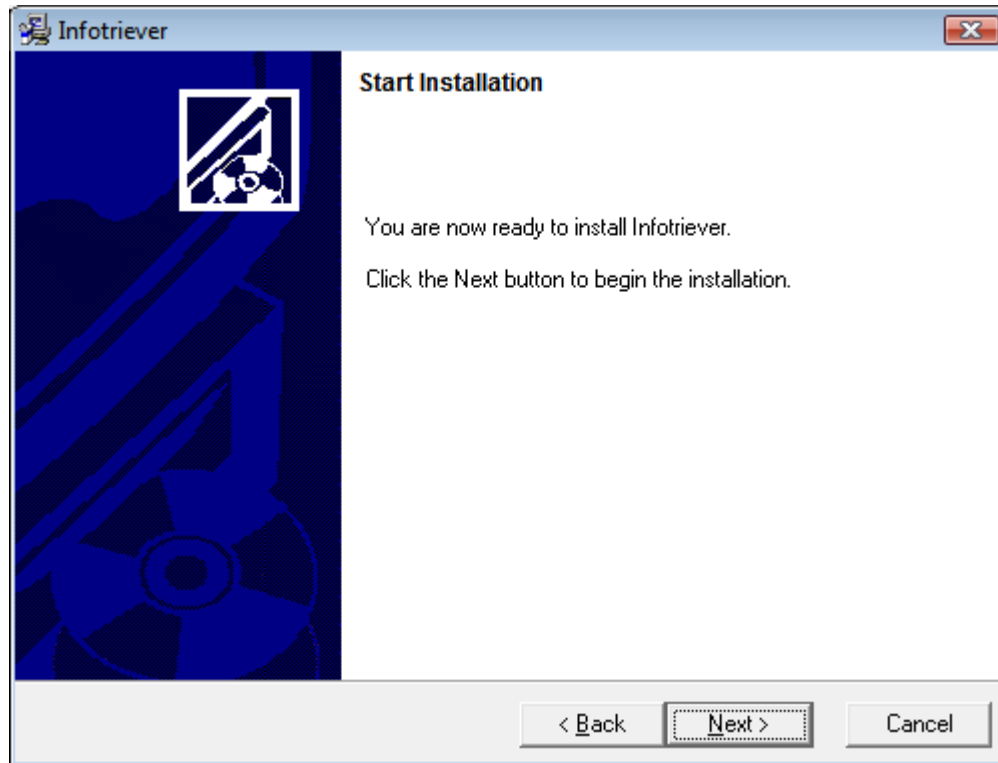


When the installer starts, the following screens will be displayed during the install.

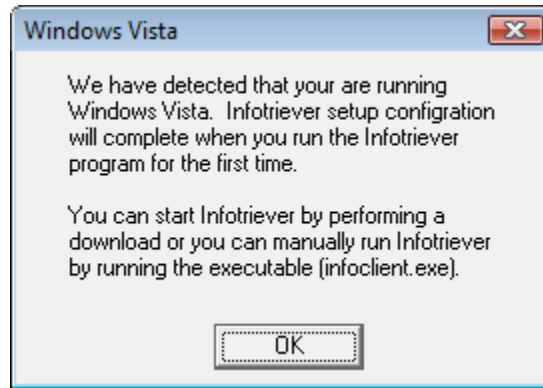


3. For 7 / Vista, we do not recommend changing the destination folder. The Infotriever executables install to default Infotriever\Agent folder under the Windows Program Files folder, but any additional files will be written to the Users folder.





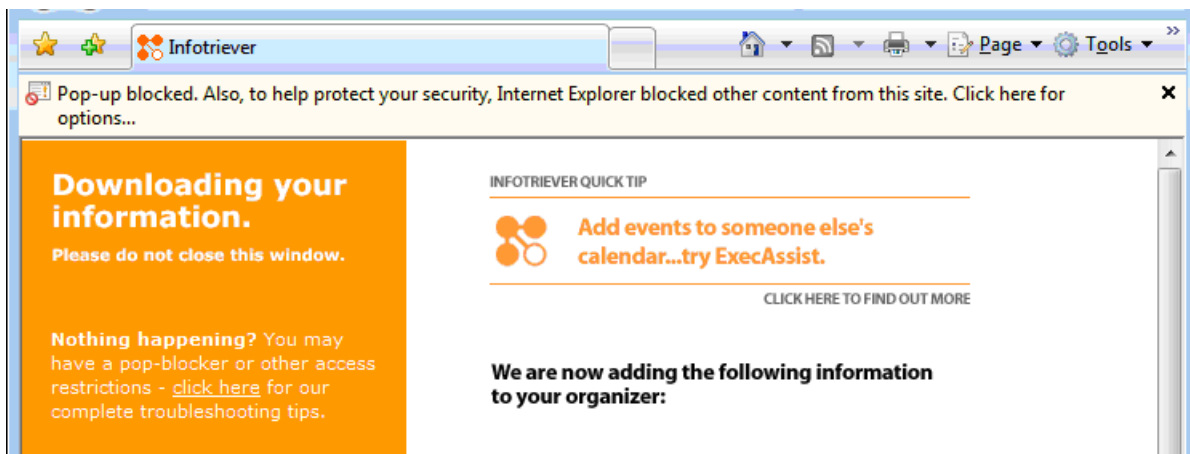
4. At the end of the installation, the Infotriever software files will have been created in your default Program Files folder. An information only dialog will be shown to instruct users how to continue the next phase of the setup.



Stage 2: Individual User Configuration and Assignment of Unique Infotriever Client ID

Stage 2 of the deployment process is the individual configuration and assignment of the unique Infotriever client ID. Each user must go through this stage on their own, or a system administrator may perform this step on behalf of the user at the user's computer to choose their PIM and set up their unique Infotriever account. If your IT staff will not be completing this step, please document the configuration steps for your users.

1. We recommend visiting an Infotriever enabled website to perform an information download. In this example, we show the downloading of the Infotriever Support contact. You will notice that there are some Internet Explorer/7 / Vista warnings that you will have to respond to. Please click on the IE bar to allow the Infotriever content to display. Note, you may also have to configure the Windows popup blocker to allow popups from my.infotriever.com.



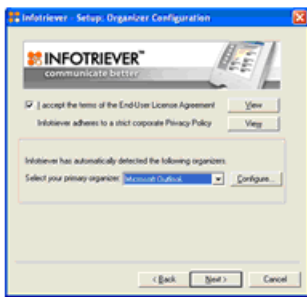
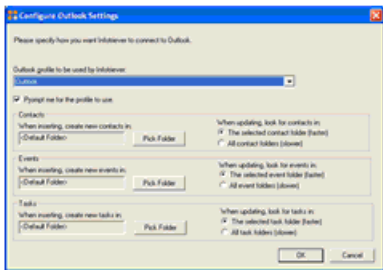

2. Depending on the partner site from which you are downloading, you will see an Internet Explorer warning asking you if you wish to **run** the Infotriever ActiveX plugin. You must click on the warning bar to allow the Infotriever plug-in to run.

This website wants to run the following add-on: 'Infotriever 3.0 IE Plug-in' from 'Infotriever Canada, Inc.'. If you trust the website and the add-on and want to allow it to run, click here...

Add to Calendar powered by **INFOTRIEVER**

We are now installing Infotriever's Add to Calendar software on your computer



Please follow the instructions on the grey installer dialog boxes, as shown below.

If you see a [yellow bar](#) at the top of this web page, click it and select Install "ActiveX Control..." to proceed. If you do not see the screens above after installing the ActiveX control, or you do not see the yellow bar, try our [standalone installer](#).

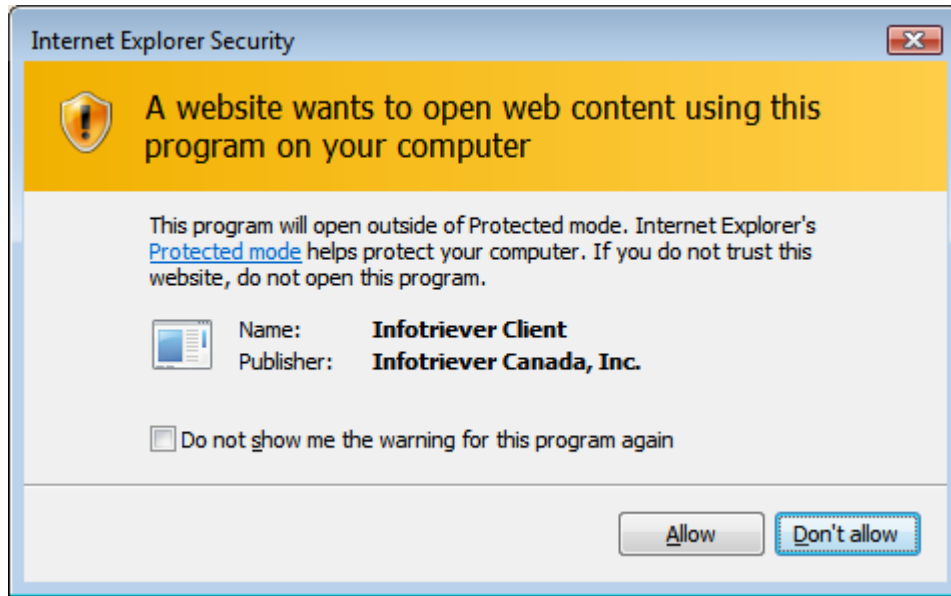
Please [allow Infotriever pop-ups](#) on your pop-up blockers to ensure seamless Infotriever downloads to your calendar.

[Need help?](#) | [Privacy Policy](#) | [Corporate Accounts](#) | [Contact Us](#)

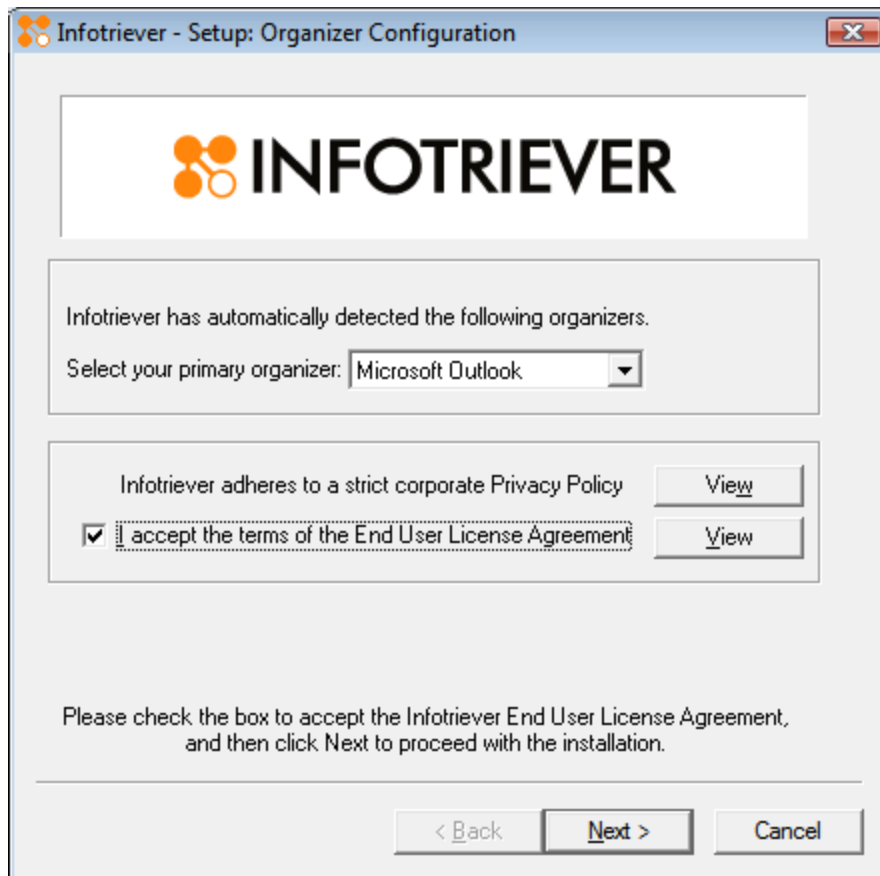





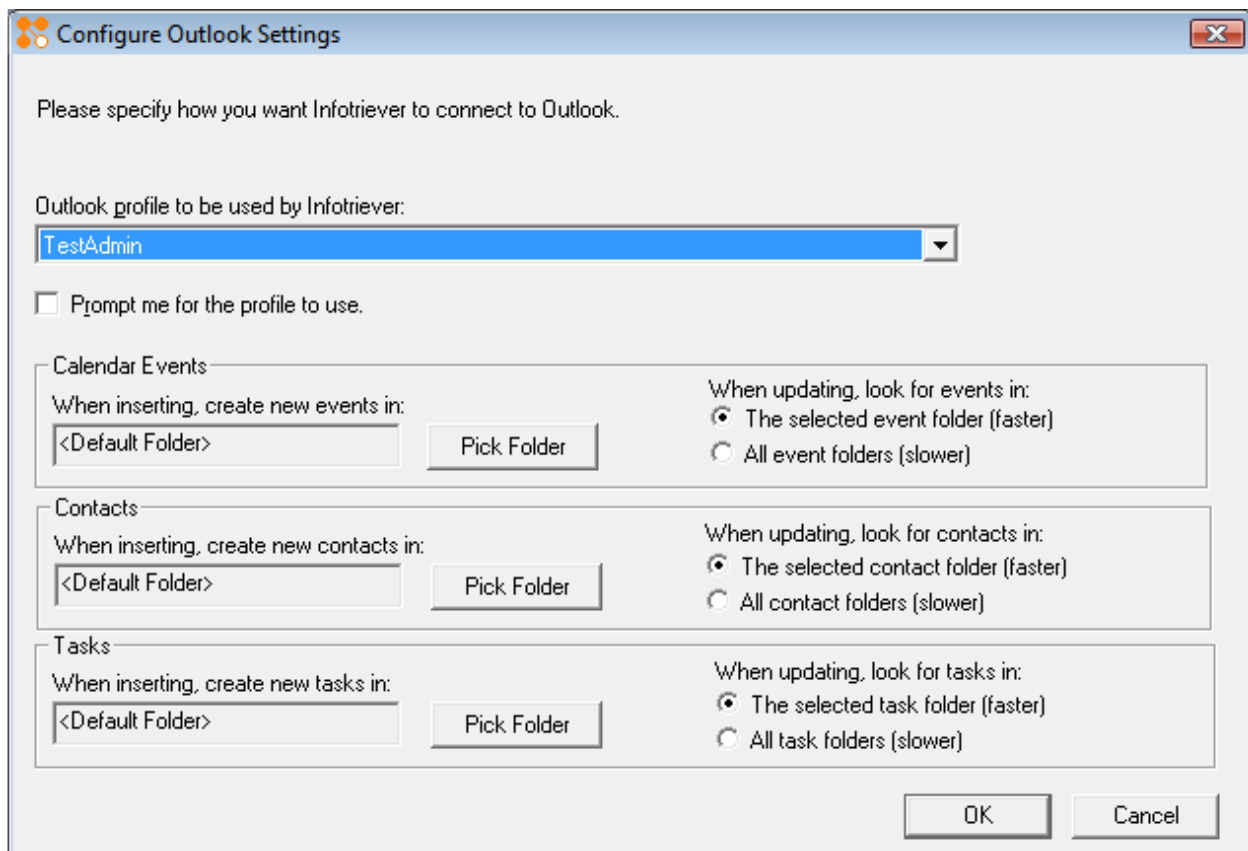
- After allowing the Infotriever ActiveX plug-in to run, you may see a warning from Internet Explorer to alert you that the Infotriever will be running to process some information. This warning is part of IE's new Protected Mode feature; you may check the box, if you do not wish to see this warning during future downloads.



3. The following screens will be shown when Infotriever performs its first-time configuration.



- Depending on the configuration of the organizer you selected, you may see a screen like this (Outlook example shown) requesting additional information. For example, if you have more than one Outlook profile, select the one that you wish to be used by Infotriever. Also, decide if you want to be prompted for which Outlook profile to be used every time you download, and check or uncheck the box as appropriate (Tip: unless you know that you need to access multiple profiles, we recommend that you leave this box unchecked). For the bottom sections, we recommend that you use the default settings. Click OK when you are done.



Configure Outlook Settings

Please specify how you want Infotriever to connect to Outlook.

Outlook profile to be used by Infotriever:
TestAdmin

Prompt me for the profile to use.

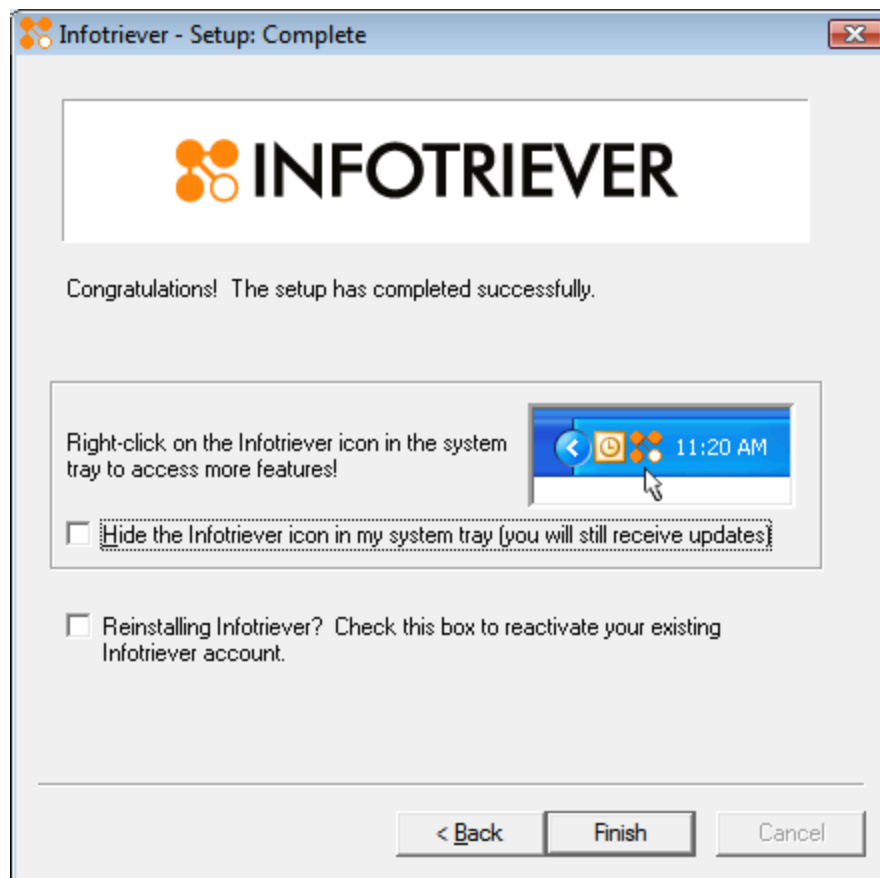
Calendar Events
When inserting, create new events in:
<Default Folder> Pick Folder
When updating, look for events in:
 The selected event folder (faster)
 All event folders (slower)

Contacts
When inserting, create new contacts in:
<Default Folder> Pick Folder
When updating, look for contacts in:
 The selected contact folder (faster)
 All contact folders (slower)

Tasks
When inserting, create new tasks in:
<Default Folder> Pick Folder
When updating, look for tasks in:
 The selected task folder (faster)
 All task folders (slower)

OK Cancel

5. When you reach the end of the install process, simply leave the bottom box below unchecked, and click Finish.



Mass Deployment Instructions

Stage 1: Preparation of Infotriever Image (To be performed by Company's System Administrator)

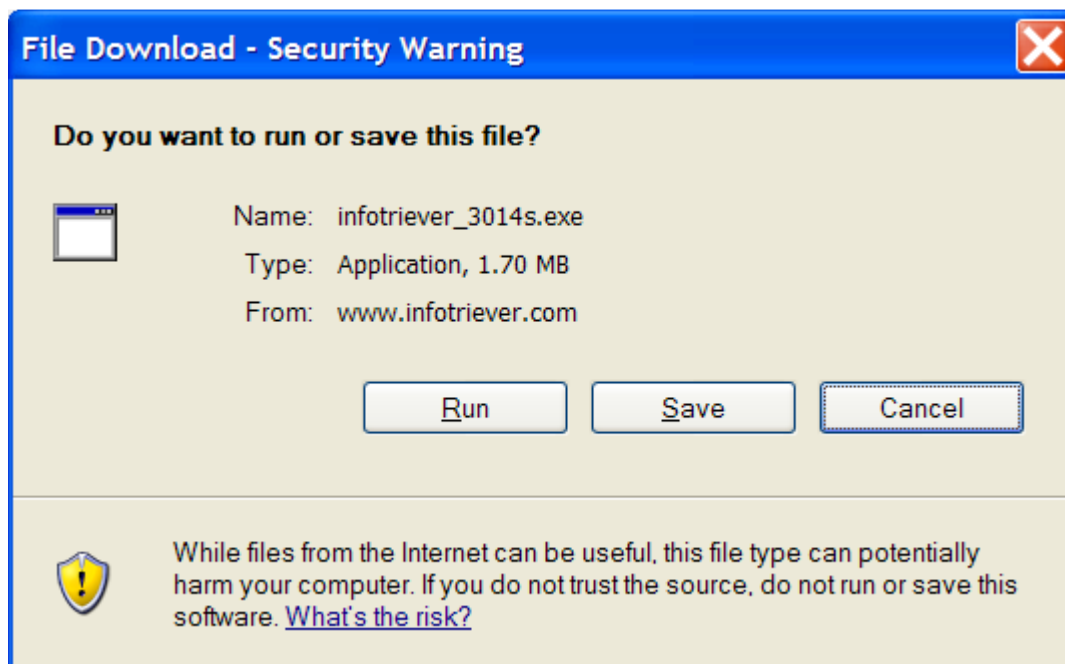
We recommend installing and certifying the Infotriever software by following the individual installation instructions above, prior to performing a mass deployment. In order to create an installation package or image, follow these instructions.

The mass deployment image must be created at the end of the file extraction and before the individual user configuration is performed.

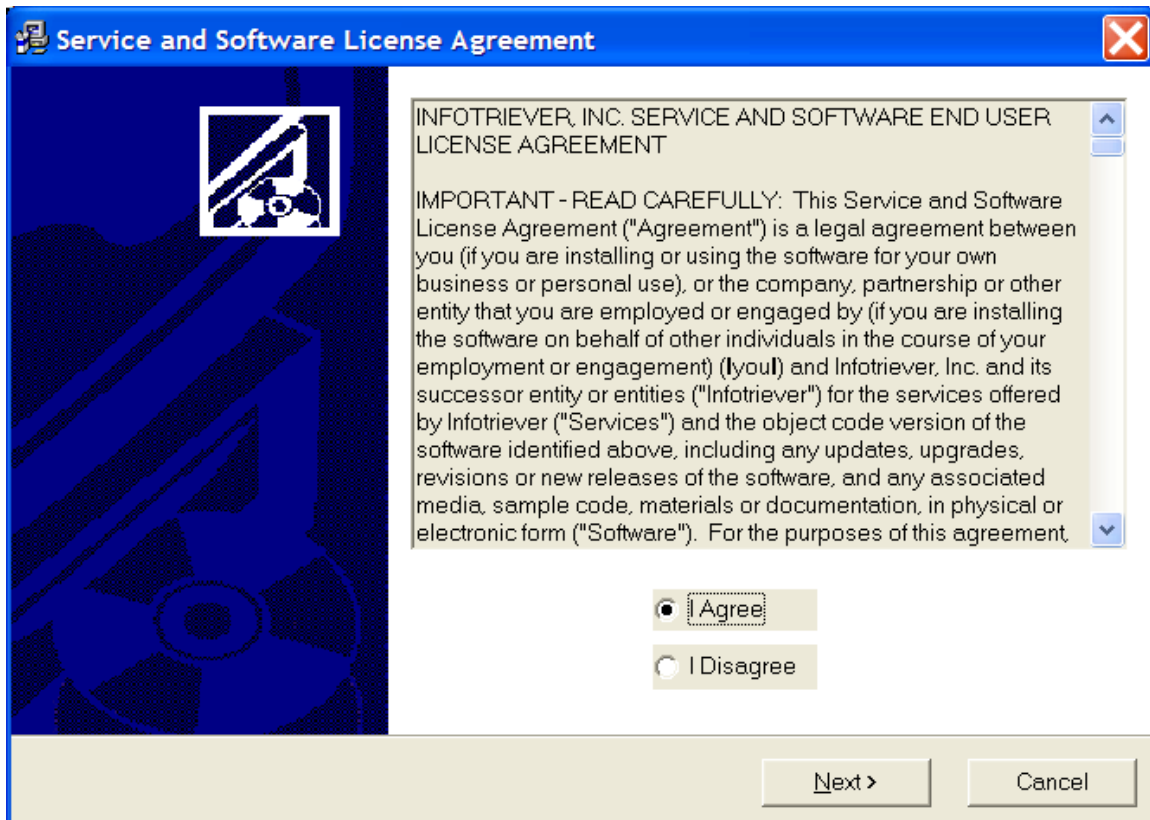
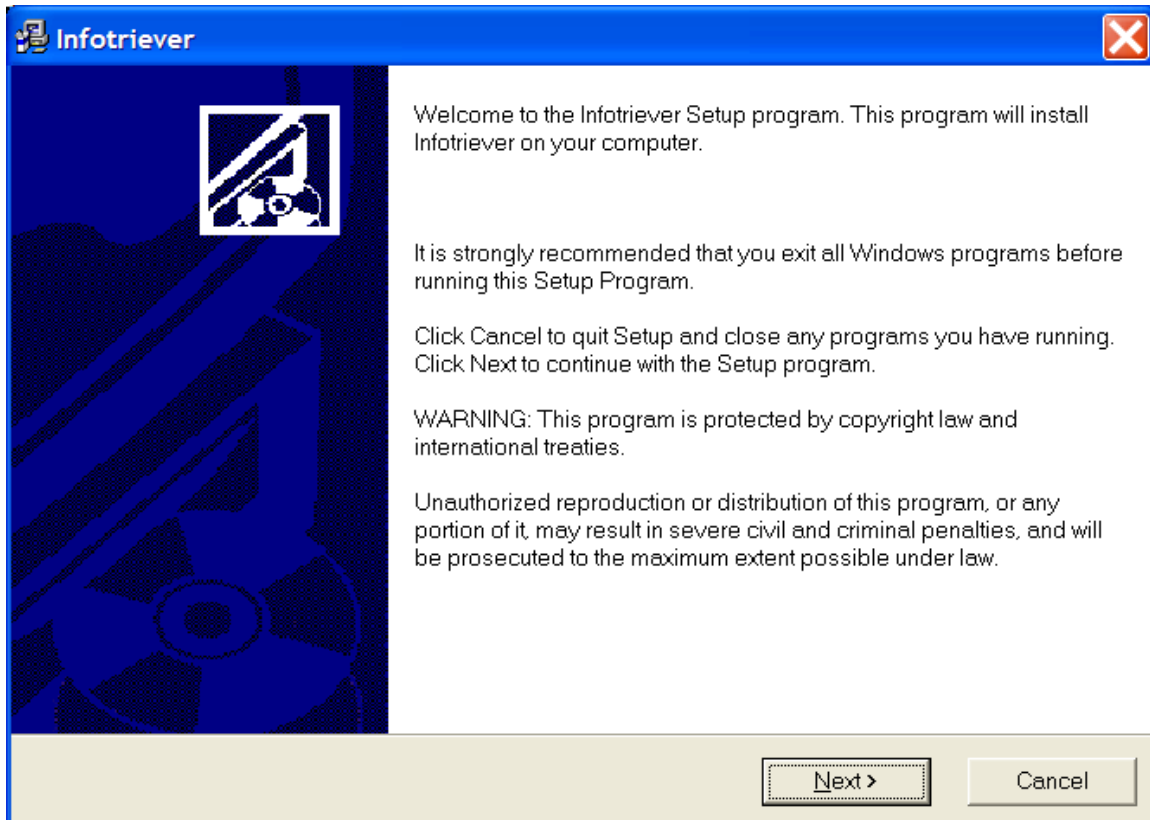
Note: the following instructions show the Windows XP examples and samples. For 7 / Vista, please refer to the steps, under the section Individual Install Instructions – Windows 7 / Vista Stage 1: File Download and Extraction.

Stage 1 of the mass deployment process is to be conducted by a System Administrator.

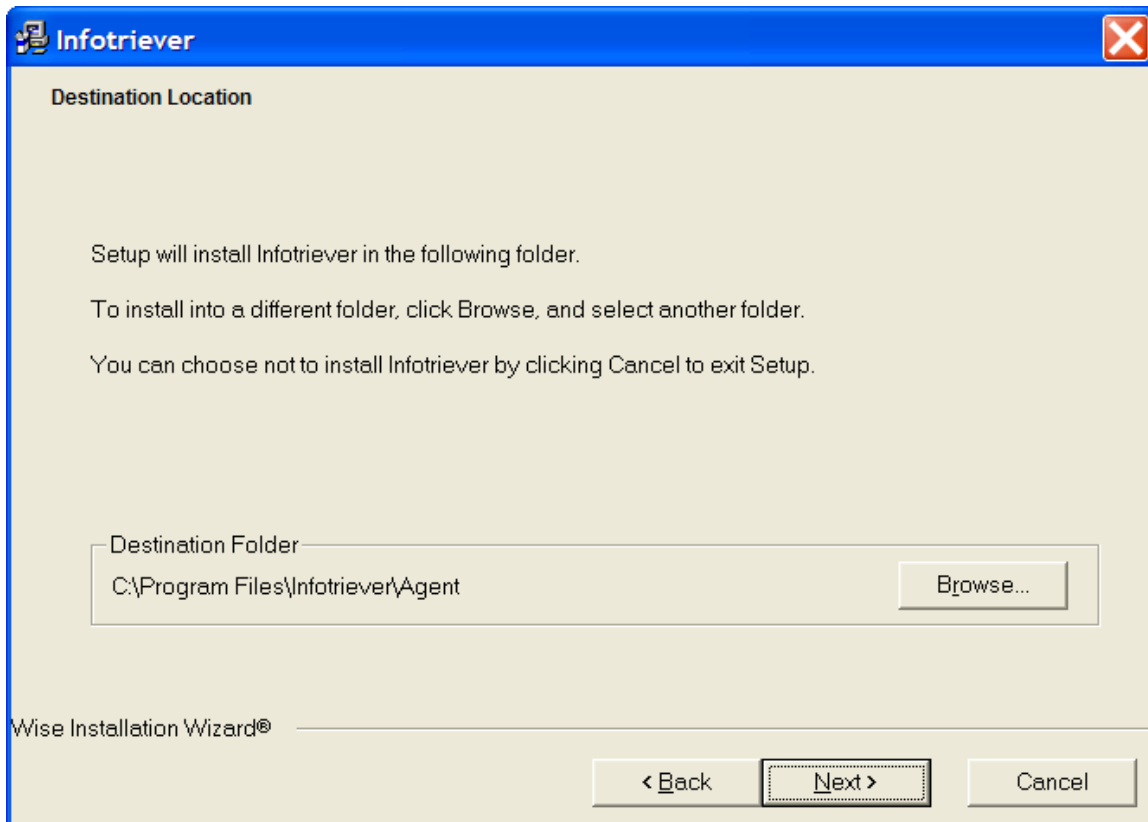
1. On a clean system, download the Infotriever executable from http://www.infotriever.com/download/infotriever_3100S.exe.

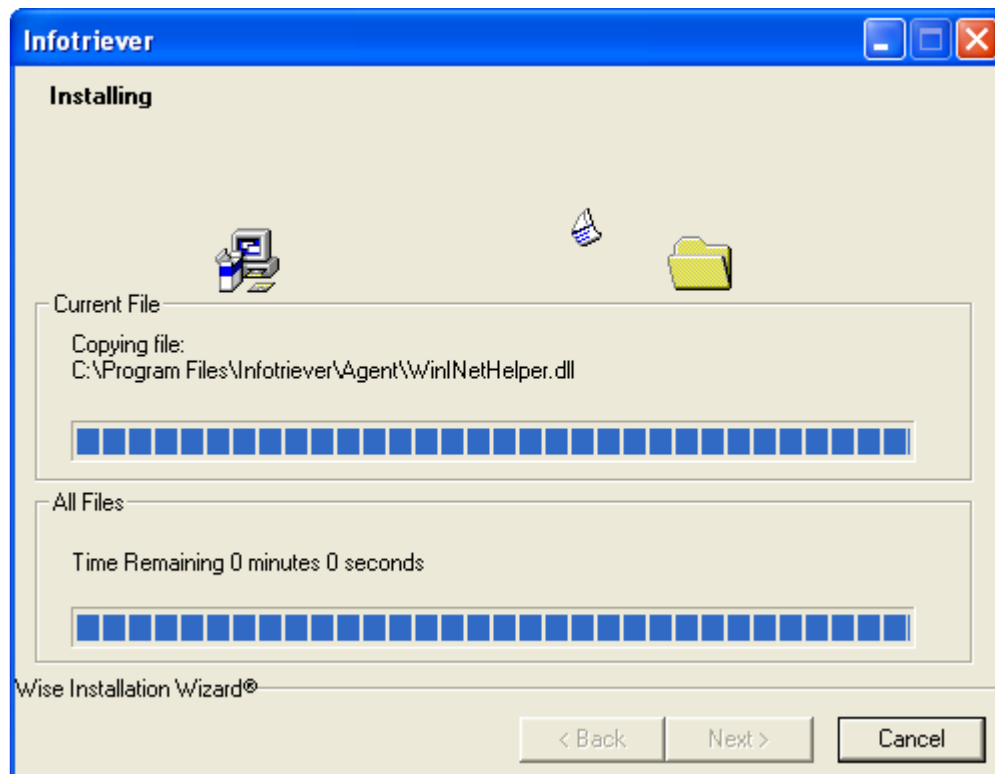
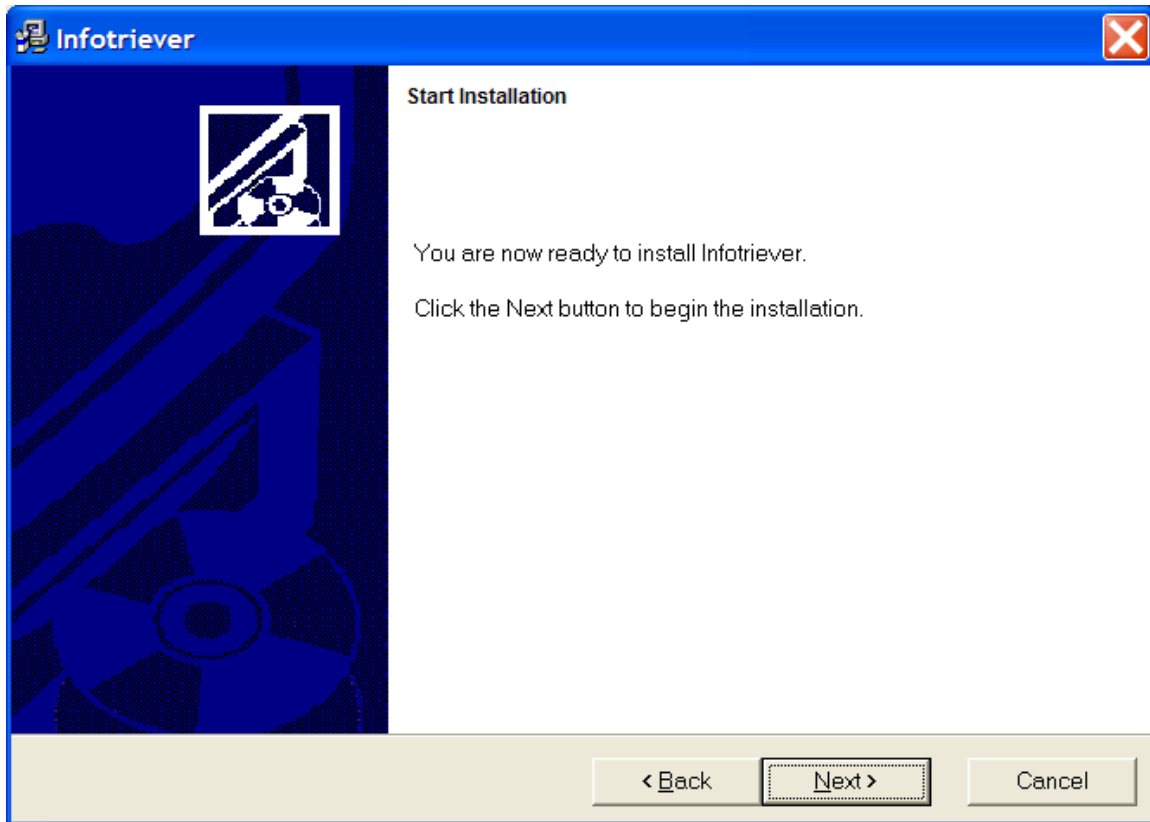


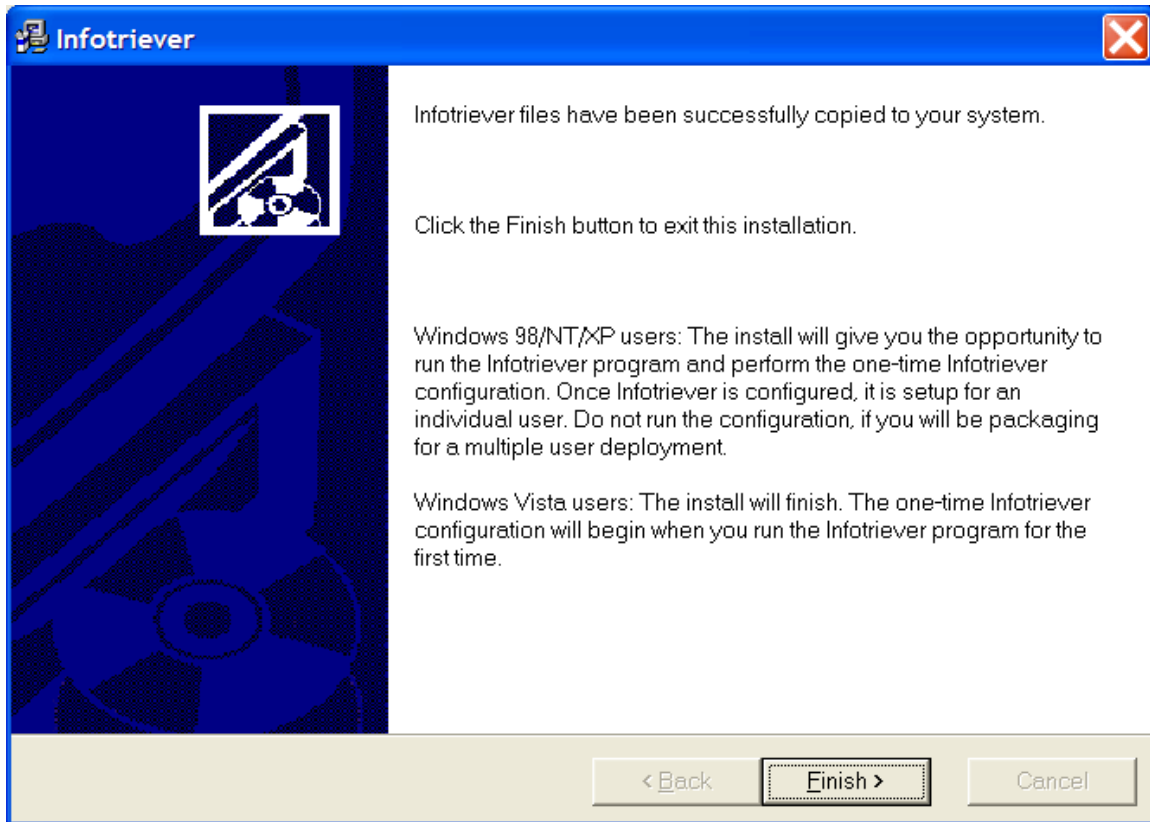
2. Before running the Infotriever installer, ensure that the Windows login that is being used for the install has administrative rights. Note: that the Windows XP "Run As" feature is not compatible with the standalone installer
3. Run the Infotriever installer interactively by double-clicking on the installer executable (Infotriever_3100S.exe). The following screens will be displayed during the install.



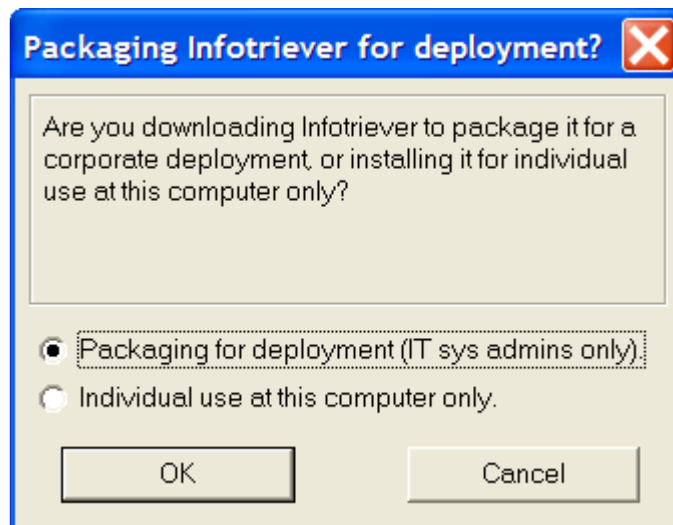
4. The default installation folder is to the Infotriever\Agent under the Windows Program Files. To run properly, Infotriever requires write access to the installation directory. If you restrict access to the Program Files folder, please select a different installation folder.







- At the end of the installation, select "Packaging for deployment (IT sys admins only)" and click "OK". It is very important to not run Infotriever since the first time that Infotriever runs; it performs its initial configuration and obtains an Infotriever account id. This must be done on an individual basis by each Infotriever user so that he/she is assigned a unique Infotriever account.

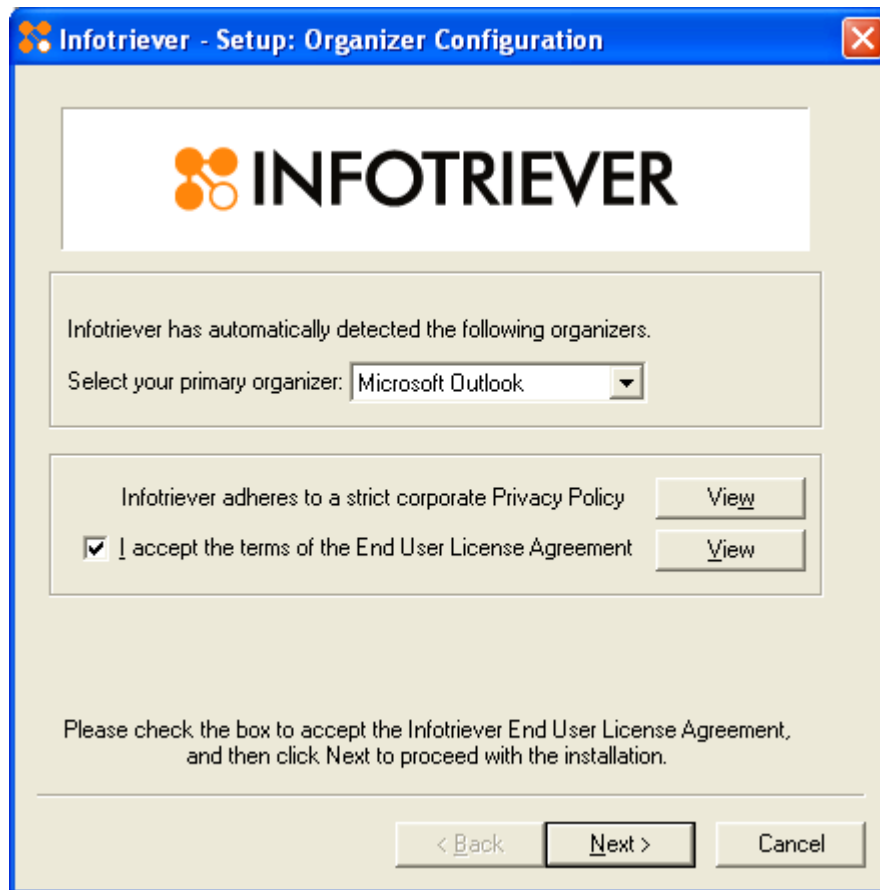


6. Capture the installation package or software image at this point. The Infotriever installation consists of the files in the Infotriever installation folder and the registry entries created.
7. Deploy the installation package or image to selected users and provide instructions about how to complete Stage 2 – Individual User Configuration and Assignment of Infotriever Client ID. The initial configuration will need to be performed when the user prior to his/her first Infotriever download. The instructions have been repeated below.

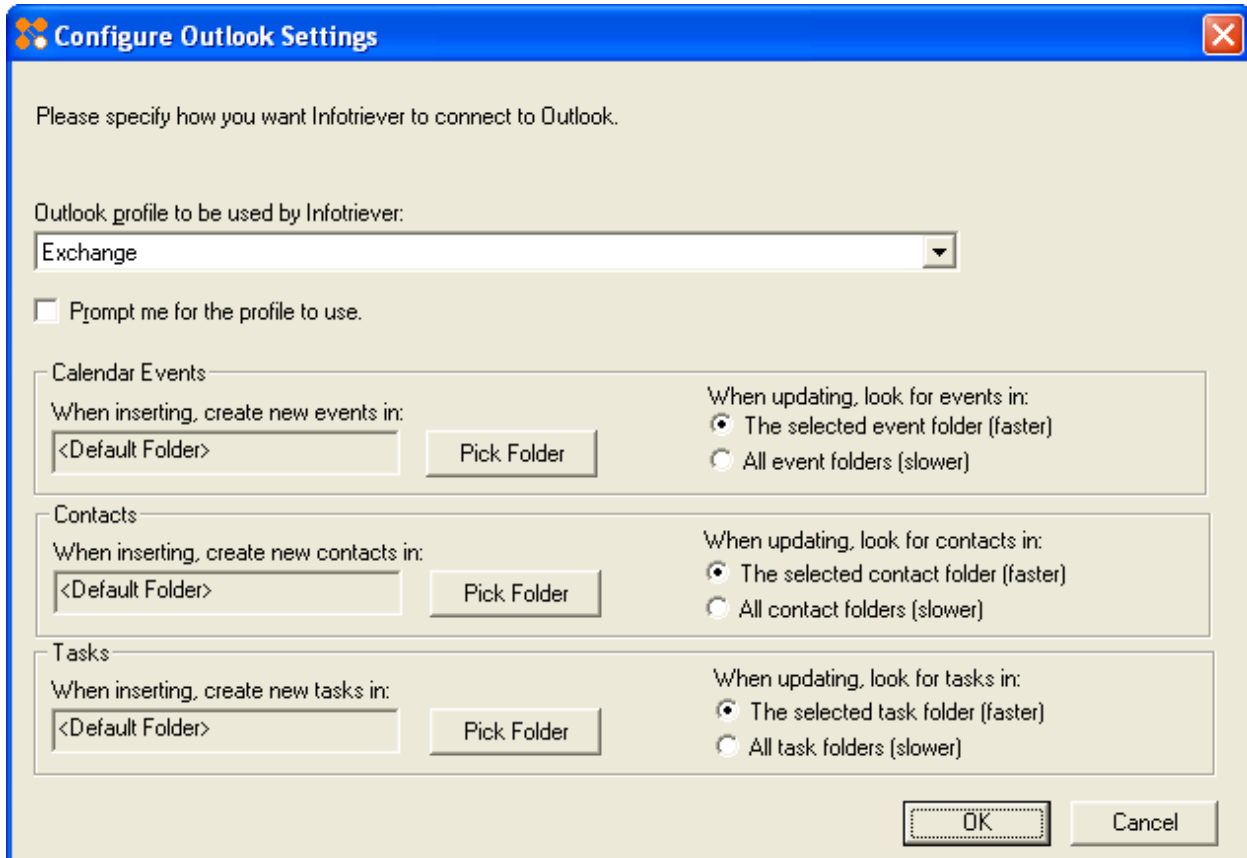
Stage 2: Individual User Configuration and Assignment of Unique Infotriever Client ID (To be performed by Individual End User)

Stage 2 of the deployment process is the individual configuration and assignment of the unique Infotriever client ID. Each user must go through this stage on their own, or a system administrator may perform this step on behalf of the user at the user's computer to choose their PIM and set up their unique Infotriever account. If your IT staff will not be completing this step, please document the configuration steps for your users.

1. Start Infotriever by browsing to the Infotriever installation folder and double-clicking on infoclient.exe. Infotriever will automatically detect the supported organizers on your computer. Select the organizer into which you wish Infotriever to deliver your event and contact downloads and updates, accept the terms of the End User License Agreement and click Next.



- Depending on the configuration of the organizer you selected, you may see a screen like this (Outlook example shown) requesting additional information. For example, if you have more than one Outlook profile, select the one that you wish to be used by Infotriever. Also, decide if you want to be prompted for which Outlook profile to be used every time you download, and tick or untick the box as appropriate. For the bottom sections, we recommend that you use the default settings. Click OK when you are done.



Configure Outlook Settings

Please specify how you want Infotriever to connect to Outlook.

Outlook profile to be used by Infotriever:
Exchange

Prompt me for the profile to use.

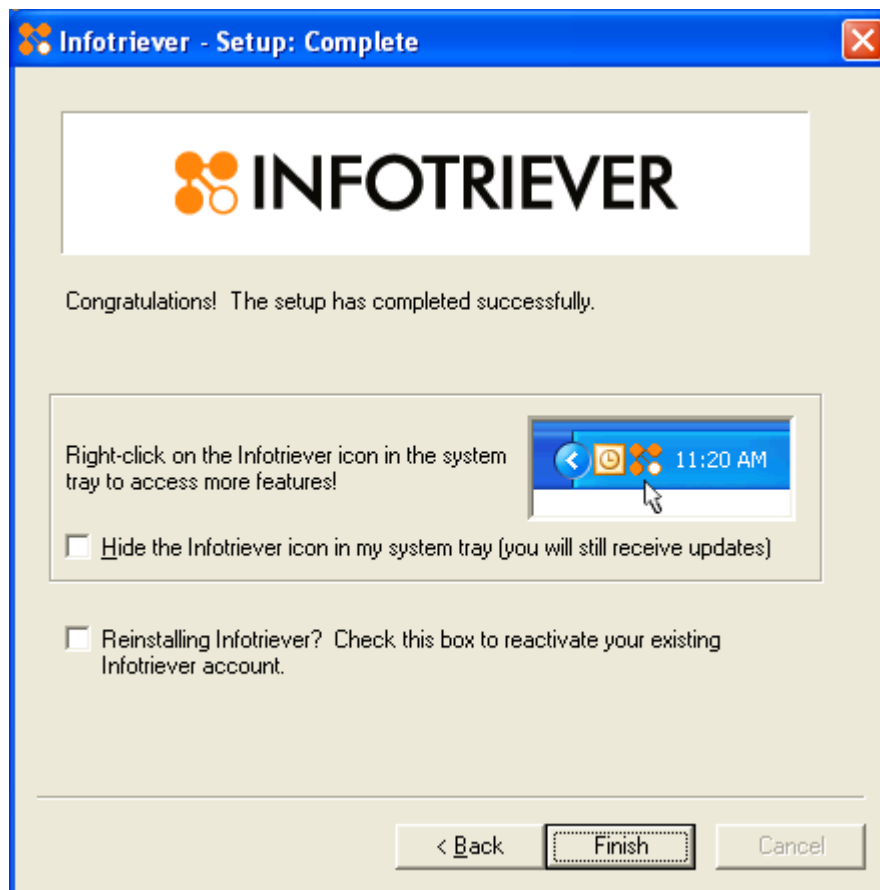
Calendar Events
When inserting, create new events in:
<Default Folder> Pick Folder
When updating, look for events in:
 The selected event folder (faster)
 All event folders (slower)

Contacts
When inserting, create new contacts in:
<Default Folder> Pick Folder
When updating, look for contacts in:
 The selected contact folder (faster)
 All contact folders (slower)

Tasks
When inserting, create new tasks in:
<Default Folder> Pick Folder
When updating, look for tasks in:
 The selected task folder (faster)
 All task folders (slower)

OK Cancel

3. When you reach the end of the install process, simply leave the bottom box below unchecked, and click Finish.



If you have any questions, please contact us at service@infotriever.com. Thank you.