

Implementing the IT Policy Manager for BlackBerry

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Summary

The IT policy manager enables you to define and restrict the settings for users' desktop software. It enables you to provide BlackBerry™ users with consistent settings by applying global parameters. The IT policy manager does this by interacting with the BlackBerry Desktop Manager to define and enforce the customized configuration. You can use the IT policy manager to define BlackBerry handheld and BlackBerry Desktop Software behavior.

The IT policy manager consists of the following components:

- ◆ `ITPolicy.exe`: an editor that enables you to modify the parameters in the `Policy.inf` file and generates a compiled file that can be read by the desktop software
- ◆ `Policy.inf`: contains the policy parameters you modify; the values in this file are used to generate a compiled binary file
- ◆ `Policy.bin`: the compiled version of the `Policy.inf` file; this file is read by the BlackBerry Desktop Manager, which then enforces the defined policy parameters
- ◆ `Keyword.txt`: lists the `Policy.inf` parameters and describes the permitted values

Planning IT Policy deployment

There are two general IT policy deployment scenarios you can use: local and distributed. The advantages and disadvantages listed below can help you determine which approach is most suitable for your environment.

1. Local Deployment

Local deployment consists of locally storing the IT Policy file on each user's workstation.

Advantages

- ◆ The BlackBerry Desktop Manager automatically searches for a local IT Policy file, so no workstation configuration is required.
- ◆ Network problems will not interfere with file availability.

Disadvantages

- ◆ A mechanism must be defined for distributing the IT Policy file to users' workstations.
- ◆ Users can delete the file from their workstation.

Two different scenarios exist for local deployment: initial and subsequent. Initial deployment occurs before users install the BlackBerry Desktop Software. Subsequent deployment occurs if policy files are being deployed for users with BlackBerry Desktop Software already installed.

Initial Deployment

To deploy the `Policy.bin` file to users' local computers, copy the contents of the desktop software installation CD to a file server. Install the IT Policy file with the BlackBerry Desktop Software by performing one of the following actions:

- ◆ Copy the `Policy.bin` file to the same directory as the desktop software installer.

OR

- ◆ To the `setup.ini` file, located in the same directory as the desktop software installer, add the following lines:

```
[Policy]
Policy_Path=c:\Program Files\Research In Motion\BlackBerry\policy.bin
```

The new settings are implemented the next time the user starts the desktop software and, if necessary, when the handheld is connected to the desktop.

Note: You should verify that the path is set for the user who runs the desktop software.

Subsequent Deployment

To deploy the `Policy.bin` file to users' local computers, distribute the file and place it in the default BlackBerry installation path (`C:\Program Files\Research In Motion\BlackBerry`).

If the default BlackBerry installation path was not used, you must create a path registry setting that enables the BlackBerry Desktop Manager to locate the `Policy.bin` file. The following registry entry is required:

```
HKEY_CURRENT_USER\Software\Research In Motion\BlackBerry\
Policy Manager\Path
```

where `Path` is a key, named `Path`, whose value is the full path to `Policy.bin`. For example, `C:\BlackBerry\policy.bin`.

The new settings are implemented the next time the user starts the desktop software and, if necessary, when the handheld is connected to the desktop.

Note: You should verify that the path is set for the user who runs the desktop software.

2. Distributed Deployment

Distributed deployment consists of storing the IT Policy file on a network server and ensuring that users' workstations point to the file.

Advantages

- ◆ The IT Policy file can be maintained in a single location.
- ◆ Users cannot delete the file.

Disadvantages

- ◆ Workstations must be configured in such a way that the BlackBerry Desktop Manager will locate the distributed file. However, further configuration changes are not required after a workstation is set up for initial deployment.



- ◆ If, due to network problems, the BlackBerry Desktop Manager cannot locate the network policy file, it reads the registry settings defined when the policy file was last read. This is only problematic if the file was changed since the BlackBerry Desktop Manager last read the file.
- ◆ If the desktop software cannot locate the `Policy.bin` file, the BlackBerry Desktop Manager informs the user and processes a local copy (if available).

Two different scenarios exist for distributed deployment: initial and subsequent. Initial deployment occurs before users install the BlackBerry Desktop Software. Subsequent deployment occurs if policy files are deployed for users with BlackBerry Desktop Software already installed.

Initial Deployment

To deploy the `Policy.bin` file on a server, add the following lines to the `setup.ini` file that is located in the same directory as the desktop software installer:

```
[Policy]
Policy_Path=path\policy.bin
```

where `path` is the server location of the `Policy.bin` file. For example,
`\\server1\BlackBerry\Policy_File\policy.bin`

The new settings are implemented the next time the user starts the desktop software and, if necessary, when the handheld is connected to the desktop.

Note: You should verify that the path is set for the user who runs the desktop software.

Subsequent Deployment

To deploy the `Policy.bin` file to a network location, place the file in the desired location and ensure that the required registry setting is defined on each user's workstation. The following registry entry is required:

```
HKEY_CURRENT_USER\Software\Research In Motion\BlackBerry\
Policy Manager\Path
```

where `Path` is a key, named `Path`, whose value is the `.bin` file's full network path. For example,
`\\server1\BlackBerry\Policy_File\policy.bin`

The new settings are implemented the next time the user starts the desktop software and, if necessary, when the handheld is connected to the desktop.

Note: You should verify that the path is set for the user who runs the desktop software.

IT Policy deployment best practices

Each organization has a distinctive set of IT policies. The BlackBerry IT Policy should always consider the general guidelines set by the overall IT policies of the organization. Below is a sample recommendation for deploying the BlackBerry IT Policy.

Assumptions

- ◆ The policy is set only on items that are controlled centrally.
- ◆ The policy is centralized.

Deployment Steps

1. Modify the `Policy.inf` file to include the following settings:

```
*****
;
; Policy.inf - Management Configuration file for BlackBerry Desktop Software
;
;
; Notes: For comments a (;) appears at the beginning of the line.
;       Use (\) for line continuation for strings.
;
;       Format:  Key = Value
;               Key {Policy } = value
;               Key {Default} = value
;
;               where: 'value'  can be an int, boolean or string.
;                       {Policy} key is updated if different time stamp.
;                       {Default} key is updated only once.
;
;               If no policy attribute {}, key will default to 'Default'
;
*****
```



```
;;;;;;;;;;;;;
;;
;; BlackBerry Desktop Manager Configuration
;;
;;;;;;;;;;;;;

; If the application appears on the taskbar
HideWhenMinimized = true

; Prompt the user when the desktop manager starts
MessagePrompt = Welcome to the Desktop Manager

; To enable or disable the USB-Serial converter
EnableUSBconverter = false

; Control whether the Application Loader is available to the user
ShowApplicationLoader {Policy} = false

; Control whether the IT Policy warning prompt is displayed if offline
ShowPolicyErrMsg {Policy} = false

;;;;;;;;;;;;;
;;
;; Synchronization
;; Synchronize for PIM, email, and folder management defaults
;;;;;;;;;;;;;

; This setting enables you to specify whether or not you want PIM
; information to be synchronized when the user clicks Synchronize Now
; in the Intellisync window.
SynchronizeNowPIM = true

; This setting enables you to specify whether or not you want email
; information to be synchronized when the user clicks Synchronize Now
; in the Intellisync window.
SynchronizeNowEmail = true

; This setting enables you to specify whether or not you want the date and
; time to be synchronized when the user clicks Synchronize Now in
; the Intellisync window.
```



```
SynchronizeNowDateTime = true
```

```
; This setting enables you to specify whether or not you want PIM  
; information to be synchronized automatically when the handheld  
; is connected to the computer.
```

```
AutoSynchronizePIM = true
```

```
; This setting enables you to specify whether or not you want email  
; information to be synchronized automatically when the handheld is  
; connected to the computer.
```

```
AutoSynchronizeEmail = false
```

```
; This setting enables you to specify whether or not you want date and time  
; information to be synchronized automatically when the handheld is connected to  
; the computer.
```

```
AutoSynchronizeDateTime = false
```

```
; This setting enables you to specify whether or not you want to synchronize  
; folders instead of performing an import.
```

```
SyncFoldersInsteadOfImport = true
```

```
; This setting enables you to specify how information conflicts are managed  
; between the handheld and the computer during synchronization.  
; If set to true, desktop information is used. If set to false, handheld  
; information is used.
```

```
FolderConflictDesktopWins = true
```

```
;This setting enables you to disable wireless calendar synchronization.
```

```
DisableWirelessCalendar {Policy} = false
```



```
;;;;;;;;;;;;;
;;
;; BlackBerry Redirector Settings
;;
;;;;;;;;;;;;;

; Append signature on outgoing messages. This should be set by the user.
AutoSignature = -----\
Sent from my BlackBerry Wireless Handheld.

; Forwards messages to the handheld
ForwardMessagesToHandheld = true

; Enables users to receive mail when the handheld is in the cradle
ForwardMessagesInCradle = false

; Set up filter rules for email redirection
FilterRuleFile = c:\myfilters.rfi
; When filter rules do not apply, forward or do not send messages.
ForwardWhenRulesDontApply = true

; When sending a message from handheld, do not save a copy in the Sent Items
folder.
DontSaveSentMessages = false

;;;;;;;;;;;;;
;;
;; Backup/Restore Configuration
;;
;; These values control the setting in the Backup and Restore Options window.
;;;;;;;;;;;;;

; This value controls the "Automatically back up my handheld" setting
; in the Options window, which enables or disables prompted automatic backups.
AutoBackupEnabled = true

; This value indicates how often an AutoBackup is performed, in days.
AutoBackupFrequency = 7

; This setting controls the exclusion of email and synchronized data from the
; automatic backup. If set to true, the "Backup all handheld application data"
```



```
; option is selected.
AutoBackupIncludeAll = true

; This setting controls whether email is excluded from automatic backups
; (when AutoBackupIncludeAll is false).
AutoBackupExcludeEmail = false

; This setting controls whether synchronized application data is excluded
; from automatic backups (when AutoBackupIncludeAll is false).
; "Synchronized data" is that data which is configured for synchronization with
; Intellisync; this varies according to the user's preferences.
AutoBackupExcludeSync = false

;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;
;;
;; WebLink Configuration
;;
;; These values control the appearance and behavior of the WebLink extension.
;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;

; Setting this value to false prevents the WebLink icon from being displayed.
ShowWebLink = false

; This setting specifies the URL that is used when the WebLink icon is
; activated.
WebLinkURL = www.your_network_here.com/go/downloads

; This setting controls the label that is displayed for the WebLink icon.
WebLinkLabel = Downloads
```



```
;;;;;;;;;;;;;
;;
;; Handheld Security Settings
;;
;;;;;;;;;;;;;

; Determines whether a password is required on the handheld
PasswordRequired {policy}= true

; Determines whether the user can disable the password
UserCanDisablePassword = false

; This value indicates the minimum length of an acceptable handheld
; security password. The valid range is 1 to 12 characters, inclusive.
MinPasswordLength {policy} = 7

; Password Pattern Checks
; The valid range is 0 or 1.
; 0 -> no checks
; 1 -> ensure password has at least one letter and one digit
PasswordPatternChecks {policy} = 1

; Maximum handheld security timeout
; The valid range is 1 to 60 minutes, inclusive.
; The handheld user is permitted to select any security timeout value
; less than this value.
MaxSecurityTimeout {policy} = 20

; Determines whether the user can change the timeout
UserCanChangeTimeout {policy} = TRUE

; Password aging
; The valid range is 0 to 365.
; Specifying a value of 0 indicates password aging is disabled. Other
; values specify the maximum age of the password before the handheld
; user is prompted to change it.
MaxPasswordAgeInDays {policy} = 30
```



```
;;;;;;;;;;;;;
;;
;; Messaging Settings
;;
;;;;;;;;;;;;;

; Indicates whether PIN-to-PIN messaging is permitted
; If true, handheld users can use the PIN-to-PIN messaging. If false,
; this capability is hidden from the handheld user.
AllowPINtoPIN {policy} = true

;;;;;;;;;;;;;
;;
;; Owner Information
;;
;;;;;;;;;;;;;

; Owner Name - if the value is "*" use the registry setting
OwnerName {default} = Research In Motion Limited

; Owner Info - if the value is "*" use the registry setting
OwnerInfo {default} = Please return to RIM\
Phone # (519) 888-7465\
295 Phillip St\
Waterloo Ont\
N2L 3W8
```

2. Compile the policy file by doing the following:
 1. In Windows Explorer, browse to the directory in which you installed ITPolicy.exe.
 2. Double-click ITPolicy.exe to start the IT Policy Manager.
 3. On the **File** menu, click **Open**. A directory dialog box appears.
 4. Browse to the .inf file that you want to compile and double-click it. It opens in the IT Policy Manager.
 5. On the **Action** menu, click **Generate**. A confirmation dialog box appears.
 6. Click **OK**. The Policy.bin file is created that you need to deploy.



3. For BlackBerry users that are not deployed, perform the following initial deployment procedure:
 1. Copy the BlackBerry Desktop Software to a file server share; for example: \\server1\BlackBerry
 2. Copy the Policy.bin file created in the previous section to \\server1\BlackBerry\Policy_Bin
 3. Locate the Setup.ini file.
 4. Edit the Setup.ini file and add the following lines:

```
[Policy]
Policy_Path=path\policy.bin
```

Where path is the server location of the Policy.bin file; for example,
\\server1\BlackBerry\Policy_File\policy.bin

The new settings are implemented the next time the user starts the desktop software and, if necessary, when the handheld is connected to the desktop.

4. For BlackBerry users that are deployed, perform the subsequent deployment procedure as shown below:
 1. Copy the Policy.bin file to a desired network location; for example, \\server1\BlackBerry\Policy_Bin
 2. Verify that the required registry setting is defined on each user's workstation. The following registry entry is required:

```
HKEY_CURRENT_USER\Software\Research In Motion\BlackBerry\Policy Manager\Path
```

where Path is a key, named Path, whose value is the .bin file's full network path. For example,
\\server1\BlackBerry\Policy_File\policy.bin

The new settings are implemented the next time the user starts the desktop software and, if necessary, when the handheld is connected to the desktop.

Note: You should verify that the path is set for the user who runs the desktop; the registry modification must be made under the current BlackBerry user's context.

To simplify the process, registry modifications can be deployed using network logging scripts. For information on how to implement registry changes using the logging scripts, refer to your operating system's network user manual.

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