

Notate AE Citrix setup guide

10th December 2020

OVERVIEW

This guide will help you to configure Notate for your Android Enterprise environment with Citrix XenMobile.

PRE REQUIREMENTS

It is assumed that you already have a working Citrix XenMobile environment and can use it to manage iOS applications and/or Android (legacy DA) applications.

Set up Android Enterprise in Citrix environment

If you don't have any Android Enterprise application configured in your Citrix environment, you need first to register Citrix as your EMM provider through managed Google Play. That setup connects managed Google Play to Endpoint Management and creates an enterprise for Android Enterprise in Endpoint Management. It will allow you to configure Android Enterprise applications, including Notate using Citrix device policies.

For the managed Google Play setup Google [recommends](#) to use a personal Google account, rather than Google Workspace (formerly G Suite) organizational account. Moreover Citrix setup for the Google Workspace account is very complicated, so we don't recommend to follow the path.

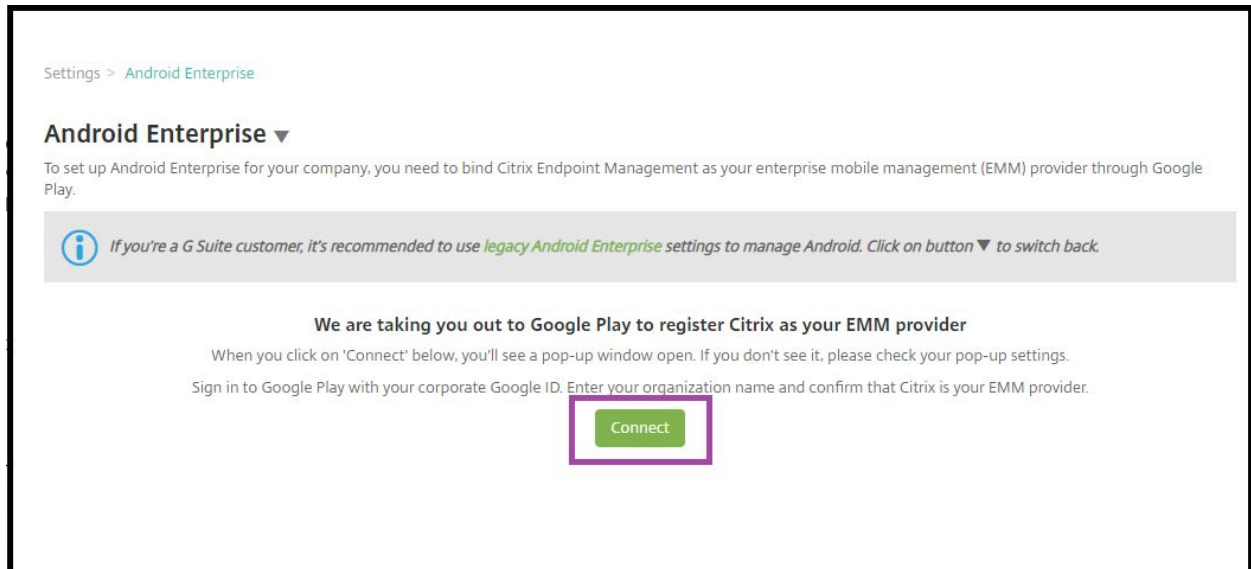
Start from creating a dedicated personal Google account. Sign out of all accounts and log into the created account explicitly to ensure it is the default one. Go to Citrix Endpoint Management and on the Setting page select "Android Enterprise":

 Refresh

Actions ▾

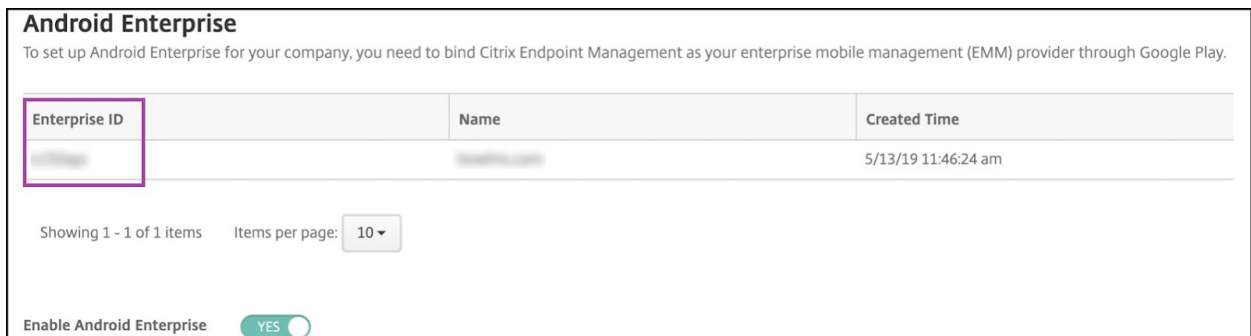
Monitor

Release Management



On the page press the “Connect” button. A popup with Google account page appears that will ask you to confirm Citrix is your EMM provider. Also it asks your organization name and contact persons details. After you press the “Complete setup” button, the setup is complete and the popup closes.

An enterprise ID is added for Android Enterprise. To enable Android Enterprise, slide Enable Android Enterprise to Yes:



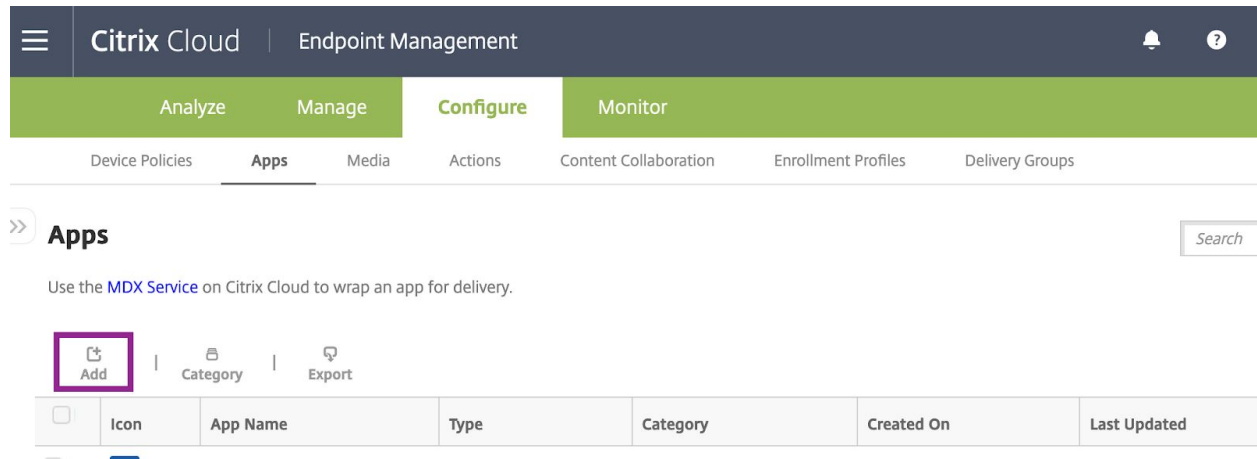
Your environment is connected to Google and is ready to manage devices. You can now provide apps for users.

Add Notate as an Android Enterprise application

You can add Notate for Enterprise either using a provided MDX file or directly from Google Play.

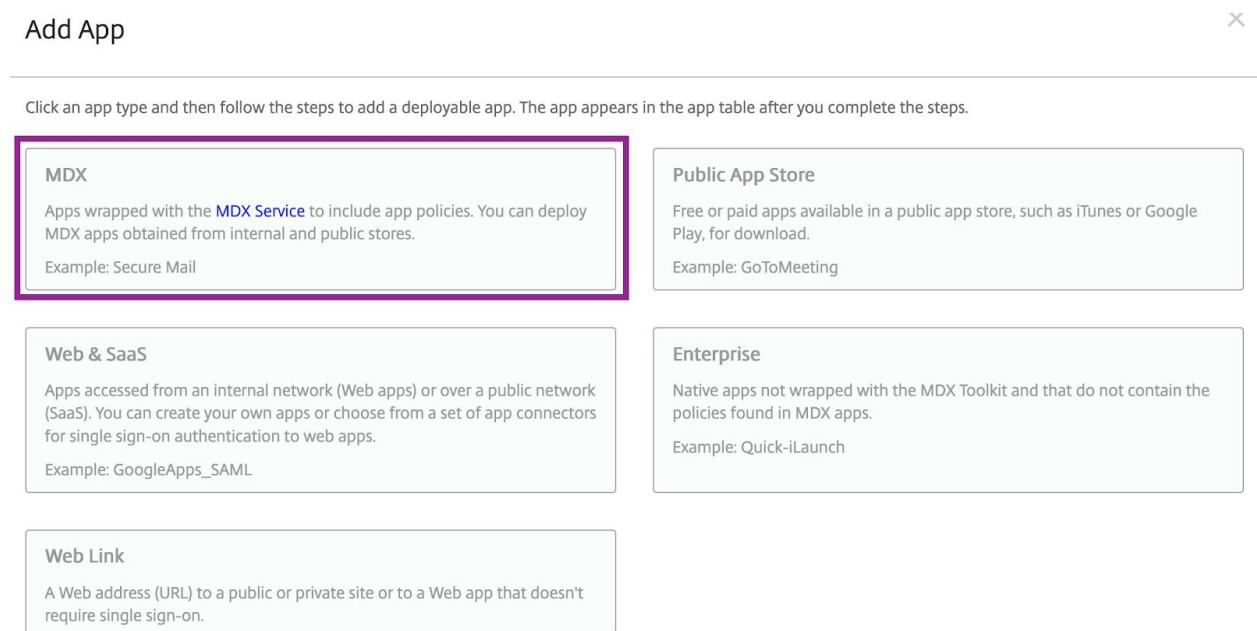
Using a provided MDX file

Navigate to the application configuration page (Configure -> Apps) and press the Add button:



The screenshot shows the Citrix Cloud interface for Endpoint Management. The top navigation bar includes 'Citrix Cloud' and 'Endpoint Management'. Below this is a secondary navigation bar with tabs: 'Analyze', 'Manage', 'Configure' (selected), and 'Monitor'. Under the 'Configure' tab, there are sub-tabs: 'Device Policies', 'Apps' (selected), 'Media', 'Actions', 'Content Collaboration', 'Enrollment Profiles', and 'Delivery Groups'. The main content area is titled 'Apps' and includes a search bar. Below the title, there is a text prompt: 'Use the MDX Service on Citrix Cloud to wrap an app for delivery.' Below this prompt, there are three icons: 'Add' (highlighted with a red box), 'Category', and 'Export'. Below the icons is a table with the following columns: 'Icon', 'App Name', 'Type', 'Category', 'Created On', and 'Last Updated'.

In the popup select “MDX”:



The screenshot shows the 'Add App' popup window. The title is 'Add App' with a close button (X) in the top right corner. Below the title, there is a text prompt: 'Click an app type and then follow the steps to add a deployable app. The app appears in the app table after you complete the steps.' Below this prompt, there are five app type options, each in a box with a title, description, and example:

- MDX** (highlighted with a red box): Apps wrapped with the MDX Service to include app policies. You can deploy MDX apps obtained from internal and public stores. Example: Secure Mail
- Public App Store**: Free or paid apps available in a public app store, such as iTunes or Google Play, for download. Example: GoToMeeting
- Web & SaaS**: Apps accessed from an internal network (Web apps) or over a public network (SaaS). You can create your own apps or choose from a set of app connectors for single sign-on authentication to web apps. Example: GoogleApps_SAML
- Enterprise**: Native apps not wrapped with the MDX Toolkit and that do not contain the policies found in MDX apps. Example: Quick-iLaunch
- Web Link**: A Web address (URL) to a public or private site or to a Web app that doesn't require single sign-on.

Fill in the application name as you want it to appear inside Citrix XenMobile, then press the Next button below:

The screenshot shows the Citrix Cloud Endpoint Management interface. The top navigation bar includes 'Citrix Cloud' and 'Endpoint Management'. Below it, a green bar contains 'Analyze', 'Manage', 'Configure' (highlighted), and 'Monitor'. A secondary bar lists 'Device Policies', 'Apps' (highlighted), 'Media', 'Actions', 'Content Collaboration', 'Enrollment Profiles', and 'Delivery Groups'.

The main content area is divided into two sections:

- Public App Store:** A sidebar menu with '1 App Information' (highlighted) and '2 Platform' (with a 'Clear All' link). Under '2 Platform', there are checkboxes for 'iPhone', 'iPad', 'Android (legacy DA)', 'Android Enterprise' (checked), and 'Windows Desktop/Tablet'.
- App Information:** A form with the following fields:
 - Name ***: A text input field containing 'Notate for Android Enterprise'.
 - Description**: A large text area.
 - App category**: A dropdown menu currently showing 'All Selected'.

In the left menu unselect all the platforms except Android Enterprise and press Next again. In the search box press the “Upload” button and select the MDX file from your computer for upload:

The screenshot shows the 'MDX' section of the Citrix Cloud interface. The left sidebar menu has '1 App Information' and '2 Platform' (highlighted, with a 'Select All' link). Under '2 Platform', there are checkboxes for 'iOS', 'Android (legacy DA)', 'Android Enterprise' (checked), 'Windows Phone', and 'Windows Desktop/Tablet'.

The main content area is titled 'Android Enterprise MDX App' and contains the following elements:

- A text prompt: 'Select an .mdx file to upload'.
- An 'Upload' button.
- A note: 'Use the [MDX Service](#) on Citrix Cloud to wrap an app for delivery.'

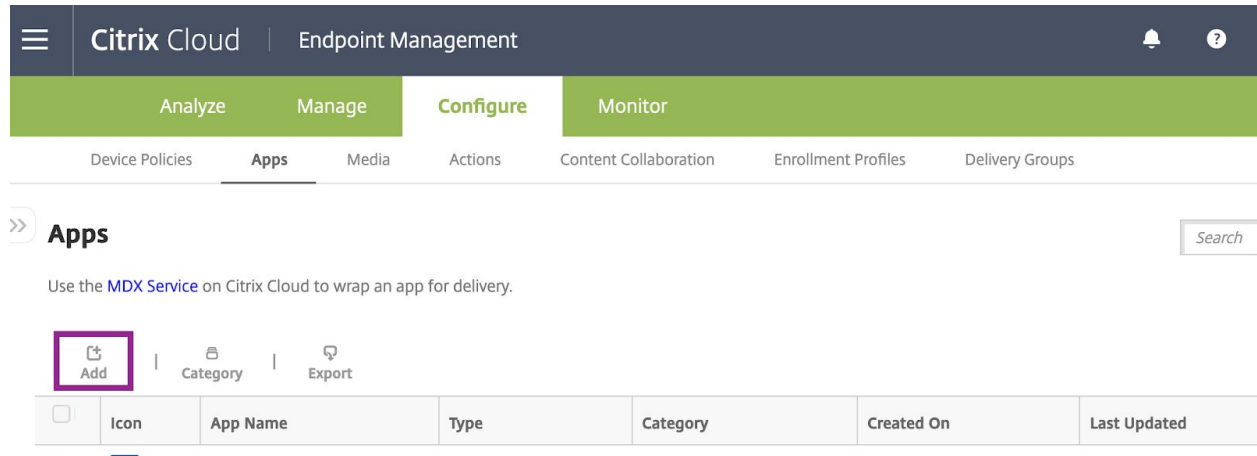
After the upload check the application details (you don't have to change anything there):

File name *	Notate for Android Enterprise
App Description *	Notate for Android Enterprise
Product track	Production - 3.9
App version	3.9
Package ID	com.shafersystems.notate.enterp
Minimum OS version	
Maximum OS version	

Press the Next button. Optionally you can select an approval workflow and the delivery group assignment (to have the application automatically provisioned for the selected groups). Finally press “Save”.

Using the Notate for Enterprise from the Google Play

Navigate to the application configuration page (Configure -> Apps) and press the Add button:

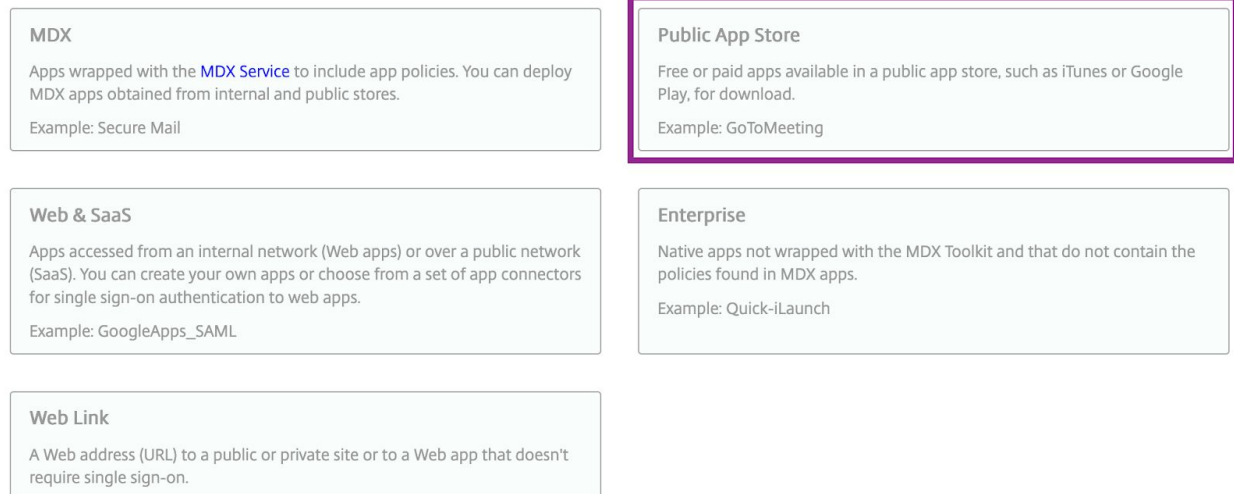


The screenshot shows the Citrix Cloud Endpoint Management interface. The top navigation bar includes 'Citrix Cloud' and 'Endpoint Management'. Below this is a green bar with tabs: 'Analyze', 'Manage', 'Configure' (selected), and 'Monitor'. Under the 'Configure' tab, there are sub-tabs: 'Device Policies', 'Apps' (selected), 'Media', 'Actions', 'Content Collaboration', 'Enrollment Profiles', and 'Delivery Groups'. The main content area is titled 'Apps' and includes a search bar. Below the title, there is a text box stating: 'Use the [MDX Service](#) on Citrix Cloud to wrap an app for delivery.' Below this text are three buttons: 'Add' (highlighted with a red box), 'Category', and 'Export'. At the bottom, there is a table with the following columns: 'Icon', 'App Name', 'Type', 'Category', 'Created On', and 'Last Updated'.

In the popup select “Public App Store”:

Add App

Click an app type and then follow the steps to add a deployable app. The app appears in the app table after you complete the steps.



The screenshot shows the 'Add App' popup with five app types listed in a grid:

- MDX**: Apps wrapped with the [MDX Service](#) to include app policies. You can deploy MDX apps obtained from internal and public stores. Example: Secure Mail
- Public App Store** (highlighted with a red box): Free or paid apps available in a public app store, such as iTunes or Google Play, for download. Example: GoToMeeting
- Web & SaaS**: Apps accessed from an internal network (Web apps) or over a public network (SaaS). You can create your own apps or choose from a set of app connectors for single sign-on authentication to web apps. Example: GoogleApps_SAML
- Enterprise**: Native apps not wrapped with the MDX Toolkit and that do not contain the policies found in MDX apps. Example: Quick-iLaunch
- Web Link**: A Web address (URL) to a public or private site or to a Web app that doesn't require single sign-on.

Fill in the application name as you want it to appear inside Citrix XenMobile, then press the Next button below:

☰

Citrix Cloud | Endpoint Management

🔔 ?

AnalyzeManageConfigureMonitor

Device PoliciesAppsMediaActionsContent CollaborationEnrollment ProfilesDelivery Groups

Public App Store

1 App Information

2 Platform Clear All

☒ iPhone

☒ iPad

☒ Android (legacy DA)

☒ Android Enterprise

☐ Windows Desktop/Tablet

App Information

Name *

Notate for Android Enterprise ?

Description

App category

All Selected ▼

In the left menu unselect all the platforms except Android Enterprise and press Next again. In the search box enter “Notate for Enterprise” and press “Search”:

☰

Citrix Cloud | Endpoint Management

AnalyzeManageConfigureMonitor

Device PoliciesAppsMediaActionsContent CollaborationEnrollment Profiles

Public App Store

1 App Information

2 Platform Clear All

☐ iPhone

☐ iPad

☐ Android (legacy DA)

☒ Android Enterprise

☐ Windows Desktop/Tablet

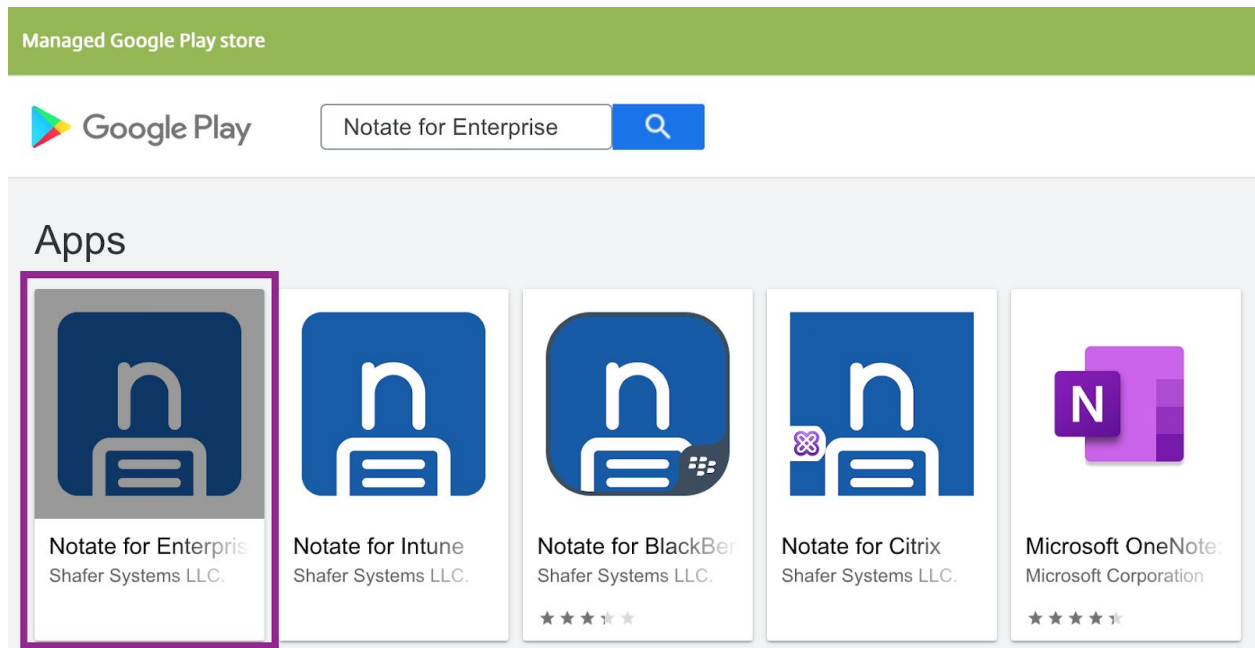
Managed Google Play

Type an app name or keyword in the field and search for your desired app. When you app appears in the store.

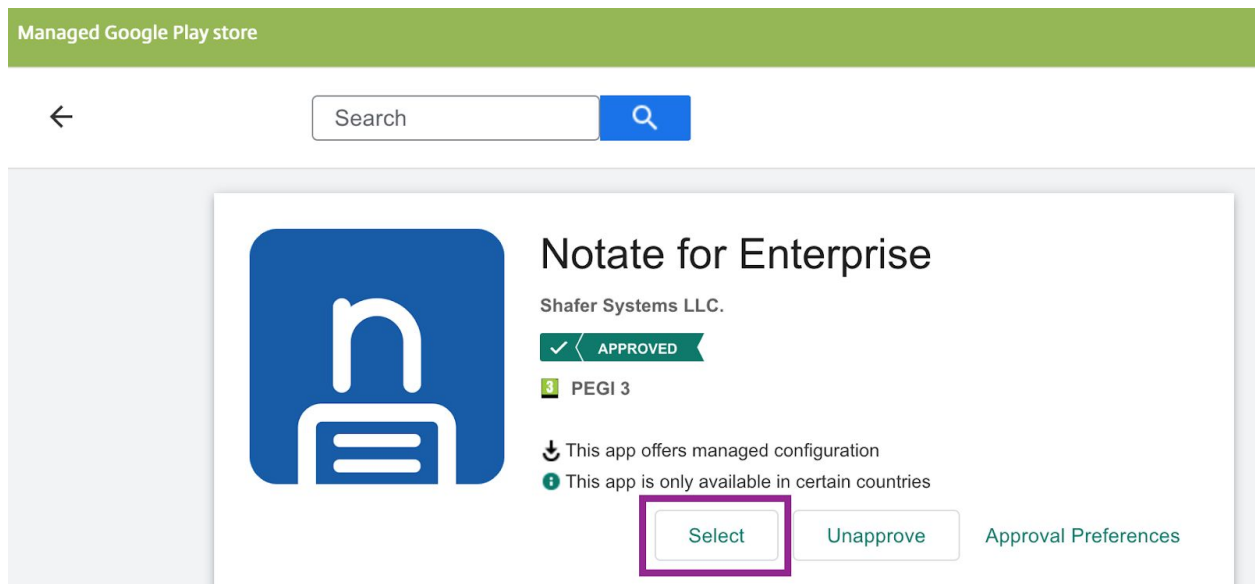
Notate for Enterprise ✕

Search

In the popup click on the “Notate for Enterprise” application:



Confirm that you approve the application for use in the managed Google Play and press Select:



The popup closes and a rectangle with the application name appears on the page

Public App Store

- ☐ iPad
- ☐ Android (legacy DA)
- ☒ Android Enterprise
- ☐ Windows Desktop/Tablet
- ☐ Windows Phone

3 Approvals (optional)

4 Delivery Group Assignments (optional)

Managed Google Play

Type an app name or keyword in the field and search for your desired app. When the app appears in the store.



Search

Search results for com.shafersystems.notate.enterprise in Managed Google Play



Notate for Enterprise
Shafer Systems LLC.

Didn't find the app you were looking for?

Click on it and check the application details (you don't have to change anything there):

App Details

Name *

Description *

Product track

Production - 3.9

Version

3.9

Package ID

com.shafersystems.notate.enterp

Image



► Deployment Rules

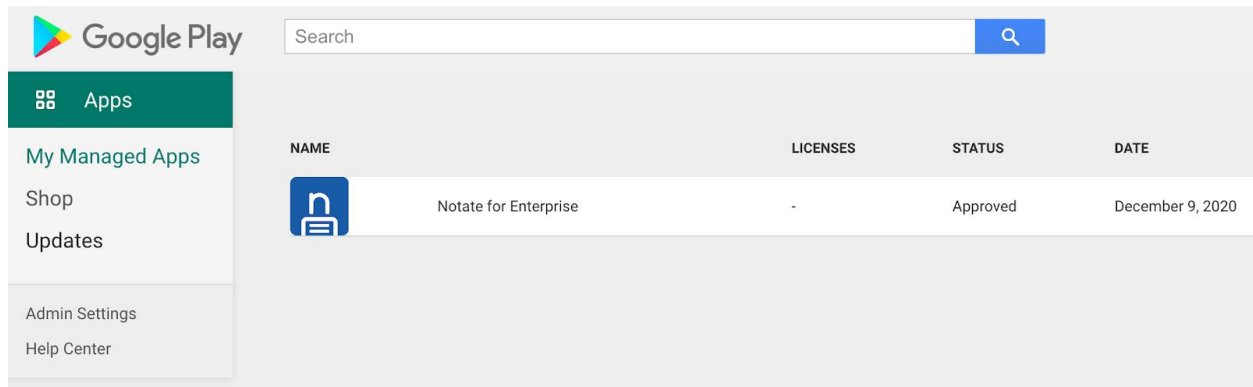
Back

Next >

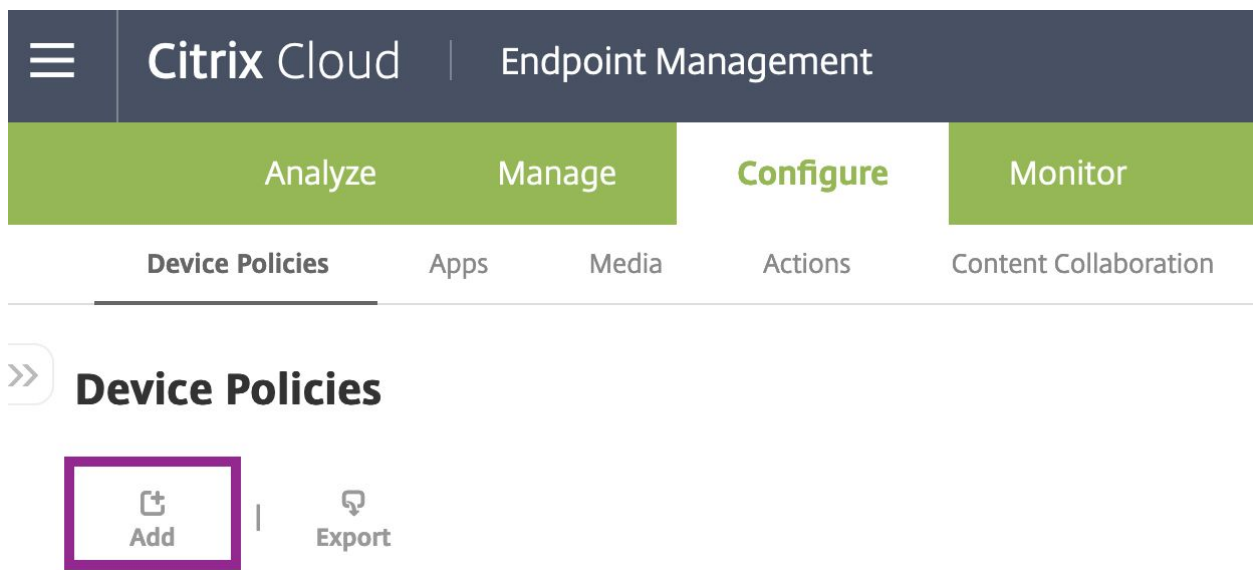
Press the Next button. Optionally you can select an approval workflow and the delivery group assignment (to have the application automatically provisioned for the selected groups). Finally press "Save".

Add managed policy for Notate

In another browser window open the URL <https://play.google.com/work/licenses/apps> and verify that you see the application you've just added:



Navigate to the device policy configuration page (Configure -> Device Policies) and press the Add button:



In the left menu select “Android Enterprise” and on the right click “Managed Configurations”:

The screenshot shows the 'Configure' tab with the 'Device Policies' sub-tab selected. On the left, the 'Policy Platform' list includes iOS, Windows Desktop/Tablet, Android (legacy DA), macOS, **Android Enterprise** (checked), Windows Mobile/CE, and Windows Phone. On the right, the 'Policies most often used' list includes Exchange, Location, Passcode, Restrictions, Scheduling, and WiFi. The 'Security' section on the right includes App Permissions, Credentials, Keyguard Management, Kiosk, Knox Platform for Enterprise Key, **Managed Configurations** (highlighted with a red box), and Samsung MDM License Key.

Select the application “Notate for Enterprise” in the popup and press OK. In the Managed Policy configuration enter the policy name and press Next:

The screenshot shows the 'Managed Configurations' page with the 'Policy Info' tab selected. The 'Policy Information' section displays the domain 'com.shafersystems.notate.enterprise'. The 'Policy Name' field is filled with 'Notate for AE Policy'. The 'Description' field is empty. The left sidebar shows the 'Managed Configurations' section with '1 Policy Info' selected, '2 Platforms' (with a 'Clear All' link), '3 Assignment', and '4 Android Enterprise' (checked).

On the Managed Configuration pane specify the Notate parameters:

- **License Key:** Use the license key provided to you by Shafer Systems
- **Email Address:** Use the templated value from your MDM to specify the end users’ email address.

-
- **User Name:** Use the templated value from your MDM to specify the end users' username. The format accepted by your on-prem exchange server is typically `domain\username`. An alternative format that works with Office 365 is `user@domain.com` (typically the user's email address)
 - **Autodiscovery URLs:** Typically this field should be left blank. It is only necessary if your server supports a non standard auto discovery URL.
 - **Exchange Web Services URL:** Leave this field blank for Autodiscovery, or specify the EWS URL for a faster initial connection. The EWS URL format is:
`https://server.domain.com/EWS/Exchange.asmx`
 - **Sharing:** Allows users to share their Exchange notes and task subfolders with other Exchange users.
 - **Files:** Enables Notate's robust PDF editing feature to be used. Simply send a PDF file to Notate via Open In, and you can then edit, annotate, and sign PDF documents and optionally save them as notes.
 - **GeoTagging:** Enables the app to tag a note with its location when created.
 - **Camera:** Enables users to insert camera shots into notes.
 - **Photo Gallery:** Enables users to insert images from the device camera roll into notes.
 - **Voice Recordings:** Enables users to make voice recordings in notes.
 - **Attachments:** Enables users to save file attachments in notes.
 - **Tasks:** Enables users to use Notate for task management
 - **Disable Peer Verification:** Enable this setting in order to allow Notate to access an on-prem Exchange server which does not have a public SSL certificate.
 - **Allow Crash Reports:** Enable crash reports to be sent to the publisher for correction.

Citrix Cloud | Endpoint Management

Analyze Manage **Configure** Monitor

Device Policies Apps Media Actions Content Collaboration Enrollment Profiles Delivery Groups

Managed Configurations

1 Policy Info

2 Platforms [Clear All](#)

☒ Android Enterprise

3 Assignment

This policy lets you configure a variety of application-related options and application-related settings that are defined by the app developer. If a tooltip mentions using a "templated value", use the corresponding Endpoint Manag

License Key ?

Email Address ?

User Name ?

Autodiscovery URLs ?

Exchange Web Services URL ?

Sharing ☒ ?

Files ☒ ?

Geo Tagging ☒ ?

Press “Next” button and on the next screen select the delivery groups that the policy is assigned to. Press “Save” button to complete:

Analyze Manage **Configure** Monitor

Device Policies Apps Media Actions Content Collaboration Enrollment Profiles

Managed Configurations

1 Policy Info

2 Platforms [Clear All](#)

☒ Android Enterprise

3 Assignment

Managed Configurations
com.shafersystems.notate.enterprise

Choose delivery groups

☐ AllUsers

☒ Test Users

Now you have the application and policy configured. Enroll a new device for a user in the selected delivery group and you should have Notate for Enterprise installed on the device.