

EFT Outlook Add-In

For EFT v8.0.4

GLOBALSCAPE

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THE EFT OUTLOOK ADD-IN

EFT Workspaces includes an Outlook Add-In that allows you to send files in Outlook and managed with EFT using Workspaces, and includes sending secure messages, expiring file links, specifying recipient authentication options, and receiving notifications when the recipient clicks the download link.

Installing the EFT Outlook Add-In

To use the Workspaces with Outlook, you must first install the EFT Outlook Add-In. You can use the deployment script available on the **Workspaces OAI** tab of the Site to deploy it to multiple computers at once in any deployment tool that you normally use, or you can install it with the EFT Outlook Add-In installer as described below.

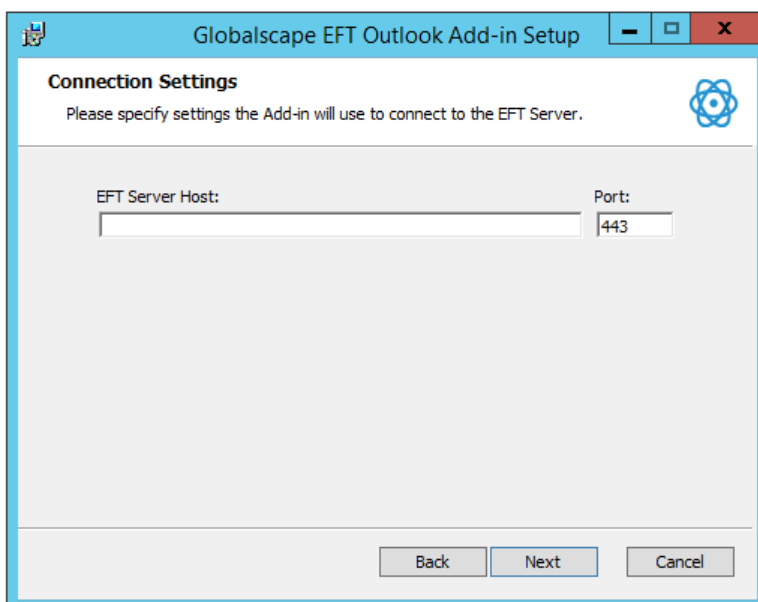
Before installing, refer to [System Requirements](#) in the EFT online help.

When configuring Outlook to send files with Workspaces, ensure the following configuration is set:

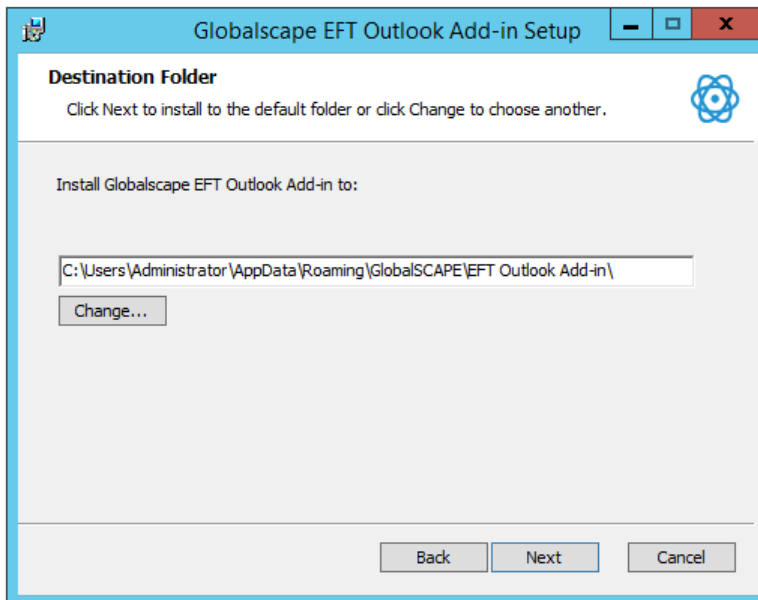
- The user account must have **Allow Secure File Sending** enabled on the user account's **Connections** tab.
- Kerberos requires the administrator to [set the SPN](#) for the account EFT is using.
- All user accounts need folder creation at their root folder enabled.

To install the EFT Outlook Add-In

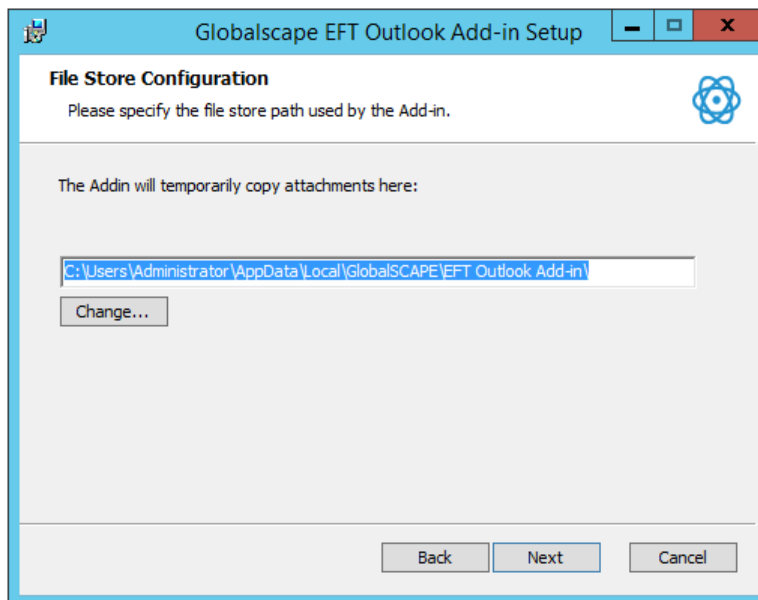
1. Get the installers from the installation folder (e.g., C:\Program Files (x86)\Globalscape\EFT Server Enterprise(OAI).
 - **EFTOutlookAddinInstaller.msi** - This is the main installer.
 - **EFTOutlookAddinSetup.exe** - This executable contains files that are needed by the main installer.
2. Start the **EFTOutlookAddinInstaller.msi** installer and click **Next** on the Welcome page.
3. Click **Next**.



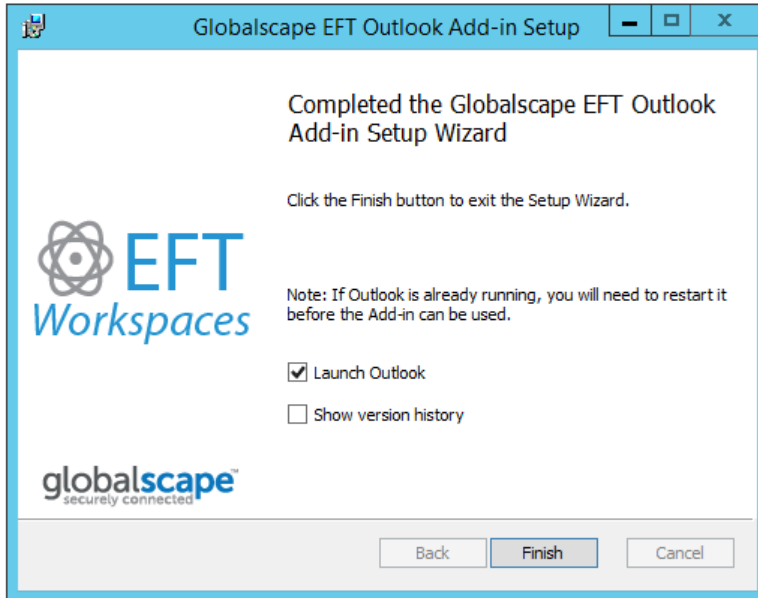
- Specify the **EFT Server Host** (URL) and **Port**, then click **Next**.



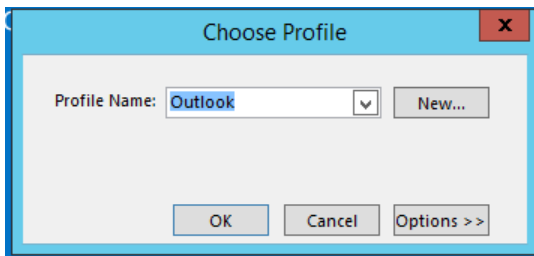
- Specify the location in which to install the Add-In, then click **Next**.



- Specify the location to store temporary copies of attachments while they are processed, then click **Next**.
- Click **Install**.



8. When installation is complete, click **Finish**. Outlook is launched.
9. In Outlook 2013 and 2016, the **Choose Profile** dialog box appears.



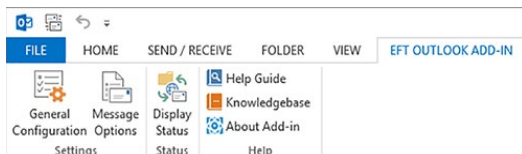
10. Specify which profile you want to configure for use with the EFT Outlook Add-In, then click **OK**.
11. When Outlook opens, it will ask if you want to install the Add-In. Click **Yes**.
12. If there are issues with the EFT SSL certificate, you will be ask if you want to accept it. Click **Yes**. (Clicking **No** will disable the Add-In.)

The EFT Outlook Add-In options appear on the menu and in new emails.

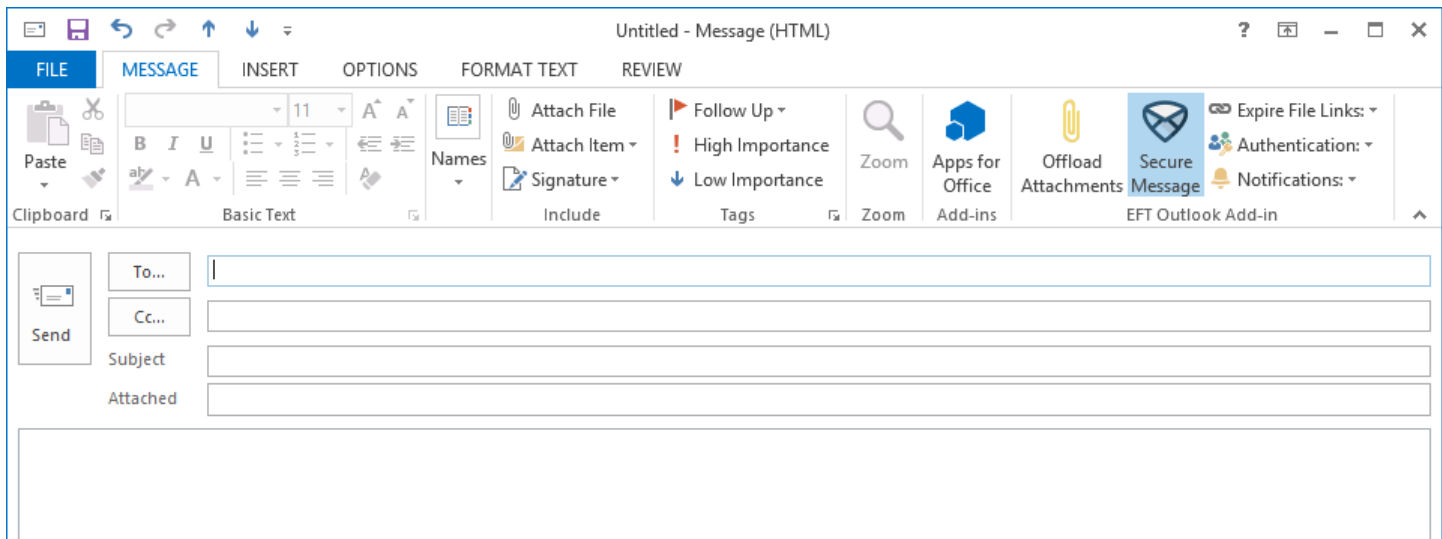
EFT Outlook Add-In Interface

The EFT Outlook Add-In allows you to send files from Outlook for pickup via a secure link.

When the user interface is enabled, the EFT Outlook Add-in options are available in Outlook:



When you create a new email, the EFT Outlook Add-In options appear:



- If the EFT Outlook Add-in does not appear in Outlook, refer to [Enabling or Disabling the Outlook Add-In](#).
- If the EFT Outlook Add-in options are grayed out, check the following:
 - The account used to connect to EFT is not valid. Be sure that an EFT user account is used to [connect to EFT](#).
 - The Add-in is unable to communicate with the EFT server. This could be caused by a number of issues, including [incorrect connection information](#), invalid or blocked user account, or blocked IP address from multiple invalid connections.
 - Outlook Add-in is disabled in [Outlook](#) or in EFT.

Changing the Message Format in Outlook

RTF-formatted messages are not supported. The procedures below describe how to change the message format, depending on your version of Outlook.

Changing the Message Format in Outlook 2010 and later

To change the message format for all messages

1. Click the **File** tab.
2. Click **Options**.
3. Click **Mail**.
4. Under **Compose messages**, in the **Compose messages in this format** list, click **HTML** or **Plain Text**.

To change the format of an individual message

1. With the message open, click **Format Text**.
2. On the **Format** tab, click the format you want to use (**Plain Text** or **HTML**).

Changing the Message Format in Outlook 2007

To change the default message format for all messages

1. On the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. In the **Compose in this message format** list, click **HTML** or **Plain Text**.

To change the format of an individual message

1. With the message open, click **Options**.
2. On the **Format** tab, click the format you want to use (**Plain Text** or **HTML**).

Connecting to EFT from Outlook

Typically, the EFT Outlook Add-In server connection information is configured by the administrator. You should not edit these settings unless directed to do so by your administrator. EFT administrators should also refer to [Configure a Service Principal Name SPN for Windows Authentication](#), below, to configure Integrated Windows Authentication (Kerberos).

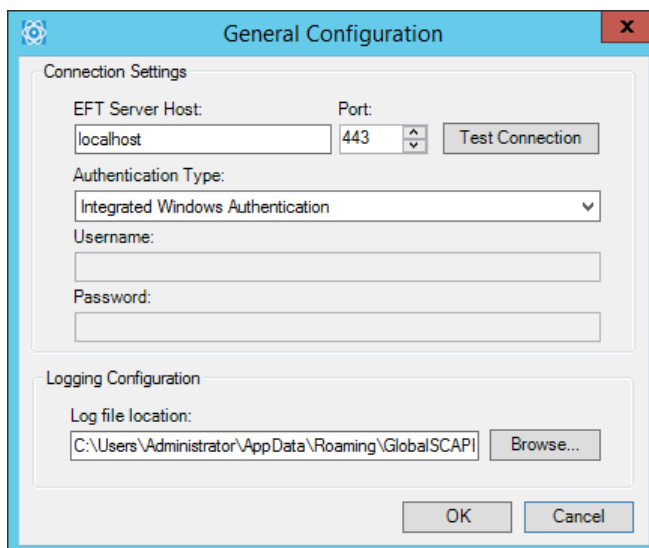
Reasons why you might want to edit these settings are if your username/password has changed, if the server is moved to another host, if your login type was changed, or if you need to change the log file location.

If the EFT Outlook Add-In is not connected to the server, it will not try to upload packages.

In the **General Configuration** dialog box, accessed from the EFT Outlook Add-In toolbar/ribbon, you can specify to which server you want to connect, how to authenticate your connection, and where to save log files. In most cases, your administrator will configure this for you during setup.

To configure the EFT Outlook Add-In

1. On the **EFT Outlook Add-In** toolbar/ribbon, click **General Configuration**. The **General Configuration** dialog box appears.



2. In the **EFT Server Host** box, provide the host name of EFT.
3. In the **Port** box, provide the port used by EFT for HTTPS connections.
4. In the **Authentication type** box, specify either manual or Windows authentication:

- **Manual**—You must provide the username and password that you use to connect to EFT or your AD credentials.
 - a. In the **Username** box, provide the *username that you use to connect to EFT* or your AD username.
 - b. In the **Password** box, provide the *password that you use to connect to EFT* or your AD password.

Use the EFT login credentials for the EFT user account, not the administrator.
 - **Integrated Windows Authentication**—Used this login type if you connect to EFT via Single Sign On (Kerberos). In this case, you do not need to provide a username and password. Your Windows credentials are used to connect.
5. If you want to test your connection, click **Test Connection**.
 6. (Optional) In the **Log file location** box, specify the path at which the log file is saved.
 7. Click **OK** to save your changes, or click **Cancel** if you do not want to save your changes.

Configure a Service Principal Name (SPN) for Windows Authentication

Use this topic as a checklist to correctly configure the Outlook Add-In so that users can authenticate with EFT using integrated Windows Authentication.

Why do I need an SPN? According to [Microsoft Technet](#), "A service principal name (SPN) is the name by which a Kerberos client uniquely identifies an instance of a service for a given Kerberos target computer. If you install multiple instances of a service on computers throughout a forest, each instance must have its own SPN. A given service instance can have multiple SPNs if there are multiple names that clients might use for authentication. For example, an SPN always includes the name of the host computer on which the service instance is running, so a service instance might register an SPN for each name or alias of its host."

Using the Windows "setspn" utility, create the Service Principal Name (SPN), which is necessary for Kerberos to function correctly for EFT. The SPN is a name by which the Add-In can uniquely identify the EFT Server service.

The "setspn" utility is typically installed by default on Active Directory server computers. The command must be run using an account with Active Directory administration rights. Typically it is easiest to perform these steps on the domain's primary Active Directory server.

To create the SPNs, execute the following at a command prompt:

```
setspn -A HTTP/eftserver eftpreauthuser
setspn -A HTTP/eftserver.globalscape.local eftpreauthuser
setspn -A HTTP/eftserver.globalscape.com eftpreauthuser
```

Where:

- eftserver eftpreauthuser is the host name of the computer running EFT; the host name that workstations would use internally to communicate with the EFT computer.
- eftserver.globalscape.local eftpreauthuser is the fully qualified host name of the computer running EFT; the full host name that workstations would use internally to communicate with the EFT computer.
- eftpreauthuser with the username of Active Directory domain account used in the "KDC pre-auth username" field of the EFT Kerberos Configuration.
- eftserver.globalscape.com is the address to which the Add-In will connect.

Do not type "HTTP://" -- the proper prefix is "HTTP/"

These SPNs should work regardless of the account the EFT server service is running as.

i *If duplicate SPNs exist (meaning multiple domain accounts with the same HTTP/<SPN>), then Kerberos will not work correctly. Once the SPN has been associated with the Kerberos Pre-Auth Account used by EFT to participate in Kerberos Authentication, you can double-check for duplicate SPNs on the domain using the command: `setspn -X`.*

To view the SPNs to verify that they were created successfully, run the following command after substituting <PreAuthUsername> auth user account:

```
setspn -l <PreAuthUsername>
```

(Note: The switch is a lower-cased letter L, **not** the number one.)

Configuring Message Options in Outlook

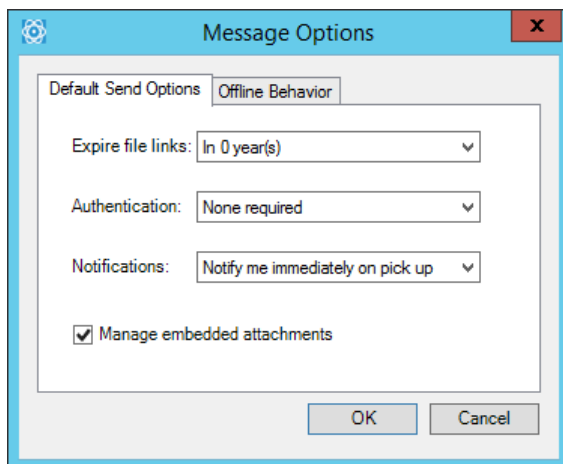
You can configure message options for all emails or for a specific email. In each email that you send, you can specify message options that pertain to that email only, overriding the default send options. You can make these settings stricter, but not less strict. Each procedure is described below.

Use the **Message Options** dialog box to specify whether the EFT Outlook Add-in should:

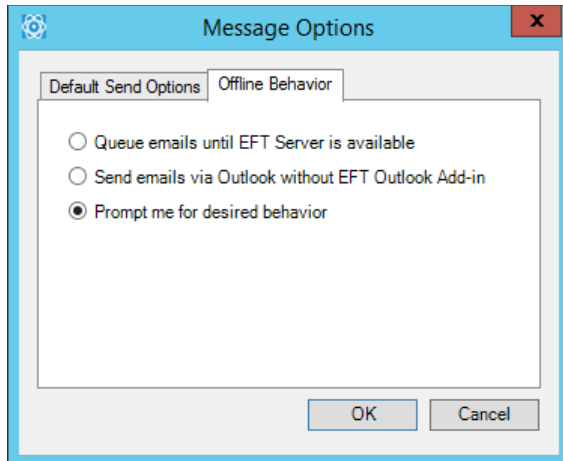
- Expire links
- Use authentication
- Notify on pickup
- Manage embedded attachments
- Queue or send emails when EFT is not available

To configure message options to apply to ALL emails

1. On the EFT Outlook Add-In toolbar/ribbon, click **Message Options**. The **Message Options** dialog box appears.



2. On the **Default Send Options** tab, specify expiration, authentication, and notification options.
3. If you want EFT to manage embedded attachments, such as a signature logo, select the **Manage embedded attachments** check box.
4. On the **Offline behavior** tab, specify the following options:



- **Queue emails until EFT server is available**—Emails are sent after EFT server becomes available.
- **Send emails via Outlook without EFT Outlook Add-in**—Emails are sent immediately, but not managed by EFT.
- **Prompt me for desired behavior**—Display a prompt when EFT is not available so you can choose whether to send immediately or hold the email until EFT is available.

5. Click **OK** to save your changes, or click **Cancel** if you do not want to save your changes.

To configure send options for a specific email

1. Create the email as you normally do.
2. In the EFT Outlook Add-In area, click the options you want to change just for this email.
3. In the **Send Options** dialog box, you can specify the following options:
 - **Offload attachments**—Embedded attachments are files that are inserted into the body of the email rather than attached to the email, such as a company logo in an email signature or a picture. If you want to make these embedded attachments into file download links, select the check box. (Cleared by default.)
 - **Expire File Links**—When selected, the ability to download the attachments will expire in the time that you specify. If the recipient attempts to download a file that is past its expiration date, the following message appears: “The file you are attempting to download has expired. Please contact the sender if this file needs to be resent.” (Cleared by default.)
 - If the administrator has selected the Retain files after link expiration check box, the temporary Workspace is removed from the virtual file system in EFT, but the files are still available on disk until the "retain files" expiration date.
 - **Authentications**—Require the user to log in to download an attachment from the Pick-up portal. Selecting this check box helps prevent unwanted downloads from email forwarding and such, and also helps guarantee that the person downloading the file is the intended recipient.

- If the user clicks on an individual file link, the login or account creation page will be displayed in their default browser. After authentication is successful, the "open/save" dialog appears.
- If the user clicks on the Pick-up portal link, the login or account creation page will be displayed in their default browser. After authentication is successful, they will be taken to the Pick-up page for that specific package.
- When the check box is selected, only the Pick-Up page link is sent. If the check box is not selected, individual links for each file are included in the email.

The authentication will be saved in their session, so clicking multiple individual file links will not require multiple log-ins. (The session length is 10 minutes.)

- **Notifications**—When selected, download notification is sent to you when the recipient clicks the download link in the email or Download Files on the Pick-Up page.

4. Click **OK** to save your changes or **Cancel** if you do not want to save your changes.

Enabling or Disabling the Outlook Add-In in Outlook

If the EFT Outlook Add-In options do not appear in Outlook you need to enable it. Or in the rare instance of an error, you may you need to disable the Outlook Add-In or reenable it.

To enable or disable the Outlook Add-In

In Outlook 2010 and later:

1. Click **File > Options**.
2. In the left pane, click **Add-Ins**.
3. In the **Manage** box, click **COM Add-Ins**, then click **Go**. The **COM Add-Ins** dialog box appears.
4. Select (turn on) or clear (turn off) the **EFT Outlook Add-In** check box, then click **OK**.

Take note of the state of the Add-In in the Trust Center (i.e. Active, Inactive, or Disabled). If the Add-In is in a disabled state, it cannot be enabled using the steps above initially. Instead, you must perform the following steps in the Trust Center:

- a. Next to the **Manage** box, click **Disabled Items**, then click **Go**.
- b. In the **Disabled Items** dialog box, click **EFT Outlook Add-In**, then click **Enable**.
- c. Close the **Disabled Items** dialog box.

If the Add-In now appears in the Active list, it is enabled. If the Add-In appears in the Inactive list, follow steps 3-4 above.

In Outlook 2007:

1. Click **Tools > Trust Center**.
2. In the left pane, click **Add-Ins**.
3. In the **Manage** box, click **COM Add-Ins**, then click **Go**. The **COM Add-Ins** dialog box appears.
4. Select (turn on) or clear (turn off) the **EFT Outlook Add-In** check box, then click **OK**.

Take note of the state of the Add-In in the Trust Center (i.e. Active, Inactive, or Disabled). If the Add-In is in a disabled state, it cannot be enabled using the steps above initially. Instead, you must perform the following steps in the Trust Center:

- a. Next to the **Manage** box, click **Disabled Items**, then click **Go**.
- b. In the **Disabled Items** dialog box, click **EFT Outlook Add-In**, then click **Enable**.
- c. Close the **Disabled Items** dialog box.

If the Add-In now appears in the Active list, it is enabled. If the Add-In appears in the Inactive list, follow steps 3-4 above.

Enabling Outlook's Language Detection

The EFT Outlook Add-In uses Outlook's proofing language detection to determine in which language an email is written. If you want to [enable the Auto detect email language setting](#), you must enable Outlook's **Detect language automatically** proofing setting.


Before Outlook's **Detect language automatically** option can detect the language that you are typing and enable the proofing tools for that language, you must turn on the language-specific options you want to use.

To turn on language specific options

- For Microsoft Office 2007, refer to the Microsoft Office article at <http://office.microsoft.com/en-us/outlook-help/enable-the-use-of-other-languages-in-your-office-programs-HA010243503.aspx>.
- For Microsoft Office 2010 and later, refer to the Microsoft Office article at <http://office.microsoft.com/en-us/outlook-help/enable-the-use-of-other-languages-in-your-office-programs-HA010354783.aspx>.

To enable Outlook's Detect language automatically proofing setting

- For Outlook 2007, refer to the Microsoft Office article at <http://office.microsoft.com/en-us/outlook-help/turn-on-automatic-language-options-HA010244823.aspx>.
- For Outlook 2010 and later, refer to the Microsoft Office article at <http://office.microsoft.com/en-us/outlook-help/turn-on-automatic-language-options-HA010354274.aspx>.

 *From the Microsoft Office links above: "Automatic language detection does not work on a single-word basis, but on a sentence basis. Depending on the length of your sentences, you might need to type several sentences before Outlook has enough contextual information to automatically detect the language and apply the correct dictionary."*

Outlook must be restarted for the changes to take effect. After you have turned on the language-specific options in Microsoft Office and enabled Outlook's **Detect language automatically** proofing setting, then the Add-In's automatic language detection feature will be enabled.

Mail Profiles with Multiple Accounts

Outlook 2007 supports a maximum of one mail account per mail profile. As such, the Outlook Add-In for this version of Outlook supports a mail profile with a single mail account.

Outlook 2010 and later support mail profiles with multiple mail accounts. The Outlook Add-In seamlessly works with this new feature and (from a user standpoint) there is no real difference in how the Add-In is used. Emails with attachments can be sent from any of the mail accounts in the profile and the Add-In will manage the emails that meet the policy criteria, as usual. If an email is sent with the download notification feature turned on, the notifications will be sent to the account from which the email was sent. The **Status** pane will show an aggregated view of all packages that are being managed by the Add-In for all accounts. If an account is disconnected from its mail server, the Add-In will wait until connectivity is re-established for that account before uploading commences.

The Outlook Add-In is supported with the following mailbox types:

- Outlook 2007 supports a single MAPI or POP (not both at the same time)
- Outlook 2010 and later support MAPI and POP

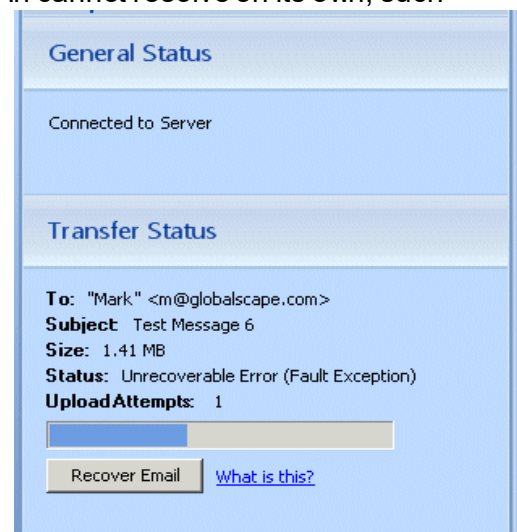
Recovering an Email from "Unrecoverable Error"

The Add-In will try to automatically recover from problems such as loss of connectivity with EFT during a transfer. If the Add-In experiences an "Unrecoverable Error" while managing a package, the **Recover Email** button appears.

An unrecoverable error is a more serious error that the Add-In cannot resolve on its own, such as a file system error caused by EFT running out of disk space. These types of errors will usually require an administrator to resolve.

If you click **Recover Email**, the Add-In will move the email corresponding to the package from Outlook's *Outbox* to the *Drafts* folder. You can then try resending the email, perhaps after the administrator has had a chance to resolve the issue. If the problem cannot be resolved in a timely fashion, but you need to send the email promptly, you can stop the Add-In from managing emails by turning it off via the Outlook *Trust Center*.

- To turn off the Outlook Add-In, refer to [Enabling or Disabling the Outlook Add-In](#).
- To edit message options, refer to [Configuring Message Options](#).



Sending Files with the Outlook Add-In

If you have ever sent an email with attachments, you already know how to use the Outlook Add-in. Create the email, attach one or more files to the email, then click **Send**. You will continue to send and receive emails as always; the only difference is that the Outlook Add-in works transparently in the background to transfer the emails that have attachments.

- The sent email is still saved to your **Sent Items** folder, but the attachments, if managed by the Outlook Add-in, are not saved in the **Sent Items** folder. Instead, a link to the attachments is added to the body of the email. The email saved to your **Sent Items** folder looks the same as the recipient's received email, minus the attachments. (Outlook's "Save Sent item to" option is not supported in the EFT Outlook Add-In.)

- The attachment and message, if managed by the Outlook Add-in, is saved on EFT in the location specified during installation, in a unique folder for each email, not on your SMTP server (such as Microsoft Exchange).
- The Outlook Add-in stores information about emails that it is processing in an individual workspace.
- The administrator configures message-sending options on EFT. You can configure more strict options in Outlook for all messages or for specific messages. Refer to [Configuring Message Options](#) for details.
- In v8.0.2 and later, you can send a secure message in Outlook without an attachment, however, you cannot expire the message immediately without an attachment.

Sending the email can fail in the following situations:

- **Offline mode**—Messages are stored in the outbox until Outlook is online and the Add-In connects to the server.
- **Loss of connectivity to the server**—Interrupted uploads due to loss of connectivity to the server are continued from the point at which they were stopped when connection to the server is re-established.
- **Insufficient disk space**—The Add-In will receive a FileSystemError response from the server and the Add-In will treat this as an [unrecoverable error](#).
- **RTF-formatted emails**—RTF-formatted messages are not supported. To change the format for all messages sent in Outlook, refer to [Changing the Message Format](#).

To send a file

1. Create an email as usual.
2. Attach the file to the email using the EFT Outlook Add-in **Offload Attachments** button.
3. (Optional) Click one or more of the following options:
 - **Secure Message**—To send the email and its attachments as a secure message, click **Secure Message**. The attachment(s) and message body will be available to the recipient(s), through a secure Pick-Up portal. A unique message containing a unique link is created for each recipient.
 - **Expire File Links**—When selected, the ability to download the attachments will expire in the time that you specify. If the recipient attempts to download a file that is past its expiration date, the following message appears: “The file you are attempting to download has expired. Please contact the sender if this file needs to be resent.”
 - If you set the message to expire immediately without attaching a file, you will receive an error message.
 - If the administrator has selected the Retain files after link expiration check box, the temporary Workspace is removed from the virtual file system in EFT, but the files are still available on disk until the "retain files" expiration date.

- **Authentications**—Require the user to log in to download an attachment from the Pick-up portal. Selecting this check box helps prevent unwanted downloads from email forwarding and such, and also helps guarantee that the person downloading the file is the intended recipient.
 - If the user clicks on an individual file link, the login or account creation page will be displayed in their default browser. After authentication is successful, the "open/save" dialog appears.
 - If the user clicks on the Pick-up portal link, the login or account creation page will be displayed in their default browser. After authentication is successful, they will be taken to the Pick-up page for that specific package.
 - When the check box is selected, only the Pick-Up page link is sent. If the check box is not selected, individual links for each file are included in the email.

The authentication will be saved in their session, so clicking multiple individual file links will not require multiple log-ins. (The session length is 10 minutes.)

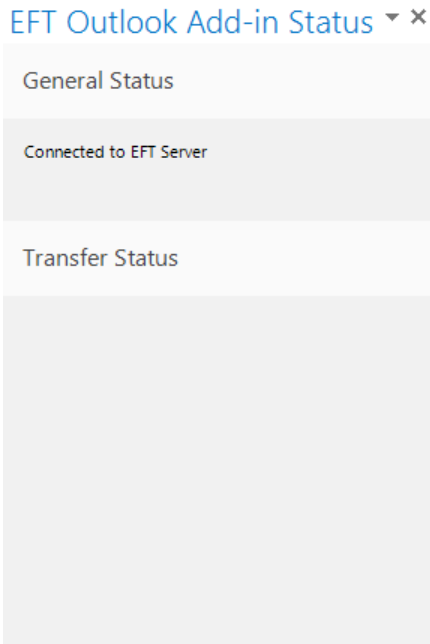
- **Notifications**—When selected, download notification is sent to you when the recipient clicks the download link in the email or "Download Files" in the Pick-Up portal.
4. Click **Send**. The email the recipient will receive a delivery notification.
 5. The recipient can download the attachment from the Web Transfer Client.
 6. If the attachment does not appear, the recipient might need to click the refresh icon. Select the check box next to the file, then click the **Download** icon. The file is saved to the downloads folder in the recipient's browser.


Viewing Add-In Status

The EFT Outlook Add-In includes a **Status** pane through which you can view whether you are connected to EFT and the status of email attachments being sent. By default, the **Status** pane is hidden. The pane appears on the right side of the main Outlook window.

To view EFT Outlook Add-in status

- On the **EFT Outlook Add-In** toolbar/ribbon, click **Display Status**. The **EFT Outlook Add-in Status** pane appears.



- The **General Status** area displays the status of your server connection. If the Outlook Add-In is not connected to the server, it will not try to upload packages.
- The **Transfer Status** area displays the status of attachments being sent, including recipient, subject line, size of the file, status (Pending, Transferring, Verifying File Digest, etc.), and the number of upload attempts.
- To dock or undock the **Status** pane
 - Click and hold the title bar of the **Status** pane until the **Move** cursor  appears (or click the down arrow on the title bar of the pane, then click **Move**) then drag the pane to undock it and move it where you want.
 - To dock the pane, click in the title bar, and drag the pane back to the right or left side of the primary Outlook window.
 - To resize the pane (when undocked) click and hold a corner of the pane (or click the down arrow on the title bar of the pane, then click **Size**), then drag the pane to the size you want.
- If the upload failed, the **Transfer Status** area displays the following information:
 - Text-based description of current status, including information on what prevented package from being uploaded in error cases
 - Subject of the package
 - Recipients of the package
 - Total size of package
 - Number of upload retry attempts for package
 - [Recover Email button](#) for failures that were the result of an unrecoverable error. Clicking **Recover Email** moves the email to the Outlook **Drafts** folder.