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Introduction to Secure Ad Hoc Transfer

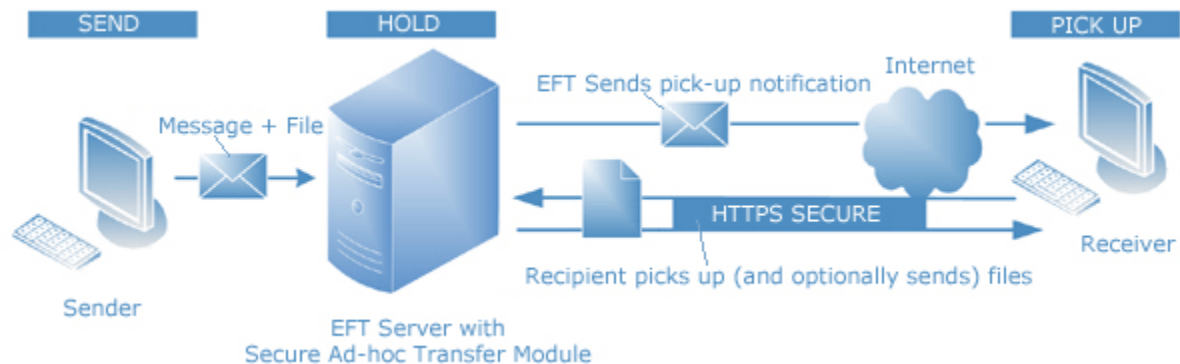
EFT Server's Secure Ad Hoc Transfer (SAT) module allows your internal users to send and receive large e-mail file attachments to recipients outside of your organization quickly, reliably, and securely, all without having to manually create or maintain FTP accounts on EFT Server.

The SAT Module works in conjunction with EFT Server and allows users inside an enterprise to transfer files to and from recipients outside the organization with secure authentication, non-repudiation, and auditing capabilities. Version 1.5 added ASP.NET technology to overcome file size limits when uploading very large attachments. The Web page supports file attachments up to 2GB, which is a limit of HTTP.

The process is bidirectional; recipients can securely deliver files back to the sender if the sender grants them permission. Auditing and receipt notifications provide verifiable transfer of data.

An automated process sets up new user accounts, assigns home folders, notifies the recipient that a file is ready to be picked up, audits all transactions, expires old temporary accounts, and finally, deletes expired accounts.

Below is a brief overview of what takes place behind the scenes when users send a file.



1. A user sends an e-mail with an attachment using EFT Server's Ad Hoc Transfer.
2. Ad Hoc Transfer creates a new temporary account on EFT Server. This temporary account is assigned a random username and password, and expires in seven days.
3. A temporary folder is created and associated with the temporary account. An e-mail is sent to the recipient with a secure hyperlink (HTTPS), a temporary account user name and password, and a list of files available for download.
4. The recipient of the e-mail follows the HTTPS link, enters the temporary user name and password, and connects to the default HTTPS Web interface or the Web Transfer Client.
5. The recipient can now download the files.
6. The recipient can also upload files, if this option is enabled by the sender. When files are uploaded, the sender is notified that the uploaded files can be picked up. The recipient uses the same login credentials. After seven days, the temporary account user name and password is disabled, and the disabled temporary account is removed from EFT Server's file system.
7. If EFT Server has Auditing and Reporting, all of the transactions associated with the Ad Hoc account are logged to EFT Server's auditing and reporting database for non-repudiation and auditing purposes.

Perform the steps below in the order listed:

1. Review the [system requirements](#), [deployment methods](#), and [installation prerequisites](#).
2. [Install the SAT Module](#).
3. [Configure the SAT Module](#)
4. [Customize the SAT module Web interface](#)
5. [Configure EFT Server to send upload notifications](#)

Getting Started with the Secure Ad Hoc Transfer Module

Before you can allow your internal users to send and receive e-mail file attachments using the Secure Ad Hoc Transfer (SAT) module, there are a few configuration options to consider. Review the topics below for details.

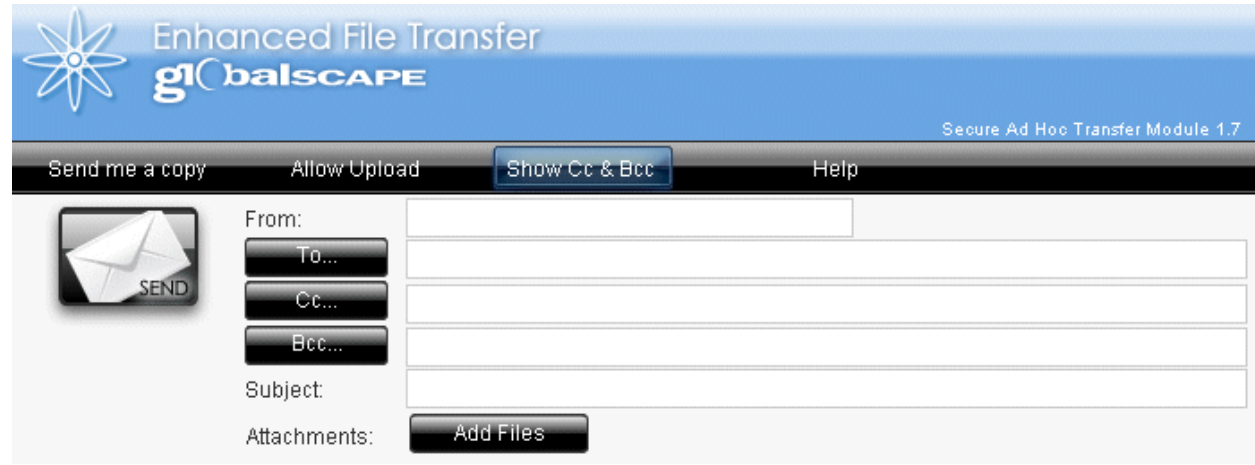


*This help file, **adhoc.chm**, and the release notes, **notes.txt**, can be found in the SAT installation folder (by default, **C:\inetpub\EFTAdHoc**).*

- [Receiving Notification when Recipient Uploads a File](#) - The SAT module default installation handles the process of notifying your recipients when a file is sent. In addition, temporary accounts are disabled automatically one week after account creation. You must configure EFT Server to [remove expired temporary accounts](#) from EFT Server (including their home folder and any files contained within) automatically, and to receive notifications for files uploaded by recipients.
- [Using the PCI Module with the Secure Ad Hoc Transfer Module](#) - If you are using the HS-PCI module and the SAT module with EFT Server, you should create a separate, non-PCI DSS Site that is used only for the SAT module. Alternately, you can disable the features that are not compatible, but that would take the Site out of compliance with the PCI DSS.
- [Enforcing Strong \(Complex\) Passwords](#) - If your Site's complex password settings require more than 20 characters, you must configure the **Ad Hoc** User Setting Level to override the Site's password settings so that complex passwords for SAT temporary users contain fewer than 20 characters.
- [Sending Large Files](#) - If you expect to transfer large files, e.g., 1 GB or larger, we strongly recommend that you install EFT Server on the same computer as IIS and, in edit settings in the [SAT configuration file](#).
- [SAT module configuration](#) - Refer to [Secure Ad Hoc Transfer's Configuration File](#) for details of editing the configuration file.
- You must configure your SMTP server to allow the computer on which the SAT module is installed to relay. Refer to the following Web links for details:
 - [Allowing application servers to relay off Exchange Server 2007](#) (Microsoft Exchange Team Blog)
 - [How to troubleshoot mail relay issues in Exchange Server 2003 and in Exchange 2000 Server](#) (Microsoft KB article ID 895853)
- [Activating Secure Ad Hoc Transfer](#) - When you first install the Secure Ad Hoc Transfer module, you are given the choice of installing a Full or Trial version. The trial version is not time limited, but file sender operations are limited to ten per IIS session and one file at a time. Follow the instructions in [Activating Secure Ad Hoc Transfer](#) to activate the full version.
- [Troubleshooting Errors in the Secure Ad Hoc Transfer Module](#). Refer to the topics in this chapter for the resolution to common errors.

What's New in Secure Ad Hoc Transfer

Secure Ad Hoc Transfer has had a makeover! The SendMail form in version 1.7 has been redesigned with a cleaner, more interactive interface, with several new features that were common requests from current customers. The new features and enhancements are described below.



The screenshot shows the 'Enhanced File Transfer' interface by g!C balsCAPE. The title bar includes 'Secure Ad Hoc Transfer Module 1.7'. Below the title bar are navigation buttons: 'Send me a copy', 'Allow Upload', 'Show Cc & Bcc', and 'Help'. The main form area contains a 'SEND' button with an envelope icon, a 'From:' field, 'To...', 'Cc...', and 'Bcc...' buttons, a 'Subject:' field, and an 'Attachments:' section with an 'Add Files' button.



For the Secure Ad Hoc Transfer (SAT) release notes, refer to **notes.txt** in the SAT installation folder (by default, **C:\vnetpub\EFTAdHoc**).

- SAT v1.7 has an option for "[Single-click authentication](#)," which means that you can configure SAT to include a hyperlink in the notification e-mail to automatically log the recipient into the Web Transfer Client.
- The upload notification process now sends just one e-mail per transaction instead of sending one e-mail for each file attachment.
- New "[Smart Email](#)" functionality allows SAT to pull e-mail address from EFT Server users' details. SAT completes the e-mail address based on first and last name if the user's full name and e-mail fields are populated in EFT Server.
- SAT checks for and warns on common configuration errors when the application is started.
- In the SendMail form, the **From** e-mail address is prepopulated with the last address used. The **From** address is stored in a cookie for one day after a successful e-mail has been sent.
- Add [BCC recipients](#) and show or hide the **Cc** and **Bcc** fields.
- [Customize the notification e-mail](#) with your own company logo or remove the logs from the e-mails.
- Add as many file attachments to one e-mail as you need to send. Each time you click Add Files, a new attachment box appears.
- Add "[blacklist](#)" and "[whitelist](#)" destination domains in the **To**, **Cc**, and **Bcc** fields.
- [Configure temporary user accounts to not expire](#).
- [Specify Virtual Folders in EFT Server](#) for Ad Hoc users and use EFT Server's Local File Copy protocol when the Ad Hoc User Settings Level is on a remote share.

