SecurEnvoy Outlook Agent Installation and Administration Guide

SecurEnvoy Global HQ
Merlin House, Brunel Road, Theale, Reading. RG7 4AB
Tel: 0845 2600010 Fax: 0845 260014 www.SecurEnvoy.com

SecurEnvoy Outlook agent (2007-2013)

Installation – Admin Guide v8.1

The SecurEnvoy Security server is the main central component of the SecurEnvoy suite of products. It has direct integration into a LDAP directory server (Microsoft Active Directory, Novell e-Dir, Sun Directory Server and Linux Open LDAP Directory Server) for user information, controls and manages the authentication of SMS passcodes and the subsequent sending of them.
This must be installed for SecurAccess, SecurPassword SecurICE and SecurMail

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Foreword

SecurEnvoy is the trusted global leader of tokenless two-factor authentication. As the pioneers of mobile phone based tokenless authentication; SecurEnvoy lead the way with ground breaking solutions that others aspire too.
Our innovative approach to the tokenless market now sees thousands of users benefitting from our solutions all over the world. With users deployed across five continents, our customers benefit from significant reduced time to deploy and a zero footprint approach means there is no remote software deployment and administrators enjoy the management tools allowing them to rapidly deploy up to 100,000 users per hour.
Our design philosophy is based on re-using existing customer technology investments such as Microsoft Active Directory, simplifying the end user authentication experience while enhancing the overall security.
With no token manufacturing costs the return on investment (ROI) is so much more acceptable to businesses and organizations, and environmentally the green benefits of a zero carbon footprint also attract environmentally responsible purchasers. We are truly now providing solutions that have zero impact on our environment.
SecurEnvoy distribute through the channel, providing customers the value added benefits of working with local partners. We have now built up a technical and sales infrastructure that supports most languages and cultures around the world.
The business was officially incorporated in 2003 after preliminary, coding and testing in our labs. Years on we now have happy customers across the five continents and regional support. Business levels have more than doubled year on year due to our subscription sales model that is an acceptable route that allows our clients to budget more effectively. This model includes local support and annual subscriptions.
Founded by Andrew Kemshall and Stephen Watts, the two founders work relentlessly to achieve business growth worldwide. This massive growth has been possible through the quality of people and the experience within the company both from sales and technical expansion.
SecurEnvoy continues to shape the way millions of people plan their authentication requirements and purchasing decisions.

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1.0 Overview of Installation Files

SecurMail Microsoft Outlook Agent (2007-2013)

This agent is only required for SecurMail. It is an Outlook plug-in that adds a button called "Send Secure" to the menu bar of new email messages. This allows the sending of a secure email to any email recipient. In addition the recipient is authenticated using Two-Factor authentication.

1.1 Outlook Agent

Supported Outlook Versions:

Outlook 2007, 2010, 2013 (32bit Only) **Outlook (64bit) client is currently not supported.**

Supported Operating Systems:

Windows XP SP2 or later (32bit or 64bit)
Windows Vista (32bit or 64bit)
Windows 7 (32bit or 64bit)
Windows Server 2003 SP1 or later (32bit or 64bit)
Windows Server 2008 (32bit or 64bit)
Windows Server 2008 R2 (32bit or 64bit)
Windows 8 (32bit or 64bit) **8.1 currently not supported**
Windows Server 2012 (32bit or 64bit) **2012 R2 currently not supported**

Note

Outlook Agent 8.1 requires 8.1 or higher SecurEnvoy Server

2.0 SecurMail Outlook Agent Install & Configuration

2.1 Basic Overview

The agent can be installed in two ways, the first is a simple setup.exe file for a few installations, the second is to us the MSI installer so that a software push model can be utilised.

Whatever the scenario, the following file (semail.ini) must be updated before the installations are carried out.

2.2 Pre-Installation checklist

> **Note**
>
> *Note, Dot Net 3.5 framework must be install before running setup*

To install the agent locate the Outlook Agent software.

Navigate to the Agent software folder and then select the Windows folder. Locate the semail.ini file Once located edit the file with a text editor, output is shown below.

Before installing this agent it is recommended that your security server name is added to semail.ini as follows:-

- Locate the line "SecurityServer="
- Change to "SecurityServer=http(s)://my_security_server" where my_security_server is the name of the SecurEnvoy security server.

> **Note**
>
> *Note, if the network between the outlook agent and the security server is not trusted then use https in place of http.*

There must be a network connection via http (Port 80) or https (Port 443) between the Outlook agent and the security server.

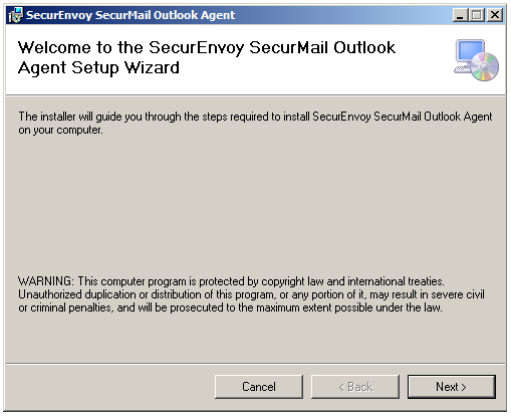
Confirm this is true by manually browsing to the following:

http://{My Security Server]/secserver
i.e. http://www.abc.com/secserver
OR
https://{My Security Server]/secserver
i.e. https://www.abc.com/secserver

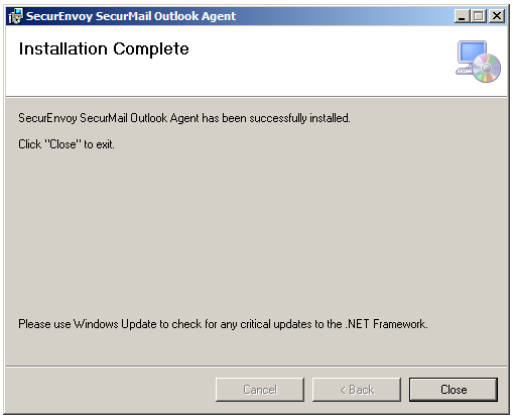
You should get the following returned.
"ERR, Unknown Flag"

2.3 Installation of SecurMail Outlook Agent

To install the IIS Agent manually, run "Microsoft Outlook Agent (2007-2013)\Setup.exe"



Follow the on screen prompts



Once complete the following screen is displayed. Click finish to close the installer.

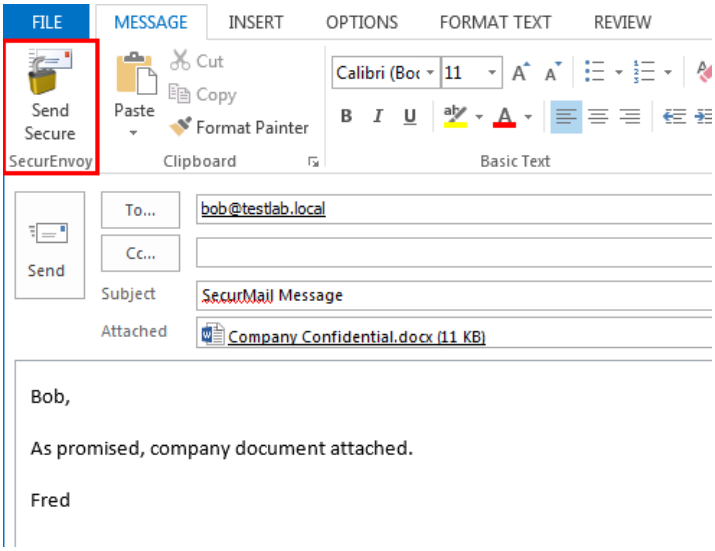
Note

To install via Microsoft's Active Directory Group Policy, it is recommended that this policy is added to "**User Configuration**" and NOT "Computer Configuration".
You must install Visual Studio 2007 or 2010 Tools For Office prior to pushing SecurMail Outlook Agent

3.0 Operation of SecurMail Outlook Agent

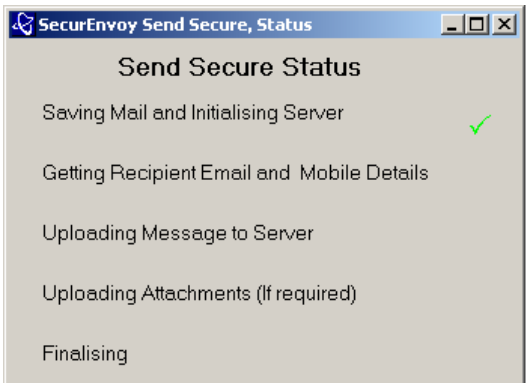
3.1 Sending a Secure Mail

When composing an email, it can be sent securely using the "Send Secure" button which will now be in the Outlook Ribbon.





If a sender calls the plug-in by pressing this button, the following steps will occur…



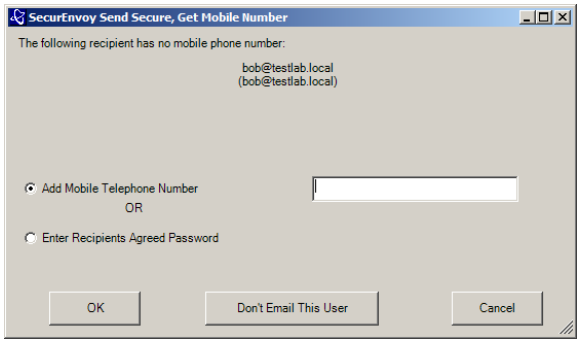
Saving Mail and Initialising Server

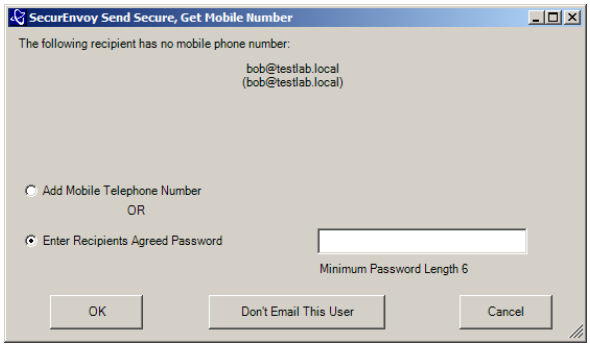
The current mail is saved to draft and a connection to the security server via https (or http) is made, the security server will return a unique ID for this request.



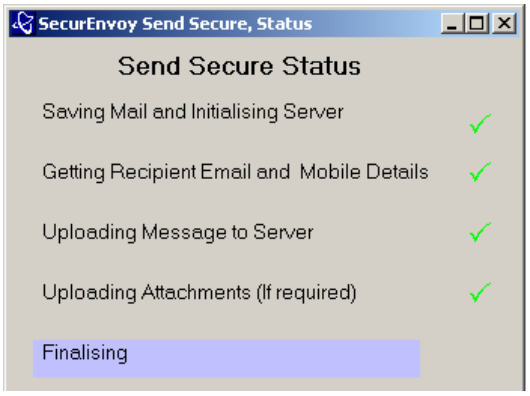
The user is prompted to send the message either with a "One Time Passcode" or "Auto Enrol and Store". The difference is that a message sent with a "One Time Passcode" can only be opened and read once, then it is automatically deleted, whereas the "Auto Enrol and Store allows the recipient to keep opening the message until it expires at a pre defined time (default 30 days controlled by the SecurEnvoy Security server)

Getting Recipient Email and Mobile Details
All recipients defined in TO: CC: or BCC: are checked for valid email addresses and mobile numbers are looked up in the sender's local contacts database.





If a Mobile Number is not known, the sender is prompted for to input one or a password. If using a password the sender must relay this information to the recipient to allow the email to be opened.

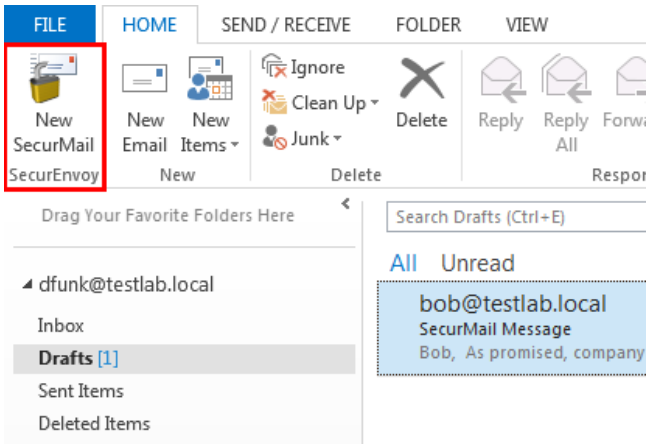


Uploading Message to Server
The current mail's subject and message body is uploaded to the security server via the IIS virtual directory secupload2

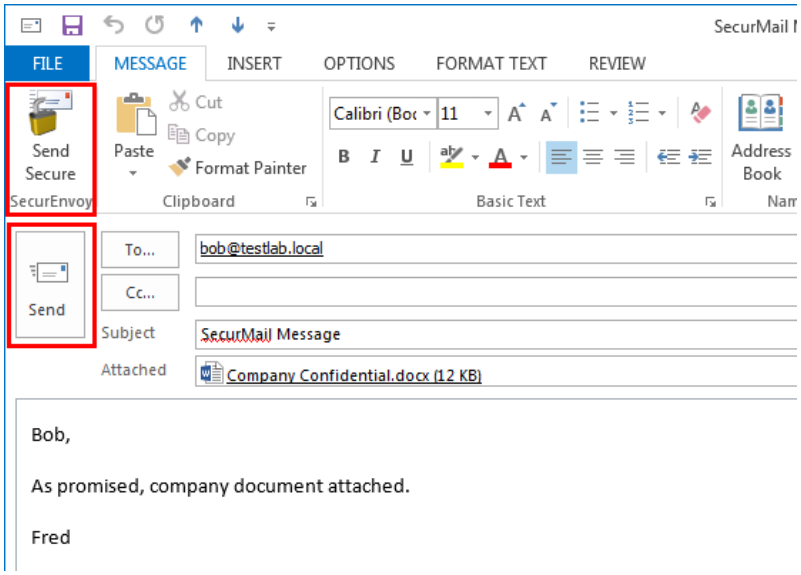
Uploading Attachments (If required)
All attachments are uploaded to the security server via the IIS virtual directory secupload2

Finalising
The current mail's subject is pre-pended with the ID reference number of this message. The message is moved to sent and deleted from draft.

3.2 Ensuring an Email is Sent Securely (Outlook 2007-2013 Only)



Previously, an email was not defined as secure upon creation, but only when the "Send Secure" button was clicked. The Outlook 2007-2013 Agent includes the ability to define an email as a secure mail by including a new toolbar button and menu item in the "New" menu. When clicked, these will open a new mail window as normal, but this email will always be sent securely, even if the user clicks the regular outlook Send button.



If an email is created with one of the new options above, then both the "Send Secure" and normal "Send" button will send the email securely.

Configuration for Non-English Installations

For the agent to correctly add a new item to the "New" menu, the correct name of the "New" menu needs to be configured in the semail.ini

Also the text of the new button and menu item can be configured to a local language.

Please see the Advanced Configuration for more details on the relevant settings.

4.0 Post Installation of Outlook Agent

Post Installation Settings

When the "Send Secure" button is first pressed the user is prompted for the following.

Enter Your Email Address?

This is the Internet SMTP address that recipients will use when replying to your secure mails.

It is also sent to them as a reference in the SMS authentication message.

If "SecurityServer=" in semail.ini is not set then following will also be requested.

Enter Security Server URL

This is the full URL to the security server and must include http:// or https:// . If the network between the security server and all Outlook agents is trusted (Internal) or secure then http:// is recommended as SSL encryption is not required.

Note that SecurEnvoy Professional Services can create a setup.exe or setup.msi package that has "SecurityServer=" pre-set to the location of your internal security server.

NOTE: If the SecurMail service is being hosted, an additional question is asked regarding the senders mobile telephone number.

5.0 Advanced Configuration

The user's SMTP Address and if required Security Server location is defined in `secmailuser.ini` located under the user's application data folder – e.g.

`C:\Documents and Settings\{USERNAME}\Application Data\SecurEnvoy` (On Windows XP/2003)

`C:\Users\{USERNAME}\AppData\Roaming\SecurEnvoy` (On Windows Vista / 7 / 2008/8/2012)

General settings are located in `semail.ini` the Windows directory – e.g. `C:\Windows`

Version	This is set by the installer and defines the current version
UploadServer	This is the URI to the upload web resource on the security server. Default: /secupload/webreceive.exe
ControlServer	This is the URI to the main security control web resource on the security server. Default: /secsever/securectrl.exe
GetMobileFromContacts	Can be set to True or False If set to True, the mobile number of recipients will be searched for from the contacts database of Outlook. Default: True
GetMobileFromGAL	Can be set to True or False If set to True, the mobile number of recipients will be searched for from the Globe Address List (GAL). Note it is advised that users copy GAL user data to there local contacts database is mobile numbers can be edited in contacts. Default: False
TimeoutSocket	Timeout is milliseconds that the underlining network connection waits to get a connection to the security server. Default: 60000 (60 seconds) If Outlook to security server connections is on an internal fast network it is recommended that this is lowered.
TimeoutReceive	Timeout is milliseconds that the outlook agent waits for a response from the web server that hosts the security server resource. Default: 60000 (60 seconds) If the security server is hosted on a fast dedicated server, it is recommended that this is lowered.
TimeoutSend	Timeout is milliseconds that the outlook agent waits for the security server to acknowledge that the web server has received the request Default: 60000 (60 seconds) If the security server is hosted on a fast dedicated server, it is recommended that this is lowered.
Debug	Can be set to True or False If set to True writes debug information to the current users Documents area ("My Documents") in a file called secmail_plugin.txt Default: False
Websend_Debug	Can be set to True or False If set to True writes debug information on file uploads of both the message body and any attachments. This debug trace is created in the current users Documents area ("My Documents") in a file called secmail_{messageID}{attachment name}.txt i.e. if sending an email attachment called text.doc with ID102 the file would be called secmail_102text.doc.txt Default: False
Icon	The location of the icon used in the menu bar for the "Send Secure" button. Default: Set by the installer to the program location used when installing the agent.

SecurityServer	If your security server is called www.mysecmail.com and is located internally to your company then the following should be entered: http://www.mysecmail.com If this is not set then the user will be prompted on first run for this information. If this is set, any existing setting in the user's secmailuser.ini will be overridden. Default: not set
HostedService	Can be set to True or False If set to True, the Outlook client will contact a hosted environment, all secure emails sent will be chargeable.
StoreMode	Can be set to True or False If set to True the user will be prompted for ONE TIME or STORE modes. If set to False ONE TIME emails only are sent. Default: True
DisplayMessage	A line of characters that is displayed at the bottom of the initial dialog window. Default: www.securenvoy.com
AutomaticProxy	Can be set to True or False If set to True, Microsoft's Internet Explore proxy setting of the current user are imported when Outlook first starts. Default: True
Button Pos	Value can be set between 1-9, This dictates the position of the button within the standard toolbar in the Outlook email client Default: 1
MinPasswordlength	Minimum password length if using a password instead of a SMS passcode. Default is 6

Outlook 2007 Settings

Outlook2007AddToNewMenu	Add a new entry to the "New" menu (True or False)
Outlook2007NewMenuName	The name of the "New" menu. This may need to be changed for non-English installations so that the Outlook Agent can locate the menu.
Outlook2007NewMenuItemPosition	The position for the new item within the "New" menu. (Starts from 1)
Outlook2007NewMenuItemText	The caption of the new item within the "New" menu
Outlook2007AddToStandardToolbar	Add a new button to the "Standard" toolbar (True or False)
Outlook2007StandardToolbarName	The name of the "Standard" menu. This may need to be changed for non-English installations
Outlook2007StandardToolbarButtonPosition	The position for the new button within the "Standard" toolbar (Starts from 1)
Outlook2007StandardToolbarButtonText	The caption of the new button within the "Standard toolbar"