

RMFT Outlook Add-In User Guide

Software Version 2.5

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Introduction

RMFT is a managed file transfer platform that facilitates secure file exchange between an organization's internal users, external users, and business partners. RMFT Outlook Add-in brings many of RMFT's file sending and auditing capabilities to Microsoft Office Outlook, enabling Outlook users with RMFT accounts to send and track files and folders of virtually any size.

When you send a message with attachments via RMFT, the files are uploaded to RMFT Server where they are replaced by links for downloading the files. RMFT Server sends the recipients an email message containing the file download links. You can track the upload of files to RMFT Server and request to be notified whenever the files are downloaded.

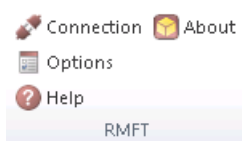
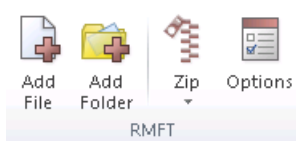
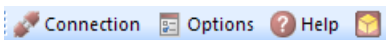
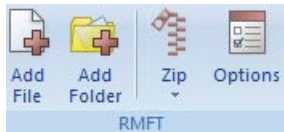
In this guide: [Chapter 1: Sending Files and Folders](#) explains how to send files and folders with RMFT Outlook Add-in, how to set sending options for each message, how to track transfer progress, and how to recall files.

[Chapter 2: RMFT Outlook Add-in Options](#) explains how to modify the default attachment, expiration, notification and categorization options.

[Chapter 3: Connection Settings](#) explains how to configure connectivity to RMFT Server.

[Appendix A: Troubleshooting](#) provides resolutions to problems that may occur while using RMFT Outlook Add-in.

The instructions in this guide assume that you are using the **RMFT** toolbars which are displayed by default after RMFT Outlook Add-in is installed. The RMFT toolbars appear in the main Outlook window and in the **Message** window's **Message** and **Insert** ribbons.

Outlook Version	RMFT Toolbar in the Main Outlook Window	RMFT Toolbar in Outlook's Message and Insert Ribbons
2010		
2007		
	<p>Note: If the toolbars are not shown, select Toolbars > RMFT from the View menu. The Connection, Options, Help and About buttons are also available through the Tools > RMFT menu.</p>	

1. Sending Files and Folders with RMFT

In this chapter, the following tasks are explained:

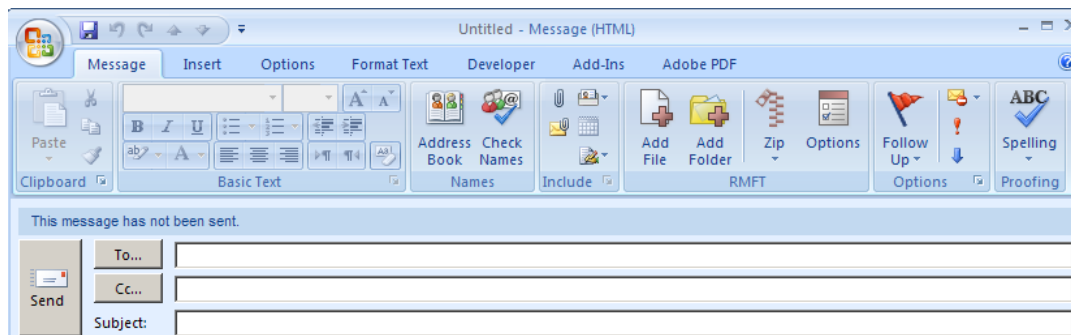
- Sending files and folders with RMFT
- Overriding the default RMFT sending options
- Tracking transfer progress
- Recalling files sent with RMFT

Note: Files can be added using Outlook's Attach File option or the Add File option in the **RMFT** toolbar. Whereas files added using Outlook's Attach File option will only be sent with RMFT if the RMFT Outlook Add-in settings are configured accordingly, files added with the Add File option in the **RMFT** toolbar will always be sent with RMFT. For more information on configuring RMFT Outlook Add-in to send regular Outlook attachments (i.e. files attached with Outlook's Attach File option) with RMFT, see [2. Options](#).

To send files or folders with RMFT:

1. Click  **New**.

The **Message** window opens.

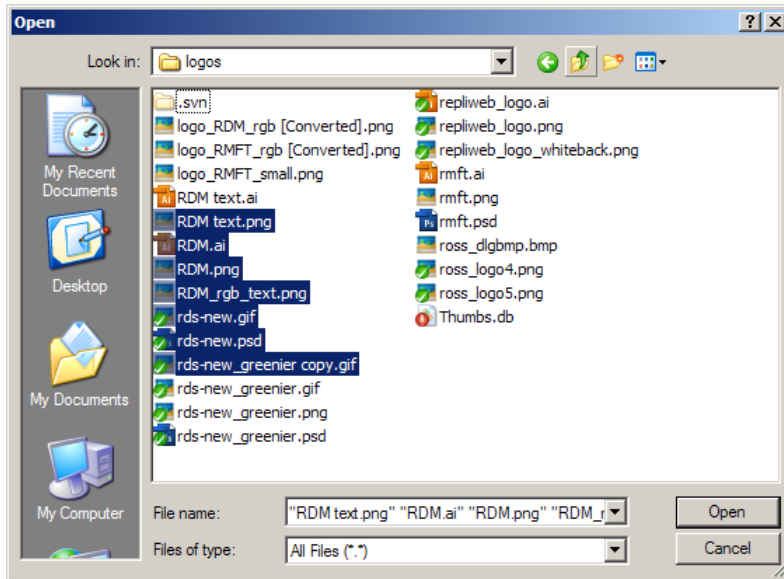


2. In the **To** field, specify the email addresses of the designated recipients.

Note: If you receive an error that a certain recipient does not exist (even though you specified a valid email address), please contact your RMFT administrator and request to be granted the appropriate sending privileges.

3. Optionally, in the **Subject** field, specify a subject.
4. To add files, click the **Add File** button in the **RMFT** toolbar (or click the **Attach File** button in Outlook's **Include** toolbar).

The **Open** dialog box opens.



5. Select the files that you want to send and then click **Open**.

Metadata files containing information about the location of the actual files are attached to the message. The metadata files have the same name as the actual files but a different extension, which will either be **rmftfhlink** (if the files are in their [original location](#)) or **rmftslink** (if the files have been copied to a [temporary directory](#)).

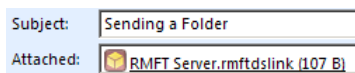


6. To add a folder, click the **Add Folder** button in the **RMFT** toolbar.

The **Open** dialog box opens.

7. Select the folder that you want to send and then click **Open**.

A metadata file containing information about the folder's location is attached to the message. The metadata file has the same name as the folder and will either be appended with the extension **rmftdslink** (if the files are in their [original location](#)) or **rmftdmlink** (if the files have been copied to a [temporary directory](#)).



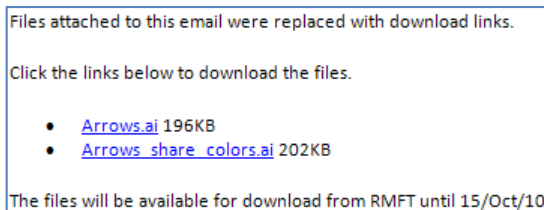
8. To zip all of the attachments into a single archive, click the **Zip** button in the **RMFT** toolbar (the option may already be enabled if the **Zip** option is enabled in the default settings – for more information, see [2. Options](#)).

To set a password to protect the contents of the zip file, click the downward arrow below the **Zip** button and then select **Set Password**.

Note: You do not need to enable the Zip option when sending a single folder as folders are always zipped before being sent. You may however want to enable the Zip option when sending multiple folders (or multiple attachments), as this will zip all attachments into a single archive.

9. To override the default sending options, click the **Options** button. For a description of the available options, see [Message Options](#) below.
10. Click **Send**.

The message is first moved to your **Outbox** and then to your **Sent Items** folder. In the **Sent Items** folder, the metadata files are replaced with download links.




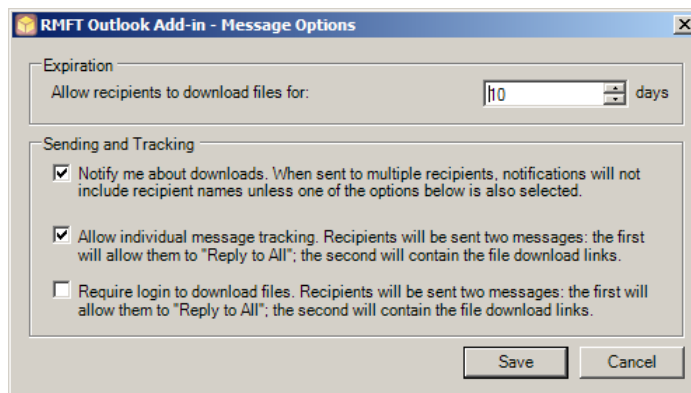
For information about tracking the file transfer, see [Tracking Transfer Progress](#).

Message Options

For each new message, you can override the default [Expiration](#) and [Sending and Tracking](#) options defined for the RMFT Outlook Add-in.

To open the Message Options dialog box:

1. Click the  (**Options**) button in the **RMFT** toolbar.



2. For an explanation of the **Expiration** and **Sending and Tracking** options, see [Expiration](#) and [Sending and Tracking](#) respectively.
3. Click **Save** to save your settings for the current message.

Tracking Transfer Progress

After you click **Send**, messages sent with RMFT will be moved to your **Outbox** folder where you can view the file transfer progress. Note that transfer time (i.e. the time that the message remains in your Outbox) will vary according to the total size of the files transferred and the network load at the time of transfer.

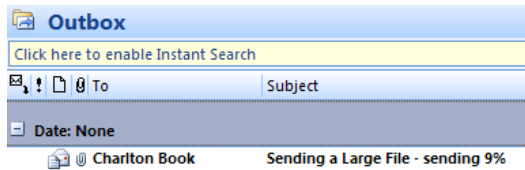


Figure 1: Transfer Progress of Files sent with RMFT

If, for whatever reason, RMFT Outlook Add-in is unable to send the files, it will continue trying until it either succeeds or exhausts all of its recovery attempts.

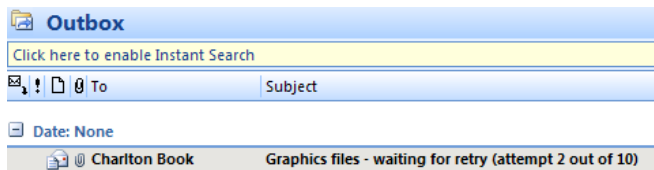


Figure 2: Attempting to Send the Files after Initial Failure

You can abort the sending at any time by simply right-clicking the message and selecting **Delete**.

After the files are sent, the message containing links to download the files will be moved to your **Sent Items** folder.

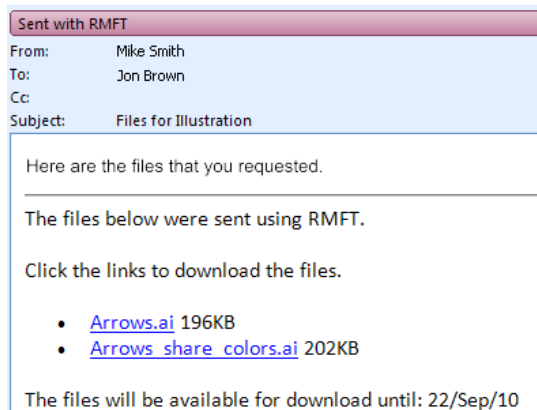

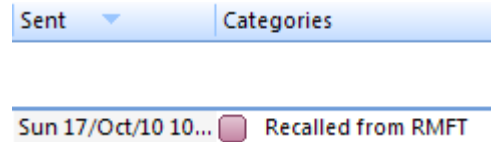


Figure 3: Message sent with RMFT

Recalling Files sent with RMFT

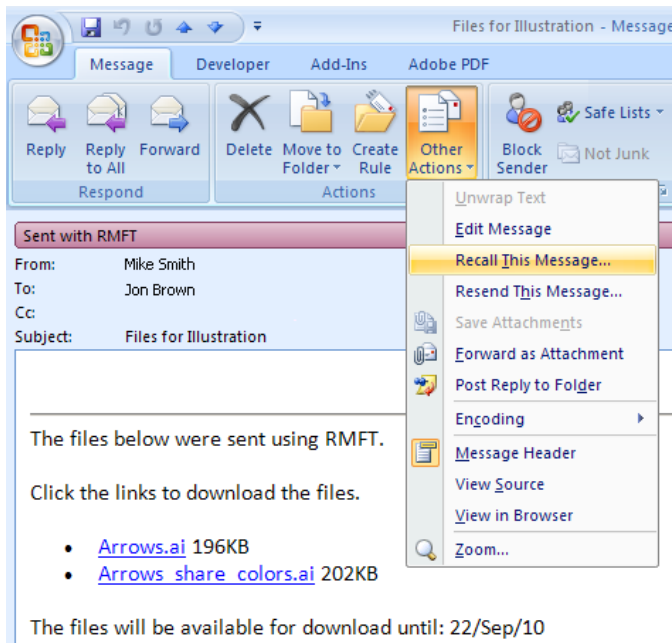
You can recall files sent with RMFT using Outlook's Message Recall option. This is a two-stage process involving first recalling the files and then recalling the message itself.

Note: Files recalled from RMFT will be indicated by a  icon in the **Sent Items** folder.

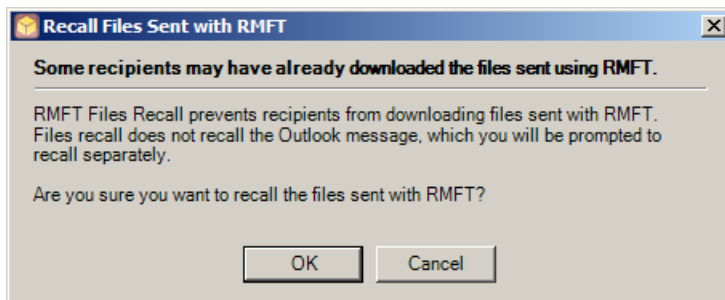


To recall files sent with RMFT:

1. Open the relevant message in your **Sent Items** folder.
2. Click **Other Actions** and then select **Recall This Message** from the drop-down menu.



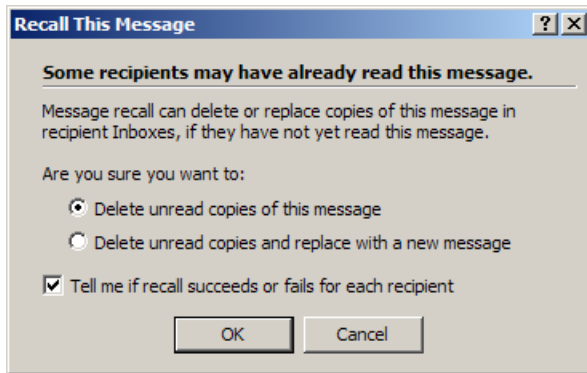
A prompt appears asking you to confirm your request to recall the files sent with RMFT.



Note: Recalling the files prevents future access to the files, but does not affect files which may have already been downloaded by the recipients. It also does not recall the Outlook message itself, which you will need to recall separately.

3. Click **OK**.

Another prompt appears asking you to confirm your request to recall the Outlook message.



4. Click **OK**. If you choose not to recall the Outlook message (not recommended), recipients will receive the message, but will not be able to download the files.

2. Options

In the **Options** dialog box, you can perform the following tasks:

- Specify criteria for sending Outlook attachments with RMFT
- Specify whether files added with the RMFT toolbar should be copied to a temporary directory before sending
- Enable zipping
- Set an expiration period after which recipients will not be able to download files
- Request notifications and configure message sending options
- Categorize sent items as “Sent with RMFT”

To open the RMFT Outlook Add-in Options dialog box:

- ◆ Click the  (**Options**) button in the **RMFT** toolbar (in the main Outlook window).

The **RMFT Outlook Add-in Options** dialog box opens.

Outlook Attachments

Note: Outlook Attachments are files that have been attached to the message using Outlook's **Attach File** button.

Option	Description
Send as regular Outlook attachments	Send the attached files as regular Outlook attachments (i.e. not with RMFT).
Send all files with RMFT	Send all attachments with RMFT, regardless of size or type.
Send all files with RMFT only if any of the following conditions are met:	<p>Specify criteria for sending Outlook attachments with RMFT. If the specified sending criteria is either fully or partially met, the message will be sent using RMFT. For example, if you specified to send messages with RMFT when the total attachment size exceeds 2 MB and the attached file types are Word documents (.doc), the messages will be sent with RMFT as long as the attachments exceed 2 MB, even if they are not Word documents.</p> <p>Note: Attachments that do not meet any of the criteria for sending with RMFT will be sent as regular Outlook attachments.</p>
Total file size exceeds	Send <i>all</i> of the attachments with RMFT if their combined size is larger than the specified size.
File types include (unsafe types will be ignored)	<p>Send <i>all</i> of the attachments with RMFT if at least one of the attached files matches the specified file type. File types must be separated by a semi-colon without spaces (but do not need to be prefixed with a period), for example:</p> <p><code>avi ;mpeg</code></p> <p>Note: Unsafe file types (such as .exe or .bat files) attached using the standard Outlook "Attach File" option cannot be sent with RMFT. To send unsafe file types with RMFT, add them to the message using the "Add File" option in the RMFT toolbar.</p>
Always ask before sending with RMFT	Always ask whether files attached using Outlook's Attach File option and that meet the specified sending criteria should be sent with RMFT.

RMFT Attachments

Note: RMFT Attachments are files that have been added to the message using the **Add File** or **Add Folder** buttons in the **RMFT** toolbar.

Option	Description
Send files/folders from their original locations.	Send files from their original locations.
<p>If some files/folders are missing:</p> <p>Send anyway</p> <p>Do not send</p>	<p>Send the files even if some of them are missing. Files may be missing, for example, if they were deleted from the disk after being added to the message.</p> <p>Do not send any of the files if some of the files are missing.</p>
Copy files/folders to a temporary folder	<p>Select this option to prevent files from being modified (i.e. by other applications) before they are sent.</p> <p>Choose Just files to only copy files to a temporary location or Files and folders to copy both files and folders to a temporary location before sending.</p>

ZIP

Option	Description
Zip all attachments into one archive before sending with RMFT.	<p>Zip all files/folders and send them as a single archive.</p> <p>Note: Zipping large files or certain file types may increase transfer speed while zipping file formats that already compressed (such as jpegs and mpegs) will have little effect on file size and may even reduce the transfer speed and place an unnecessary burden on the CPU.</p>

Expiration


Option	Description
Allow recipients to download files for	Only allow recipients to download the attached files for the specified number of days.

	<p>Note: A shorter expiration period defined by your RMFT administrator (on RMFT Server) will override any expiration period that you specify here. For example, if you specify 20 days and the expiration period defined on RMFT Server is 10 days, the expiration period will be 10 days.</p>
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Sending and Tracking

Option	Description
Notify me about downloads	<p>Receive notifications whenever the files are downloaded by the recipients.</p> <p>If you send the message to multiple recipients, The notifications will not inform you which recipients downloaded the files unless you also select the Mail each recipient separately option (below).</p>
Mail each recipient separately	<p>Send a separate message to each recipient. If you select this option together with the Notify me about downloads option, you will be notified whenever the files are downloaded as well as which recipients downloaded them.</p> <p>Note: When this option is selected, two messages will be sent. The first will be sent to all of the specified recipients, allowing them to reply to any/all of the other recipients. The second will be sent to each recipient individually and allow them to download the files.</p>
Require login to download files	<p>Recipients will be required to log in to download the files (using their RMFT username and password).</p> <p>Note: When this option is selected and the email is sent to multiple recipients, two messages will be sent. The first will be sent to all of the specified recipients, allowing them to reply to any/all of the other recipients. The second will be sent to each recipient individually and allow them to access the files.</p>


Category

Option	Description
Categorize items sent using RMFT as "Sent with RMFT".	Categorize items sent using RMFT as "Sent with RMFT". If you select this option, messages sent using will be indicated with a  icon (in all Outlook folders).

3. Connection Settings

Your connection settings determine how RMFT Outlook Add-in connects to RMFT Server in order to upload files. These settings should not be modified unless instructed by your RMFT Administrator.

To open the RMFT Outlook Add-in – Connection Settings dialog box:

- ◆ Click the  **Connection** button in the **RMFT** toolbar.

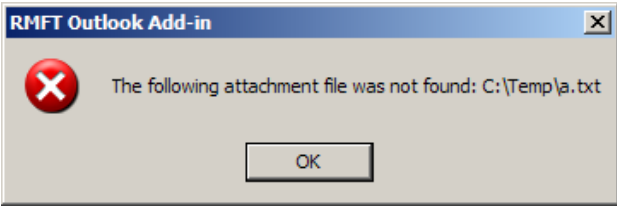
The **RMFT Outlook Add-in – Connection Settings** dialog box opens.

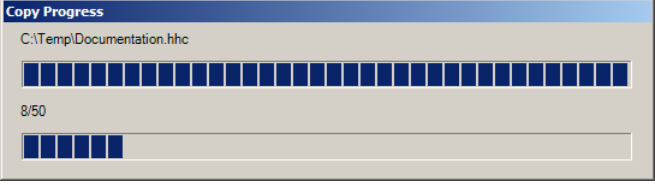
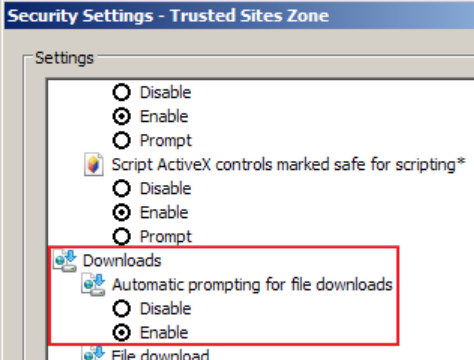
Option	Description
RMFT Server	Select either Server Details or Server URL according to the instructions that you received from your RMFT administrator.
Server Details	If you select this option, in the Server Name field, specify the IP address or hostname of the RMFT Server machine (as provided by your RMFT administrator).
Server URL	If you select this option, specify the RMFT Server URL (as provided by your RMFT administrator). Example: <code>http://org.domain.com:3102/RmftWebService</code>
Port	The port through which RMFT Outlook Add-in communicates with RMFT Server. Do not change unless instructed to do so by your

	RMFT administrator.
Connection	The method RMFT Desktop Client uses to connect to RMFT Server. Only choose methods which have been approved by your RMFT administrator. If you are not sure which method to choose, contact your RMFT administrator.
Proxy	<p>Choose one of the following options as appropriate:</p> <ul style="list-style-type: none"> ▪ None If you select this option, RMFT Outlook Add-in will connect directly to RMFT Server. ▪ Auto-Detect If you select this option, RMFT Outlook Add-in will connect to RMFT Server as specified in your Windows settings (either directly or using a proxy server). ▪ Manual Select this option to connect to RMFT Server via your organization's proxy server and then specify the IP address or hostname of your proxy server. <ul style="list-style-type: none"> ○ Proxy Server Specify the IP address or hostname of your proxy server.
Port	The port through which RMFT Outlook Add-in communicates with your proxy server. Do not change unless you are sure that your proxy port is different.
Use my Windows credentials	Select this option if you normally log in to RMFT Server using your Windows credentials. Note that this method uses Integrated Windows Authentication (also known as NTLM) to authenticate your identity to RMFT Server.
Use my RMFT credentials	<p>Select this option if you normally log in to RMFT Server using your RMFT credentials or if you normally log in to RMFT Server using your Windows credentials but are currently logged in to your computer as a different user.</p> <p>Note: If you are not sure which credentials to use, please contact your RMFT Administrator.</p> <ul style="list-style-type: none"> ▪ Username Your RMFT username. ▪ Password Your RMFT password. ▪ Domain Only applicable if you are an Active Directory RMFT user and did not select Use my Windows credentials. Specify your Active Directory domain name.
Test Connection	Click to test the connection to RMFT Server.
Save	Click to save your settings.

A. Troubleshooting

This appendix highlights various issues that you may encounter when using RMFT Outlook Add-in.

Problem	Cause/Resolution
Some of the RMFT Outlook Add-in settings are grayed out and cannot be changed.	Options that are grayed out have been pre-configured by your RMFT administrator. Such options cannot be modified.
I set the expiration option to Allow recipients to download files for <50> days , but one of the recipients contacted me after 20 days and said that the files had already expired.	The maximum expiration period is set by the RMFT administrator. The administrator-defined expiration period overrides the user-defined package expiration periods. For example, an administrator-defined policy of 30 days will override a user-specified expiration period of 60 days.
<p>The following message is displayed when I try to send files added with the RMFT toolbar:</p>  <p>and the message stays in my Outbox with the following text appended to the subject:</p> <p>- Error: missing attachments</p>	<p>This message is displayed when the following option is selected in the Options dialog box:</p> <p>If some files/folders are missing or inaccessible: Don't Send</p>
RMFT Outlook Add-in is configured to send files attached using the regular Outlook "Attach File" option with RMFT, and to zip the files before sending. When the Zip file contains file types that Outlook considers unsafe (e.g. exe), the message is sent, but the Zip file arrives without the unsafe file types.	Unsafe file types attached using the Outlook "Attach File" option cannot be sent with RMFT. If you need to send unsafe file types, the solution is to add them with the RMFT "Add File" option.
Sending email by right-clicking a file in Windows Explorer and selecting Send To > Mail Recipient does not send the message with RMFT even if RMFT Outlook Add-in is configured to send the file with RMFT.	This functionality is currently not supported. The solution is to attach the files from Outlook's New Message window.
A Copy Progress bar similar to the one shown below is displayed when I attach files using either the RMFT Add File or Add Folder option.	This happens when the Copy files/folders to a temporary folder option is selected in the Options dialog box.

	<p>If you are attaching a folder with many files or if you are attaching a very large file, the copying process may take a few moments to complete.</p>
<p>When using Internet Explorer to access your Gmail account, clicking the file download link (in the notification) does not open a download prompt. Instead, the Internet Explorer Information bar is displayed with an option to download the file. Subsequently selecting the download option in the Information bar loads a blank page with the Gmail copyright notice.</p>	<p>By default, the Automatic prompting for file downloads option is disabled in Internet Explorer. Enabling this option will resolve the problem. If you only want to enable this option for the Trusted Sites Zone, add Gmail to the Trusted Sites Zone in the Options > Security tab.</p> <p>To enable the Automatic prompting for file downloads option, click the Custom level button in the Options > Security tab and then select the relevant item.</p> 
<p>When I mail a file from Windows Explorer or directly from Microsoft Office, the conditions for sending with RMFT are ignored.</p>	<p>Mailing files from Windows Explorer or directly from Microsoft Office programs is currently not supported.</p>
<p>RMFT zipped my attachments, even though I did not enable the "Zip all attachments..." option.</p>	<p>RMFT does not support filenames with non-ascii characters. When you attach files with filenames that contain non-ascii characters, the only way that RMFT can process them is by automatically zipping them into a single zip file.</p>
<p>I installed the RMFT Outlook Add-in, but none of the features are visible.</p>	<p>Verify that RepliWeb RMFT Add-in is listed and enabled in the COM Add-Ins window.</p> <p>To open the COM Add-Ins window:</p> <ol style="list-style-type: none"> 1. From the Tools menu, select Trust Center. 2. In the Trust Center window, select Add-

ins in the left pane.

3. At the bottom of the **Add-ins** tab, make sure that **COM Add-ins** appears in the **Manage** drop-down list and then click **Go**.



The COM Add-Ins window opens.