

OutDisk 4.0 FTP

FTP for Email Users using Microsoft® Windows® and/or
Microsoft Outlook®

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What is OutDisk®?

OutDisk is an FTP file transfer utility developed by Encryptomatic LLC. OutDisk is designed to meet the needs of email users who use email as the context for sharing documents and files.

As email file attachments become larger, they consume a significant amount of storage space, bandwidth and network resources. Many organizations now restrict email file attachments, both inbound and outbound. File attachments of certain types (.exe, .msi, .zip, etc) often are not allowed through fire walls.

OutDisk helps email users share their files by removing them from the email and sending them via FTP to a web server. OutDisk can also be used to encrypt documents using the widely adopted Winzip® Zip encryption standard (AES128-bit encryption exceeds current HIPAA strength requirements).

OutDisk Requirements

OutDisk requires Windows 2000, XP, Vista, or 7 with the latest Microsoft Windows and Office Service Packs installed. A web server with Server Side Includes enabled is also necessary. Minimum suggested hardware requires are a 1 GHZ processor, and 50 MB free disk space.

Note: earlier versions of OutDisk utilized php landing pages. As of May 15, 2010, OutDisk now utilizes server side includes (.shtml) for landing pages (note: a landing page is the web page a user visits to download a file).

OutDisk's Outlook add-in component is compatible with Microsoft Outlook 2003, 2007, and will be compatible with Outlook 2010 upon release. The latest Microsoft Office Service Packs are required.

Currently, OutDisk requires Microsoft Outlook be configured to use HTML or Text email messages. It is presently not compatible with Outlook's Rich Text formatted email messages.

How Does OutDisk Work?

OutDisk is both a desktop utility and add-in for Microsoft Outlook 2003/2007/2010.

OutDisk for Outlook, Overview

OutDisk for Outlook is the add-in for Microsoft Outlook 2003, 2007 and 2010 (32bit and 64bit). OutDisk for Outlook can be activated by the user simply by clicking on the "Use OutDisk" button visible in a new email window. Any files attached to the email will now be uploaded via FTP to the web server, and thus will not be included inside of the email.





A URL link and an optional message may be inserted into the email after the user clicks Outlook's Send button.

Behind the scenes, logs into the FTP server, creates a unique sub folder to hold the files for this email, and then begins to upload the files.

Because it can take awhile to complete an upload of very large files, OutDisk immediately uploads an index.shtml page which contains a message (customizable) that says "Files are uploading, please check back later or contact the sender). After the file have been uploaded, OutDisk uploads a new index.php page (customizable) that will display the contents of the directory, making them accessible to the recipient to download using their web browser (either via http or https).

If the files have been encrypted, the recipient will need to know the password to decrypt the files.

Adding Files to OutDisk for Outlook

Open a new email message in Outlook

Add the desired file attachments to the Outlook email, as normal.

Click the "Use OutDisk" button

Click the Outlook "Send" button

Outlook will now insert the customized message and download URL into the outgoing email, remove all file attachments from the email, process the file attachments according to OutDisk's default settings (including add zip compression, create self extracting or self decrypting file, add AES encryption, etc), and upload the files via FTP to the web server.

OutDisk for Windows, overview

OutDisk for Windows is the "desktop" part of OutDisk, and works in a slightly different manner as OutDisk for Windows.

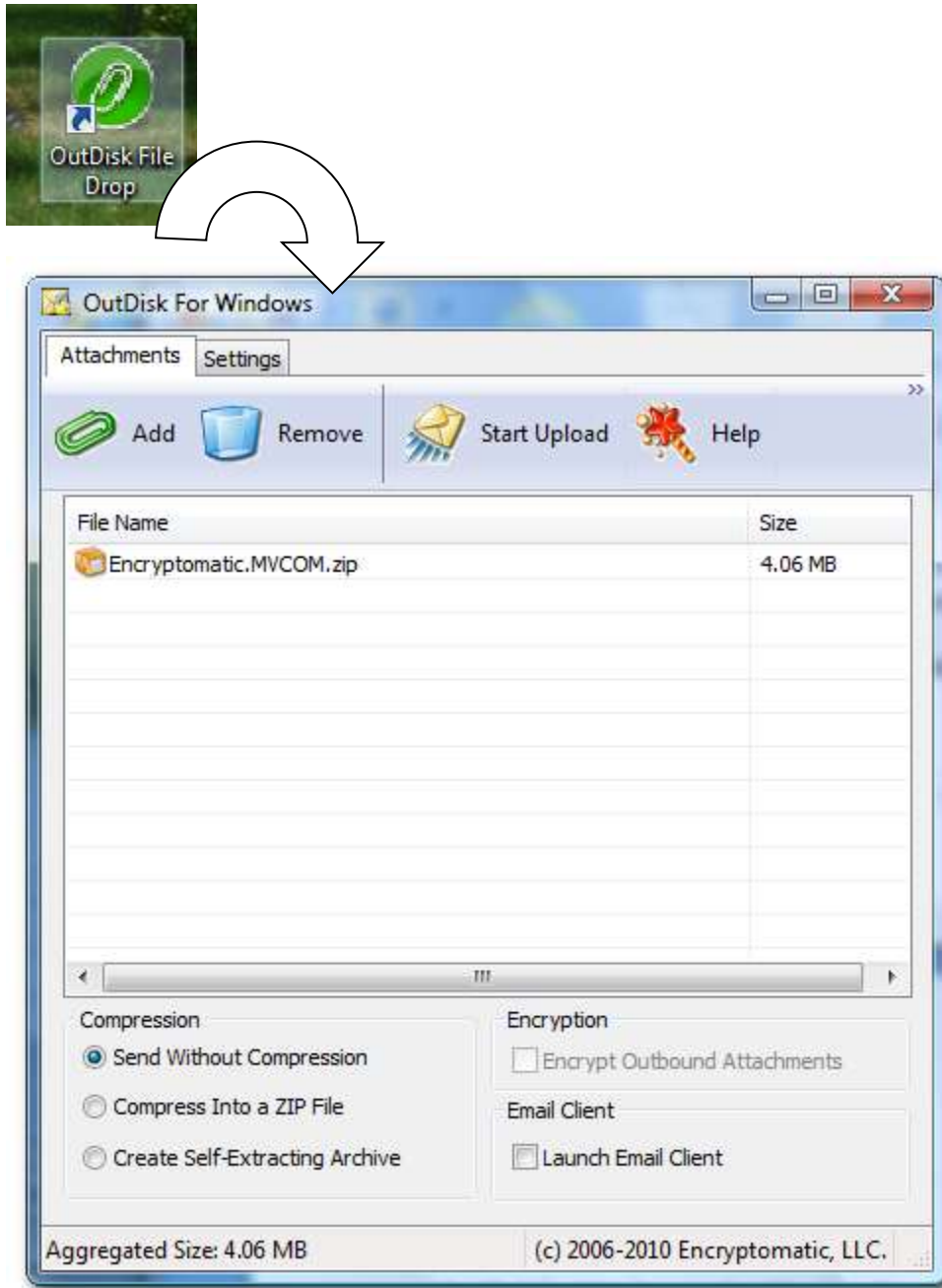
With OutDisk for Windows, files can be added by dragging and dropping onto the OutDisk desktop icon, or by opening OutDisk from the tray icon and then navigating to the file.

Most users will interact with OutDisk for Windows through either the desktop icon, or by the options that become visible when right-clicking on the tray icon (the green paperclip).



Adding Files to OutDisk for Windows

With OutDisk for Windows, files can be added by dragging and dropping onto the OutDisk desktop icon, or by opening OutDisk from the tray icon and then navigating to the file.



After a file is added to OutDisk for Windows, the user can manipulate the available options to apply compression or encryption to the file before it is uploaded.

Self-Extracting Archive and Encryption options can be combined to create a self-decrypting .exe file.

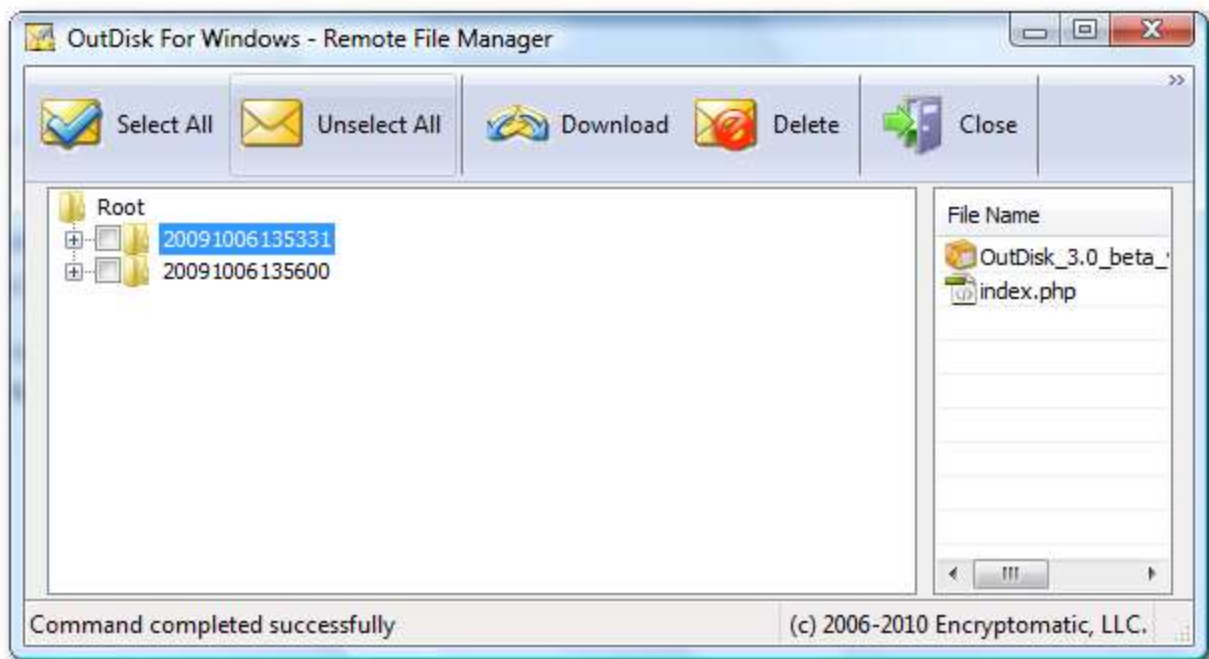
“Launch Email Client” will cause OutDisk to invoke a new email window from the default email client, and pass the URL to the email. The user can then edit the link into the context of the email message.

File Management

Remote File Manager

OutDisk uploads files from the local computer via FTP to a web server that is accessible via http/https.

Management of the uploaded files can be done directly through OutDisk using the Remote File Manager (RFM). To access RFM, right click the OutDisk tray icon (the green paper clip) and then choose Remote File Manager.



Remote File Manager lets the user accomplish the following list of tasks:

1. View the files in a specific folder
2. Permanently delete file folders
3. Download individual files
4. Permanently delete individual files

With RFM, users can only access files for their FTP account. No other browsing is allowed.



Server Scripts

We have developed some file management scripts in both PHP that can be installed on the server to clean out aging files. They are commented, and are intended to provide you with a guide for implementing file removal capabilities.

The scripts require administrator permissions. They can be run on the server as a Scheduled Task as often as is desired. Before running the script, please review it and make the necessary adjustments to based on your server paths and preferences. The scripts are commented and should be familiar to someone with basic scripting knowledge.

It is recommended that they be implemented by a server administrator with a basic working knowledge of scripting languages. In most cases, these scripts will function with minimal tweaking.

We regret we are not able to provide direct support for these scripts due to the differences in server configurations across Apache and IIS, we have found that we are not able to provide direct support for these scripts.

The function of these scripts is to examine the OutDisk file folder structure on the web server, and to remove files and folders that meet the age criteria set in the script.

Using the scripts is a simple way to ensure that aging files are cleaned out on a regular basis.

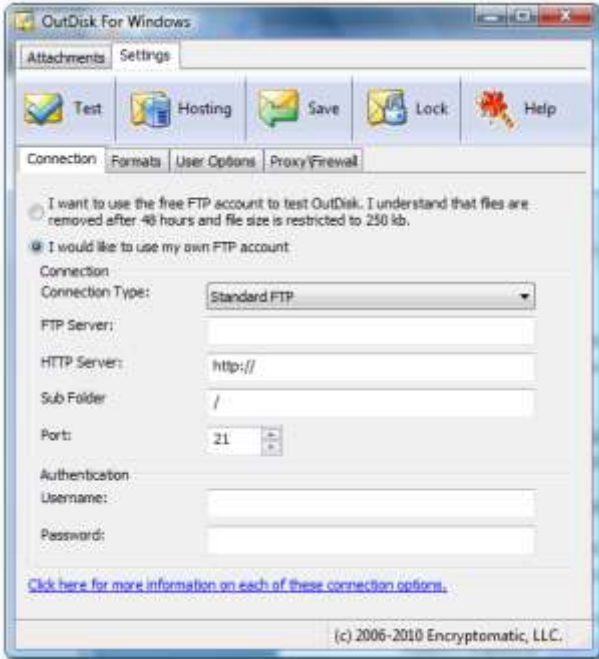
OutDisk includes a custom message (Outlook Settings>Default text) that can be inserted into the email. This message could be set to remind recipients that “Files will be automatically deleted after xx days.”

The server scripts can be requested by contacting supportline@encryptomatic.com or completing a support request at <http://www.encryptomatic.com/ost>

Configuring FTP Settings

Although OutDisk is designed for ease of use, the most difficult part of using OutDisk is determining the correct initial configuration of the FTP and HTTP settings.





Using the Test FTP Account

The best way to begin using OutDisk is to temporarily begin using the built in FTP account for testing purposes. To use the Test Account, select, “I want to use the free FTP account to test OutDisk.”

If OutDisk works well for you using the Test Account, then you will know that you do not have firewall issues. If the Test FTP account does not work, check with your system administrator to see if FTP traffic over port 21 is blocked.

Configuring your FTP and Web Host Account

FTP Server – includes the web address FTP server, such as ftp.yourcompany.com. It is possible (but not required) to specify an absolute path on this server where OutDisk should operate. To specify this location, use this format:

ftp.yourcompany.com|/wwwroot/outdisk

Where the first part of the entry is your server address, the separator is the | character, and the last part is the server path. This tells OutDisk to operate from the specified path after it logs into your server.

To setup your FTP account information, you must know your FTP account login and password information. You can obtain this from your web master or your web hosting company. Your ftp account must be able to upload files to a web server. If OutDisk tries and fails to upload specific files, it is because there is a restriction on the type of files that can be uploaded to the server. If this situation arises, your system administrator will need to work with you to resolve it.



HTTP Server

You must also know the domain name and path information to the directory where files are uploaded. The HTTP path and your FTP path must resolve to the same location.

For example, your FTP account may send files to this location <ftp://localhost/www/FTP1/>

The http path to that location may be <http://www.mycompany.com/FTP1/>

This is probably the most difficult setting to get right. If it is incorrect, OutDisk will show a error during the setup test, and a 401 server error may result when on URL's generated.

Account Configuration Settings

FTP Server: Your ftp server information. May look like: <ftp.mycompany.com>

Http Server: The path to your web accessible directory. May look like: www.mycompany.com/FTP1/

Sub Folder: This can be virtually any word, such as MARY. In this instance, OutDisk will create a sub directory called MARY, and place all subsequent file uploads in folders beneath the MARY folder. This option is most commonly used when two or more people agree to share a FTP account, but they want to keep the files separate. If you are a single user on a single FTP account, then you probably will have no need for this functionality, and you should just leave this field empty.

IMPORTANT: If you choose to use the Sub Folder, be sure to include it in the Http Server setting. In the case above, using a Sub Folder called MARY would require you to change the Http Server setting to:

<http://www.mycompany.com/FTP1/MARY>

Failure to do this may cause the FTP upload path and the http download path to be unsynchronized.

User Name: This is the user name or login name for your FTP account

Password: This is the password to login to your FTP account

Testing your FTP Account Configuration

After configuring your FTP account information, you should let OutDisk test the connection and verify that it is correct.

Click the "TEST" button.

OutDisk will now attempt to log into your account, upload a .txt file, and then download that file via the http url. If it is successful, OutDisk will report that the test succeeded. If the test is unsuccessful, it means that your configuration is not correct.



The most common reason that the test fails is because of an incorrectly configured http path. Often this is caused because the user configured a Sub Folder setting, but did not include that Sub Folder setting in the HTTP Server download path.

Enterprise Edition

The Enterprise Edition of OutDisk consists is available for 20 or more licenses. It helps to simplify the deployment of OutDisk to groups of users.

Quick Start Instructions

OutDisk Enterprise Quick Start Instructions

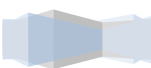
Process

1. Load the Configurator exe. Enter values for the settings (FTP account, default settings, landing pages)
2. Save the settings, and a XML file is created.
3. Install OutDisk Enterprise from the command line using MSIEXEC:

```
msiexec /i "OutDisk.AddinSetup.msi" /qb UPDATEPATH="http://www.your-domain.com/configurator-xml-file.xml"
```

Considerations:

1. The same Configurator.xml file may be used for the 32 and 64-bit version of OutDisk
2. Be certain to install the 64-bit OutDisk ONLY where Outlook 2010 (or later) -64bit version is used.
3. The 32-bit version of OutDisk should can be used on a 64-bit Windows computer when it has the 32-bit version of Outlook. The 32-bit or 64-bit version of Outdisk must correspond to whether a 32 or 64 bit version of OUTLOOK is installed.
4. OutDisk will check for a new configurator xml file each time it is started. If it does not find a XML file it defaults to the last known settings. Best practice is to remove the XML file after a reasonable period of time. To update settigs across users, upload a new xml file with the same name to the same location.
5. You may specify a path to custom landing pages in the Configurator application. To prevent the host server from executing the file while OutDisk is retrieving it, it is necessary to append "od" to the extension of the file. For example, if you want users to use a landing page called "page1.php" you should rename it "page1.phpod" and set the path to the renamed file in the configurator. OutDisk will read the file and copy it to the user's computer, renaming it as "page1.php". It may also be necessary to tell a Windows server to send a "phpod" file, as default server settings may prevent it.



6. OutDisk may be installed locally by running the .msi or the bootstrap setup.exe file locally. The configurator file is not necessary. Manual configuration of settings will be required.

.MSI File

OutDisk Enterprise is available as a Microsoft Installer .MSI file.

The configurator XML file may be copied to a web share, and then the path specified during the installation of MSI file. This will cause OutDisk to get its FTP account and default settings from the XML file.

Install OutDisk Enterprise from the command line using MSIEEXEC:

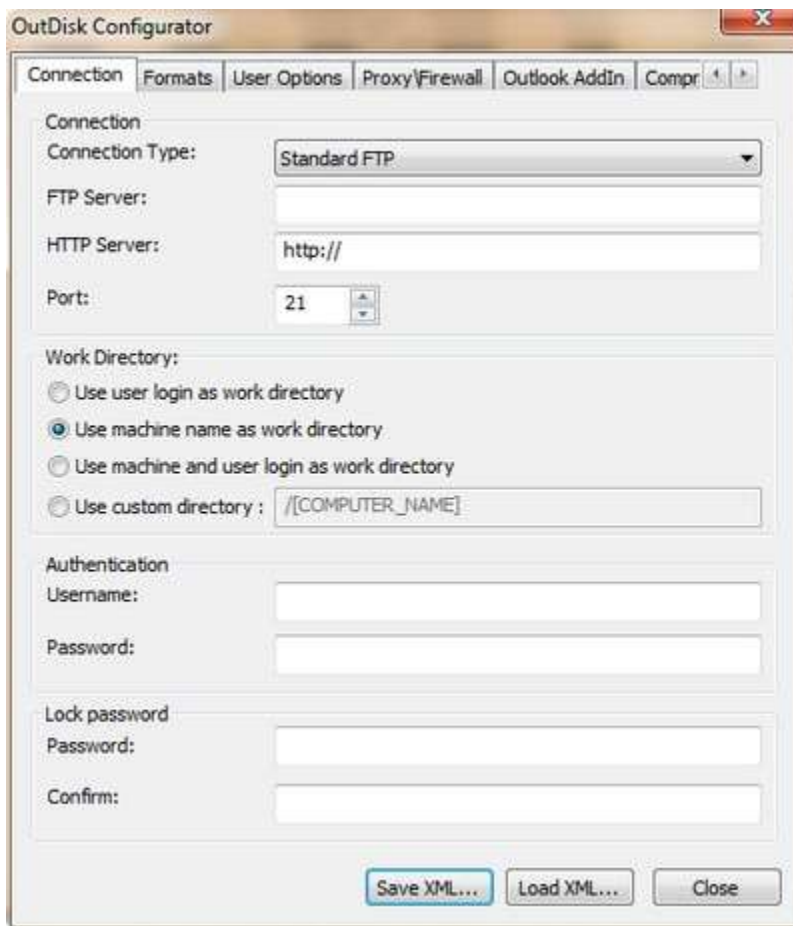
```
msiexec /i "OutDisk.AddinSetup.msi" /qb UPDATEPATH="http://www.your-domain.com/configurator-xml-file.xml"
```

Configurator Utility

The configurator utility is part of the Enterprise Edition of OutDisk. It allows a system administrator to set the FTP connection settings (which are not readable by the end user), and to determine the default settings for OutDisk.



Connection Tab



FTP Server – includes the web address FTP server, such as ftp.yourcompany.com. It is possible (but not required) to specify an absolute path on this server where OutDisk should operate. To specify this location, use this format:

ftp.yourcompany.com | /wwwroot/outdisk

Where the first part of the entry is your server address, the separator is the | character, and the last part is the server path. This tells OutDisk to operate from the specified path after it logs into your server.

Work Directory – In situations where a single FTP account may have multiple users, it may be desirable to keep the user’s files organized into separate folders. OutDisk has the built-in ability to set the name of these folders by the selectable criteria in this section. The Work Directory is an extension of the absolute path specific in the FTP Server setting. If you select ‘Use machine name as work directory’ then OutDisk will append the machine name to the absolute path specified under FTP Server settings.

Carrying forward the example mentioned above in the the FTP Server setting discussion, if we select Use Machine Name, the place where OutDisk stores files will be:

/wwwroot/outdisk/machine123/{unique-outdisk-folder-name}



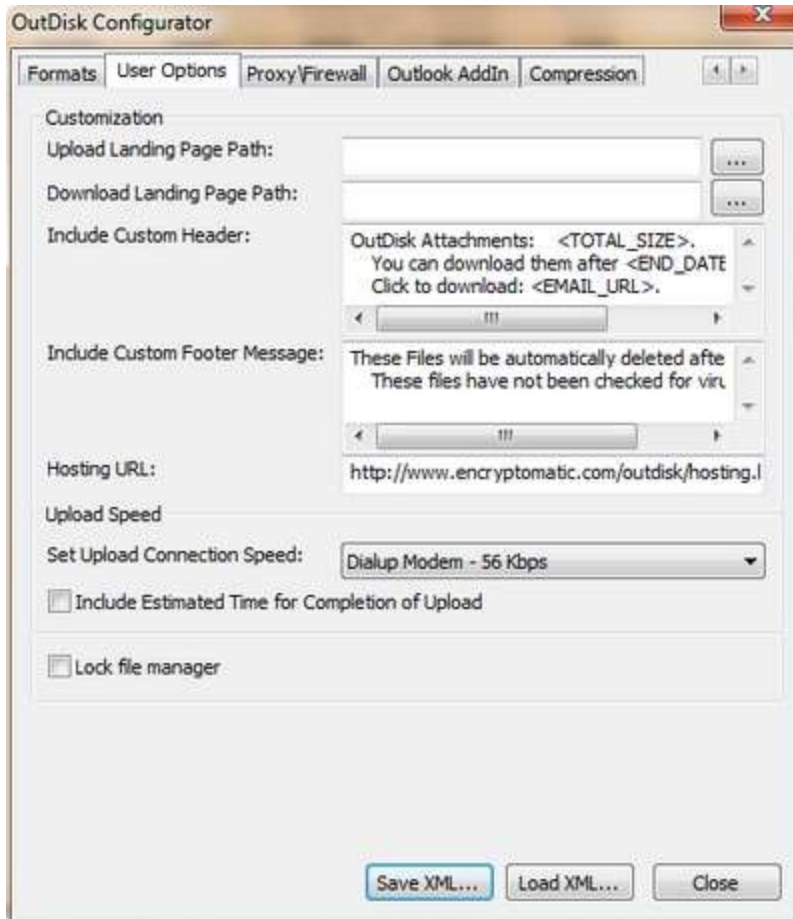
Authentication – These are the FTP server credentials. They are not visible to the user.

Formats Tab

The Formats Tab allows you to select a default time/date format, a clock format (24 or 12 hours), and a name that is used for compressed file attachments. At this time, compressed files will have the same name.



User Options



Landing Pages

A landing page is a page to which the recipient is taken when they following an OutDisk url.

Upload Landing Page Path – the http or https path to a specified page. This page alerts the recipient that the file is still uploading. This page is replaced by the Download Landing Page after the upload is complete.

Download Landing Page Path – the http or https path to the landing page. This is a shtml page (or a page capable of inserting a server side include text file) which displays a link to download the file.

Configuring Custom landing pages for all users

If you would like to apply a custom landing page to all of your OutDisk Enterprise users, there is a method to do this. Although the OutDisk Enterprise installer includes standard landing pages, you can customize your own landing page, and specify a web path to those pages on Configurator>User Options tab>Landing Page paths.

To do this, create your landing pages, and rename them as follows (so they will not be executed by the server and can be downloaded by OutDisk):

downloadpage.shtml >rename as> downloadlandingpage.shtmlod

downloadpage.php >rename as> downloadlandingpage.phpod

etc.

Just append “od” to the file extension of the landing page. OutDisk will read that file, understand that it is a landing page, will replace its default landing page, and will then remove the “od” from the page.

For example, you might upload your landing page file to a folder at <http://yourdomain/downloadpage.shtmlod> and then put this path into the Download page field on the User Options tab. When OutDisk is reading the settings from your XML file, it will know to download this file via http and replace its default landing page with your new page.

Custom Header/Footer

This text is relevant to users of the Desktop Version of OutDisk (not the Outlook add-in). The purpose of this section is to make it easy for the sender to share the OutDisk url with the recipient. The sender may simply paste this pre-determined text into an email message or into an instant message.

OutDisk recognizes several tokens which will cause it to insert text into this text:

<TOTAL_SIZE> - total file size

<END_DATE> - A date format estimating the time when a file is expected to have completed uploading. It's possible that a recipient may receive a link before a file has completed uploading. This is a signal to the recipient. If a slow connection is used for uploading, and the file is very large, then this estimate time may be hours into the future.

<EMAIL_URL> - The OutDisk generated URL that the recipient will follow to initiate the download of the file.



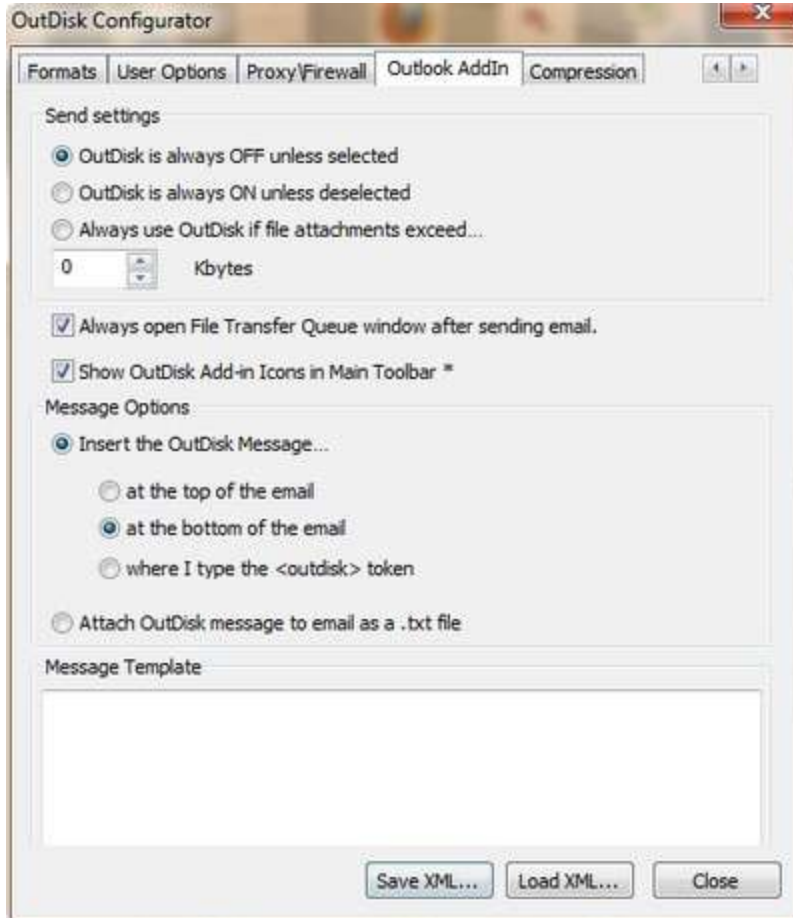
Proxy Firewall



Proxy\Firewall settings allow you to determine a proxy hostname, login, proxy port, and to determine firewall settings for all OutDisk users.



Outlook Add-in



The Outlook Add-in tab determines the settings for how OutDisk works with Outlook.

OutDisk is always OFF – OutDisk will be set to OFF, unless the activated by the user.

OutDisk is always ON – OutDisk’s initial state is set to ON. It will process all file attachments, unless the user specifically turns it off.

Always Use OutDisk if file attachments exceed... --- OutDisk will automatically be activated if the size of file attachments in the email exceed a threshold maximum.

Message Options

OutDisk will insert a pre-defined

email message in one of three places: at the top of the email, at the bottom of the email, or wherever the sender places the <outdisk> token within the email.

We suggest leaving this set to Top of the email. Setting at “bottom” poses visibility problems if the sender is replying to a long email thread. Using the token works well if users are properly trained and aware of it.

Message Template

This text is relevant to users of the Desktop Version of OutDisk (not the Outlook add-in). The purpose of this section is to make it easy for the sender to share the OutDisk url with the recipient. The sender may simply paste this pre-determined text into an email message or into an instant message.

OutDisk recognizes several tokens which will cause it to insert text into this text:

<TOTAL_SIZE> - total file size



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<EMAIL_URL> - The OutDisk generated URL that the recipient will follow to initiate the download of the file.

Compression

This section will set the default settings for compressing files. OutDisk can compress files into a standard zip file, or into a self-extracting Windows .exe file.

AES-128bit encryption that is built into most Zip utilities may be used to encrypt files. Encrypted files will required the recipient to use a password to decrypt the fiels.

Generally, we recommend checking "Always prompt me for compression and encryption options." This will cause OutDisk to prompt the sender for compression options when files are sent.



For presales questions, please contact the Sales Team at 1-651-815-4902 x1, or email sales@encryptomatic.com

Support

For OutDisk product support, please visit <http://www.encryptomatic.com/support> and open a ticket for OutDisk assistance.

For presales questions, please contact the Sales Team at 1-651-815-4902 x1, or email sales-08@encryptomatic.com

To order OutDisk or for more information, please visit <http://www.encryptomatic.com/outdisk>

