



DataMotion SecureMail Plugin for Microsoft Outlook Guide

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REVISION HISTORY

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent changes listed first.

Version 2

- *Supported Operating Systems*
 - » Removed Outlook 2007 and Windows Vista from the table.
- *Button Types*
 - » This new section and its subsections describe each button type.

Version 1

Initial version of this document.

About This Publication

ABOUT DATAMOTION SECUREMAIL

This publication describes the DataMotion SecureMail Plugin for Microsoft Outlook including setup for both individuals and organizations.

DataMotion SecureMail provides easy-to-use encrypted email messaging and data transfer via the Internet for protecting all of the important information flowing between you, your business partners and your clients.

SecureMail protects sensitive messages with military-grade encryption, and it allows users to send secure messages and files using one click, with built-in tracking of all messages and files sent, received, and opened. It works with popular email clients such as Microsoft Outlook, as well as on the iPhone and other mobile devices, and it is intuitive for senders and recipients, so it can be up and running in minutes with no outside IT support. With integrated large file support, DataMotion SecureMail seamlessly delivers documents, images, and other files up to 2 GB in size, eliminating a significant bottleneck in data exchange.

Providing effortless secure sending from email clients and direct delivery to the recipient's inbox, plus the ability to transfer large files easily from desktop clients or mobile devices, DataMotion SecureMail offers unsurpassed capability, flexibility, and user experience.

INTENDED AUDIENCE

This publication is intended for both a technical audience which includes system admins and system integrators, and a general user audience.

Additional technical documentation, as well as user documentation, is also available from DataMotion. See [DataMotion Documentation](#) (on page 6).

HOW TO USE THIS PUBLICATION

The content is organized as follows:

About This Publication.

Provides an overview of the content of this publication and how to use the publication.

DataMotion SecureMail Plugin for Microsoft Outlook

Describes what the DataMotion SecureMail Plugin is.

Supported Operating Systems

Includes information regarding which operating systems are currently supported by the plugin. Also, the table in this section includes an overview of the plugin types and which operating systems and outlook versions are supported.

RELATED INFORMATION

DATAMOTION DOCUMENTATION

- *DataMotion SecureMail Administration Guide* (part # 050007)
Documents the system installation, maintenance, and administration tools for administrators and integrators.

Additional documentation is available on many other topics. Please contact DataMotion Customer Service for more information.

DATAMOTION SECUREMAIL PLUGIN FOR MICROSOFT OUTLOOK

The DataMotion SecureMail Plugin or **Send Secure** button enables secure message transmission with just a click of a button. This Send Secure button in your email client when clicked will send a message that is encrypted for secure delivery via SecureMail. No special software or passwords need to be exchanged with recipients. When a recipient sends a reply, it is securely delivered to your inbox and unencrypted automatically, ready to read without needing any additional steps. If the corporate button is being used it will require TLS delivery to be enabled.

There are two versions of the button that are available to DataMotion SecureMail customers to download depending on their needs. The first is a **Personal Button** designed for a single user and a **Corporate Button** designed for company-wide installation. Each version has its own steps for installation which shall be covered as separate sections throughout the Installation section of this document. The Corporate Button also has three different modes that can be used to determine how emails are sent securely. These three modes and how to configure each one are described in the Corporate Button Modes section.

SUPPORTED OPERATING SYSTEMS

The DataMotion SecureMail Plugin is only available for recent versions of the Microsoft Outlook product and has absolutely no compatibility with the Macintosh versions of Outlook in any capacity. Any Windows operating system from Windows Vista and prior are no longer supported by Microsoft. As a result of this the SecureMail Plugin is not being supported on those platforms by DataMotion any longer. An updated chart of supported platforms and which buttons can be installed on them is listed below.

Table of Supported Operating Systems and Button Versions

		Button Versions			
		Personal Button	Corporate Button		
Windows OS	Outlook Version	Desktop Encryption	Desktop Encryption	Secure Redirection	Secure Tagging
Windows 7	2010	✓	✓	✓	✓
	2013	✓	✓	✓	✓
	2016	✓	✓	✓	✓
Windows 8	2010	✓	✓	✓	✓
	2013	✓	✓	✓	✓
	2016	✓	✓	✓	✓
Windows 10	2010	✓	✓	✓	✓
	2013	✓	✓	✓	✓
	2016	✓	✓	✓	✓

Special cases					
Citrix	2010		✓	✓	✓
	2013		✓	✓	✓

BUTTON TYPES

The types of buttons listed in the table above will perform differently depending the on the one being selected.

Desktop Encryption (Personal or Corporate)

Desktop encryption will tell SecureMail to encrypt the message before it is sent to the mail server. This option is the only available choice for the personal button as the button is downloaded to work only with the email of the account holder who downloads the button.

Secure Redirection (Corporate Option Only)

Secure Redirection is a common configuration for the corporate button. In this case when the user clicks Send Secure the recipient list is changed to point to the DataMotion Server. Further information can be found in the Corporate Button Modes section.

Secure Tagging (Corporate Option Only)

Secure Tagging uses a tag placed into the message header (SECURE for example) that can be scanned. If the tag is detected then the message will be securely transmitted. Further information can be found in the Corporate Button Modes section.

INSTALLATION

Depending on the version of the button in use the installation steps can vary greatly. The greatest difference between the two is the fact that while there is only really one way to install the Personal Button, the Corporate Button can be installed in a variety of ways and has three separate configuration modes available (these modes are described in the Corporate Button Modes section on page 19). Refer to the following sections for information on how to install the type of button you or your users shall be using.

PRE-INSTALL DETERMINE OUTLOOK BIT VERSION

It is paramount that before proceeding with the download and installation of any type of plugin, what the bit-version of the Outlook client installed on the user(s) machine actually is. This process can vary depending on the version of Outlook installed so, for reference, instructions for all supported Outlook versions have been included in the sections below.

Outlook 2010

To locate the bit version of an Outlook 2010 installation, simply click on the File tab, and then click on Help from the menu on the left. You should see a screen that is similar to the following once done.



Take note of the **About Microsoft Outlook** section as shown in the image above as this section indicates which bit version is installed. When proceeding with the installation steps for the Send Secure button be certain that the bit version of the chosen download matches the value in the parenthesis.

Outlook 2013

To locate the bit version of an Outlook 2013 installation, click on the File tab, then select Office Account from the menu on the left. When the tab loads click on the About Outlook button as shown below.

Product Information



Product Activated

Microsoft Office Professional Plus 2013

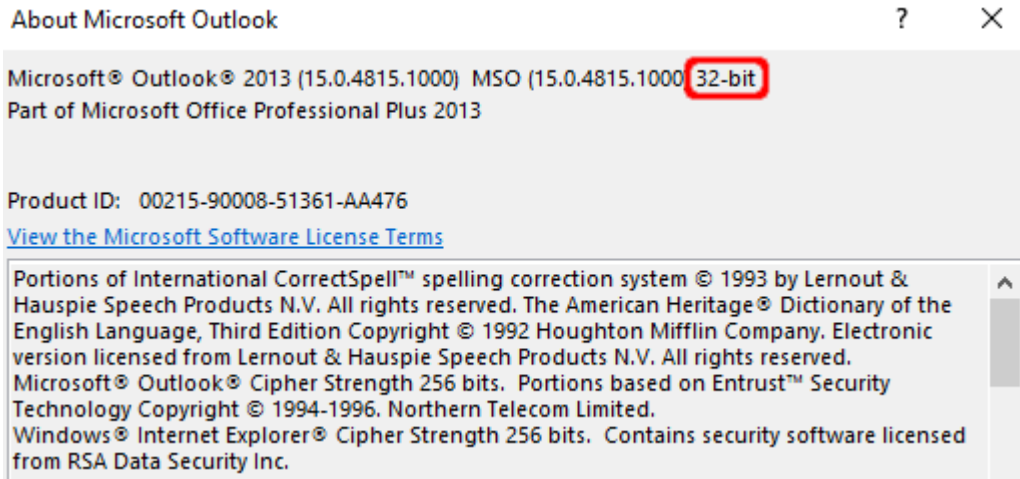
This product contains



About Outlook

Learn more about Outlook, Support, Product ID, and Copyright information.

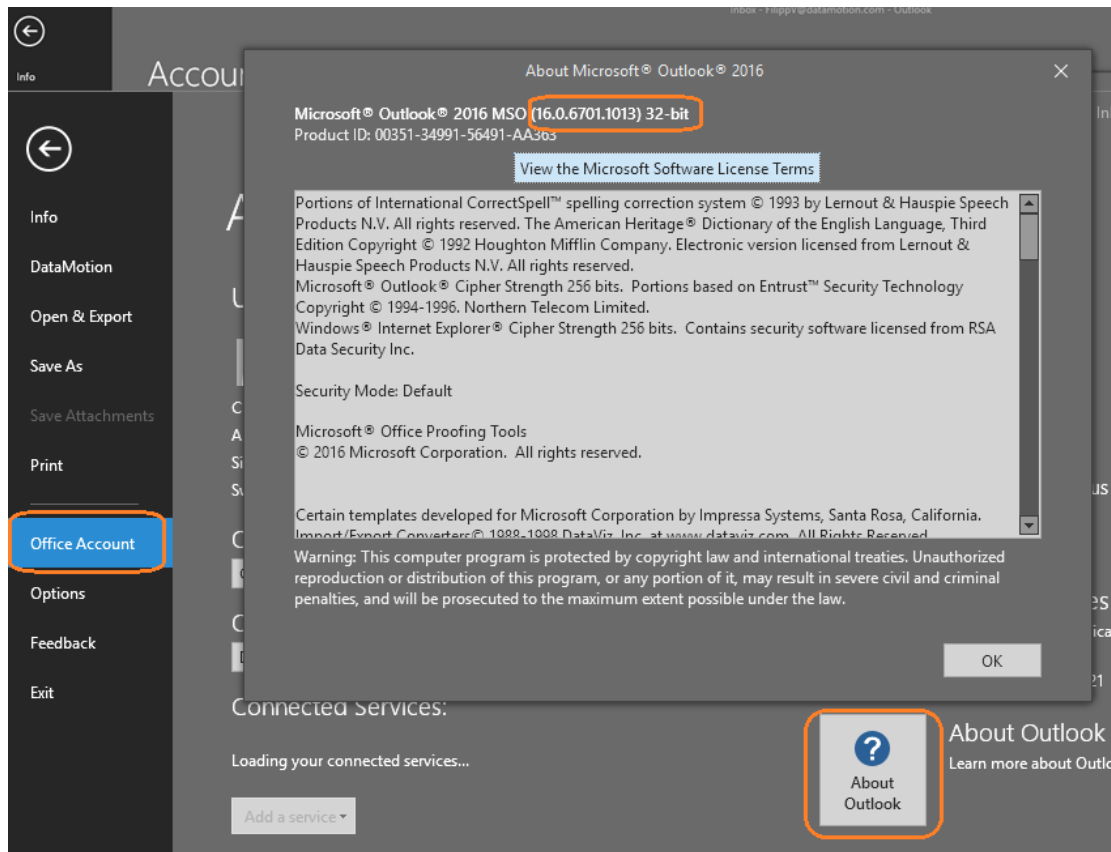
The screen that is displayed upon clicking the button shown above, will bring a screen that detailing the bit version of the Outlook installed.



Take note of the About Microsoft Outlook section as shown in the image above as this section indicates which bit version is installed. When proceeding with the installation steps for the Send Secure button be certain that the bit version of the chosen download matches the value in the parenthesis.

Outlook 2016

To locate the bit version of an Outlook 2016 installation, click on the File tab, then select Office Account from the menu on the left. When the tab loads click on the About Outlook button as shown below to see a popup containing the necessary information.



INSTALLING THE PERSONAL BUTTON

Before installing the Personal Button please ensure that you have either Outlook 2010, 2013, or 2016 installed on your computer. Also make sure that you have fully activated your DataMotion SecureMail account and have your password on hand as the installation will request it upon completion. After ensuring that you have a supported Outlook version and a fully enabled SecureMail account, begin the installation process by performing the following steps.

1. Login to your DataMotion SecureMail account at <https://ssl.datamotion.com>.
2. Navigate to the **Member Center** page if you are not currently there.
3. Select the **Client Downloads** link underneath the **Download Console** section.
4. Use the drop-down next to the **Download Now!** button and select the button you wish to download.
 - » The v5.0 is the latest version of the button and is compatible with Outlook 2013 and 2016 only.

NOTE: The button that is downloaded will be configured specifically for the account of the user who is signed in. This means that the button will only ever work for the user account that initiated the download and no one else. If the download for the installer is shared and another user attempts to install it, the button will fail to send

messages due to the unique encryption key generated for the original user who downloaded the button.

- » The v.4.4 and 4.3 buttons are the previous versions of the button and are only compatible with Outlook versions prior to Outlook 2016. If you are using Outlook 2010 you need to use either of these versions.
5. Click the **Download Now!** button once you have made your decision to download the installer to your machine.



[Compose](#) [Member Center](#) [Inbox](#) [Track Sent](#) [Logout](#)

Download Console

Welcome to the Download Console. To download the installation file, select the appropriate version from the drop down list below and click Download Now!

PRODUCT INFORMATION:

SecureMail v5.x supports Microsoft Office Outlook versions **2013** and **2016** only.

SecureMail v4.4 supports Microsoft Office Outlook versions 2010 and 2013.

Most Outlook versions are 32-bit. 64-bit versions of SecureMail should only be used with 64-bit versions of Outlook. If you are not sure whether you have a 32-bit or 64-bit version of Outlook, see [How to determine the Outlook version](#) below for information about checking the version. Download the SecureMail version which matches the Outlook version.

SecureMail for Outlook 32-bit v5.0 ▼

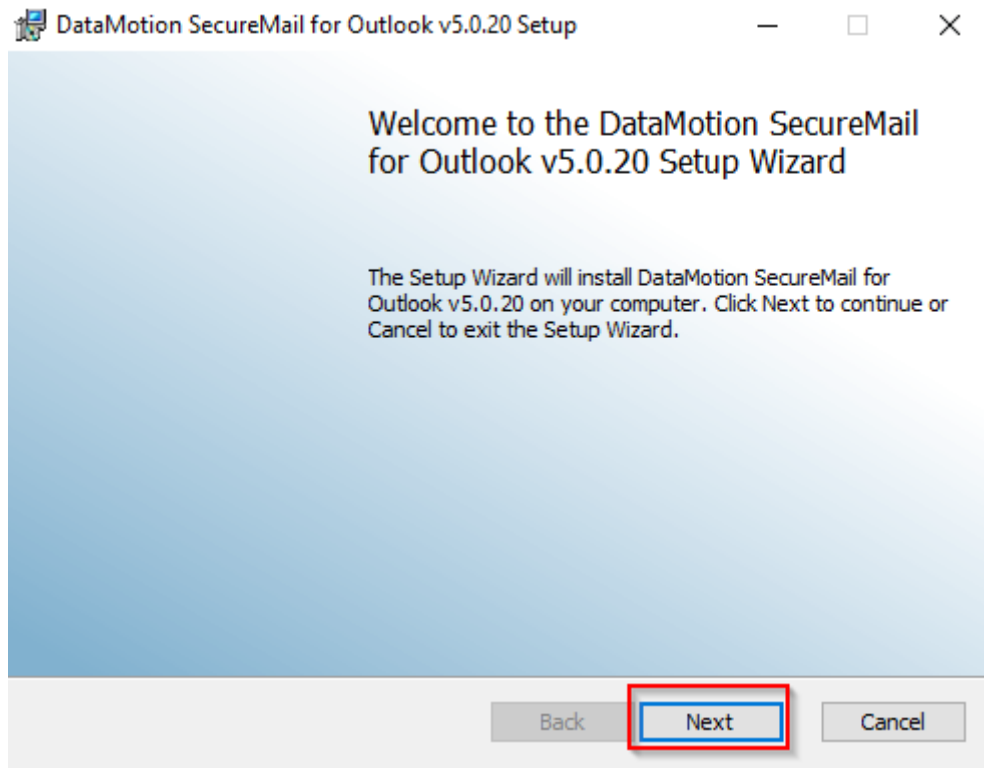
Download Now!

6. Navigate to where the installer was downloaded and double click the installer to run it.

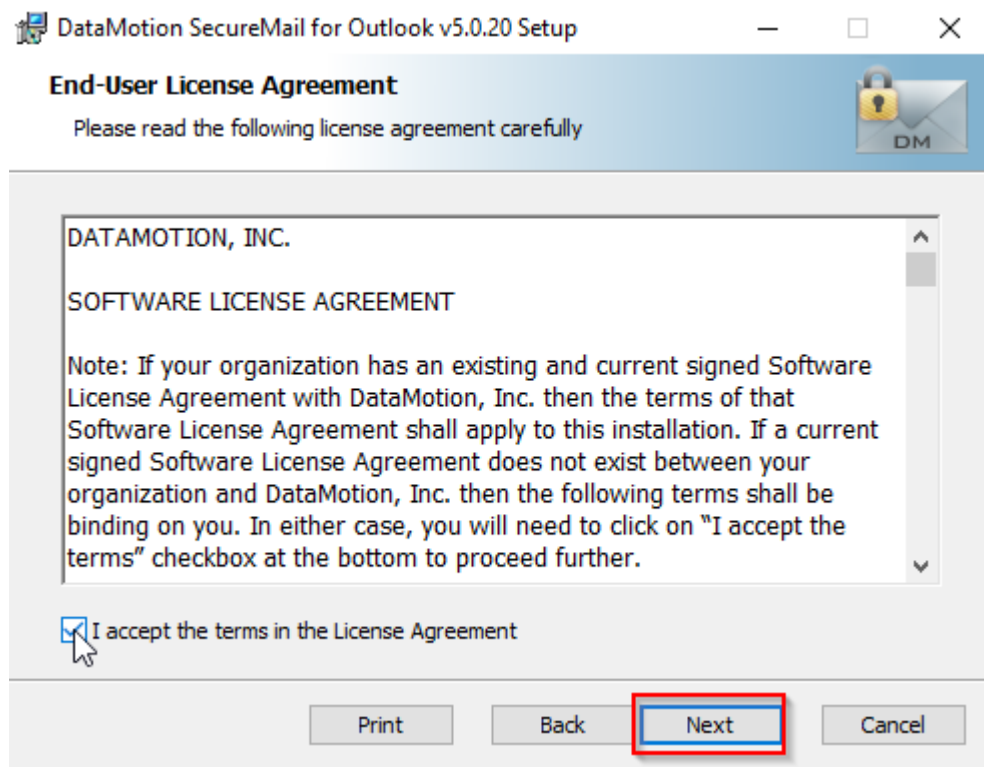
NOTE: For first time installation Windows might flag the installer as being unrecognized and prevent the installer from running. The installer is not harmful in any way however, so if this does occur right click on the installer and select Run as Administrator in order to bypass the issue.

NOTE: Depending on your version of Windows, you may see a "The app you're trying to install isn't a verified app from the Store" popup. If this happens simply click the Install anyway button to continue.

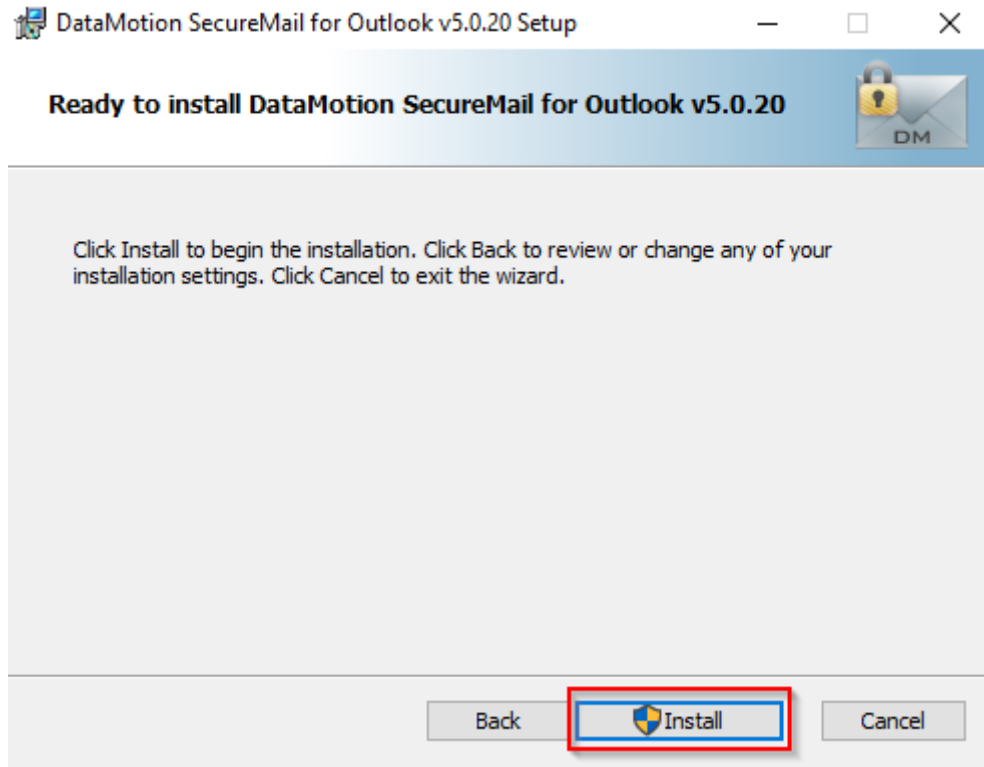
7. When the installer opens click the Next button to proceed.



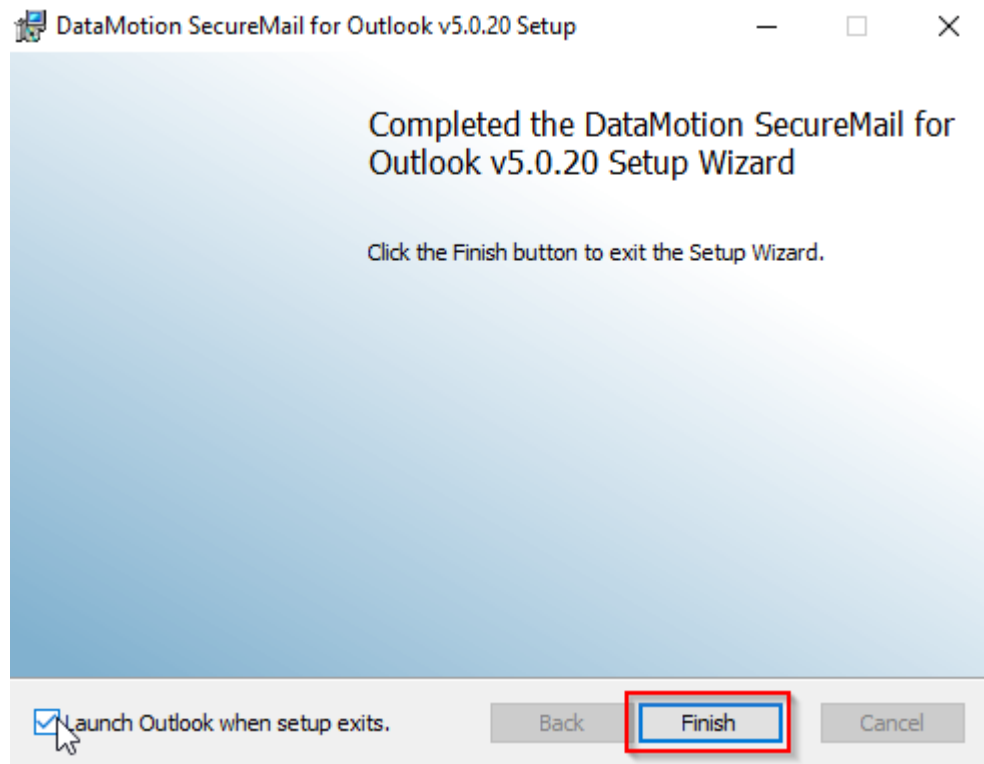
8. Read the Software License Agreement and click on the **I accept the terms in the License Agreement** checkbox and click the Next button.



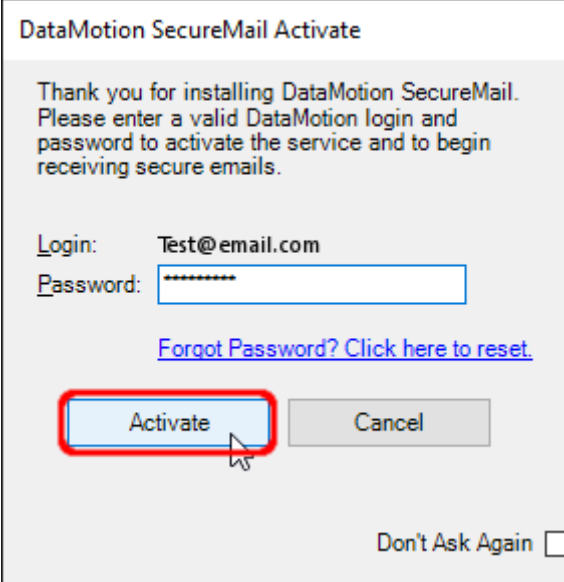
- 9. Click Install.



- 10. After the installation is completed click the Launch Outlook checkbox and click Finish.



11. After Outlook opens, enter your DataMotion SecureMail password and click the Activate button.



DataMotion SecureMail Activate

Thank you for installing DataMotion SecureMail. Please enter a valid DataMotion login and password to activate the service and to begin receiving secure emails.

Login: Test@email.com

Password: *****

[Forgot Password? Click here to reset.](#)

Activate Cancel

Don't Ask Again

12. Click the OK button when prompted.

The Send Secure button will now appear in your Outlook client whenever you send a new email. To ensure that everything is working properly, take a look at the Using The Send Secure Button section to learn how to send a message with the Send Secure button.

INSTALLING THE CORPORATE BUTTON

The Corporate button uses a single encryption key shared by all customers/users with that version of the add-in. The SendSecure Button looks the same to users whether it is the Corporate or Personal button. While installation will not be impacted, it is important to be certain of which configuration mode your company needs to run to satisfy its needs and requirements. For reference the modes are described in the Corporate Button Modes section on page 19.

The Corporate button can be found on the Download Console in the same manner as the Personal button.

Administrators:

To download the 32-bit v1.0 Tagging-only version of the Outlook Add-in, please click [here](#)

To download the 64-bit v1.0 Tagging-only version of the Outlook Add-in, please click [here](#)

To download the 32-bit v4.4 Corporate version of the Outlook Add-in, please click [here](#)

To download the 64-bit v4.4 Corporate version of the Outlook Add-in, please click [here](#)

To download the 32-bit v5.0 Corporate version of the Outlook Add-in, please click [here](#)

To download the 64-bit v5.0 Corporate version of the Outlook Add-in, please click [here](#)

IMPORTANT:

The Corporate version of the SecureMail 'Send Secure' button is not user-specific, and may require additional configuration or additional DataMotion products, such as SecureMail Gateway, in order to function properly. If you are not sure which configuration you may need, please contact Support for assistance.

NOTE: If using Outlook 2016 or 2013 you can select the v5.0 button on the Download Console. If you are using Outlook 2010 you must select the v4.4 button. The v1.0 Tagging-only button can be used with any Outlook version.

Group Policy Network Installation

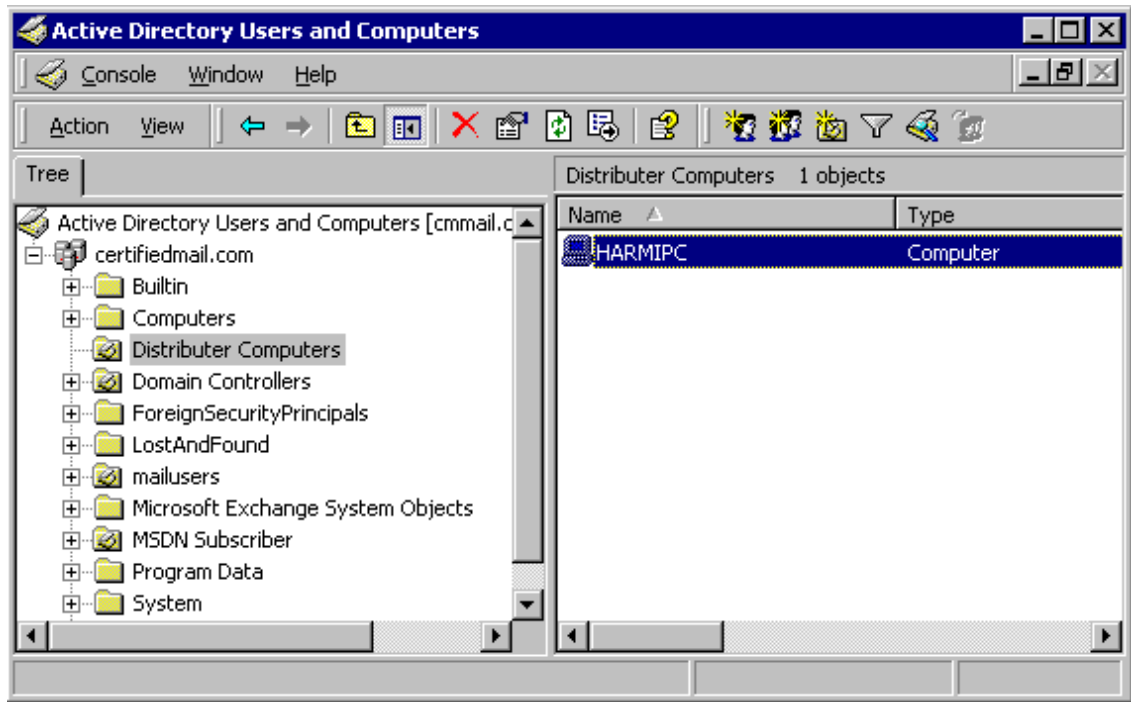
The SendSecure add-in for Microsoft Outlook provides one-click sending of secure messages. SendSecure is available in a Corporate version that can be automatically distributed to specific desktops from the network. The following procedure describes the steps required to distribute this button using Microsoft Active Directory and the Group Policy Management MMC snap in.

NOTE: In this information, "CertifiedMail" is a synonym for "DataMotion SecureMail."

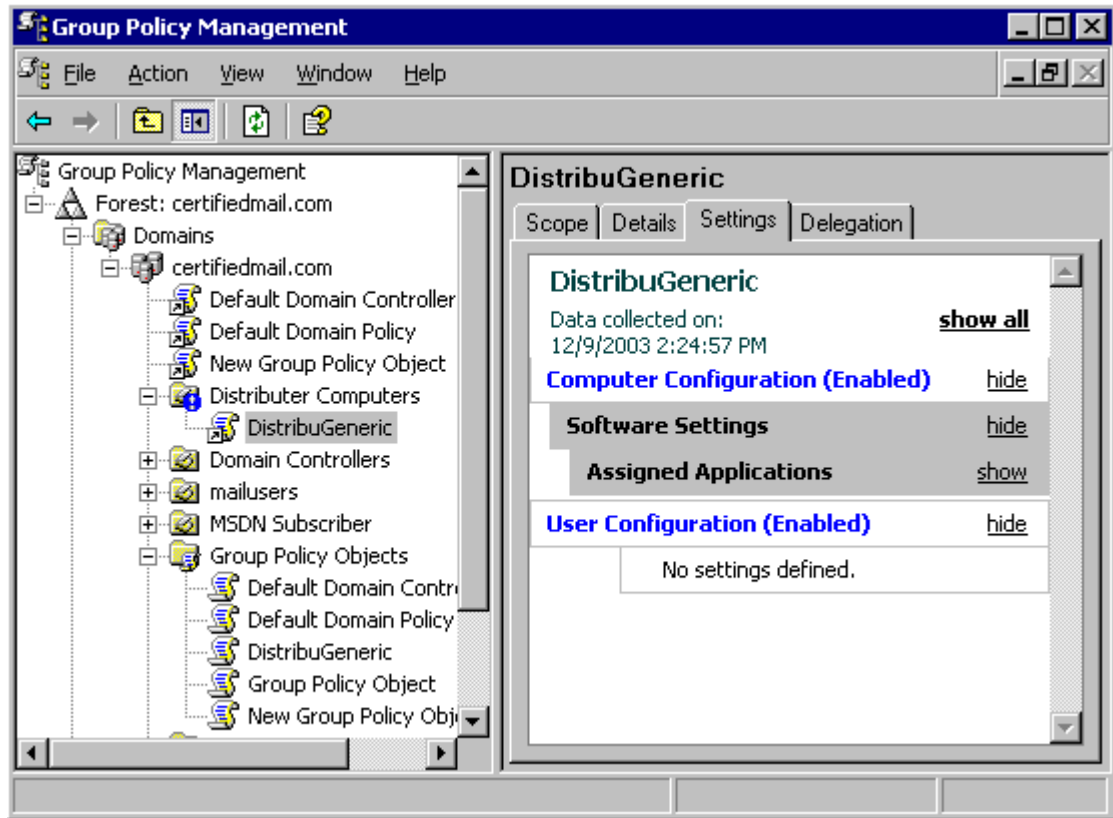
Step-by-Step Procedure

1. From your Active Directory Domain Controller, launch **Active Directory Users and Computers** from the Start | All Programs | Administrative Tools menu.
2. Create a new Organizational Unit (OU) that will contain computer names to distribute the SendSecure add-in. In this example, an OU named "Distributer Computers" was created.
3. Add computers to the OU that will receive the SendSecure add-in. In this example, computer "HARMIPC" was added to the new "Distributer Computers" OU.

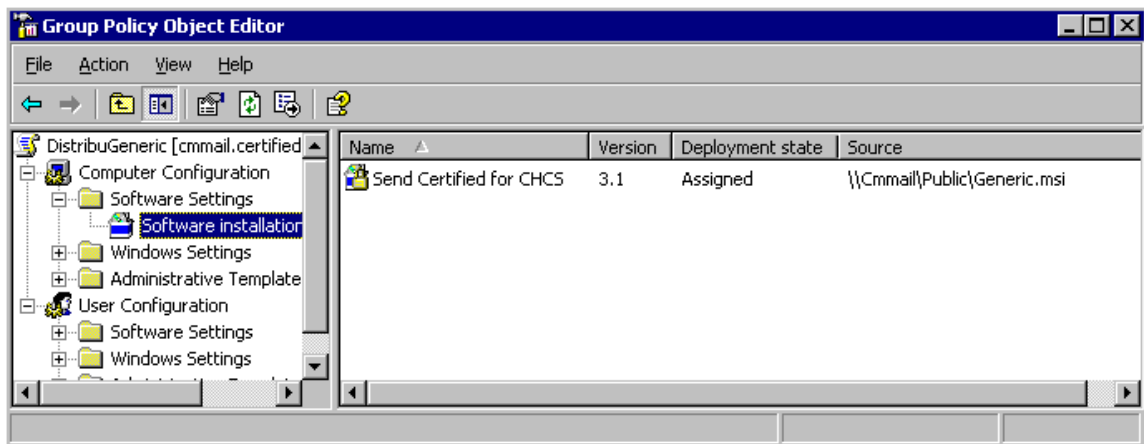
NOTE: To add many computers to the "Distributer Computers" OU, it is recommended that you create a Group under the Computers node. Then assign multiple computers to this Group. Instead of adding individual computers to the "Distributer Computers" OU, simply add the one Group entry to represent all computers in the Group.



4. Right click on the new “Distributer Computers” OU and choose “Create and Link a GPO Here”.
5. Make a new Group Policy Object (GPO) at your new OU. In this example, the GPO will be named “DistribuGeneric”.



6. Right click on the new GPO and choose Edit. In the Group Policy Object Editor window, expand Computer Configuration->Software Settings->Software installation. Right click on “Software installation” and choose a new package.
7. Copy your SendSecure “Generic.msi” file to a directory on your network that can be accessed by all workstations that are members of “Distributer Computers”. Then browse to this path and file to add it to Computer Configuration->Software Settings->Software installation.



NOTE: Make sure you give the Computer or Group of computers account read permissions to that network share folder and also to the SendSecure "Generic.msi" file. If using individual Computer accounts, they are typically represented by Computername+\$, for example, HARMIPC\$.

8. On the "Deploy Software" dialog, choose "Assigned" as the deployment method so that the SendSecure Generic.msi software will automatically run.

NOTE: Do not deploy the "Generic.msi" file under the GPO User Configuration tree, as it will need a workstation user that has local administrator rights to install the software. By deploying to the Computer Configuration tree, the credential to install the software is the local system account which always has local administrator rights on that computer.

This concludes the installation.

Installation with Citrix/Terminal Services

The SendSecure Button add-in can be installed in a Terminal Services/Remote Desktop/Citrix environment. The Corporate version of the SendSecure Button must be used.

NOTE: By default, the Corporate version of the Outlook plugin uses a tagging configuration by default. In order to use the Corporate button with Citrix/Terminal Services without involving the use of the DataMotion Gateway, the "tagging" DMConfig.xml file will have to be replaced with a "desktop encryption" DMConfig.xml file. This must change must be performed before running the installer.

NOTE: To replace the existing "tagging" DMConfig.xml file, simply copy the DMConfig.xml file in the Desktop Encryption folder, and paste it into the directory containing the SecureMailSetup.msi. Overwrite the existing DMConfig.xml when prompted.

The Corporate version of the SendSecure Button can be installed normally on the server running Terminal Services. Make sure to close Microsoft Outlook before you install and all users are logged out of the server. After installation, desktop clients (up to the number of licensed users) can use the SendSecure Button.

CORPORATE BUTTON MODES

The Corporate Button can be configured using three separate configuration modes and each will alter your mail flow. Be certain of which mode you want the button to utilize as configuration is performed via manually moving files. These two modes and how to configure them are described in the sections below.

Desktop Encryption

Desktop encryption will tell SecureMail to encrypt the message before it is sent to the mail server. This provides a high degree of security since encryption is done at the endpoint, and it does not require any mail server configuration to work. Because the email is encrypted at the desktop, it is not possible to archive emails from the desktop or the mail server (only the encrypted copy would be saved). Archival can be done through the DataMotion Server.

Secure Redirection

Secure Redirection is a common configuration for the corporate button. In this case when the user clicks Send Secure the recipient list is changed to point to the DataMotion Server. To ensure secure delivery, this configuration requires a secure TLS connection to be established between your external mail gateway and the DataMotion Server. Once the message has reached the server it is encrypted for recipient delivery. This configuration provides an unencrypted archive from the mail server or client.

Secure Tagging

Secure Tagging uses a tag placed into the message header that can be scanned. In this case when the user clicks Send Secure a tag is added to the header (for example, the tag SECURE would note a message which should be encrypted) which can be found by your email content filter, which must be configured for content-based routing. Messages with the proper tag would be forwarded to the DataMotion Server. To ensure secure delivery, this configuration requires a secure TLS connection to be established between your external mail gateway and the DataMotion Server. Once the message has reached the server it is encrypted for recipient delivery. This configuration provides an unencrypted archive from the mail server or client.

MODE CONFIGURATION

Changing which mode the Corporate Button uses to send email is all dependent on the DMConfig.xml file. The DMConfig.xml that is utilized by the installation, is the one present in the base folder “SecureMailX##v.X.XCorp” and is the one that must be changed in order for the Send Secure button to use the new configuration mode. For convenience the Desktop Encryption and Secure Redirection (the folder is named Redirection in the download) are included in separate folders in the download. Refer to the sections below to see how to change the configuration mode to the one that is desired.

The Secure Tagging button is a separate download on the Download Console page. The directories for this button differ from the other versions as a result.

Desktop Encryption

In order to change the configuration mode to use Desktop Encryption perform the following steps.

1. Navigate to where the SecureMailX###v.X.XCorp folder is on the machine.
2. Enter the Desktop Encryption folder.
3. Copy the DMConfig.xml file.
4. Return to the previous folder.
5. Paste the DMConfig.xml file into the folder and overwrite when prompted.

Secure Redirection

In order to change the configuration mode to use Secure Redirection perform the following steps.

1. Navigate to where the SecureMailX###v.X.XCorp folder is on the machine.
2. Enter the Redirection folder.
3. Copy the DMConfig.xml file contained in the folder.
4. Return to the previous folder.
5. Paste the DMConfig.xml into the folder and overwrite when prompted.

To be absolutely certain the DMConfig.xml is the proper one, check the header of the xml file for “Secure Redirection Corporate Configuration.” If this line is present then you are finished.

Secure Tagging

Use the instructions in this section to configure the tag used by the button.

Editing the Tag used in the Content Filter

It is possible to change the text that is used for the tag when it passes through the content filter of your mail server. This is simple to do and requires minimal xml editing. The following instructions assume that you are already in the SecureMailX86v1.0Tagging folder.

1. Open the DMConfig.xml file.

NOTE: When opening the file it is recommended to use Notepad or Notepad++ for syntax highlighting if necessary.

2. Find the SmtptCorporationModeSubjectTag line.
3. Change the text in between the square brackets ([Secure] is the default) to the desired text.
4. Save the file.

ALTERING THE SEND SECURE BUTTON ICON

It is possible to change the icon of the Send Secure Button itself by creating an Images folder within the same directory as the SecureMailSetup.msi installer. Within the Images folder, a 32x32 (in pixels) can be used to replace the standard image after installation.

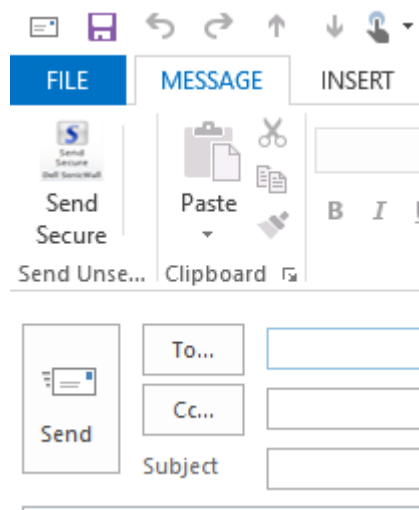
NOTE: The image used must be a png file, and be renamed to SendSecureButton.png.

It is also possible to change the label text shown in Outlook whenever a new message or reply is started. This is a simple task as well and only requires opening the DMConfig.xml file of choice and editing or adding a <SendSecureButtonLabel> within the <CMInfo> tag:

<SendSecureButtonLabel>(Label Text Here)</SendSecureButtonLabel>

NOTE: Every xml configuration mode is supported.

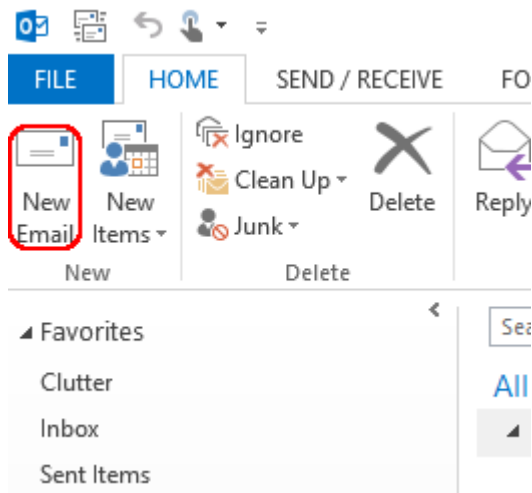
Once installation has been completed, anytime a new message or reply is initiated, the button and label will have changed to match your custom configuration.



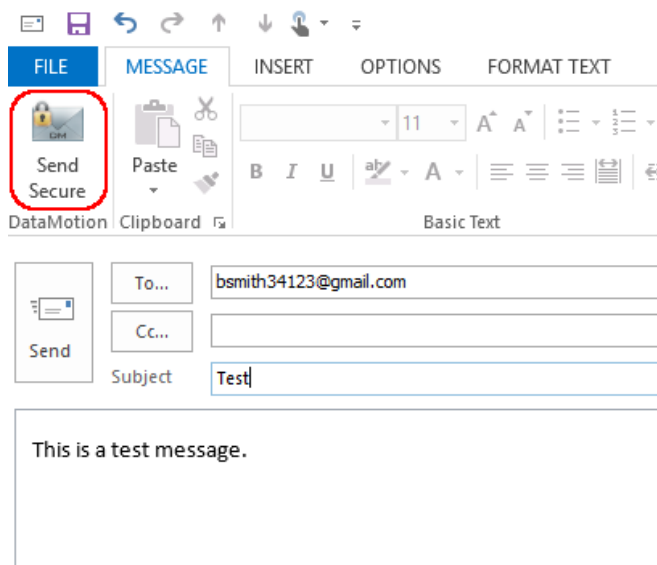
USING THE SEND SECURE BUTTON

No matter how the Send Secure button was installed, using the button itself is the same for all users. Usage of the button itself is relatively simple and the process is identical to sending a regular email through Outlook. To be certain that the button is working as expected perform the following instructions to send a secure email via the button.

1. Open your Outlook client (if it is not already).
2. Click on the New Email button on the top left.



3. Enter a recipient in the To field and then enter information as desired.
4. Click the Send Secure button on the top left.



5. The recipient of the message should receive a notification message indicating that they have received a secure email.

test@email.com

to me ▾

DataMotion Message Delivery

test@email.com has created a secure e-mail message for you at:

<https://ssl.datamotion.com/l.aspx?l=en-us>

To access your message, simply follow these steps:

1. Click on the above link.
2. Type bsmith34123@gmail.com for your Login ID, and then your password.
3. Access your Inbox to view your message.

Problems accessing the message?

If you are unable to open the link, please make sure that your firewall or your company's security settings are not blocking the link.

If you are unsure of your password, please reset it at <https://ssl.datamotion.com/> by clicking on the "Click HERE to reset your password" link.

Additional Help:

- Questions relating to the content of the e-mail should be directed to the sender or sending organization.
- Questions relating to reading this secure message can be sent to support@datamotion.com.

Message Details:

Subject: Test
From: test@email.com
To: bsmith34123@gmail.com
Created: 5/4/2016 3:43:18 PM (GMT-05:00)
Expires: 5/4/2018 3:43:18 PM (GMT-05:00)

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NOTE: If your company has the Safe TLS option enabled, the recipient may not receive a notification, but will instead receive the message as plain text.

* * *

This represents the end of the *DataMotion SecureMail Plugin for Microsoft Outlook Guide*.