Secure Mobile Access Module

Administration Guide

Version 1.0

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Table of Contents

Introduction **1**

Prerequisites 1

Preparing EFT Server™ **1**

Finding the EFT Server Site Root 1

Installing the TappIn Agent **5**

The Standard TappIn Agent 5

Configuring the Agent 6

Removing a Share or Changing Permissions 7

Installing the Secure Mobile Access Module **9**

To install the SMA module 9

Configuring the SMA Module 11

To Configure the SMA Module 11

Configuring Event Triggers **13**

Group Membership Event Rule Processing 13

To Create a New Group 13

To Edit the Event Rule 14

Event Trigger Tips and Tricks 15

Repair 15

To Repair the SMA Module Installation 15

Using the System **17**

To Add a User 17

Existing Users 18

To Add Existing Users to the SMA Module Group 18

Deleting a User 19

Accessing Content from Your Mobile Device 19

Index **21**

Introduction

This guide provides the steps to provision and configure the **Secure Mobile Access** (**SMA**) module for EFT Server. The process should take no more than 15 minutes to complete and will provide end users with access to their EFT Server data from their desktop and handheld device.

Prerequisites

Before installing and configuring the **SMA** module, install and configure the following items:

- Enterprise File Transfer (EFT) Server or EFT Server Enterprise 6.4.7 or later.
- **TappIn Agent** 1.3.1.154

NOTE: To use the **SMA** module event rules, ensure that you are running at least version 6.4.5 of either EFT Server or EFT Server Enterprise. No other EFT Server modules are required; however, if you do not have at least the 6.4.5 version of the software, you will receive a "Failed to Install" message when attempting to configure the SMA module.

Preparing EFT Server™

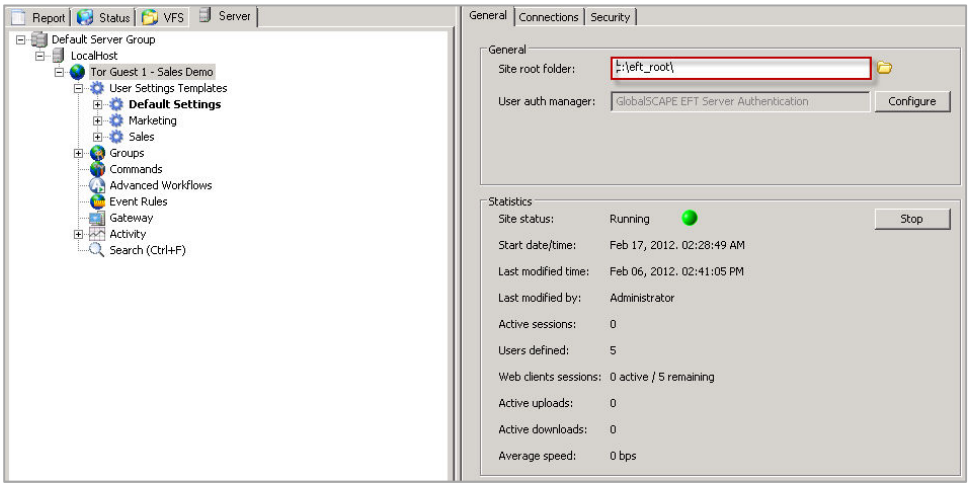
Installation of the EFT Server is beyond the scope of this document. For assistance with installing and configuring EFT Server, please refer to the product documentation at http://help.globalscape.com/help.

Finding the EFT Server Site Root

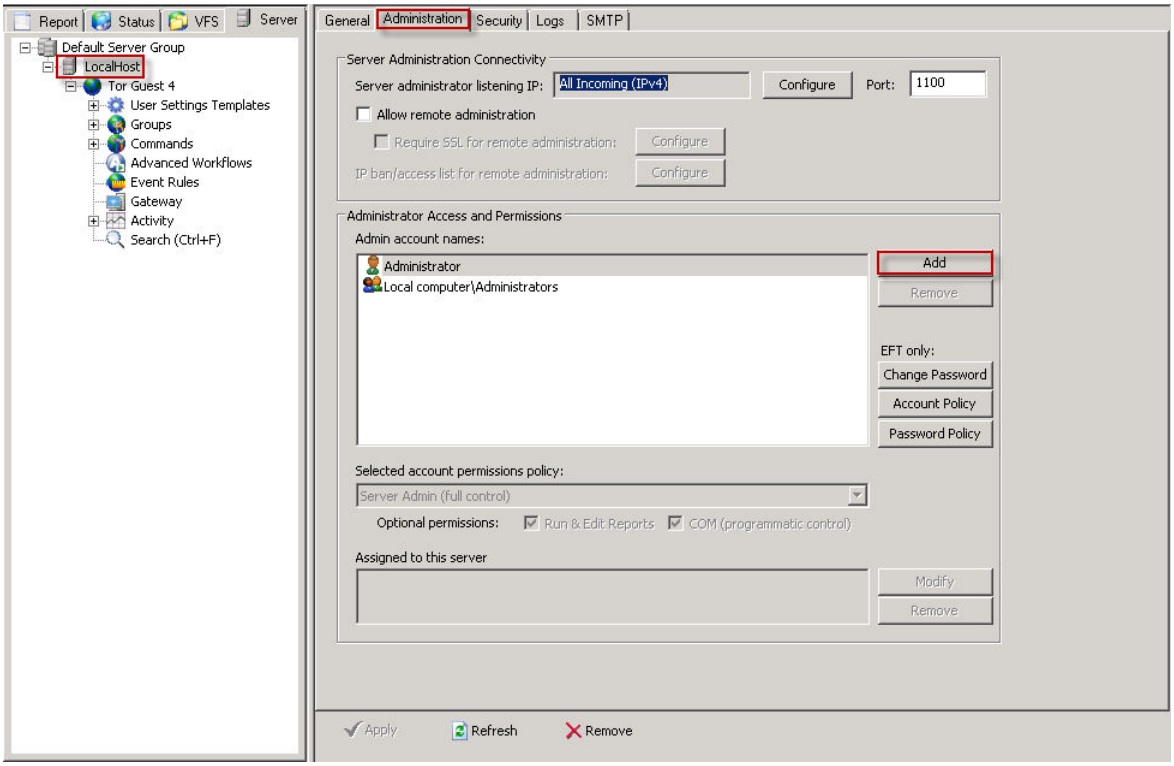
The first step in preparation for SMA deployment is to note the name of the site on which you want to install SMA and the location of the site root folder.

To find the Site name and Site root folder

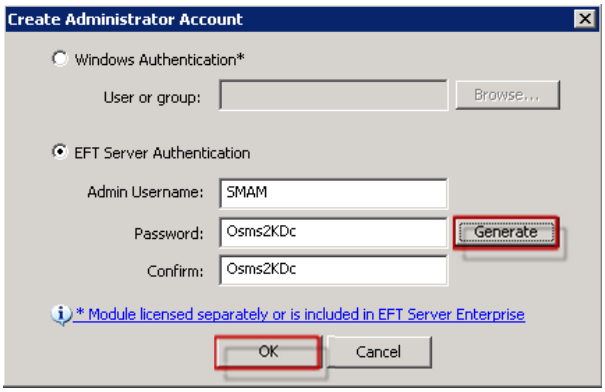
1. Open the EFT Server administration interface and log in.
2. Click the site where you will add **SMA**. Make note of the site name, as it may have been changed from the default. In the image below, the site name is **Tor Guest 4**.
3. In the right pane, click the **General** tab.



4. Make note of the **Site root folder** location. In the screen shot above, the **Site root folder** is **C:\eft_root**.
5. In the right pane, click the **Administration** tab.



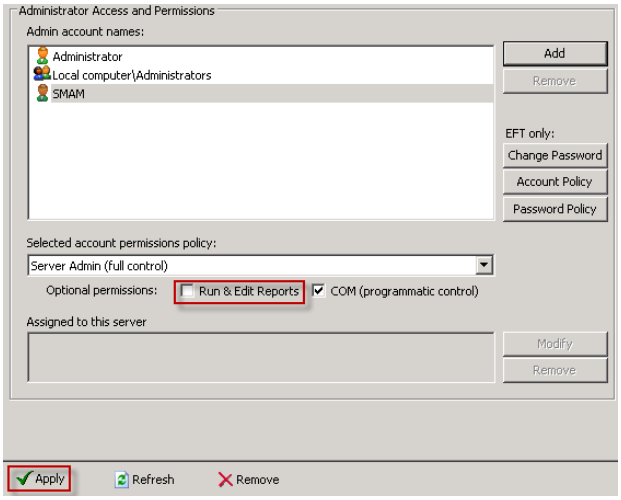
6. In the **Administrator Access and Permissions** area, click **Add**. The **Create Administrator Account** dialog box appears.
7. In the **EFT Server Authentication** area, specify an **Admin Username** and **Password**.



NOTE: Passwords are case sensitive. The username and password fields each cannot exceed 1024 characters. To create a complex password, click **Generate**. Make note of the new admin username and password for use when the configuration of the module occurs.

8. Click **OK**.

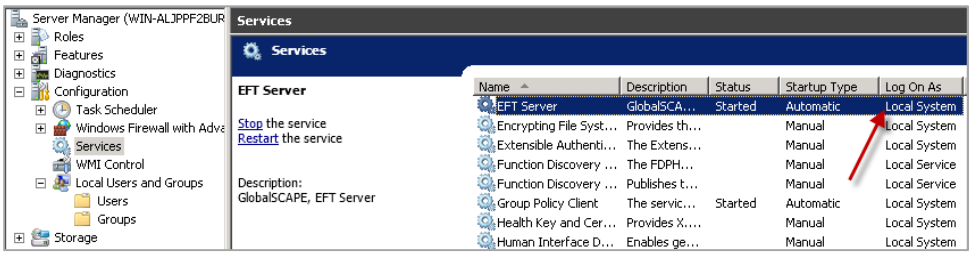
9. Clear the **Run & Edit Reports** check box, then click **Apply** to save the changes on EFT Server.



10. If the **Site root** is located on another system, there may be permission challenges to overcome before setup can continue.

    a. Open the **Services** applet as follows:
    - Click **Start**.
    - Click into the **Start Search** box and type **services.msc**.
    - Press **ENTER**.

    b. Determine which account is being used to run the EFT Server service. In this example, the account service logs on as "Local System."



If the EFT Server service account is logging on as Local System, then the standard **TappIn Agent Service** (described later in this process) can be run. If the EFT Service is being run by another account (this will occasionally be the case when the EFT Server Site root is located on a separate system), then contact Support at +1-210-366-3993 to obtain the **Lite Agent** installation client for the **TappIn Agent**.

Installing the TappIn Agent

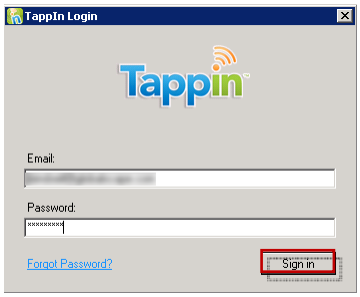
The easiest way to share files on multiple networked computers is to install the **Standard TappIn Agent** on each computer separately and share the files or folders directly with the agent. The **Standard TappIn Agent** runs as a service in Windows and starts automatically when the computer is turned on. A user need not be logged into Windows.

The Standard TappIn Agent

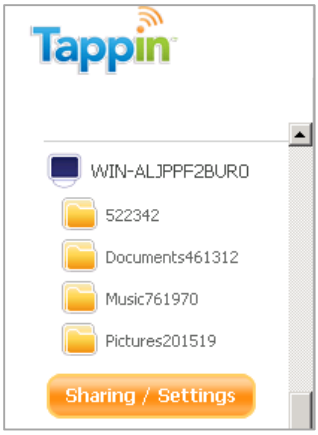
For typical installations, the **Standard TappIn Agent** can be installed as follows:

1. Open a browser and navigate to http://www.tappin.com/products/tappin-desktop-agent.
2. Right-click **Download TappIn for Windows**, then click **Save target as.**

3. Double-click the downloaded file, **TappInAgent.exe**. The installation happens almost completely in the background and can take up to two (2) minutes of silent installation.
4. When prompted, enter your **TappIn Email Address** and **Password.**
   - If you have not already created the account as a part of the pre-sales process, then proceed to create a new **TappIn** account.



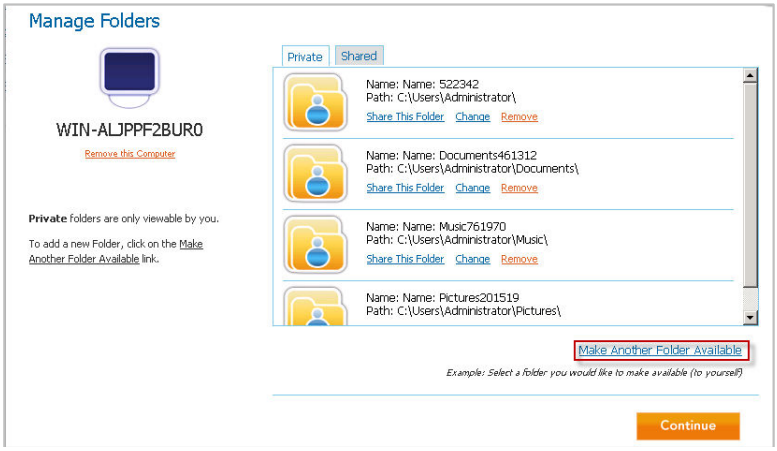
A browser window opens and shows the system and the current directories, if any, that are visible on the system.



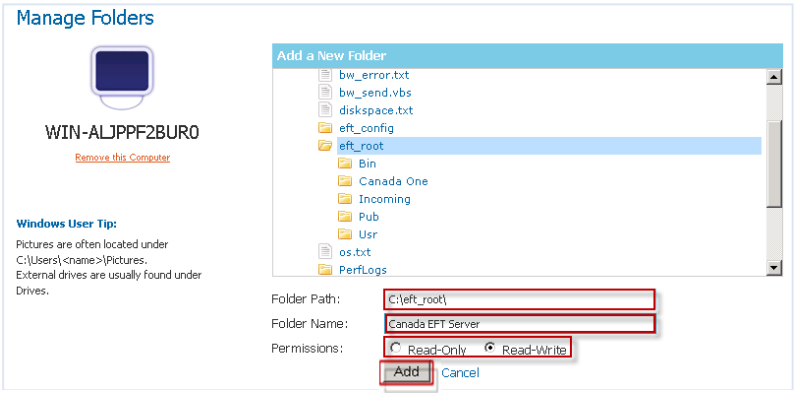
Configuring the Agent

1. Click **Sharing / Setting**.

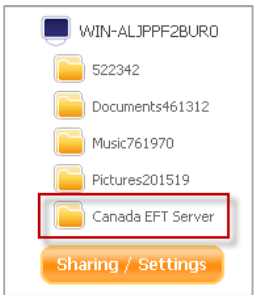
2. At the bottom of the page, click **Make Another Folder Available**. Make note of the new folder name for later use.



3. Create the root share:
   a. Click the folder that is the site root identified in Finding the EFT Server Site Root.
   b. Type a descriptive name into the folder name field.
   c. Specify whether to make it **Read-Only** or **Read-Write** for mobile devices.
   d. Click **Add**.



4. You are returned to the main screen. Notice that the new share is now visible in the left window.

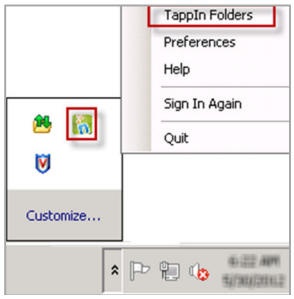


Your **TappIn** software is now configured.

Removing a Share or Changing Permissions

Occasionally, it may be necessary to remove a share or change its permissions.

1. Choose one of the following two options to remove or change permissions of a share:
   - In the system tray of the computer on which you installed the **TappIn Agent**, right-click the **TappIn** logo, then click **TappIn Folders**. The **TappIn Configuration** web page appears.

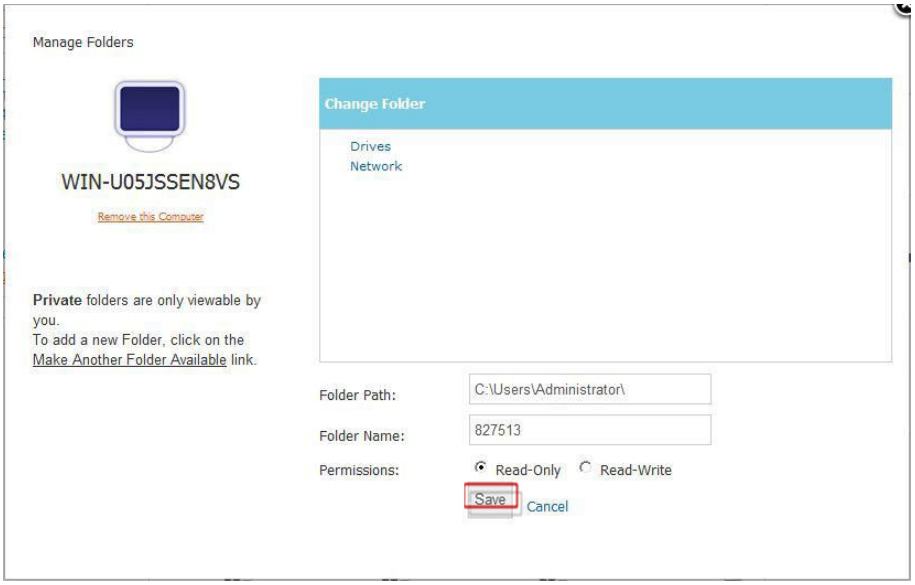


   - Go to https://app.tappin.com/my/stuff and remove or change share permissions.
2. To remove or modify any user or system share, click **Settings**. The **Manage Folders** page appears.

3. Click the shared folder, then click **Change** or **Remove**.

   NOTE: The **Change** option allows the ability to browse folders and change permissions.

4. If you are changing permissions, click the permission, then click **Save**.



5. If you are removing the folder, a confirmation message appears. Click **Remove** to confirm.

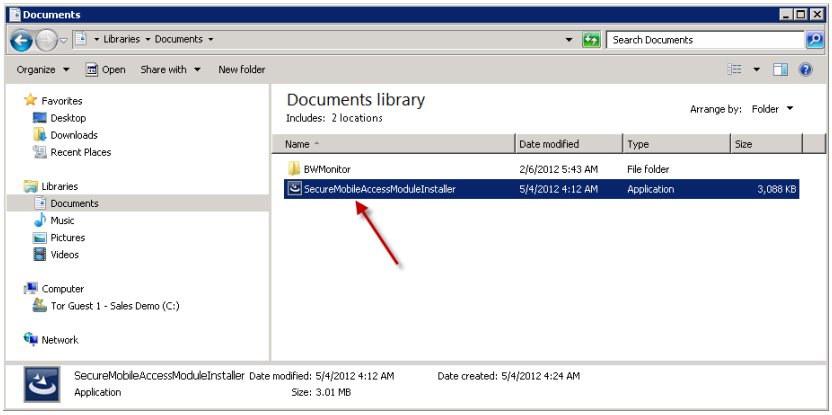
6. You are returned to the **Manage Folders** page. Click **Continue**.

Installing the Secure Mobile Access Module

SMA module installation takes only a few minutes to complete.

To install the SMA module

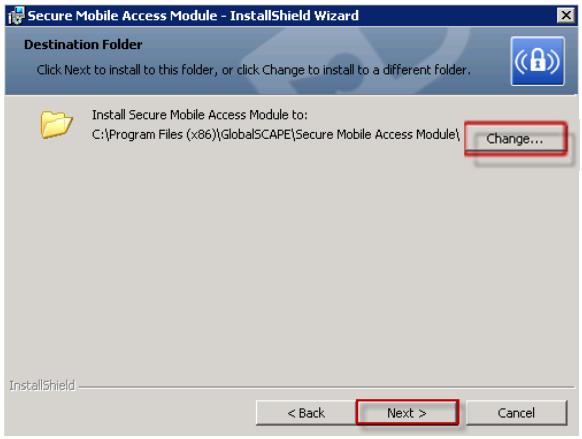
1. Obtain the installation software from your pre-sales account manager or by contacting GlobalSCAPE Support at +1-210-366-3993.



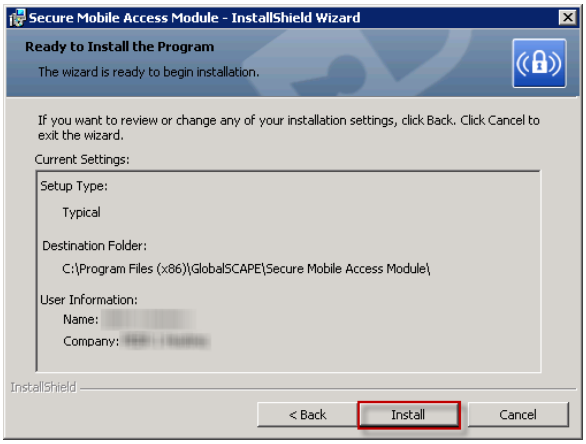
2. Double-click **SecureMobileAccessModuleInstaller.exe**. The **Secure Mobile Access** installer starts. Click **Next** to continue.

3. The **Welcome** page appears. Click **Next**.

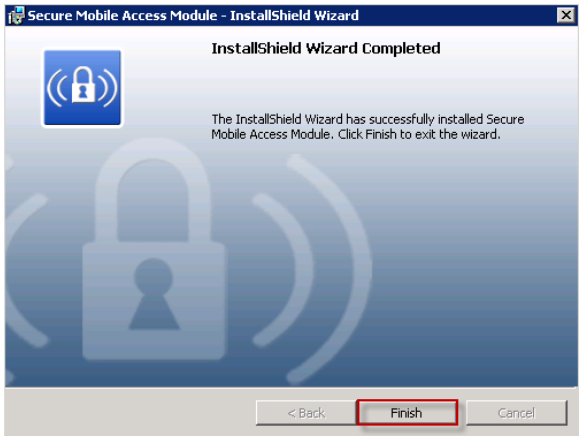
4. The **Destination Folder** page appears. Click **Next** to continue with the default file location or click **Change** to specify another location.



5. The **Ready to Install** page appears. Click **Install**.



6. After the installation is complete, click **Finish**.

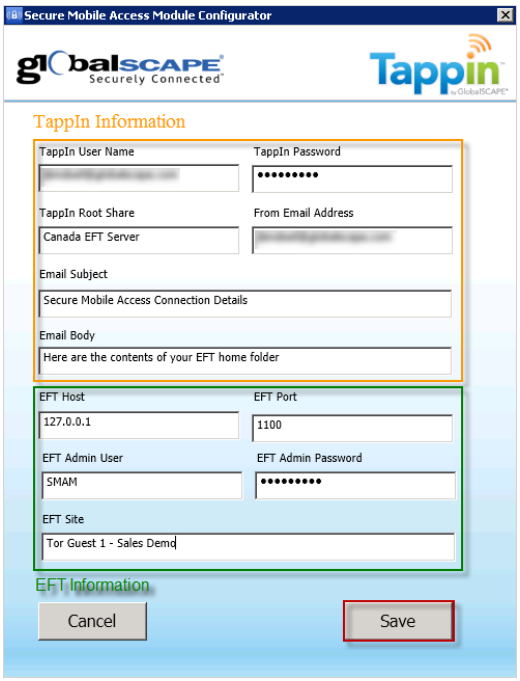


The module installation is now complete. The next step is to configure the account credentials.

Configuring the SMA Module

Be sure to have all previously created account information available before beginning the configuration process. You will need the following information before starting installation:

- **TappIn** username
- **TappIn** password
- **TappIn** root share
- Email address for emails sent from the system
- EFT Server host address
- EFT Server port
- EFT Server administrator username
- EFT Server administration password
- EFT Server Site name

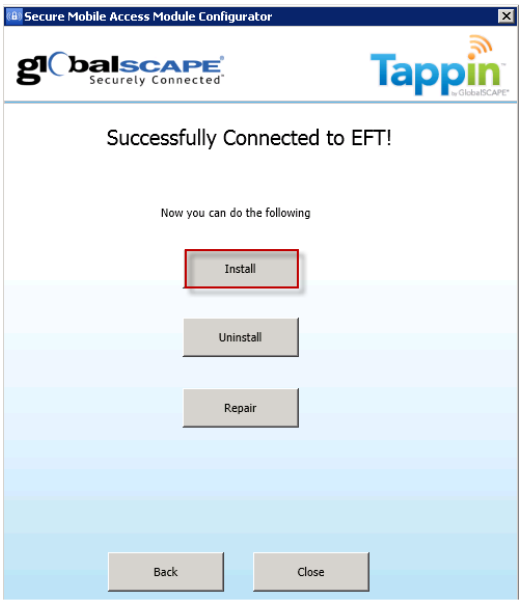


To Configure the SMA Module

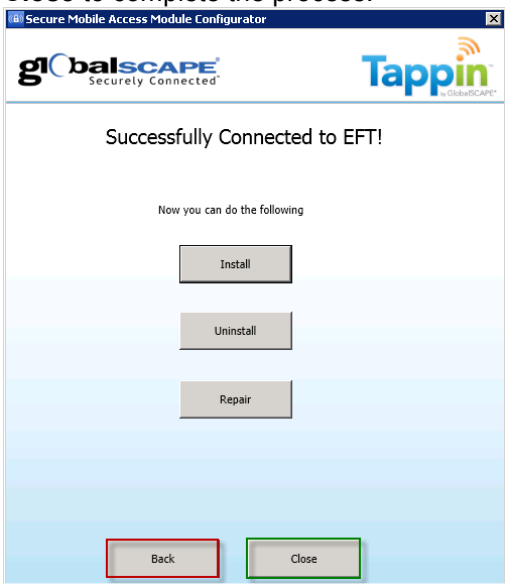
1. On the desktop, double-click the **Secure Mobile Access Module Configurator** shortcut.

2. Provide the user's **TappIn** credentials and email settings.
3. Provide the EFT Server account information.
4. Click **Save** on the next page that appears.

5. Click **Install**. The following actions will occur:
    - The custom command is created.
    - The four (4) Event Rules that call on the custom command are created.



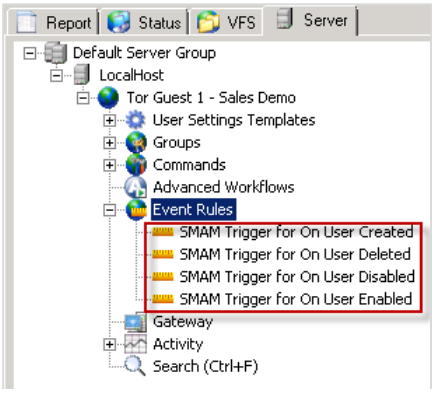
6. If the configuration works properly, you will receive the "Successfully Installed" message.
7. If errors occurred, select **Back** to verify and correct any connection information. Otherwise, click **Close** to complete the process.



If the EFT Server administration interface was left open during the configuration process, hit **F5** to refresh the screen. Otherwise, open the administration interface and log in.

Configuring Event Triggers

Upon logging into the EFT Server or EFT Server Enterprise administration interface, you will see that new SMA event rules have been created to handle the triggers for **User Created**, **User Deleted**, **User Disabled**, and **User Enabled**.



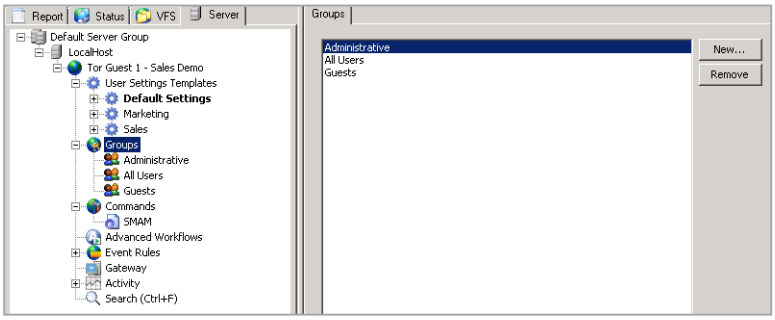
These event rules are designed to trigger for EVERY user that is created, deleted, disabled, or enabled. If the purpose is to provide this service to ALL users, then installation is complete and the system is ready for use. However, the configuration can be adjusted so that the default event rules allow only specific users to have access to the mobile functionality. Follow the process below to allow specified users access to the mobile functionality.

Group Membership Event Rule Processing

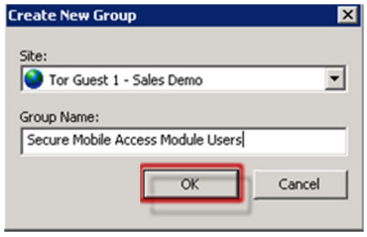
For a basic example, let us assume that you want to allow only users that are members of a specific group to use the **SMA** module features. To create a **Share** based on a group, the **Event Rule** must be slightly modified and a **Group** must have been created for users to be assigned to. Use the following steps to create a new **Permissions Group** called **Secure Mobile Access Module Users**.

To Create a New Group

1. Do one of the following:
    - Press CTRL+G.
    - Right-click in the left pane and select **New Permission Group**.
    - On the main menu, click **Configuration**, then click **New Permissions Group**.
    - In the left pane, click the **Groups** node.
    - In the right pane, click **New**.



The **Create New Group** dialog box appears.



2. In the **Site** field, select the site for which you want to create the new group (only if the **Groups** node was not selected in a site tree).
3. Type a name for the Group in the **Group Name** box. The group name can contain up to 255 characters.

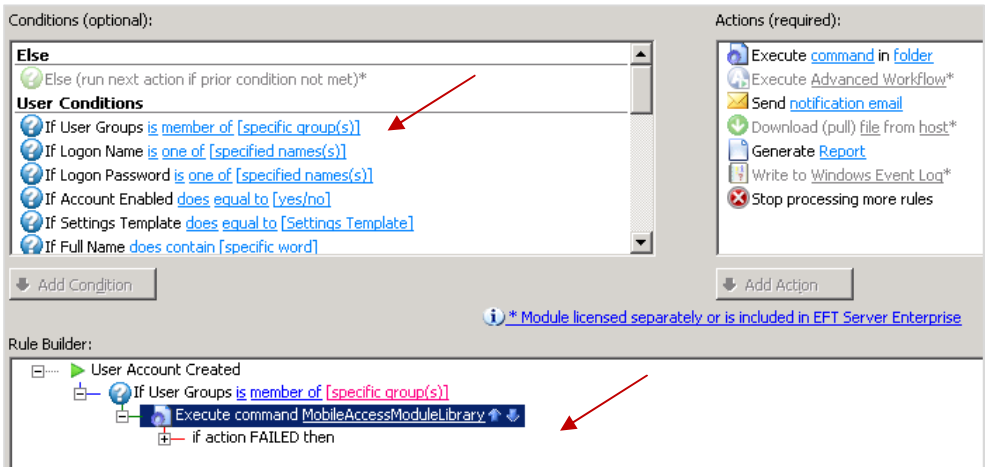
   EXAMPLE: `Secure Mobile Access Module Users`.
4. Click **OK**. The new group appears under the specified Site in the **Groups** node.

The group pane shows no members. Users will be added to the group later.

The next step is to edit the SMA Event Rules.

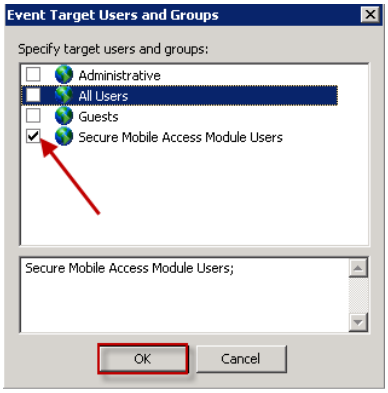
To Edit the Event Rule

1. In the left pane, select the Event Rule.
2. Under **User Condition**, double-click "**If User Groups is member of [specific group(s)]**. The **Condition** is added to the **Rule Builder**.
3. In the **Rule Builder**, click **Execute command** and drag it to the top of the **User Groups** line such that it becomes a child branch. The up/down arrows indicate that the move was successful.



4. In the **If User Groups** condition, click the **specific groups** link.

5. Specify the **Groups** that are to be a part of this feature, then click **OK**.



6. Click **Apply** to save the event rule.
7. Perform the steps above on the remaining three SMA Event Rules for **On User Deleted**, **On User Disabled**, and **On User Enabled**.

The system is now configured for group membership application of users.

Event Trigger Tips and Tricks

Event Rules can be configured to perform any kind of conditional processing to ensure that only selected users are included in the **SMA** module functionality. The following tips can be useful to return the system to its original state or to cover pre-existing users.

Repair

If you make modifications to Event Rules that do not work out as planned, you can repair the installation to revert to the original state.

To Repair the SMA Module Installation

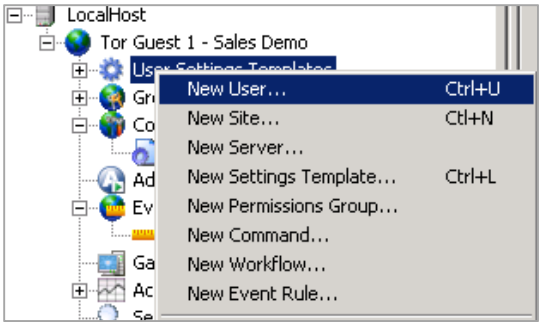
1. Double-click the **Secure Mobile Access Module Configurator** shortcut on the desktop. The **Secure Mobile Access Module Configurator** dialog box appears.
2. Without changing any information, click **Save**.
   a. On the page that appears, click **Repair** to return the Event Rules to their original state, or click **Uninstall** to remove the Event Rules from EFT Server.
   b. Click **Close**.

Using the System

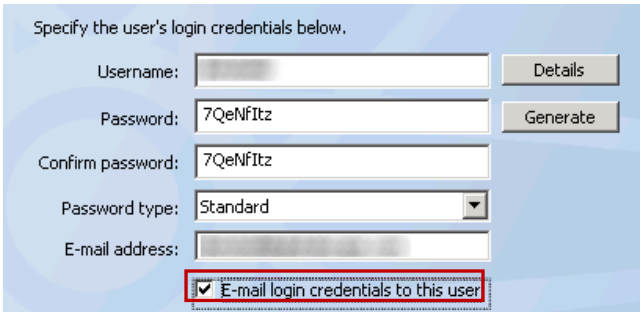
In the EFT Server administration interface, you can add and delete user access to the **SMA** module.

To Add a User

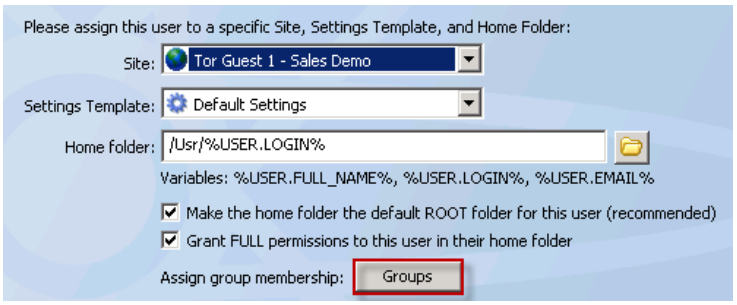
1. Right-click the **User Settings Template**, then click **New User**. The **New User Creation** wizard appears.



2. Provide the following information to specify user login credentials:
   - **Username**
   - **Password**
   - **Confirm password**
   - **Password type**
   - **E-mail address**



3. Select **Email login credentials to user** , then click **Next**.
4. Click **Groups**.



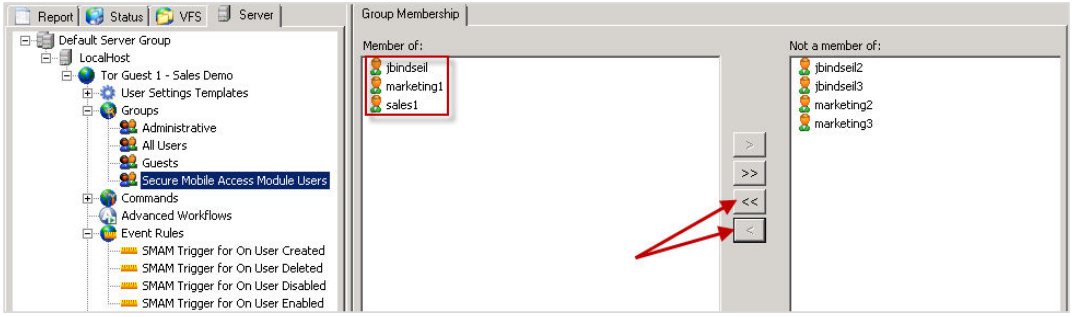
5. The **Groups** dialog box appears. Move the **Secure Mobile Access Module Users** group from the **Not a member of** pane to the **Member of pane**.
6. Click **OK**.
7. Click **Next**, then click **Finish**. The user account is now active. The Event Rule will run and create the user's **SMA** module account and send an invitation.

Existing Users

To allow existing users to use the SMA module, you can add the users to the SMA module group(s).

To Add Existing Users to the SMA Module Group

1. Verify that Event Rules have been modified to be more selective in **SMA** membership as described above. (i.e., You have modified the Event Rules such that only members of the **Secure Mobile Access Module Users** group are applied to the Event Rules.)
2. Add the legacy users to the appropriate group. (e.g., add the users to the **Secure Mobile Access Module Users** group).
3. In the left pane, click the **SMA** users group.
4. In the right pane, move the user from the **Not a member of** pane to the **Member of** pane.

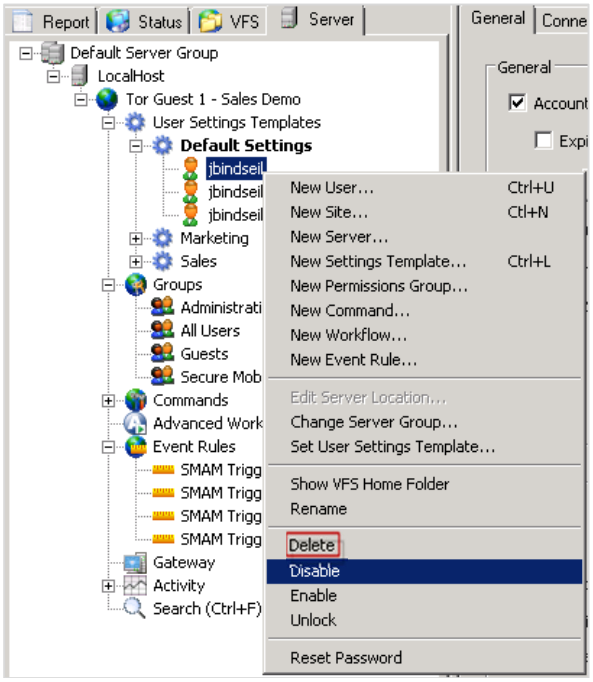


5. To verify that you have properly configured the **On User Disabled** and **On User Enabled** Event Rules, under the Settings Template (e.g., **Default Settings**), find the user you want to activate, then right-click the user, then click **Disable**.
6. Once the user has been disabled, right-click the user again, then click **Enable**.

If the Event Rules were properly configured, the Event Rule will be triggered, the user's **SMA** account will be created, and an invitation will be sent to the user.

Deleting a User

Right-click the username you want to delete, then click **Delete**. This will delete the user from EFT Server and make the share immediately unavailable for this user from their mobile devices.



Accessing Content from Your Mobile Device

1. Open the **TappIn** app.
2. Log in if this is your first time opening the app. (You can configure the app to log you in automatically).

   The name of available shares (e.g., Canada EFT) appears.

3. Click the share to view the available files.

4. You can open any file for which there is an application installed on the mobile device. (e.g., if you want to view a .log file, an application that allows you to read text files must be installed on the mobile device.)

Index

Accessing Content From Your Mobile Device 19

Add a User 17

Configuring the Agent.....6

Configuring the Desired Event Triggers 13

  Accessing TappIn Folders 13

  Selected Users Based on Group Membership Event Rule Processing 13, 18

Deleting a User from EFT Server 19

Finding the EFT Server Site Root.....1

Installing the Secure Mobile Access Module 9

  Installing the Software *9*

  Module Configuration 11

Installing the TappIn Agent.....5

  Configuring the Agent 6

  The Standard TappIn Agent 5

Introduction 1

Module Configuration 11

Removing User Shares

  Deleting a User from EFT Server 19

Selected Users Based on Group Membership Event Rule Processing 13, 18

Setting Up the EFT System 1

  Finding the EFT Server Site Root..... 1

Standard TappIn Agent..... 5

Using the System..... 17

  Accessing Content From Your Mobile Device 19

  EFT Server Actions 17