

SECURE MOBILE ACCESS™ MODULE USER GUIDE

EFT™ 2013

globalscape™

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Introduction to the Secure Mobile Access (SMA) Module

This guide provides the steps to provision and configure the Secure Mobile Access (SMA) module for Enhanced File Transfer™ (EFT™) 2013. The process should take no more than 15 minutes to complete and will provide your end users with access to their EFT data from their desktops and handheld devices.

Preparing EFT™ for SMA Installation

Before installing and configuring the SMA module, ensure that the prerequisites are met and then note the EFT Site root location.

- [Prerequisites](#)
- [Finding the EFT Server Site Root](#)

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>.

Prerequisites

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

- Enterprise File Transfer (EFT) Server Enterprise Edition v6.4.7 or later
- TapIn Agent 1.3.1.154

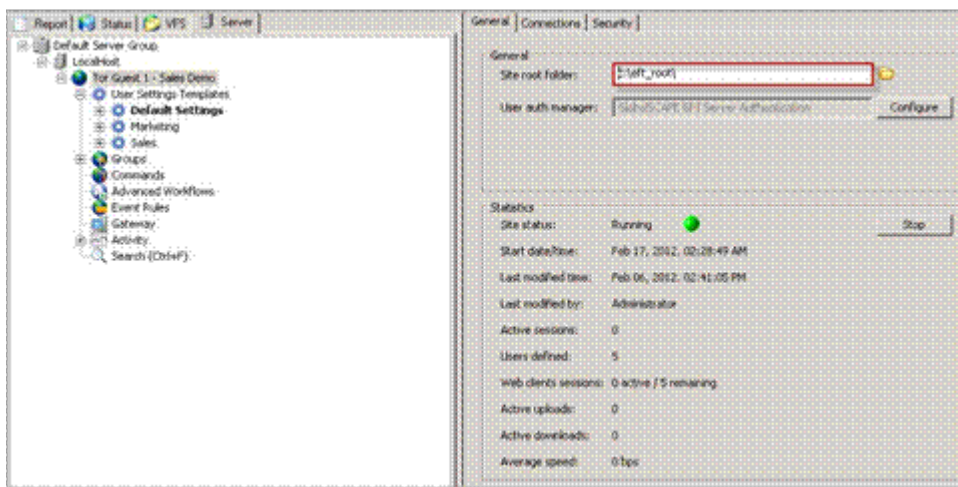
NOTE: No other EFT Server modules are required; however, if you do not have at least the 6.4.7 version of the software, you will receive a "Failed to Install" message when attempting to configure the SMA module.

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.

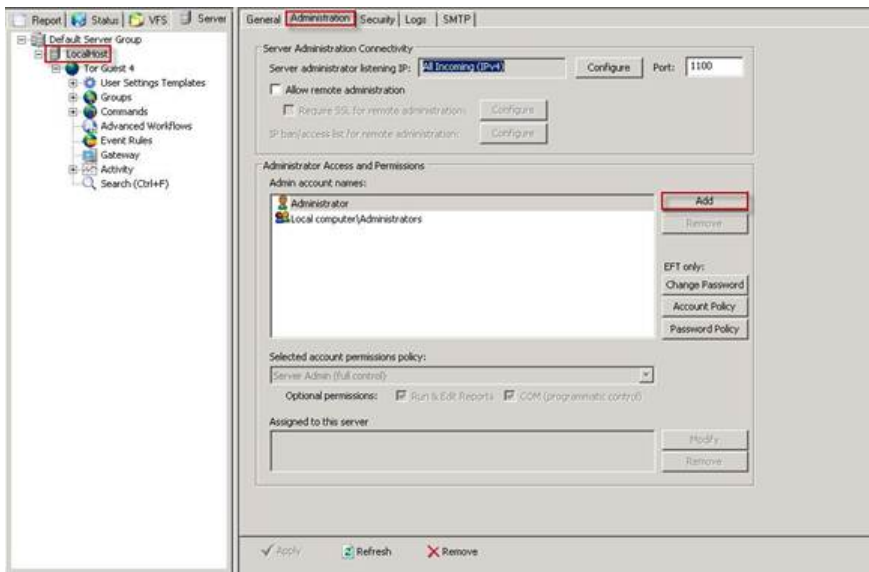
To find the Site name and Site root folder

1. Open the EFT Server administration interface and log in.
2. Click the Site on which 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.

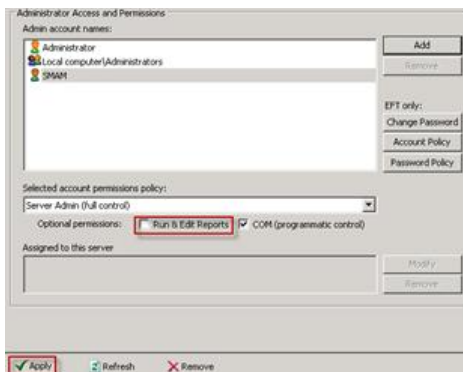
4. Make note of the Site root folder location. In the screen shot above, the Site root folder is **C:\left_root**.
5. In the right pane, click the **Administration** tab.



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. Close the EFT Server administration interface.
11. Open the Windows **Services** applet. (Click **Start**, click in the **Search** box, type `services.msc`, and then press ENTER.)
12. Determine which account is being used to run the EFT Server service. In this example, the account service logs on as "Local System."



- The standard TappIn installer can be used whether the EFT service is running as the LocalSystem Account or a different account. If you will be sharing a network folder, you have to run the TappIn agent as the EFT service account (not LocalSystem).

Installing and Configuring the TappIn Agent

- [Installing the TappIn Agent](#)
- [Configuring the TappIn Agent](#)
- [Removing a Share or Changing Permissions](#)

Installing the Standard 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.

To install the Standard TappIn Agent

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** to save it to a convenient location.



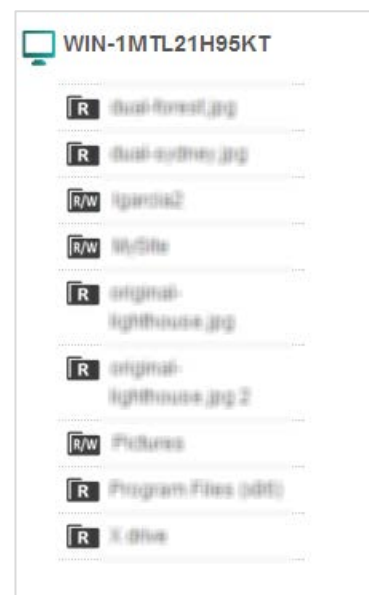
3. Double-click the downloaded file, **TappInAgent.exe**.

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 an account, then create one now.)



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

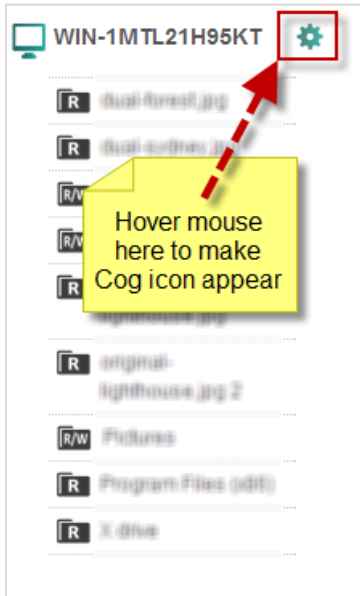


Configuring the TappIn Agent

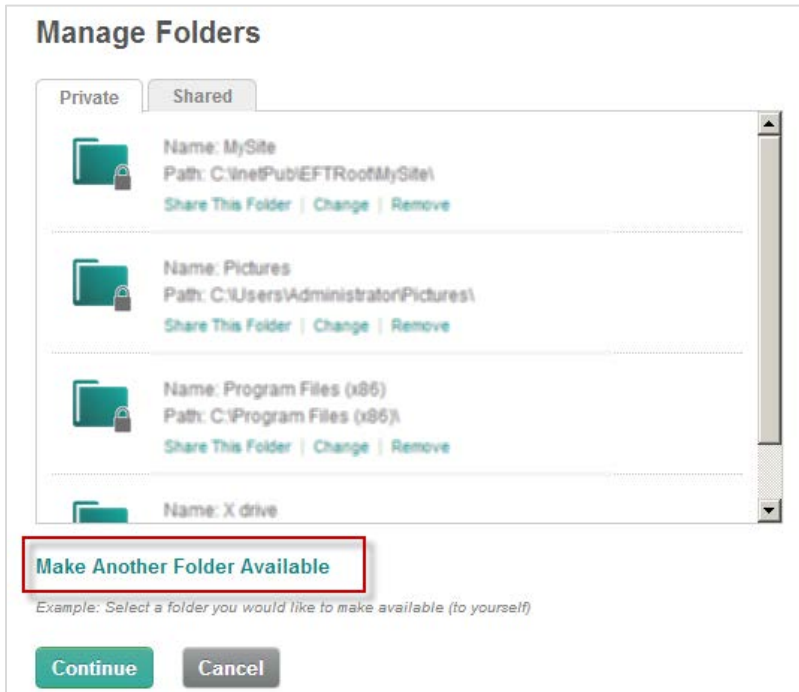
After you install the TappIn Agent, you need to configure the Agent to enable sharing.

To configure the TappIn Agent

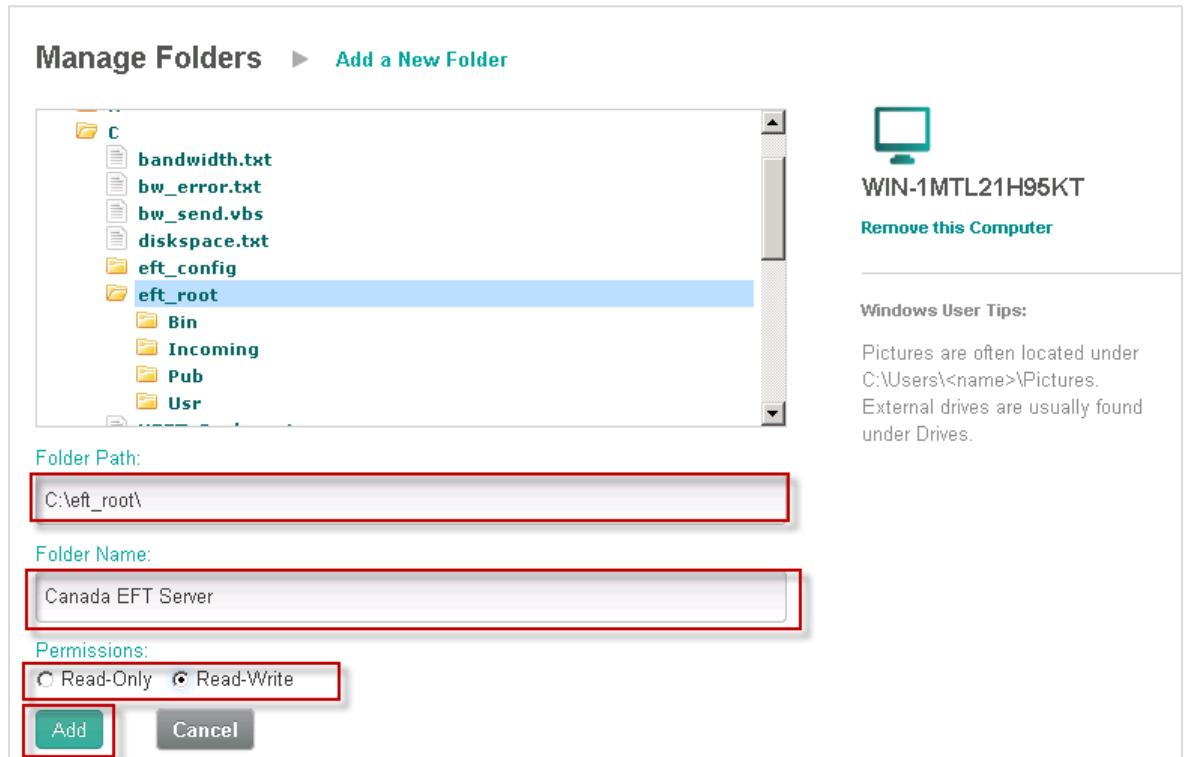
1. Place cursor to the right of the computer name to display the cog/gear icon, then click the icon.



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

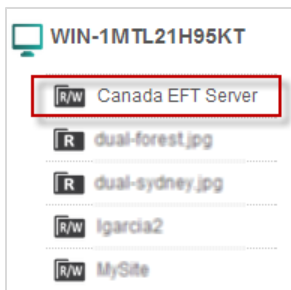


3. Create the root share:
 - a. Click the Site root folder identified in [Finding the EFT Server Site Root](#).



- b. In the **Folder Name** box, type a descriptive name.
- c. Specify whether to make it **Read-Only** or **Read-Write** for mobile devices.
- d. Click **Add**.

You are returned to the main screen, and the new share is now visible in the left pane.



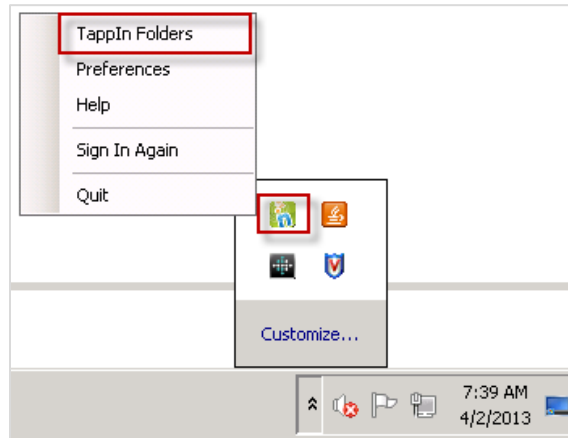
Your TappIn Agent is now configured to allow access to EFT Server.

Removing or Modifying a Share

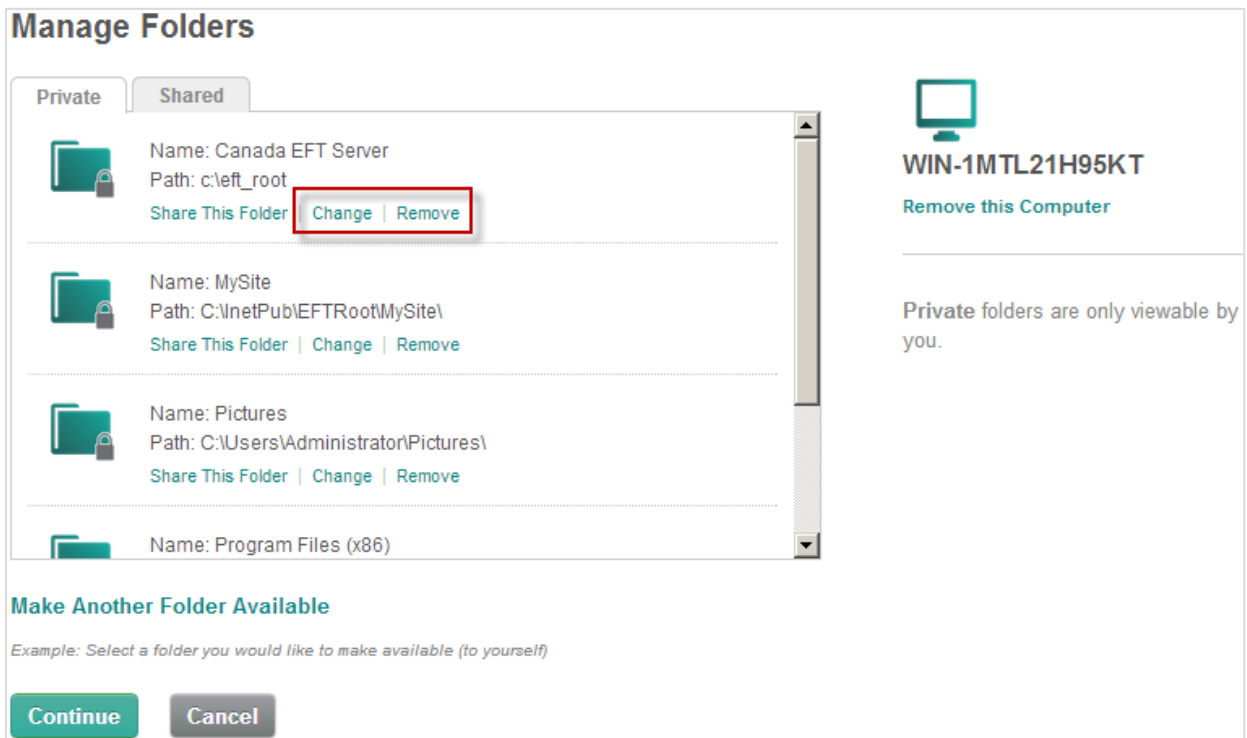
Occasionally, it may be necessary to remove a share or change its permissions.

To remove or modify any user or system share

1. Do one of the following:
 - Go to <https://app.tappin.com/my/stuff>.
 - or -
 - 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.



2. Click **Settings**. The **Manage Folders** page appears.





3. Click the shared folder, then click **Change** (to change permissions) or **Remove** (to remove a folder from sharing).


- If you clicked **Change**, click the new permission (**Read-Only** or **Read-Write**), then click **Save**.

Manage Folders

▶ Change Folder

 **Drives**

 **Network**


WIN-1MTL21H95KT
[Remove this Computer](#)

Private folders are only viewable by you.

Folder Path:
c:\left_root

Folder Name:
Canada EFT Server

Permissions:
 Read-Only Read-Write

Save **Cancel**

- If you clicked **Remove**, a confirmation message appears. Click **Remove** to confirm.

Manage Folders

▶ Remove a Folder


Are you sure you want to remove this Folder?

Doing so will remove it from your TappIn, but not actually delete any files/folders from your computer.

Folder Name: Canada EFT Server

Folder Path: c:\left_root

Remove **Cancel**


WIN-1MTL21H95KT
[Remove this Computer](#)

Private folders are only viewable by you.

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

Installing and Configuring the SMA Module

- [Installing the Secure Mobile Access Module](#)
- [Configuring the SMA Module](#)

Installing the Secure Mobile Access Module

SMA module installation takes only a few minutes to complete. Obtain the installation software from your pre-sales account manager or by contacting Globalscape Support at +1-210-366-3993.

To install the SMA module

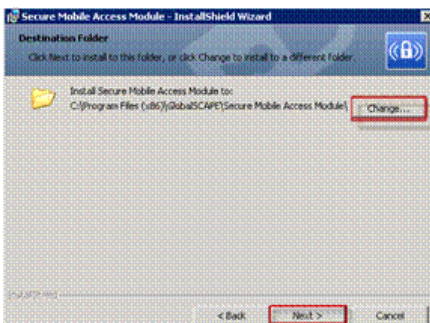
1. Double-click **SecureMobileAccessModuleInstaller.exe**.
2. The Secure Mobile Access installer starts. Click **Next** to continue.



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



4. The **Destination Folder** page appears. Keep the default file location or click **Change** to specify another location, then click **Next**.



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:

- TapIn username
- TapIn password
- TapIn 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.



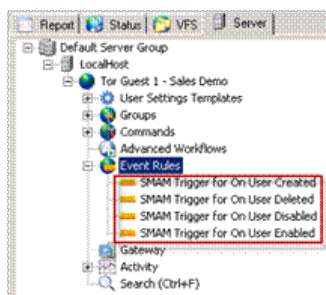
2. Provide the user's TapIn credentials and email settings.
3. Provide the EFT Server account information.
4. Click **Save** on the next page that appears.
5. Click **Install**. The custom command and the four Event Rules that call on the custom command are created and the "Successfully Installed" message appears.
6. If errors occurred, select **Back** to verify and correct any connection information. Otherwise, click **Close** to complete the process.
7. If the EFT Server administration interface was left open during the configuration process, press F5 to refresh the screen. Otherwise, open the administration interface and log in.

SMA Event Rules

- [Configuring Event Triggers](#)
- [Repairing Event Rules](#)

Configuring Event Triggers

Upon logging into the EFT 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.

Let's 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 procedure to create a new Permissions Group called **Secure Mobile Access Module Users**.

To create a new Group

1. Expand the Site used for SMA users, then click the **Groups** node.
2. In the right pane, click **New**. The **Create New Group** dialog box appears.

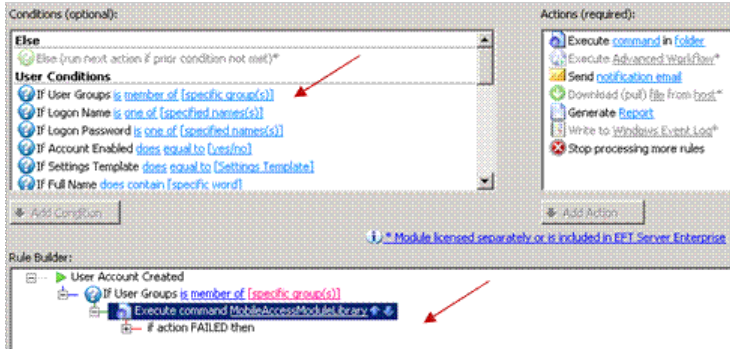


3. In the **Group Name** box, type a name for the Group. The group name can contain up to 255 characters. For example, type `Secure Mobile Access Module Users`.
4. Click **OK**. The new group appears under the specified Site in the Groups node. The group pane shows no members. Users will be added to the group later.

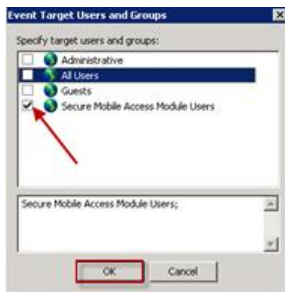
The next step is to edit the SMA Event Rules.

To Edit the SMA Event Rules

1. In the left pane, click the Event Rule. The Event Rule appears in the right pane.
2. In the Conditions area, under **User Conditions**, 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. The **Event Target Users and Groups** dialog box appears.
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.

Now the SMA Event Rules are only triggered by the users in the Groups that you specified. To verify that the Event Rules are properly configured, refer to [Allowing Existing Users SMA Access](#).

Repairing Event Rules

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 Event Rules

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**.



3. 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.
4. Click **Close**.

User Administration

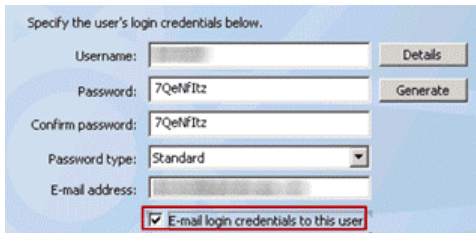
- [Adding Users](#)
- [Allowing Users SMA Access](#)
- [Deleting a User](#)

Adding Users

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

To Add a User

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



The screenshot shows a form titled "Specify the user's login credentials below." with the following fields and controls:

- Username: [text input]
- Password: 7QeNfItz [text input] with a "Generate" button to its right.
- Confirm password: 7QeNfItz [text input]
- Password type: Standard [dropdown menu]
- E-mail address: [text input]
- At the bottom, there is a checked checkbox labeled "E-mail login credentials to this user" which is highlighted with a red box.
- There are "Details" and "Generate" buttons on the right side of the form.

2. Provide the following information to specify user login credentials:
 - Username
 - Password
 - Confirm password
 - Password type
 - E-mail address
3. Select the **E-mail login credentials to this user** check box, then click **Next**.



The screenshot shows a form titled "Please assign this user to a specific Site, Settings Template, and Home Folder:" with the following fields and controls:

- Site: Tor Guest 1 - Sales Demo [dropdown menu]
- Settings Template: Default Settings [dropdown menu]
- Home folder: /usr/%USER.LOGIN% [text input]
- Variables: %USER.FULL_NAME%, %USER.LOGIN%, %USER.EMAIL%
- Two checked checkboxes: "Make the home folder the default ROOT folder for this user (recommended)" and "Grant FULL permissions to this user in their home folder".
- Assign group membership: Groups [text input]
- A "Groups" button is highlighted with a red box at the bottom right.

4. Click **Groups**. The **Groups** dialog box appears.
5. 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 [SMA Event Rules](#) will run and create the user's SMA module account and send an invitation.

Allowing Users SMA Access

To allow users to use the SMA module, you add the users to the SMA module Group(s). (If you need to create new users, refer to [Adding Users](#).)

To add users to the SMA module group

1. Verify that [SMA-related Event Rules](#) have been modified to be more selective in SMA membership.
2. Add users to the appropriate group. (That is, add the users to the **SMA users** group.)
3. In the **Groups** node, 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.

To verify that you have properly configured the SMA Event Rules

1. Under the Settings Template that contains SMA users, right-click the user that you want to activate, then click **Disable**.
2. Right-click the user again, then click **Enable**.

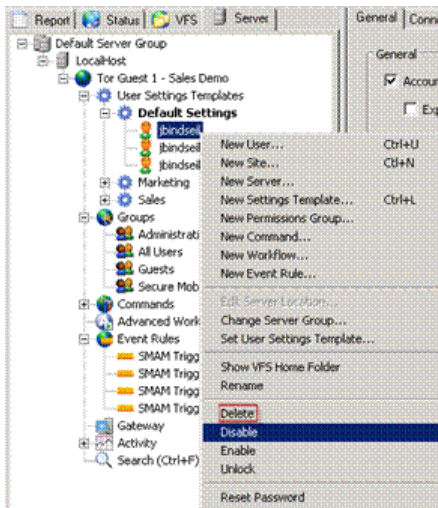
If the Event Rules were properly configured, the Event Rule will be triggered, the user's SMA account will be created, and an invitation will be sent to the user.

Deleting a User

Deleting a user from the EFT Server tree will delete the user from EFT Server and make the share immediately unavailable for this user from their mobile devices.

To a delete a user

1. In the Settings Template that contains the SMA users, right-click the user account you want to delete, then click **Delete**.



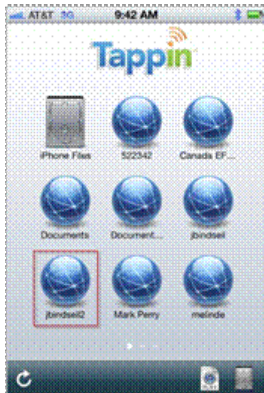
2. A confirmation prompt appears asking if you want to delete the user and the associated home folder. Click **Just Users** to delete the user account, but keep the user home folder, or click **Users and Home Folders** to delete the account and associated folders. If you click **Users and Home Folders**, another prompt appears displaying the path to the home folder for verification. If you want to delete the account and the folder, click **OK**. (If you click **Cancel**, neither the user account nor the home folder is deleted.)

Accessing Content from Your Mobile Device

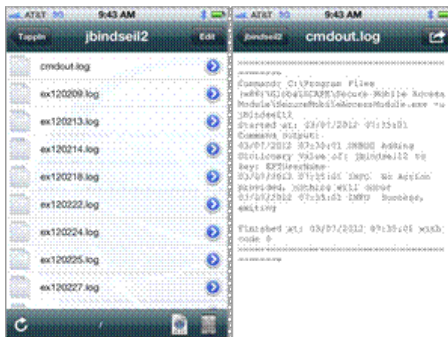
After you have installed the [SMA module](#), configured the [SMA Event Rules](#) on EFT Server, and [installed and configured the TappIn Agent](#), users who have [permission to use the SMA module](#) can access EFT Server-managed files on their mobile devices.

To access EFT Server-managed files on a mobile device

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



The names of available shares (e.g., Canada EFT) appear.



3. Click a share to view the available files.
4. You can open any file for which there is an application installed on the mobile device. For example, if you want to view a .log file, an application that allows you to read text files must be installed on the mobile device.

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