This *Mail Express Quick Start Guide* is designed to help you get the basic system installation and configuration tasks completed. You can address advanced features, such as Active Directory integration and SSL Certificate definition, after the tasks below have been completed. Hyperlinks provide additional detailed information via the GlobalSCAPE Online Help files.

Quick Start Guide Tip: Click on any ● symbol to see an example of the screen described. (Pictures are for illustration only; your system may differ.)

Quick Start Part 1 – Preparing your server for software installation

Mail Express Server relies on a number of other technologies and services to provide fully rounded functionality. Before you install Mail Express Server, complete the following critical steps in the order listed to properly prepare the environment for the new Mail Express installation. Once you have completed these actions, you may then initiate the Mail Express installation. Please be sure to read all requirements completely before beginning.

√	**Please perform these actions in the order listed:**
☐	**Ensure that the target server computer meets the** minimum system requirements.
☐	**Ensure port 443 is available at the IP address designated for Mail Express Server.** **TIP:** Use the following command: `netstat -ao	findstr :443` **NOTE:** If there is any other process listening on port 443 (including the global 0.0.0.0 interface), please refer to Mail Express Knowledgebase article #10636 for further instruction.
☐	**Ensure that Mail Express can relay through Exchange 2003, 2007, or 2010** **(Outlook 2010 is supported on Mail Express v3.2 and later)** Add Mail Express's IP address in Exchange's SMTP Virtual Server properties. For detailed instructions, refer to the Exchangepedia article How To Allow Relaying in Exchange.
☐	**Create a new service account on your Active Directory network for the Mail Express service.** This account can be used to allow authenticated relay through Exchange instead of using the IP-based relay permissions in the step above and will be required during advanced configuration for Mail Express to perform Kerberos authentication for connecting clients and for LDAP queries. ○　Username _____ Password_____
☐	**Install or enable Microsoft .NET Framework v3.5.1 SP1.** ○　Windows Server 2003: download from Microsoft Download ○　Windows Server 2008: add as a Feature in the Server Manager ○　**TIP:** Check add/remove programs to find currently installed version
☐	**Install Microsoft Windows Installer 4.5.** ○　Windows Server 2003: download from Microsoft Download ○　Windows Server 2008: included – No action required ○　**TIP:** Use the following command to find currently installed version: `msiexec /?`
☐	**Install all available Windows Updates** This is required for both security and compatibility.
☐	**Reboot the server computer.** This is required before the installation can begin if any prerequisite software was installed.

Quick Start Part 2 - Mail Express Server Software Installation

    Step One - Install the Mail Express Server

        i. Download a copy the Mail Express installation executable to the server and double-click it to begin the installation process. (Be sure to use the executable for your operating system (32 or 64-bit).)

            a. If you do not have a copy of the installation file, please contact your GlobalSCAPE sales representative or Customer Support.

        ii. During the installation process, you will be prompted to define the following information:

- Installation Directory (default is \Program Files\GlobalSCAPE\Mail Express) ●
- Attachment Storage Directory (default is \<Install_Directory>\MailExpressAttachments) ●
- Username and password for initial Mail Express Administrator account ●
  - Username _____ Password_____
- Password for the SQL Server "sa" account ●
  - Password_____
- Username and Password for the SQL Server "Mail Express" account ●
  - Username _____Password_____

        Note: All passwords must be at least 6 characters with 1 digit, 1 non-alpha, and 1 change of case.

        iii. SQL Server installation takes a large majority of the installation process time. Please be patient.

        iv. Select post-installation startup options. You should select the **Create Desktop Shortcut**, **Start the Mail Express Server**, and **Start the Administration Interface** check boxes so that you can continue with configuration, below.

Quick Start Part 3 - Mail Express Server Configuration

Please note that navigating away from any of the pages without saving will result in all changes being discarded.

    Step One - Log into the Mail Express administration portal

        i. The portal appears if the **Start the Administration Interface** check box is selected at the end of the installation process. The username and password that you can use to log into the portal was created during Step 1, Section ii.

    Step Two - On the **General Configuration** page ●, provide the following required information:

        i. Define the **Domain** value. The Domain is the system name that will be used for portal and package URL information. For example, if the domain is set to **me.globalscape.com**, the package links that recipients receive will look like **https://me.globalscape.com/pickup/<unique identifier>**.

        ii. Define the **System Notification** email address(es). These are the email addresses to which system event email notifications will be sent. You can enter multiple addresses separated by commas.

        iii. Enter all of this information into the relevant fields and then click **Save** at the bottom of the page. If all values are valid, **Save Successful** appears at the top of the page. If any errors are detected, they are displayed instead.

    Step Three - On the **Exchange Configuration** page ●, provide the following Exchange Server information:

        i. Define the following information for this step:

- Hostname of Exchange Server
- Port of Exchange Server
- Exchange authentication information
  - Username
  - Password
- "Reply To" email address
- "From" email address
- Valid email address for testing purposes

        ii. Click **Test** at the bottom of the page. If you have configured the Exchange connection correctly, the email owner will receive an email. Any errors are displayed at the top of the page.

        iii. After a successful test, click **Save** at the bottom of the page. **Save Successful** appears at the top of the page.

Step Four - On the **Add-in Settings** page ⬤, enable incoming connections from Mail Express Outlook Add-ins to Mail Express Server. (Enabling Outlook connections also enables the display of advanced authentication options and Add-in usage policy configuration. These are advanced tasks that can be configured **after** this initial Quick Start configuration is completed.)

Step Five - On the **Pick-up Portal Settings** page ⬤, enable the Pickup Portal to allow Mail Express Server to deliver attachments to recipients when they click the links provided to them in their email.

Step Six - On the **Internal User Management** page ⬤, create an internal user for testing purposes.

    i.   Creating a new internal user provides credentials for initial Outlook Add-in use.

        Note: This user can be deleted prior to moving the system to a full production status.

    ii. Define the following information:

- User email address: Test@Test.com
- Username: Test
- Display name: Test
- Password: Test123!

    iii. Ensure that the user account is enabled and that **Force Password Change** is not enabled.

    iv. After all required information is completed, click **Save** at the bottom of the page.

Quick Start Part 4 - Outlook Add-in Installation, Configuration and Initial Testing

Step One - On the **Add-in Installer** page of Administration portal ⬤, download the installation file **MailExpressOutlook<OutlookVersion)AddinSetup.zip**.

- The zip file contains both the executable file that will check for and install the prerequisites and the Mail Express Outlook Add-in installer.

Step Two - On the workstation that you want to install the Outlook Add-In, unzip the file you downloaded.

Step Three - Make sure that Outlook is shut down. Installing the Outlook Add-in while Outlook is running will prevent the installation from completing properly.

Step Four - Run the **MailExpressOutlook<OutlookVersion>AddinSetup.exe** file

    i.   **AddinSetup.exe** checks for all prerequisites and installs any that are missing. After that, it automatically launches the Mail Express Add-in installer. Performing all of the prerequisite checks and installations prior to Add-in installation remotely is an advanced task that you can perform **after** this initial Quick Start configuration.

        Note: *If .NET is not installed before you install the Add-In, you should reboot after completing the .NET installation. If you do not reboot after installing .NET, the Mail Express Add-In will not load properly in Outlook.*

    ii. During the installation process, you will be prompted to define the following information:

- The host name or IP address of the Mail Express server ⬤
- The username and password for the internal user that was created earlier. This information will be requested by the installer when you select the "Manual" login type option.

Step Five - Test client/server communication:

    i.   Enable the Mail Express toolbar ⬤ (**View > Toolbars > Mail Express**)

    ii. Clic**k Display Status** ⬤ to display the connection status between the Outlook Add-in and the Mail Express Server

    iii. Send a test email

- Compose an email as you normally would. Be sure to specify a recipient that can easily verify the receipt of the email message, such as your own email address.
- Using the **Mail Express Attach File** button ⬤, attach a file to the message and send the email.

    iv. Pick up the package 🟢

- Ask the recipient to open the email and click the link provided.

  Note: *The Mail Express system comes with a self-signed SSL certificate, so until a trusted certificate is installed later in the configuration process, the recipient may receive a security exception that needs to be accepted before downloading the file.*

- Verify that they can save/open the file that was replaced by the link.

Advanced Features – Advanced features can be configured ***after*** the initial configuration is completed and the basic system functionality has been verified. None of the advanced features are critical to the basic functionality of the system. These features include items such as defining the Mail Express SSL Certificate, configuring Active Directory Authentication, and configuring Single Sign On using Kerberos. Each of these is described in the online help.