Distributor / Reseller / Customer version



## SMX Advanced Security

# Outlook Add-in Administration Guide

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## Overview

This document is intended to provide email administrators and Outlook end users a guide for the installation of the SMX Advanced Security add-in.

The SMX Advanced Security add-in provides Microsoft Outlook users access to SMX's Advanced Security features, including user Spam Submission.

## Scope

This document covers the installation of SMX Advanced Security Plugin. This document does not cover instructions on configuring Office 365 vis-a-vis SMX filtering services.

## Audience

This document is intended for the IT administrators and support teams who use the SMX Portal to manage SMX services for themselves and their customers. Access to the SMX Portal should be restricted to personnel who support email.

- IT Administrators
- Email Security Teams
- IT Support Teams

This document is not intended for the end users who are sending and receiving emails within an organization.

Customer end-users are not expected to use the SMX Portal and this guide assumes a level of familiarity with certain application protocols that require more than a basic technical understanding from the reader.

## Installation Requirements

The SMX Advanced Security add-in requires both of the following:

- Mail Platform Requirements
  - Microsoft Office 365 (Exchange Online) or;
  - Microsoft Exchange 2016 and above
- Client Requirements
  - Microsoft Office 365 / Exchange 2016 Outlook online (OWA)
  - Microsoft Outlook 2016 client or above



Note: Microsoft Outlook Email Account must be configured as type 'Microsoft Exchange'. At this time, SMX does not support installing the SMX Advanced Security add-in on IMAP or POP3 configured Email Accounts.

## Additional Documentation

Title	Summary
SMX Portal Administrator Guide	A detailed guide on how to administer the SMX Portal.
SMX Inbound and Outbound Scrubbing Guide	Basic guide on how to use inbound and outbound filtering services.
Office 365 Inbound and Outbound Scrubbing Configuration	Step by step administrators guide for configuring Office 365 Inbound and Outbound Scrubbing.
SMX Advanced Security Plugins - User Guide	A guide on how to use the Outlook SMX Advanced Security add-in for Spam Submissions.



## Administrative Installation - Office 365 / Exchange 2016

The SMX Advanced Security add-in can be installed on Microsoft Office 365 and Exchange 2016 via the Exchange Admin Center, or manually by end users using the Microsoft Outlook Client or Outlook Online (OWA). The following section outlines the installation steps for the Administrative installation using Exchange Admin Center. For details on the manual installation process see section 7.

#### **Prerequisites:**

Account logged into Office 365 or Exchange 2016 > Exchange Admin Center with permissions to install and manage add-ins for your organisation.

iii Office 365 Admi	in				(5	) Q	🅸 ? A	U
Exchange admin cer	nter							
dashboard recipients	sharing add-ins	]						
permissions compliance management	Add-ins let your users do	and see more without lea	aving their mailbox. The following	g list shows add-ins that have bee	en installed for the organization. Find more add	d-ins for Outloo	ok at the Office Store	
organization	NAME	PROVIDER	USER DEFAULT	PROVIDED TO				
protection mail flow	Action Items Bing Maps My Templates	Microsoft Microsoft Microsoft	Enabled Enabled Enabled	Everyone Everyone Everyone				
mobile	Suggested Meetings Unsubscribe	Microsoft Microsoft	Enabled Enabled	Everyone Everyone				
public folders unified messaging								
hybrid								
			0 selected of 5 total		0	Need help?		

1. Within the Exchange admin center, open 'organization' > 'add-ins

Click the new button , select 'Add from URL' and enter the manifest URL for the SMX

Advanced Security add-in, then click 'install'.

#### Manifest URL:

https://mailadmin.smxemail.com/outlook-addin/smx-outlook-addin.xml



III Office 365 Ad	min				S	Q	ŝ	?	AU
Exchange admin c	enter								
dashboard	sharing add-ins								
recipients permissions	Add-ins let your users do and see more without leaving	their mailbox. The following list :	shows add-ins that have been i	nstalled for the organization. Find mo	re add-ins	for Outle	ook at the	Office S	Store
compliance management	+- ∕								
organization	Add from the Office Store ROVIDER	USER DEFAULT	PROVIDED TO						
protection	Add from URL icrosoft Add from file icrosoft	6 Add from URL - Mozilla	Firefox	_		×	]		
mail flow	My Templates Microsoft Suggested Meetings Microsoft	Image: A test in te	office365.com/ecp/Extensio	n/OrgInstallFromPrivateUrl.aspx	··· ☆	Ξ			
mobile	Unsubscribe Microsoft	Add from URL							
public folders		Enter the URL for the add-in	n manifest you want to install.						
unified messaging		*URL:	1 ( all dalla ( al-	I I I.					
hybrid		nttps://mailadmin.smxema	il.com/outlook-addin/smx-outl	ook-addin.xmi					
				install	Cancel				
		ected of 5 total					<u>.</u>		
https://outlook.office365.com/ecp/8	Extension/OrgExtensions.slab?reqId=1529459822289&showhelp=fal				⑦ Need	l help?			

Hint: Make sure there are no trailing spaces or the installation will error.  $\ensuremath{\mathbb{Q}}$ 

2. Once added, select the SMX Advanced Security add-in then click edit to configure settings for it. The add-in is disabled for users by default.

Note: Installation and configuration changes can take some time to be made.

			😉 Edit A	dd-in settings - Mozilla Firefox		- 🗆	×
			(i) 🔒	https://outlook.office365.con	n/ecp/Extension/OrgEditApp.aspx?ActivityC	orrelation 🛙 🚥 🏠	=
III   Office 365   Adm			SMX	Advanced Security			AU
Exchange admin ce	nter		Make 1	this add-in available to users in yo	pur organization		
dashboard	sharing add-ins		Specify us	er defaults: nal, enabled by default			
recipients				nal, disabled by default			
permissions	Add-ins let your users do	and see more without l		atory, always enabled. Users can'i	t disable this add-in.		Store
compliance management	+• 🖋 🖻 😂				Save	Cancel	
organization	NAME	PROVIDER	USER DI		Sare	Cander	
protection	Action Items	Microsoft	Enabled	Everyone	SMX Advanced Secu	rits /	
protection	Bing Maps	Microsoft	Enabled	Everyone	Version: 1.0.4	inty	
mail flow	My Templates	Microsoft	Enabled	Everyone	Created by: SMX		
	SMX Advanced Security	SMX Microsoft	Disabled Enabled	Everyone	Provides access to SMX Advanced Sec	urity features	
mobile	Suggested Meetings Unsubscribe	Microsoft	Enabled	Everyone			
public folders	0100000100		choree	crespone	Permissions: Read\write mailbox When the user clicks this add-in, the a	dd-in will be able to rea	d or modify the
					contents of any item in the user's mail	box and create new iter	ns. It will be
unified messaging					able to access personal information in example, in the subject, in the list of se		
hybrid					attachments. The add-in may send this		
			1 selected of 6 total				
					0	Need help?	

6



<sup>Q</sup>Hint: You can define the installation scope to specific users by using the 'Set-App' PowerShell cmdlet. For more information see:

https://docs.microsoft.com/en-us/powershell/module/exchange/mailboxes/Set-App

#### Manual User Installation

The following sections outline the manual installation steps for Microsoft Outlook and Outlook online (OWA). In this case the add-in is installed by the end user opposed to an administrative install across an organisation. This may be preferable when testing the add-in or when installed in smaller organisations.

## Microsoft Outlook 2016

#### **Prerequisites:**

- Microsoft Outlook 2016 client or above
- Microsoft Outlook Email Account must be configured as type 'Microsoft Exchange' (required for Microsoft Store add-in access)
- Permissions to install and manage local add-ins
- 1. Click the Office Store button (in some versions of Outlook this maybe the "Get Add-ins" button)

	Inbox - admin@testingnz.onmicrosoft.com - Outlook	団 – □ ×
File Home Send / Receive Folde	View 🛛 🖓 Tell me what you want to do	
New	All Rules * Categorize * P Browse Group	Search People □ Address Book ▼ Filter Email × Find Add-ins
Drag Your Favorite Folders Here	Search Current Mailbox	
▲ admin@testingnz.onmicrosoft.c	Focused         Other         By Flag: Start Date ∨         ↓           We didn't find anything to show here.	
▷ Drafts		
Sent Items		
▷ Deleted Items		
Archive		
Clutter		
Conversation History		
Junk		
▷ Junk Email Outbox		
RSS Feeds		
Search Folders		
▷ Groups		
Marka 🖾 🖷 🚥		
Items: 5 🌻 Reminders: 6	All folders are up to date. Updating address book. Connected to: Microsoft Exchange	□ III



2. Open 'My add-ins' and click the '+ Add a custom add-in', and select 'Add from URL'

				>	~
ADD-INS CONNECTO	RS				
Add-ins may access personal in	formation. By turning an add-in on, you agree to its Lice	ense Terms and Privacy Policy.	Search add-ins	۹	
All	My add-ins				^
My add-ins					
Admin-managed	Store add-ins				
2	Add-ins that you added from the Office store.				
	No add-ins found.				
	Admin-managed add-ins				
	Add-ins deployed by your administrator. Browse all	admin-managed add-ins.			
	No add-ins found.	-			
	Custom add-ins				
	You can install add-ins from a file or from a URL.	- Add a custom add-in∨			
	No add-ins found.	Add from URL			
		Add from file			

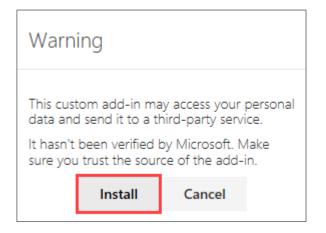
3. Enter the manifest URL for the SMX Advanced Security add-in, then click 'OK'. Manifest URL: <u>https://mailadmin.smxemail.com/outlook-addin/smx-outlook-addin.xml</u>

Add private add-in from a URL							
Enter the UR	Enter the URL of the add-in's manifest file:						
https://mai	https://mailadmin.smxemail.com/outlook-addin/smx-outlook-addin.xml						
ОК	Cancel						

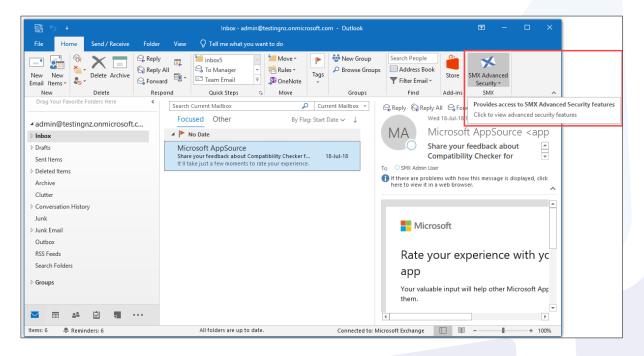
V0.1



4. Acknowledge the warning and select 'Install' to install the add-in



5. Close Office Store (or "Get Add-ins") and the SMX Advanced Security add-in will be shown within the Home ribbon.

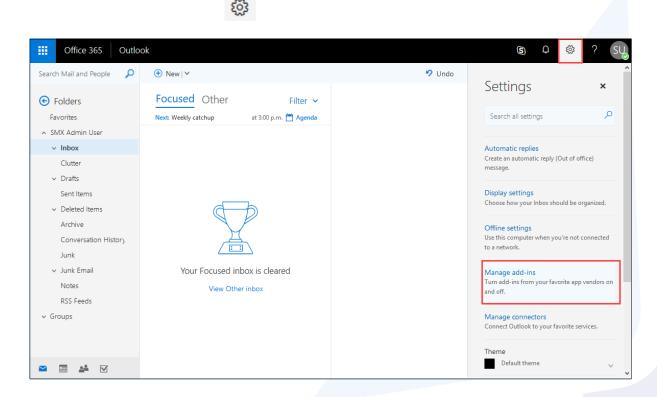




## Office 365 / Exchange 2016 Outlook Web App (OWA)

#### **Prerequisites:**

- Microsoft Office 365 / Exchange 2016 Outlook online (OWA)
- Permissions to install and manage local add-ins
- 1. Click on the 'Settings' icon and select 'Manage add-ins'





2. Open 'My add-ins' and click the '+ Add a custom add-in', and select 'Add from URL'

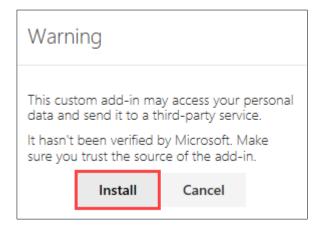
Office 365 Outloo	ok			(5)	Q	ŝ	?	SU
Search Mail and People 🛛 🔎	🕀 New   🗸	X Close					Send feedb	back
G Folders	Focused Other	Add-Ins Connectors		Q Search add	-ins			
Favorites	Next: Weekly catchup	Add-ins may access personal in License Terms and Privacy Policy	formation. By turning an add-in on, you agree to its y.					
<ul> <li>SMX Admin User</li> <li>Inbox</li> </ul>		All	My add-ins					^
Clutter	l	My add-ins	Store add-ins					
✓ Drafts		Admin-managed	Store add-Ins Add-ins that you added from the Office store.					
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✓ Deleted Items	đ							
Archive	A Contraction of the second se		Admin-managed add-ins					
Conversation History			Add-ins deployed by your administrator. Browse	all admin-managed	l add-ins			
Junk			No add-ins found.					
<ul> <li>Junk Email</li> </ul>	Your Focused inbo							
Notes	View Other in		Custom add-ins					
RSS Feeds			You can install add-ins from a file or from a URL.	+ Add a custor	m add-i	in 🗸		
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3. Enter the and enter the manifest URL for the SMX Advanced Security add-in, then click 'OK'. Manifest URL: <a href="https://mailadmin.smxemail.com/outlook-addin/smx-outlook-addin.xml">https://mailadmin.smxemail.com/outlook-addin/smx-outlook-addin.xml</a>

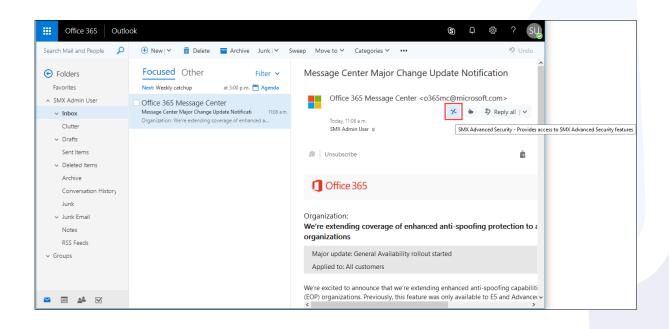
Add private add-in from a URL							
Enter the UR	Enter the URL of the add-in's manifest file:						
https://mai	https://mailadmin.smxemail.com/outlook-addin/smx-outlook-addin.xml						
ОК	Cancel						



4. Acknowledge the warning and select 'Install' to install the add-in



5. Close Settings and the SMX Advanced Security add-in icon will be shown within the Message toolbar.



#### Contact SMX

SMX values your feedback. If you have comments about this guide, please send an email message to emailsupport@smxemail.com . In your email message, please specify the document name and the section to which your comment applies. If you want to receive a response to your comments, ensure that you include your name and contact information.