Ipswitch Client Installation Guide

In This Document

Installing on a Single Computer

You can download the installation file from your MyIpswitch account. Run the installer program on the computer of each user for whom you want to provide the client application.

⚠ On Windows Vista, Windows 7, and Windows 8 the installer must be run as Administrator.

📝 You can use the "silent" (unattended) install process to automate the installations. See "Silent" install for the Ad Hoc Transfer Plug-in for Outlook for more information.

Outlook Plug-in for WS_FTP Server Install Guide

System Requirements

- Microsoft Outlook 2013, 2010, 2007 (Outlook plug-in only)
- Supported Operating Systems:
    - Windows 8 (32-bit and 64-bit)
    - Windows 7 (32-bit and 64-bit)
    - Windows Vista SP1 or later (32-bit only)
- Microsoft .NET Framework 3.5

Windows 8 may not have .NET 3.5 installed, in which case the installer prompts you to enable it as a Windows feature. To enable the framework, refer to this Microsoft *knowledge base article* (*http://support.microsoft.com/kb/2785188*).

- Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable (all OS) (Outlook plug-in only)
- Microsoft Visual Studio 2010 Tools for the Microsoft Office System (version 4.0 Runtime) Language Packs (non-English OS) (Outlook plug-in only)

If you are running the installer live (not doing a silent install), the installer automatically installs the Microsoft Visual Studio redistributable programs; you do not need to download anything from Microsoft. If running a silent install, you need to download and install these redistributable programs before running the install. See the Requirements in the Silent Install section.

On the last screen of the installer, you can select to **View Install Log**.

- English and German language support

Recipients can download files using a web browser supported by the parent Ad Hoc Transfer server.

Outlook Plug-in for WS_FTP Server Install Guide

To install the client on an end user computer:

1   Close the Microsoft Outlook application.

2   Run the Ipswitch Client Installer installation file.

3   On the installation Welcome screen, click **Next** to continue. The License Agreement dialog appears.

> Instead of the Welcome screen, Windows 8 users who do not have Microsoft .NET Framework 3.5 installed see a message that Windows is missing an installation requirement. You must enable the Microsoft .NET Framework 3.5 as a Windows feature as described System Requirements, then continue the installation.

4   Read the license agreement. If you agree with its terms, select **I accept the terms in the license agreement** and click **Next**. The Setup Type screen opens.

5   Choose the Setup type that best meets your needs:

>   If you are installing both the Ad Hoc Transfer Plug-in for Outlook and MOVEit Sync, click **Next**. The Custom Setup screen opens.

>   If you are installing only one of the clients, select **Custom**, then click **Next**. Go to step 7.

6   Select the client (feature) you want to install, then click **Next**.

> If you have a currently installed version of the client, the installer will remove the old version and install the new version of the client.

>   The Destination folder screen opens.

7   Specify a new path or click **Next** to use the default path:

- **32-bit**: `\Program Files\Ipswitch\Client`

- **64-bit**: `\Program Files (x86)\Ipswitch\Client`

   The Connection information screen opens.

8   Enter the server and account information:

- **Server**. The IP address or fully qualified server name where WS_FTP Server and Ad Hoc Transfer Module are installed, for example: `host1.domain.com`

- **This server requires an encrypted connection (SSL)**. By default, this option is selected, which means the server will require a secure SSL connection (HTTPS). Clear the selection if you want to use an unsecure connection (HTTP).

- **Port**. The port used to connect to the MOVEit server. For secure SSL connections, the default port is 443. For unsecure connections, the default port is 80. To set a custom SSL or HTTP port, select **Use Custom Port**, then click **Custom Port** and enter the new port number.

- **User name**. The user's WS_FTP Server user name.

- **Password**. The user's WS_FTP Server password.

9   Click **Next**. The **Ready to Install the Program** screen opens.

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10 Click **Install** to complete the installation.

> Optionally, select **View Install Log** to display the log.

11 On the last screen, click **Finish** to close the installer.

> If you install the the client without entering valid connection information, you can enter the correct connection information once the installation is finished. Click the **Cannot connect to server** error notification to view the configuration dialog.

When you have successfully installed the plug-in:

1 Compose a new message in Microsoft Outlook, then click the **WS_FTP Send** tab on the ribbon and select **Send through WS_FTP**, which invokes the Ad Hoc Transfer plug-in.

2 Attach files to the mail message.

3 Send them to recipients via Ad Hoc Transfer.

The process is the same as sending an email message with attachments, except that attached files will now be uploaded to the file transfer server. Recipients will receive a message with a link to connect to the file transfer server and download the files you've sent. For more information, see the Ad Hoc Transfer Plug-in for Outlook help system.

Viewing the install log

```
The install log is located at:
\Users\[Username]\AppData\Roaming\OUTLOOK_PLUGIN.log
```

Installing to Multiple End User Computers

When deploying the client to multiple end user computers, or a large workgroup, you can automate the process by using either of these methods, which are described in the following sections:

- Use the "silent" (or unattended) installation process
- Use the Active Directory Group Policy along with the silent install

Silent Install

This installation procedure is for installing the Ad Hoc Transfer Plug-in for Outlook on an end user's computer. This plug-in uses the Ad Hoc Transfer Module that you've already installed on the WS_FTP Server computer. Each end user needs to install the plug-in in order to use Outlook to send files via Ad Hoc Transfer.

To automate installation of the client, you can use silent install. This silent install uses the Microsoft Windows Installer and command line options to execute the installation.

> ⬢ You must first manually install Microsoft redistributable packages if they are not already installed on the user's machine, otherwise the client will not install properly.
>
> ⚠ You must run the installer as Administrator.

You can also silently install the client remotely on multiple computers via Active Directory Group Policy. See Active Directory Group Policy for more information.

Requirements

Before installing the client:

1 Ensure the end user's computer meets the requirements in System Requirements.
2 (All OS; Outlook plug-in only) If not already installed, choose the appropriate architecture and language for the system and download the *Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable* (*http://www.microsoft.com/en-us/download/details.aspx?id=40790*) from the Microsoft Download Center. Use these commands for silent installations:

- **32-bit:** `vstor40_x86.exe /quiet`

- **64-bit:** `vstor40_x64.exe /quiet`

3 (Non-English OS; Outlook plug-in only) If not already installed, download and install the appropriate *Microsoft Visual Studio 2010 Tools for the Microsoft Office System (Version 4.0 Runtime) Language Pack* (*http://www.microsoft.com/en-us/download/details.aspx?id=40791*) for your OS. Use these commands for silent installs:

- **32-bit:** `vstor40_LP_x86_<lang>.exe /quiet`

- **64-bit:** `vstor40_LP_x64_<lang>.exe /quiet`

4 Ensure Outlook is closed on the computer.

Using the Silent Install Program

The silent install program installs the client for all user accounts on the end user's computer. It does not allow you to run the installation for only the logged on user.

You must run the installer as Administrator.

Use this syntax to run the installer:

```
msiexec /i [path+executable].msi /q DEFAULT_HOSTNAME="[Ad Hoc
Transfer server address]" DEFAULT_SECURE="TRUE" DEFAULT_PORT="443"
DRIVER_NAME="xftWSFTPDriver.dll"
```

Using the silent install with the command shown above (with configuration properties) will install the client and configure the connection to the WS_FTP Server server to use SSL on port 443 for all users on a computer. There are additional properties you can choose depending on the situation.

The install properties are as follows (follow each option with an equals sign and enclose each of the values in quotes):

Property	Description
INSTALLDIR	(Optional) Use this property to specify the install path. The default path is: **32-bit**: `\Program Files\Ipswitch\Ad Hoc Transfer Plug-in for Outlook` **64-bit:** `\Program Files (x86)\Ipswitch\Ad Hoc Transfer Plug-in for Outlook` Use this command last.
DEFAULT_HOSTNAME	The address of the server where WS_FTP Server and Ad Hoc Transfer Module are installed.
DEFAULT_SECURE	Specify `TRUE` to use a secure SSL connection (HTTPS) or `FALSE` to use an unsecure connection (HTTP). The default is `TRUE`.
DEFAULT_PORT	The port used to connect to Ad Hoc Transfer. For secure SSL connections, this is typically 443. For unsecure connections, this is typically 80. The default is 443.

DEFAULT_LOGFILE	(Optional) Changes the path where the install log is written. The default path is: `\Users\[Username]\AppData\Roaming`
DEFAULT_SUPPCERTERRORS	To secure communications, WS_FTP Server sends a certificate back to your local PC. Specify TRUE to suppress any errors related to the certificate coming back from the file transfer server. The errors will not displayed on your PC. Specify FALSE to display any certificate errors.
DEFAULT_DEBUGLEVEL	Sets the level of information to be reported in the Ad Hoc Transfer log file: NONE - No information is logged NORMAL - Logs each Ad Hoc transaction DEBUG - Provides the connection and transfer information, in addition to the transaction.
DRIVER_NAME	You must include `DRIVER_NAME="xftWSFTPDriver.dll"` in the silent install command. This indicates the Ad Hoc Transfer plug-in version.

After you run the silent install, the default values in the table above can be found in the following folder on the end user's computer:

C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\DefaultClientRepositorySettings.xml.

Each user will need to enter their WS_FTP Server password (and possibly their username) to complete the configuration. By default, the installation is for "All Users" on the computer. When an end user launches the plug-in or the WS_FTP Connector, the name of the currently logged on user is added to this configuration file.

For more information on entering the username and password, see *Completing the End User Configuration* (on page 11).

Silent Install for a Single Computer and a Single User Account

You can use the silent install, with a slightly different set of properties, to install Ad Hoc Transfer Plug-in for Outlook to a specific user account on the machine. In this case, use this syntax to run the installer:

```
msiexec /i [path+executable].msi /q CONNECTION_HOSTNAME="[Ad Hoc
Transfer server address]" CONNECTION_SECURE="TRUE" CONNECTION_USER="[Ad
Hoc Transfer username]" CONNECTION_PASS="[Ad Hoc Transfer password]"
CONNECTION_PORT="443" DRIVER_NAME="xftWSFTPDriver.dll"
```

Using the silent install command as shown above will install the plug-in and configure the connection to the WS_FTP Server to use SSL on port 443. The username and password will also be configured, which makes this appropriate only for a single user account on a single computer.

The install properties are shown below (follow each option with an equals sign and enclose each of the values in quotes):

Property	Description
INSTALLDIR	(Optional) Use this property to specify the install path. The default path is: **32-bit**: `\Program Files\Ipswitch\Ad Hoc Transfer Plug-in for Outlook` **64-bit:** `\Program Files (x86)\Ipswitch\Ad Hoc Transfer Plug-in for Outlook` Use this command last.
CONNECTION_HOSTNAME	The address of the server where WS_FTP Server and Ad Hoc Transfer Module are installed.
CONNECTION_SECURE	Specify `TRUE` to use a secure SSL connection (HTTPS) or `FALSE` to use an unsecure connection (HTTP). The default is `TRUE`.
CONNECTION_USER	The user's Ad Hoc Transfer user name. This is the same as their WS_FTP Server user name. If this property is left blank, it defaults to the user name of the currently logged on user.
CONNECTION_PASS	The user's Ad Hoc Transfer password. This is the same as their WS_FTP Server password.
CONNECTION_PORT	The port used to connect to Ad Hoc Transfer. For secure SSL connections, this is typically 443. For unsecure connections, this is typically 80. The default is 443.
LOG_NAME	(Optional) Changes the name of the install log. The default is: `OUTLOOK_PLUGIN.log`
LOG_PATH	(Optional) Changes the path where the install log is written. The default path is: `\Users\[Username]\AppData\Roaming`
-lv	(Optional) To enable verbose logging by Windows Installer, add the following to the command line: `-lv c:\install.log` (or whatever log path and name you have set)
DRIVER_NAME	You must include `DRIVER_NAME="xftWSFTPDriver.dll"` in the silent install command. This Indicites the Ad Hoc Transfer plug-in version.

Active Directory Group Policy

Administrators can remotely deploy a client application to a large number of machines via Active Directory Group Policy by assigning a user logon script to a Group Policy Object. After installing the client, each user must enter credentials to authenticate to WS_FTP Server.

The Ipswitch Client Installer must be run as Administrator.

Requirements

- **Domain controller.** A Microsoft Windows Server 2008 or 2012 Active Directory domain controller.
- **Client computers.** Each users' computer must meet the same requirements as a silent installation. See Silent Install for more information.

Remote Deployment via Group Policy

Always test the remote deployment on non-production computers before installing the client on your users' computers.

To install via Active Directory Group Policy:

1 Configure a Group Policy Object that applies to all users for whom you plan to install the client. See Microsoft Windows Server documentation for information about configuring Group Policy Objects in Active Directory.

2 Create a new user logon script in any language supported by the users' computers that calls this command to run the installer from a shared location:

```
msiexec /i \\[sharename]\[sharepath]\[executable].msi /q
DRIVER_NAME="xftWSFTPDriver.dll" DEFAULT_HOSTNAME="[Ad Hoc
Transfer server address]" DEFAULT_SECURE="TRUE" DEFAULT_PORT="443"
```

You cannot use the `Connection_` properties (for example, `CONNECTION_USER` and `CONNECTION_PASS`) as those are for configuring a specific user. Users must enter their credentials to authenticate to WS_FTP Server after logging onto Windows. See Silent Install for the complete list of install properties and their usage.

3 Ensure that each requirement is met on all users' computers before running the Microsoft Windows Installer (.msi).

- Each end user's computer must meet the requirements in System Requirements.

- (All OS; Outlook plug-in only) If not already installed, choose the appropriate architecture and language for the system and download the *Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable* (*http://www.microsoft.com/en-us/download/details.aspx?id=40790*) from the Microsoft Download Center. Use these commands for silent installations:

  - **32-bit:** `vstor40_x86.exe /quiet`
  - **64-bit:** `vstor40_x64.exe /quiet`

- (Non-English OS; Outlook plug-in only) If not already installed, download and install the appropriate *Microsoft Visual Studio 2010 Tools for the Microsoft Office System (Version 4.0 Runtime) Language Pack* (*http://www.microsoft.com/en-us/download/details.aspx?id=40791*) for your OS. Use these commands for silent installations:

  - **32-bit:** `vstor40_LP_x86_<lang>.exe /quiet`
  - **64-bit:** `vstor40_LP_x64_<lang>.exe /quiet`

> ⚠ You must install all requirements before running the installer, otherwise the client will not install properly.

4 Use the Group Policy Management Console to assign the user logon script for the client installation to the Group Policy Object. For information on assigning user logon scripts, see:

- **Windows 2008:** *Using Startup, Shutdown, Logon, and Logoff Scripts* (*http://technet.microsoft.com/en-us/library/cc730773(WS.10).aspx*)

- **Windows 2008 R2:** *Using Startup, Shutdown, Logon, and Logoff Scripts* (*http://technet.microsoft.com/en-us/library/cc730773.aspx*)

- **Windows 2012:** *Using Startup, Shutdown, Logon, and Logoff Scripts* (*http://technet.microsoft.com/en-us/library/cc775970(WS.10).aspx*)

5 After installing the Ad Hoc Transfer Plug-in for Outlook, notify users that they must enter their authentication credentials in the WS_FTP Connector Configuration dialog after logging onto Windows.

After you run the silent install, the default values for the install properties can be found in the following folder on the end user's computer:

C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\DefaultClientRepositorySettings.xml

Each user will need to enter their WS_FTP Server password (and possibly their username) to complete the configuration. By default, the installation is for "All Users" on the computer. When an end user launches the plug-in or the WS_FTP Connector, the name of the currently logged on user is added to this configuration file.

For more information on entering the username and password, see *Completing the End User Configuration* (on page 11).

Completing the End User Configuration

Each user will need to enter their WS_FTP Server password (and possibly their username) to complete the configuration. In most cases, after using the silent install or group policy, the username will be already configured on the end user's computer. The Ad Hoc Transfer username and password should be the same as the user's credentials for the WS_FTP Server.

You can educate users about entering their usernames and passwords a couple of ways.

To enter your Ad Hoc Transfer username and password:

1   When you log onto Windows, an error notification will appear next to the WS_FTP Connector icon.
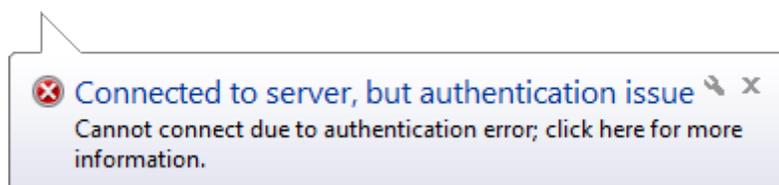
2   Click the notification to open the WS_FTP Connector Configuration dialog.

3   Enter your Ad Hoc Transfer username and password to authenticate to the server.

4   Click **OK** to save settings.

-OR-

To enter your Ad Hoc Transfer username and password:

1   Right-click the WS_FTP Connector icon and select **Configuration**.
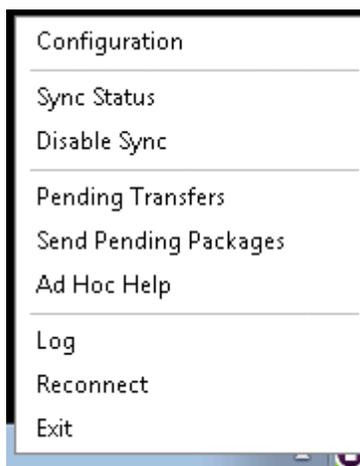
2   Enter your Ad Hoc Transfer username and password to authenticate to the server.

3   Click **OK** to save settings.

Upgrading Ad Hoc Transfer Plug-in for Outlook

> 🛑 Ipswitch no longer supports the Ad Hoc Transfer Plug-in for Outlook on Windows Server 2003 or 2008. Do not upgrade to the Ad Hoc Transfer Plug-in for Outlook V2.3 on those operating systems.

An Upgrade Affects Any Customizations to the User Interface and Help Topics

When you upgrade from version 2.1 of Ad Hoc Transfer Plug-in for Outlook, a new customizations sample file is installed. This is necessary because the schema for this XML file has changed. In order to maintain your customizations, you need to copy the entries from your existing customizations.xml file to a new customizations.xml that is based on the new sample file. The new sample file can be found in: `C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\customizations.xml.sample`

For more information, see Customizing the User Interface.

If you are upgrading from version 2.2 of Ad Hoc Transfer Plug-in for Outlook, any changes that you have made to the customizations.xml file are maintained.

Standard Upgrade

If you have a previous version of the Ad Hoc Transfer Plug-in for Outlook installed on a system with a supported version of Outlook, you can upgrade to the Ad Hoc Transfer Plug-in for Outlook V2.3 by running the installer. It retains the previous configuration settings so that the Ipswitch client can use them to connect to the WS_FTP Server server.

See *Installing* (on page 1) for installation requirements and information.

Silent Upgrade

If your current version is Ad Hoc Transfer Plug-in for Outlook V2.0 or later, the silent installation will handle the upgrade to the new version, and can install Sync at the same time.

If your current version is Ad Hoc Transfer Plug-in for Outlook V1.5, before silently upgrading to the Ad Hoc Transfer Plug-in for Outlook V2.3, you must first uninstall the previous version using command line options to execute the uninstall. The installer can use the previous configuration settings during installation so that the plug-in can use them to connect to the WS_FTP Server server.

> ⚠️ Ensure that you meet all requirements before attempting a silent install, or you will break the plug-in installation. See "Silent" install for information about installing the requirements and configuring the silent installation.

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To silently upgrade the client application:

1   Ensure Outlook is closed on the computer.

2   If your current version is Ad Hoc Transfer Plug-in for Outlook V1.5, you need to silently uninstall the version 1.5 of the plug-in. When you run the installer, you must use this syntax:

```
msiexec /x {D05A1A4A-82E2-4C04-8566-FB792A66C8E} /q
```

⚠️ If you did not install the plug-in silently on Windows Vista or 7, an Administrator must either uninstall from the command line without using the quiet (/q) parameter or uninstall the plug-in from **Programs and Features**.

3   Once the uninstall is complete, you can install the Ad Hoc Transfer Plug-in for Outlook V2.2.1 using this syntax:

```
msiexec /i [path+executable].msi /q
DRIVER_NAME="xftWSFTPDriver.dll" [optional connection properties]
```

📝 The previous connection configuration information is saved on the computer after uninstalling the plug-in. You do not need to enter connection properties again.

✅ You must run all installer commands from the Administrator account.

Remote Upgrade using Active Directory Group Policy

Since remote installation uses silent installation via the Windows Installer, if your current version is Ad Hoc Transfer Plug-in for Outlook V1.5, you must uninstall the plug-in before installing Ad Hoc Transfer Plug-in for Outlook V2.3. If your current version is Ad Hoc Transfer Plug-in for Outlook 2.0 or later, the silent installation handles the upgrade to the new version. (See Silent Upgrade above for more information.) Once the previous version is uninstalled, you can remotely upgrade the Ad Hoc Transfer Plug-in for Outlook the same way you remote install it. See Remotely Deploying the Ad Hoc Transfer Plug-in for Outlook for more information.

Upgrading the Ad Hoc Transfer Plug-in for Outlook on Outlook 2003

If you installed a previous version of the Ad Hoc Transfer Plug-in for Outlook on a system with Outlook 2003, you must upgrade to Outlook 2007/2010 because Outlook 2003 is no longer supported. Before you upgrade Outlook, uninstall the previous version of Ad Hoc Transfer Plug-in for Outlook. Once Outlook is upgraded, you can install the Ad Hoc Transfer Plug-in for Outlook V2.3.

Upgrading Outlook 2007 to Outlook 2010 or 2013

If you have the Ad Hoc Transfer Plug-in for Outlook V2.0 installed on a system with Outlook 2007, you can upgrade to Outlook 2010 or 2013 without reinstalling the plug-in.

```
If you have a previous version of the Ad Hoc Transfer Plug-in
for Outlook installed on a system with Outlook 2007, you must
upgrade the plug-in to Ad Hoc Transfer Plug-in for Outlook V2.0
before upgrading to Outlook 2010 or 2013.
```

Customizing the User Interface

You can customize the Ad Hoc Transfer Plug-in for Outlook to provide your own branding for the user interface. The following product components can be customized:

- Text labels and icons in the user interface
- Help topics

The following topics describe what you can customize, and how to customize the interface, then provides a walk-though of a sample customization.

What You Can Customize in the User Interface

Most of the icons and text that can change are part of the WS_FTP Send tab on the Outlook New E-Mail (Compose) page, as highlighted on this screen:
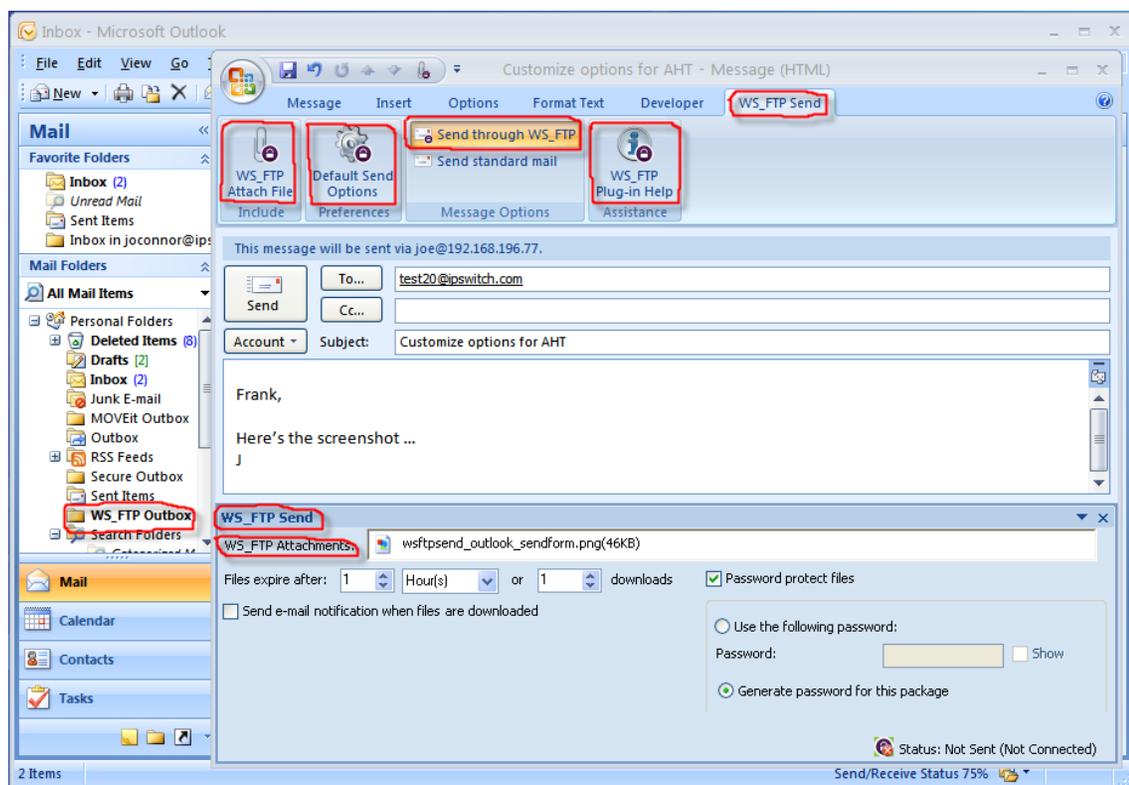
You can also have customized icons and text for the WS_FTP Connector program that runs in the Windows system tray, the WS_FTP Connector Configuration dialog, the Default Send Options dialog, and in some error messages.

Location of Files for Customizing the Interface

On any system on which you have installed Ad Hoc Transfer Plug-in for Outlook, you will find (within the Program Data Directory) the following folder:

```
C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook
```

The default icons used in the Outlook user interface are embedded in an executable program. Any new icons that you want to use need to be placed in the folder mentioned above. In this folder, you will also find the customizations.xml.sample file, which contains the options that let you override the text labels and icon files. The available options are shown in the following table:

Option (in customizations.xml)	Default Value	User Interface Location
Product Name	WS_FTP	WS_FTP Send tab; WS_FTP Attach File button; Send through WS_FTP button; WS_FTP Plug-in Help button; WS_FTP Outbox folder; Default Send Options dialog; WS_FTP Connector, Configuration dialog.
Company Name	Ipswitch, Inc	WS_FTP Connector, Configuration dialog
Tab Label	WS_FTP Send	WS_FTP Send tab, Default Send Options dialog
Attach File Image Location		WS_FTP Attach File button
Default Send Options Image Location		Default Send Options button
Send Through Server Image Location		Send through WS_FTP button
Help Image Location		WS_FTP Plug-in Help button
Icon Image Location		WS_FTP Connector - system tray
		NOTE: If you customize this icon, you should also change the icon for the shortcut in the **Programs > Startup > Ipswitch WS_FTP Connector** properties.

How to Customize the User Interface

You should implement and test any customizations on your local installation of the Outlook plug-in. You can then deploy the customization files to each end user's computer using a script or group policy.

To change (or override) the default icons and text labels in the interface, you will need to:

1 Create the icons you want to use and place then in the folder:

> `C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook`

> All replacement images require 32x32 and 16x16 bitmaps in an icon file (.ico)

2 Open the customizations.xml.sample file (found in the above mentioned folder) and save it as: customizations.xml

3 Edit the customizations.xml file to make any text label changes and to add the references to point to your own icons.

> You need to remove the comment tags from any customization option that you will use.

```
 9  <CustomizationOptions xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xmlns:xsd="http://www.w3.org/2001/XMLSchema" version="2.1" xmlns="Ipswitch.AHTDataComponents.AHTCustomizations">
10  <!--
11    <CustomizationOption name="Product Name" value="Enter hat you call this product." />
12    <CustomizationOption name="Company Name" value="Enter the name of your company here." />
13    <CustomizationOption name="Tab Label" value="Enter what should appear on the tabs here." />
14  -->
```

> If you use extended ASCII characters (for example, the umlaut character), you must save the customizations.xml file as a UTF-8 encoded file.

4 Close Outlook and restart Windows.

The new text and icons will be displayed.

> When you upgrade to the latest version of Ad Hoc Transfer Plug-in for Outlook from version 2.1, a new customizations sample file is installed. This is necessary because the schema for this XML file has changed. In order to maintain your customizations, you need to copy the entries from your existing customizations.xml file to a new customizations.xml that is based on the new sample file. The new sample file can be found in:
> `C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\customizations.xml.sample`

If you are upgrading from version 2.2 of Ad Hoc Transfer Plug-in for Outlook, any changes that you have made to the customizations.xml file are maintained.

Example of a Customized Interface

In this example, the text labels for Product Name, Company Name, and Tab Label have been changed to reflect the new name, so "SecureSend" replaces "WS_FTP Send." New icons have been created for the buttons on the SecureSend tab.

```
<CustomizationOptions xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" version="2.1"
xmlns="Ipswitch.AHTDataComponents.AHTCustomizations">

  <CustomizationOption name="Product Name" value="SecureSend" />
  <CustomizationOption name="Company Name" value="SecureSend Inc" />
  <CustomizationOption name="Tab Label" value="SecureSend" />

  <!-- All replacement images require 32x32 and 16x16 bitmaps in an icon file (.ico) -->

  <CustomizationOption name="Attach File Image Location" value="C:\ProgramData\Ipswitch\Ad Hoc Transfer Plugin for Outlook\AttachFile.ico)" />
  <CustomizationOption name="Default Send Options Image Location" value="C:\ProgramData\Ipswitch\Ad Hoc Transfer Plugin for Outlook\SendOptions.ico)" />
  <CustomizationOption name="Send Through Server Image Location" value="C:\ProgramData\Ipswitch\Ad Hoc Transfer Plugin for Outlook\SendThrough.ico)" />
  <CustomizationOption name="Help Image Location" value="C:\ProgramData\Ipswitch\Ad Hoc Transfer Plugin for Outlook\Help.ico)" />
  <CustomizationOption name="Icon Image Location" value="C:\ProgramData\Ipswitch\Ad Hoc Transfer Plugin for Outlook\lock.ico)" />
  <CustomizationOption name="Icon Failed Image Location" value="C:\ProgramData\Ipswitch\Ad Hoc Transfer Plugin for Outlook\lockfailed.ico)" />
```

The changes in the customizations.xml file are reflected in the WS_FTP Send tab and in the other user interface elements described in the table above.
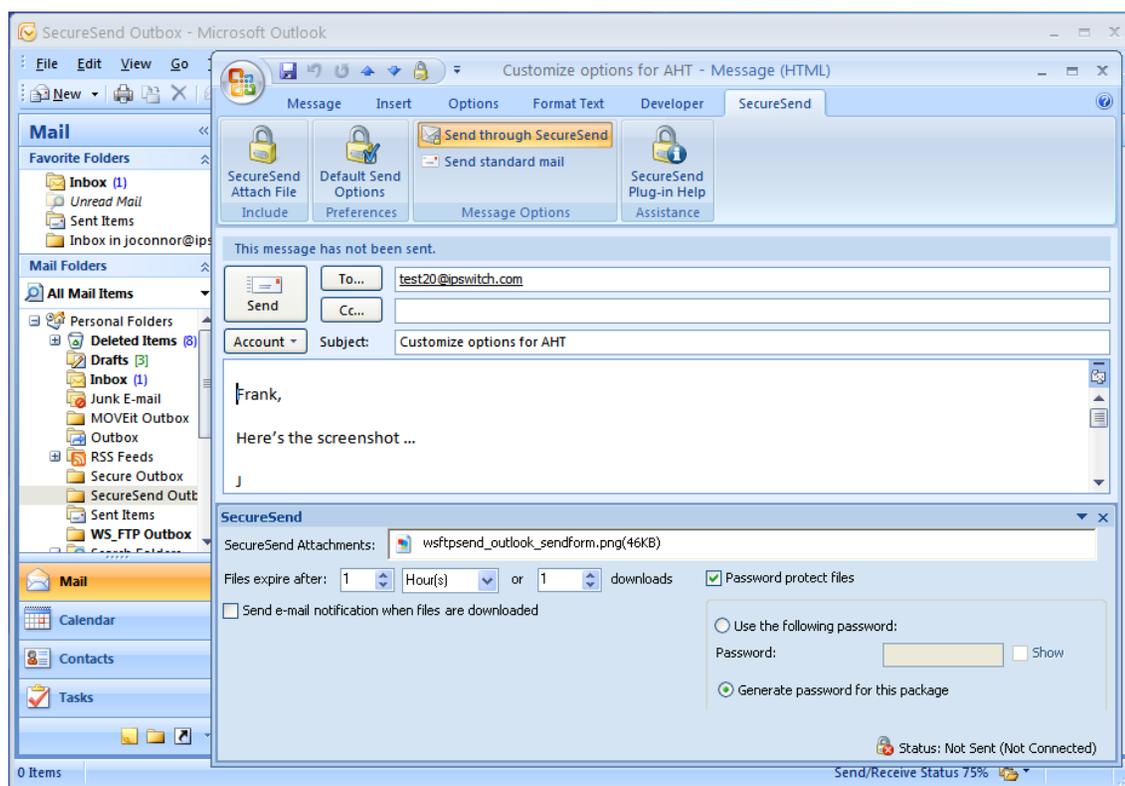
Customizing the Help Topics (Outlook plug-in only)

You can customize the Ad Hoc Transfer Plug-in for Outlook help system to provide your own content. If you do customize the text labels and icons in the interface, you'll want to reflect those changes in the associated help topics.

Getting the Help Template Files

The default help system is provided in a compiled help file (.CHM). To override the default help system, you'll need to use the customizable help files provided in the OutlookHelpTemplates.zip file, which can be downloaded from your My Ipswitch account.

You need to extract the appropriate product (MOVEit DMZ or WS_FTP) and language version of the help topics, and add the topics to a folder on the local system. We recommend creating a separate Help folder, for example:

```
C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\Help
```

Extract all files for the particular product and language version. See the readme.txt file in the OutlookHelpTemplates.zip for a description of the contents of the zip file.

In `C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook` folder, you will also find the customizations.xml.sample file, which contains the options that let you override the default help topics.

You can change topics in the help system by editing the HTML file associated with that topic. Each help topic and it's associated HTML file are shown in the following table:

Customization Option	HTML File	Help Topic Title
Quick Start Help	quickstart.htm	Quick Start
Plugin Help	ahtplugin.htm	What is the Ad Hoc Transfer Plug-in for Microsoft Outlook?
View Sent Messages Help	viewsent.htm	Viewing Sent Secure Transfers
Default Send Options Help	defaultsendoptions.htm	Default Send Options
Plugin Options Help	pluginoptions.htm	WS_FTP Server Connection Configuration
Advanced Options Help	advancedoptions.htm	Advanced Options

Connector Help	connector.htm	What is the WS_FTP Server Connector?
Cannot Locate Error Help	cannotlocate.htm	Cannot locate the server
Authentication Error Help	autherror.htm	Cannot connect due to an authentication error
Bad Certificate Error Help	badcertificate.htm	Cannot connect due to an SSL issue
	sendpassword.htm (used by MOVEit DMZ plug-in only)	Sending a Password to Unregistered Recipients
	sendingsecuretransfers.htm	Sending Secure Transfers through Ad Hoc Transfer Plug-in for Outlook
	sendoptions.htm	Ad Hoc Transfer Plug-in for Outlook Send Options
	trackprogress.htm	Tracking Secure Transfer Progress
	viewlog.htm	Viewing the Log
	troubleshooting.htm	Troubleshooting
	cannotsend.htm	Why isn't the Ad Hoc Transfer Plug-in for Outlook sending files?
	recoverfailedsend.htm	How do I recover from a failed send?

Note the following about the set of help files:

- The files that you see in the help system that are not referenced in the table are supporting files; for example images, CSS, JS. They are used to create the help display and the table of contents and search capabilities. The customized help system will display in a browser.
- Files that have an associated Customization Option, represent the help topics that are called directly from the plug-in. For these files, you need to have a corresponding entry in the customizations.xml file in order to override the default topic. For more information, see "How to Customize the Help Topics."

How to Customize the Help Topics

To change (override) the default help topics, you will need to:

1   Make sure you have extracted all help files for your product and language version from the OutlookHelpTemplates.zip file. Place the help files in the appropriate folder, for example:

```
C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\Help
```

2   Edit the appropriate topics (.htm files) identified in the table in the previous section.

3   Create any new images, such as screenshots, and place them in the appropriate folder, for example:

```
C:\ProgramData\Ipswitch\Ad Hoc Transfer Plug-in for Outlook\Help
```

> Remember to edit any reference to an image to use the new image.

4   Open the customizations.xml.sample file (found in the above mentioned folder) and save it as: customizations.xml

> If you have made previous customizations, this file will already be saved as customizations.xml.

5   Edit the customizations.xml file to change the reference for any of the help topics. You need to remove the comment tags from any help customization option that you will use. Make sure you enter the path for the customized help topic.

> If you use extended ASCII characters (for example, the umlaut character), you must save the customizations.xml file as a UTF-8 encoded file.

6   Close Outlook and restart Windows.

The new help topics will display when selected from the Outlook plug-in.