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Sophos Outlook Add-in
Deployment Guide

Contents

Introduction

The Sophos Outlook Add-in integrates seamlessly with Microsoft Outlook, making it easy for email users to report spam messages to Sophos and encrypt messages through the Sophos Email Appliance.

This add-in simplifies spam reporting for users of the Sophos Email Appliance, PureMessage for UNIX, and PureMessage for Microsoft Exchange. Once installed, users can report spam by clicking a custom button in their Outlook window.
Forwarding spam to SophosLabs helps Sophos in its ongoing efforts to improve the accuracy of spam heuristics.

Users whose mail is filtered by the Email Appliance can also take advantage of one-click encryption, which allows them to send messages by way of the appliance using SPX encryption. With this feature, users can send content containing sensitive or confidential information as a secure PDF.

As an administrator, you can control how the add-in is installed and which features are available to your end users. For example, if you want the add-in to be solely a tool for reporting spam, you can disable the message encryption options or hide them from your users.

This documentation is intended to aid in the evaluation and installation of the add-in. It also describes how to report spam and encrypt a message. You must then provide end users with the necessary instructions.

Prerequisites

- Microsoft Outlook 2013 or 2016 (32 and 64-bit versions are supported)

    - To encrypt messages using the Sophos Email Appliance, Microsoft Outlook must be configured to send mail using either SMTP or Microsoft Exchange.

- Windows 7, Windows 8, Windows 10 (32 and 64-bit versions are supported).
- Microsoft .NET Framework 4.6.1
- Microsoft Visual Studio 2010 Tools for Office Runtime 4.0

Note: It is recommended that you install all available updates to ensure full compatibility. If you are installing with the setup.exe file provided by Sophos, Microsoft .NET Framework 4.6.1 is installed automatically, if not already installed. Microsoft Visual Studio 2010 Tools for Office runtime should be installed by the user from https://www.microsoft.com/en-us/download/details.aspx?id=48217. If you are installing using the procedure described in Installing the Add-in on Multiple Workstations, both the .NET Framework and Visual Studio Tools must be installed beforehand.

Installation

Depending on how you prefer to deploy the Sophos Outlook Add-in, there are two main methods of installation. The first, which is done by launching the installer, is designed for evaluations and organizations where users will install the add-in themselves, or an administrator will perform a separate installation on each user machine.

The second method involves using the `.msi` file, which is provided for you to install the add-in on multiple user machines from a central location on the network.

Note: Regardless of the method, if the add-in is installed in a directory other than the Microsoft Windows "Program Files" directory (for example, `C:\Program Files\`), end users will be shown a message box prompting them to install a Microsoft Office "customization." End users must click Install to complete the installation of the OutlookAdd-in.

Downloading the Outlook Add-in

Before you can install the Sophos Outlook Add-in, you must obtain the necessary files from the Sophos website. The download is free, but you will first be prompted to log in to your MySophos account. If you do not have an account, visit the Sophos registration page. If you need assistance, see How to create a MySophos login to download your Sophos software.

1. If you have a MySophos account, visit this web page:

   https://www.sophos.com/en-us/support/downloads/email/sophos-outlook-add-in.aspx

2. When prompted, log in to your MySophos account.
3. To view the download page for this product, review the End User License Agreement, and click Accept.
4. Click Download.
5. Follow your operating system's prompts to complete the download of `SophosOutlookAdd-in.zip`. See Installing the Add-in on a Single Workstation or Installing the Add-in on Multiple Workstations for installation instructions.

Installing the Add-in on a Single Workstation

If you prefer end users install the add-in themselves, and you are comfortable with making *all* the options described in

Setting Options available to your users, then you can deploy the add-in as follows. If, instead, you want to perform a separate installation for each user, you must run `setup.exe` on each user workstation.

> 📝 Note: If you would like to evaluate the add-in before deploying it to multiple users, it is recommended that you first use this method to install on a single test machine.

1   The files you received from Sophos include `setup.exe` and `SophosOutlookAddInSetup.msi.` Place these files in the same directory on an internal server that is accessible to your intended users and provide them with the location.

2   Instruct users to double-click `setup.exe` and follow the steps in the installation wizard.

3   On the Select Components page, instruct users to choose the appropriate option: Both SophosLabs spam reporting and SPX email encryption, SophosLabs spam reporting only, or SPX email encryption only.

4   Users should complete the remaining steps in the wizard.

5   Users can then launch Microsoft Outlook, and the new features will be installed. If Outlook was open during installation, users will have to close Outlook and re-open it for the changes to take effect.

Installing the Add-in on Multiple Workstations

Although it is possible to use the `setup.exe` installer provided by Sophos to install the default version of the Sophos Outlook Add-in on each user workstation, you may prefer to create a custom version of the tool and then distribute it to your end users.

This is the best method if you want to control which features users can see and access. For example, if users' mail is filtered by a Sophos product other than the Email Appliance, it makes sense to disable and hide the encryption functionality because it is unavailable on all other Sophos products.

The `msiexec` command calls the `SophosOutlookAddInSetup.msi` installer provided by Sophos. Use the Sophos command-line options described below to make some, or all the add-in features available to your users.

Regardless of which settings you choose to enable, the installer creates Windows Registry keys for every possible option. Should you decide to adjust the settings later, you can edit your users' registries. For more information, see Changing the Registry.

You can create a version of the add-in that is appropriate for your organization with the `msiexec` command. The command-line options used to customize the Options dialog box for the add-in are described below. For information about other `msiexec` options, see the Microsoft documentation.

📝 Note: By default, the add-in is installed in the Windows `Program Files` directory. If you specify a different installation directory using `msiexec`, your end users will be prompted to accept the new add-in as a customization. They must click Install to accept.

This table shows the command-line options you can use to determine which features your end users can see and access. When specifying these options, you can use the short form that is shown in brackets after each option.

In the table below, the following values apply.

For features with values of 0 and 1:

> 0 = check box is cleared

> 1 = check box is selected.

For features with values of 1, 2, and 3, excluding ENABLETYPE (see table):

> 1 = Feature is visible to users and is configurable

> 2 = Feature appears to users as grayed out

> 3 = Feature is hidden from users

Command-Line Option (Abbreviated Option)	Description	Available Values
ENABLETYPE (T)	Determines which features are available to users	1. Encryption only 2. Spam reporting only 3. Both encryption and spam reporting
ENCRYPTIONCONFIGURABLE (EC)	Controls availability of encryption features	1, 2, 3
SETCONFIDENTIAL (C)	Adds "confidential" to message header	0, 1
ADDINTERNETHEADER (I)	Adds specified header to message header	0, 1
INTERNETHEADER (H)	Specifies header for ADDINTERNETHEADER	Provide string. Default: "X-Sophos-SPX-Encrypt: yes"
USERPREFCONFIGURABLE (UC)	Controls availability of spam reporting features	1, 2, 3
SPAMEMAILADDRESSCONFIGURABLE (SC)	Controls availability of spam report address	1, 2, 3
SPAMEMAILADDRESS (E)	The address(es) to which spam is sent	Provide address(es). Default: "is-spam@labs.sophos.com"
SPAMACTION (M)	Deletes messages reported as spam or moves them to the Junk E-mail folder	0, 1
SAVESPAMREPORT (S)	Saves copies of messages as reports in Sent Items folder	0, 1
SHOWACKNOWLEDGEMENT (A)	Shows confirmation message when reporting spam	0, 1

Example: Sophos Default Configuration

This is the `msiexec` command that is used to install the add-in with the Sophos default options.

```
msiexec /i SophosOutlookAddInSetup.msi /qn /l* install_log.txt
```

If you run it with these command-line options, your users' Options dialog box will have the same features and default settings as the one shown below.

Example: All User Preferences Disabled

This is the `msiexec` command you would run if you wanted to disable encryption, enable spam reporting, but turn off user-configurable options. Notice that the Submission Address field contains two addresses, so that the spam is reported to Sophos as well as an internal recipient. You may want to do this to monitor the kind of messages that end users are reporting as spam.

```
msiexec /i SophosOutlookAddInSetup.msi /qn /l* install_log.txt ENABLETYPE=2
ENCRYPTIONCONFIGURABLE=2 USERPREFCONFIGURABLE=2
SPAMEMAILADDRESS="is-spam@labs.sophos.com; is-spam@example.com"
SPAMEMAILADDRESSCONFIGURABLE=2 SPAMACTION=1 SAVESPAMREPORT=1 SHOWACKNOWLEDGEMENT=1
```

If you run `msiexec` with these options, your users' Options dialog box will have the same features and settings as the one shown below. Since there are no user-configurable options, the Reset to Defaults button is hidden.

Changing the Registry

When you install the add-in on multiple servers, keys are added to the users' registries for all possible options. If you want to change what is available to users through the Options dialog box, you can simply update the registry settings using your preferred tool.

During installation, the following registry entry is created:

`HKEY_LOCAL_MACHINE\SOFTWARE\Sophos\SophosOutlookAddIn\Settings`

On 64-bit systems with 32-bit Outlook this will be:

`HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Sophos\SophosOutlookAddIn\Settings`

Any configuration changes that an end user makes will be displayed in:

`HKEY_CURRENT_USER\SOFTWARE\Sophos\SophosOutlookAddIn\Settings`

The table below shows the Sophos default values for each key. To change the setting, you must assign a different value. See Installing the Add-in on Multiple Workstations for definitions of additional values.

The Reset to Defaults button is available to users whenever you make at least one of the add-in options configurable.

> 📝 Important: Use the syntax exactly as it is shown below. Each registry key must be entered with the sentence case displayed here. This applies to the key's "type," which must also be included exactly as shown. Despite differences in case, the names of the keys are consistent with the options described in "Installing the Add-in on Multiple Workstations." See this section for a complete definition of each option/key.

If you want to add or remove specific options or sets of options, reset the Windows Registry using the keys and values described below.

For a complete description of each option and its available values, see the table of equivalent command-line options in Installing the Add-in on Multiple Workstations.

Type	Key	Default Value
DWORD	EnableType	3 (Enables reporting and encryption)
DWORD	EncryptionConfigurable	1 (Users can configure encryption)
DWORD	SetConfidential	1 (Sensitivity is set to confidential for encryption)
DWORD	AddInternetHeader	0 (Internet Header is not added)
String	InternetHeader	"X-Sophos-SPX-Encrypt: yes"
DWORD	UserPrefConfigurable	1 (Users can configure all spam reporting preferences)
DWORD	SpamEmailAddressConfigurable	1 (Users can configure the Submission Address)
String	SpamEmailAddress	"is-spam@labs.sophos.com"
DWORD	SpamAction	1 (Reported messages are moved to Junk E-mail folder)
DWORD	SaveSpamReport	1 (Copies of messages are saved as reports in Sent Items folder)
DWORD	ShowAcknowledgement	1 (Confirmation message is displayed when reporting spam)

Upon installation, a registry value is created in `HKEY_LOCAL_MACHINE\SOFTWARE\Sophos\SophosOutlookAddIn` named `Debug`. By default, it is set to "0," and user activity is logged to a file. The location differs, depending on the version of Windows:

- Windows 7: `%ALLUSERSPROFILE%\Sophos\Sophos Outlook Add-in\logs\<username>.log`

To generate more detailed log entries, set the key's value to "1".

End User Tasks

If you have granted end users access to these features, they can do the following with their installed add-in.

Reporting Spam

1. In the main Outlook window, select the folder (for example, Inbox) containing the spam message(s) you want to report.
2. Select the message(s) to report.
3. On the Home tab of the Outlook Ribbon, click Report As Spam.
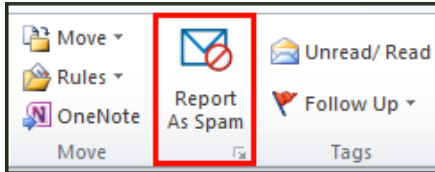
> Note: You can also access the Report As Spam option from a context menu by right-clicking the message(s) that you want to report or open any message in its own window and click the Report As Spam button on the toolbar.

4. If the option to show a confirmation dialog box is selected, a message is displayed, asking if you want to move the message to the default folder and report it as spam to SophosLabs. By default, the message is moved to the Junk E-mail folder. To specify a different folder, see

5. Setting Options. Click OK to complete the report.

Encrypting Messages (Sophos Email Appliance Only)

1. In Outlook, compose an email message.
2. In the top-left corner of the Message window, click Encrypt.
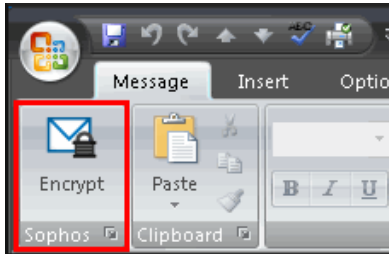
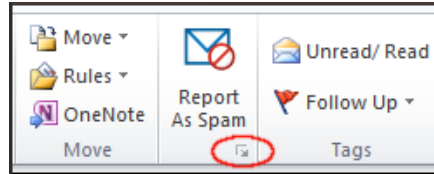The Encrypt button is highlighted in orange, indicating that the message will be encrypted.

3. Click Send.

The message is sent to the Email Appliance for encryption.

Setting Options

Depending on how the add-in is deployed, you can give end users access to some or all the options listed below.

Users can view and configure available options by clicking the dialog box launcher under the Report As Spam button.

Users can set the options that you made available during installation. If `setup.exe` is used for installation, all the following options are configurable.

Instruct your users to select from whichever of the following options are available and click OK to save the changes.

Email Encryption

> Note: Users should select the option that corresponds with the encryption policy rule you have configured on your Email Appliance. It is important that these settings match because the encryption is performed by the appliance. For more information, see *Encryption: SPX* in the Sophos Email Appliance documentation.

- Set Sensitivity to Confidential: Sets the message's sensitivity to "Confidential." This causes Outlook to add a "Company-Confidential" message header, indicating that the Sophos Email Appliance should encrypt the message using SPX.
- Add Internet Header: Adds the specified header to the message, indicating that the Email Appliance should encrypt the message using SPX.

  > Note: The name of the header (for example, X-Sophos-SPX-Encrypt) must only contain ASCII characters. The value of the header (for example, "yes") may contain multibyte characters.

Spam Reporting

- Submission Address: The address(es) to which spam messages will be forwarded. The default is to forward all messages to SophosLabs; however, you may prefer to designate one or more people within your organization who are responsible for confirming the validity/appropriateness of the message before is forwarded to SophosLabs. If you want to forward the spam to more than one address (for example, SophosLabs and an email administrator within your organization), enter multiple addresses, separated by semicolons. If you enter an incorrectly formed address, an error icon is displayed to the right of the text box.

- Delete spam messages(s) or Move to folder: Select one of these options to determine what happens to reported spam. You can either delete all forwarded messages or specify the destination folder for all messages forwarded as spam. (If a user reports a message as spam, it will be removed from its original location and moved to this folder instead.)

- Save report in Sent Items: The message body is converted to an attachment and saved as a report in the Sent Items folder.

- Show confirmation dialog box: A message is shown, asking if you want to forward the message(s).

Language

- Select Language: Select the display language of the add-in. You can select from English, French, Spanish, Italian, Deutsch, Chinese traditional, Simplified and Japanese.

- Reset to Defaults: Returns all enabled features to the default settings that Sophos assigned. This button is automatically available to users whenever they can configure at least one of the options described above.

Re-enabling the Add-in

If, for any reason, the Sophos Outlook Add-in becomes disabled, your end users should take the following steps to re-enable it.

1. Select File ➤ Options.
2. On the Trust Center/Options sidebar, select Add-ins.
3. From the Manage drop-down list, select COM Add-ins, and click Go.
4. In the COM Add-ins dialog box, locate Sophos Outlook Add-in, and select that checkbox.
5. Click OK.

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