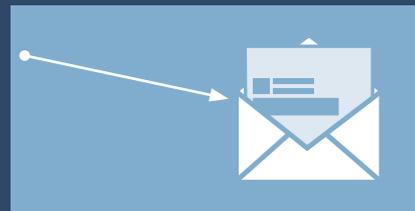
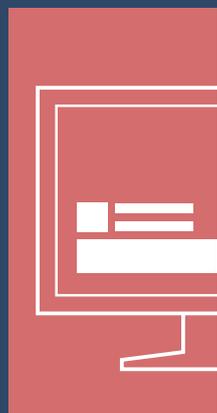
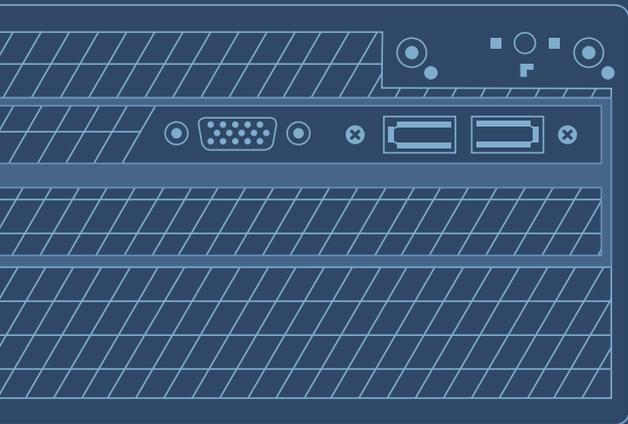




exclaimer™ mail disclaimers

Getting Started Guide



www.exclaimer.com

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About This Guide

This aim of this guide is to provide information about installing and configuring Exclaimer Mail Disclaimers.

Here, you can find out about system requirements, licensing, what changes occur on your system when Mail Disclaimers is installed and the installation process itself. Installation details are provided for a standard install (via an install wizard) and for a 'silent' install on remote servers (via the command prompt).

Having installed Exclaimer Mail Disclaimers, detailed help for all aspects of the application is available from the help menu.

If you require further information, please refer to the [Further Help & Support](#) section on page 24.

Mail Disclaimers Overview

With ever increasing regulatory and compliance requirements, the disclaiming of company emails is a vital part of business today. With Exclaimer Mail Disclaimers, you can be sure of total compliance with wide ranging and often complex regulations, whilst maintaining a professional brand image using sophisticated tools for branding and signing emails.

Traditionally, disclaimers are used to help mitigate liability for breach of confidentiality, transmission of viruses, entering into contracts, negligent misstatement and employer's liability. Within Exclaimer Mail Disclaimers, disclaimers are used for this purpose, but they can also be used for so much more.

What Does Exclaimer Mail Disclaimers Do?

With the ability to create rich, highly creative disclaimer templates (including tables, images and dynamic Active Directory fields) and to add these before or after original email messages, you can use disclaimers to consistently apply corporate branding, add signatures, insert banners for sales promotions and corporate events...the possibilities are immense.

Templates are created using an intuitive template editor, which will be familiar to anyone who has worked with Microsoft products such as Outlook and Word. Versions can be created in HTML, RTF and Plain Text formats, with an instant preview feature so you can see, at a glance, how your template will be displayed in email messages.

But That's Not All...

Having created any number of disclaimer templates, it is likely that you will want to specify criteria under which they should be applied. Sometimes, this might be as simple as saying 'apply this template to all outgoing messages', but other times you may have more complex requirements. For example, you might choose to apply different disclaimers according to the sender, or according to the day of the week, or dependent upon the content of the email subject line...the possibilities are huge and can all be achieved using mail disclaimer policies.

A policy can be thought of as a set of rules which are used to control how disclaimers are applied to email messages. With a wealth of available conditions and exceptions (which can be applied to messages sent and received both internally and externally) you have complete control over the circumstances under which disclaimers are applied.

And There's More...

Perhaps one policy isn't enough; perhaps you need to apply (or not apply) certain disclaimers based on whether or not a previous disclaimer was applied. With Exclaimer Mail Disclaimers, you can create policy chains to define such dependencies.

There's no need to worry about complicated testing processes, since Exclaimer Mail Disclaimers includes an intuitive policy tester which will simulate the process of sending and receiving emails so you can quickly see if policies have been defined correctly.

How Does It Work From A Technical Perspective?

Exclaimer Mail Disclaimers serves disclaimers, signatures and branding via a **Microsoft Exchange Transport Agent**.

As such, Exclaimer Mail Disclaimers must be installed on a server that also has the **Microsoft Exchange Hub Transport Role** installed.

When installing Exclaimer Mail Disclaimers, it will install the **Exclaimer Mail Disclaimers Transport Agent** with a **Priority** of 1.

The **Microsoft Exchange Transport Service** is restarted as part of the installation process; this is required to ensure that the **Transport Agent** installation change takes effect with the **Microsoft Exchange** server.

In multi-server environments, Exclaimer Mail Disclaimers should be installed on each Hub Transport server that processes messages which require disclaimers. For further information about installing on multiple servers, please refer to [Remote Deployment \(page 18\)](#) and [Command Line Installation \(page 20\)](#) sections of this guide.

Licensing

Our aim is to get you working with Exclaimer software as quickly as possible, with minimal restrictions. As such, we have implemented a flexible licensing policy.

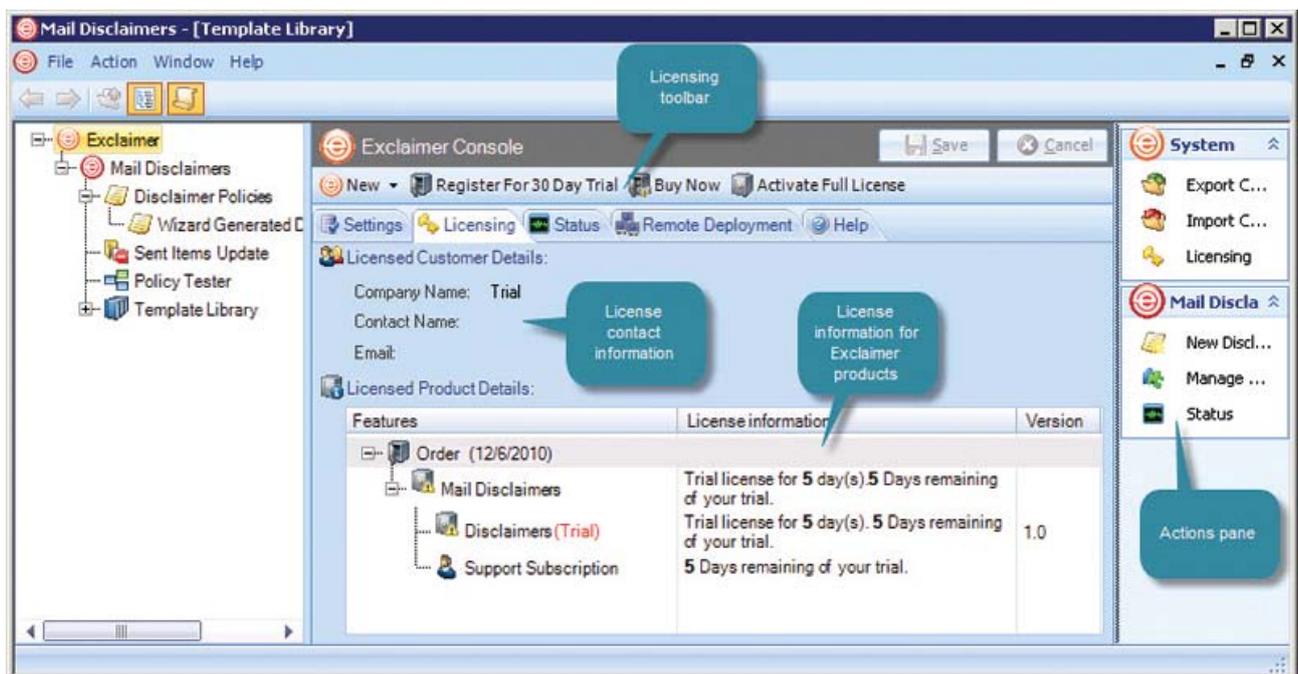
If you have installed Exclaimer software for the first time, you can use it for **five days** without any form of registration.

After five days, you will be prompted to register in order to continue trialling the software free of charge for a further 30 days. Having completed this trial, you can either:

- Purchase the product from the [Exclaimer website](http://www.exclaimer.co.uk/mail-disclaimers) (<http://www.exclaimer.co.uk/mail-disclaimers>) or by contacting the [Exclaimer sales team](mailto:sales@exclaimer.com) (sales@exclaimer.com).
- Contact the [Exclaimer sales team](mailto:sales@exclaimer.com) to extend your trial

Having installed Exclaimer Mail Disclaimers, licensing information and options can be found on the **licensing** tab within the Exclaimer Console.

You can access this by selecting the **Exclaimer** branch of the console tree and clicking the **licensing** tab, or by selecting **licensing** from the **actions** pane:



System Requirements

System requirements for hardware and software are summarised below.

Hardware

Component	Minimum Requirements	Recommended Requirements
CPU	x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.	x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.
Memory	2GB	4GB
Disk Space	350MB	500MB
Screen Resolution	1024 x 768 pixels	1152 x 864 or higher

Software

Component	Minimum Requirements
Operating System	<ul style="list-style-type: none"> Windows Server 2003 R2 x64 (including all service pack levels). Windows Server 2008 x64 (including all service pack levels). Windows Server 2008 R2 x64 (including all service pack levels). Windows Small Business Server 2008. Windows Small Business Server 2011. Windows Server 2012 x64.
Exchange Server	<ul style="list-style-type: none"> Microsoft Exchange Server 2007 SP1 Rollup 5. Microsoft Exchange Server 2007 SP2. Microsoft Exchange Server 2007 SP3. Microsoft Exchange Server 2010. Microsoft Exchange Server 2010 SP1. Microsoft Exchange Server 2010 SP2 and above.
Exchange Server Roles	Microsoft Exchange Hub Transport Server.
Microsoft .NET Framework	Microsoft .Net Framework 2.0. Note: For the Sent Items Update feature, you will require Microsoft .Net Framework 3.5 and above.

Installation Overview

The standard Exclaimer Mail Disclaimers installation process is comprised of two parts - [installation](#) (see page 09) and then [first use configuration](#) (see page 12).

The **installation wizard** installs required programs and copies data files to your system, whilst the **configuration wizard** steps through some basic setup options which enable you to get started with Mail Disclaimers.

Both stages are quick and easy to complete, using a familiar 'wizard' approach to guide you through each process, step-by-step.

If you need to perform a 'silent' installation on remote servers, you can install Mail Disclaimers using [command line options](#) - please refer to page 20.

What Happens When Mail Disclaimers Is Installed?

The installation process includes the Exclaimer **license agreement** and copies files to your specified destination folder. Once complete, the [configuration wizard](#) (see page 12) is launched, so you can configure basic settings which will enable you to get started as soon as the wizard is complete.

System Changes

The installation process makes the following changes to your system:

- The **Exclaimer Mail Disclaimers Transport Agent** is installed with a **Priority** of 1.
- The **Exclaimer Mail Disclaimers Configuration Service** is installed.
- The **Exclaimer Mail Disclaimers Remote Deployment Service** is installed
- The **Exclaimer Mail Disclaimers Sent Items Update Service** is installed

Installation File Location(s)

As part of the installation process, you are asked to specify a destination folder, into which program files will be installed. The default folder is **C:\Program Files\Exclaimer Ltd\Mail Disclaimers**.

In addition to program files, a number of configuration files are copied to your system. The location of these files varies according to operating system, as summarized below:

Operating System	Location
Windows Server 2003 x64 Windows Server 2003 R2 x64	\Documents and Settings\All Users\Application Data\ Exclaimer Ltd\Mail Disclaimers
Windows Server 2008 x64 Windows Server 2008 R2 x64 Windows Server 2012 Windows Small Business Server 2008 Windows Small Business Server 2011	\ProgramData\Exclaimer Ltd\Mail Disclaimers

Downloading Mail Disclaimers

The Mail Disclaimers installation file is named setup.exe and can be downloaded from the Exclaimer products page (<http://www.exclaimer.co.uk/mail-disclaimers>).

Once downloaded, **setup.exe** should be run on the **Microsoft Exchange Hub Transport Server**.

If required, an MSI is available from support by contacting support@exclaimer.com.

The Installation Wizard

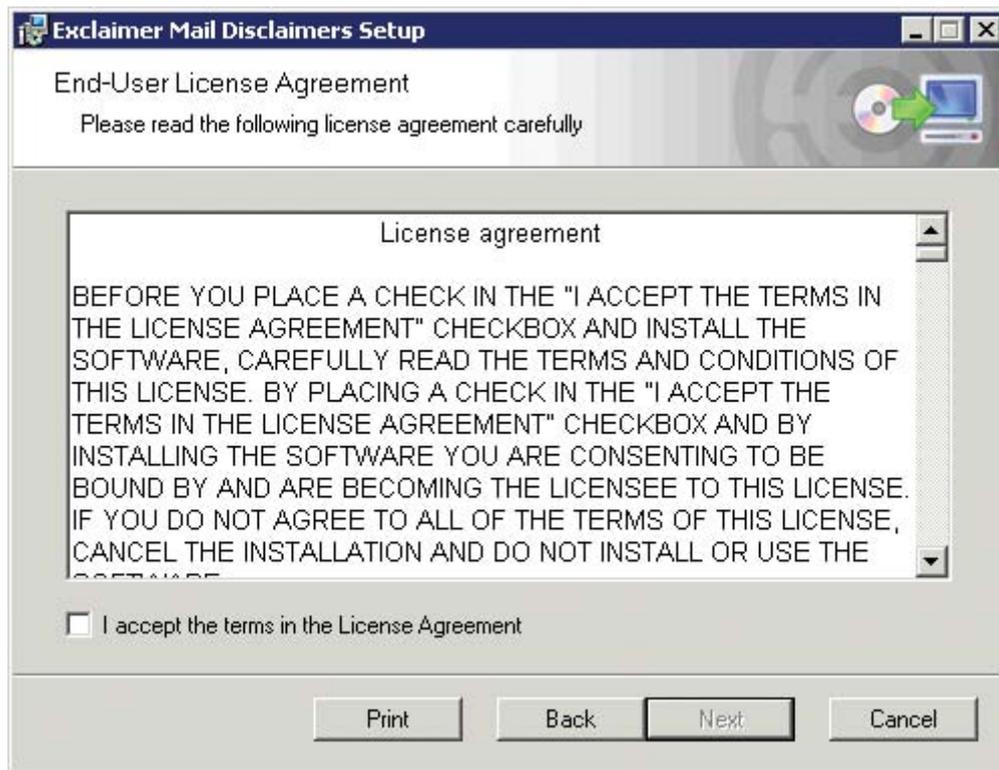
1. Double click the **setup.exe** file to start the installation and display a welcome message:



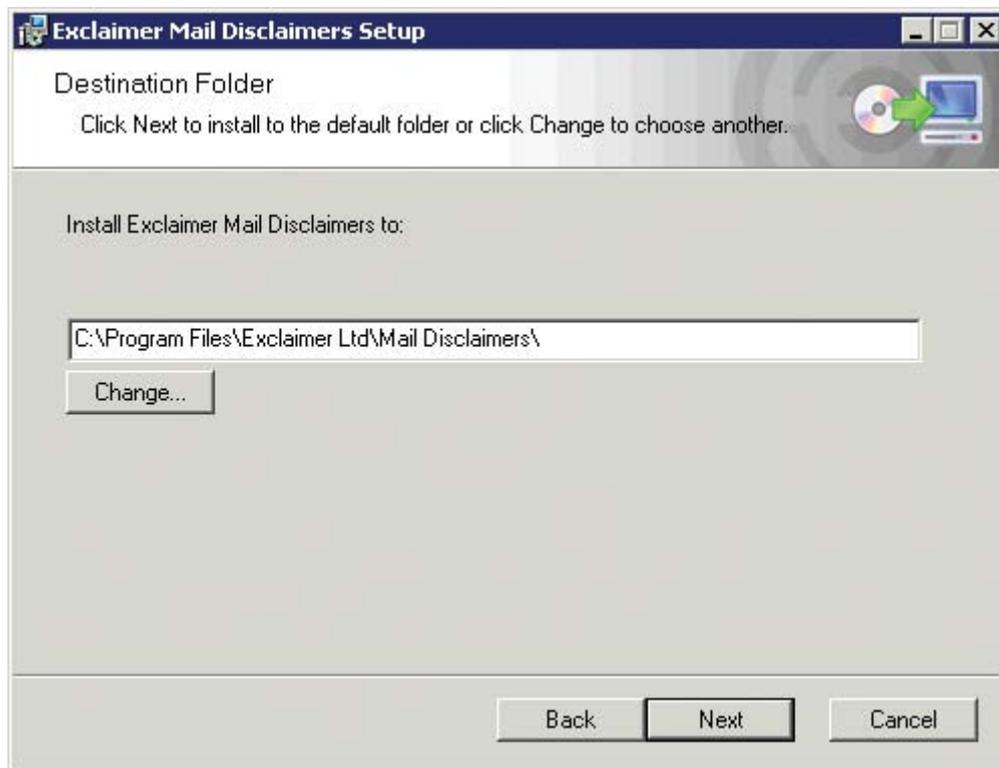
2. Click **setup** to start the setup wizard:



3. Click **next** to view the end-user license agreement:

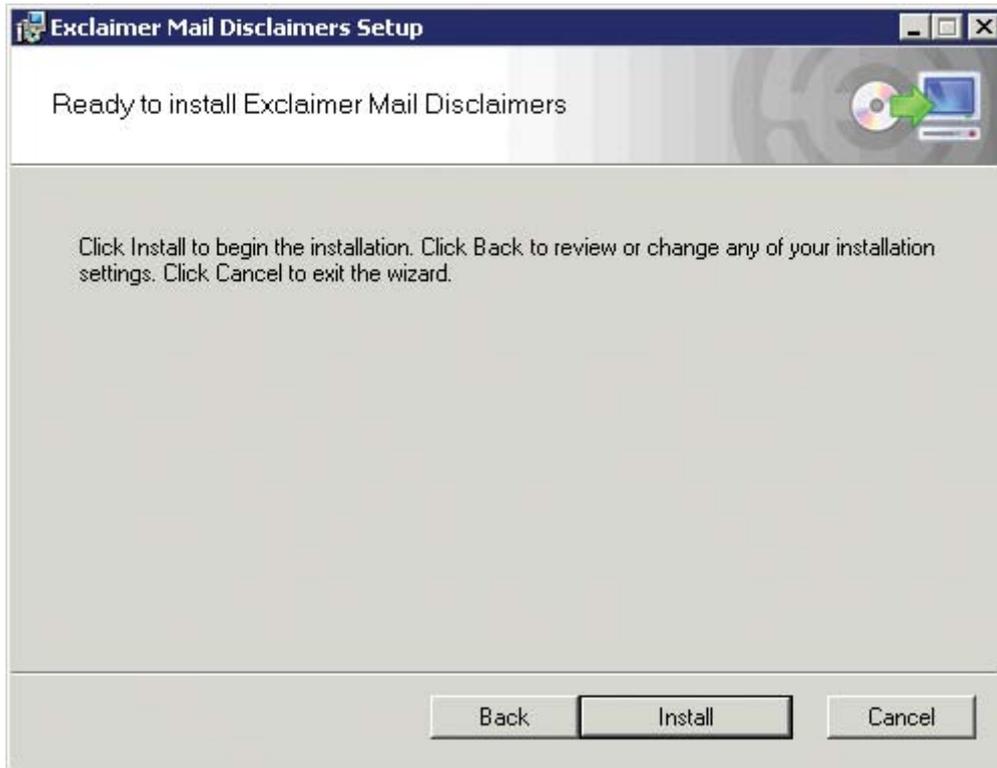


4. Having read the license agreement, check the **I accept the terms in the license agreement** box, then click **next** to select a destination folder for installed files:

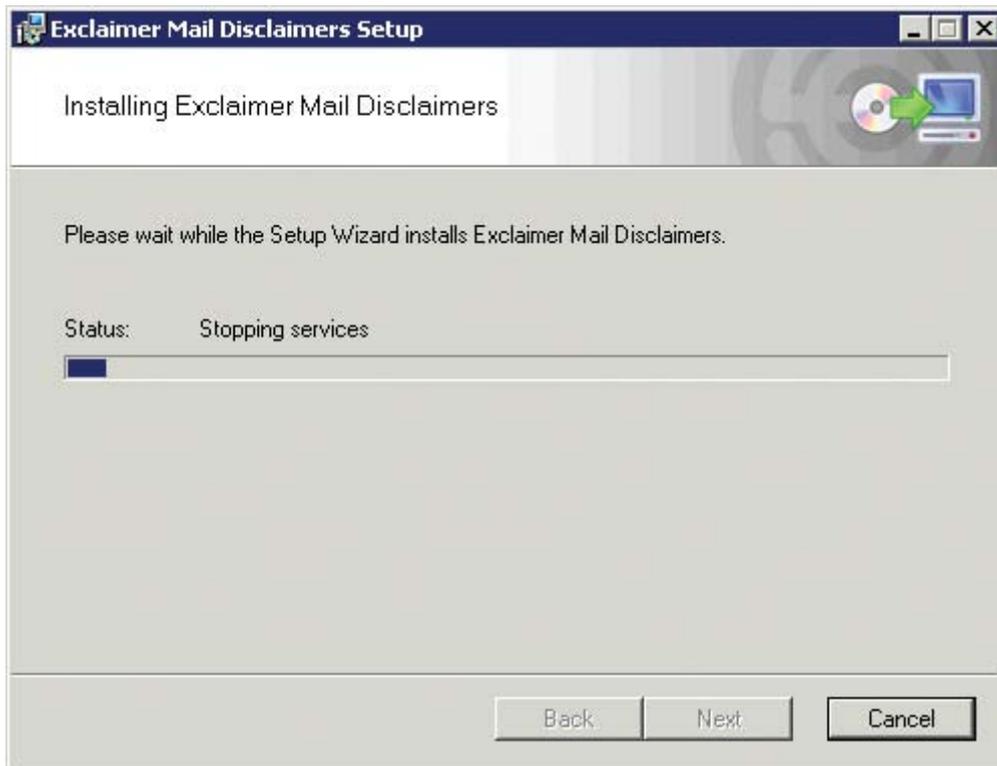


From here you can accept the default folder, or click **change** to specify a new location for installed files.

5. Click **next** to confirm the destination folder and prepare the installation:



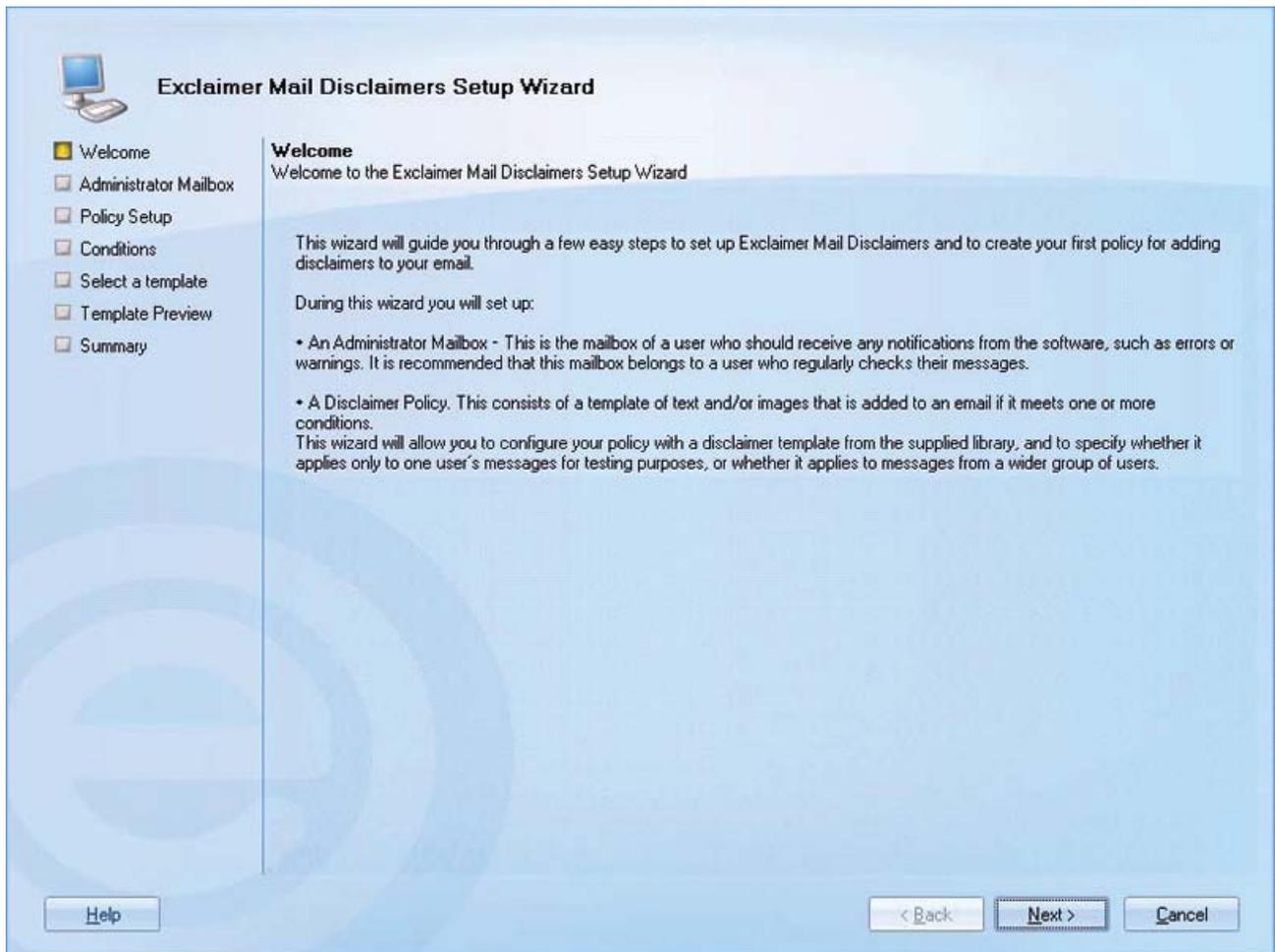
6. Click **install** to perform the installation:



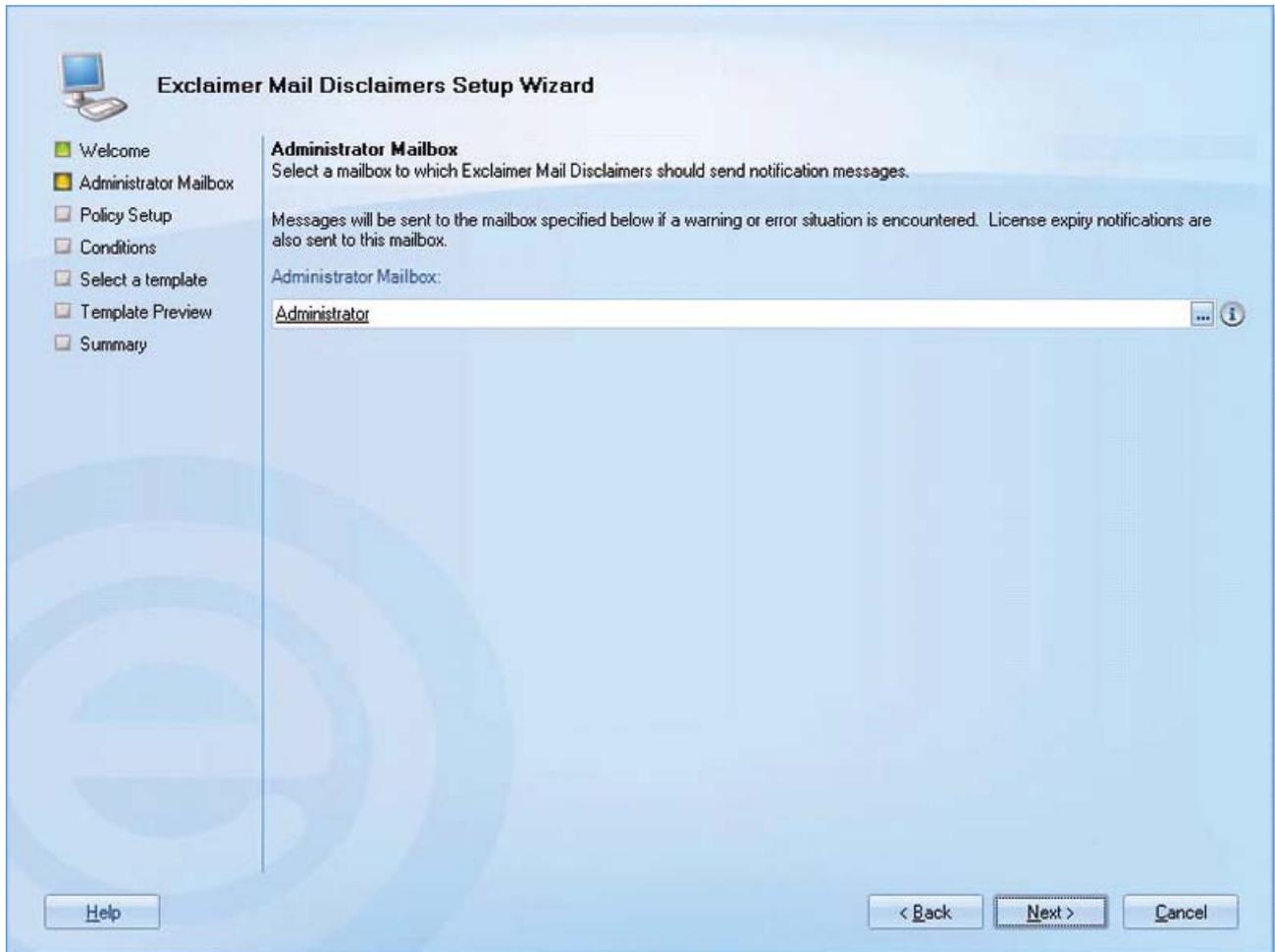
7. Once files are copied, click **finish**. The installation is now complete and the [configuration wizard](#) (see page 12) is launched so you can confirm basic settings and get started with Exclaimer Mail Disclaimers.

First Use Configuration Wizard

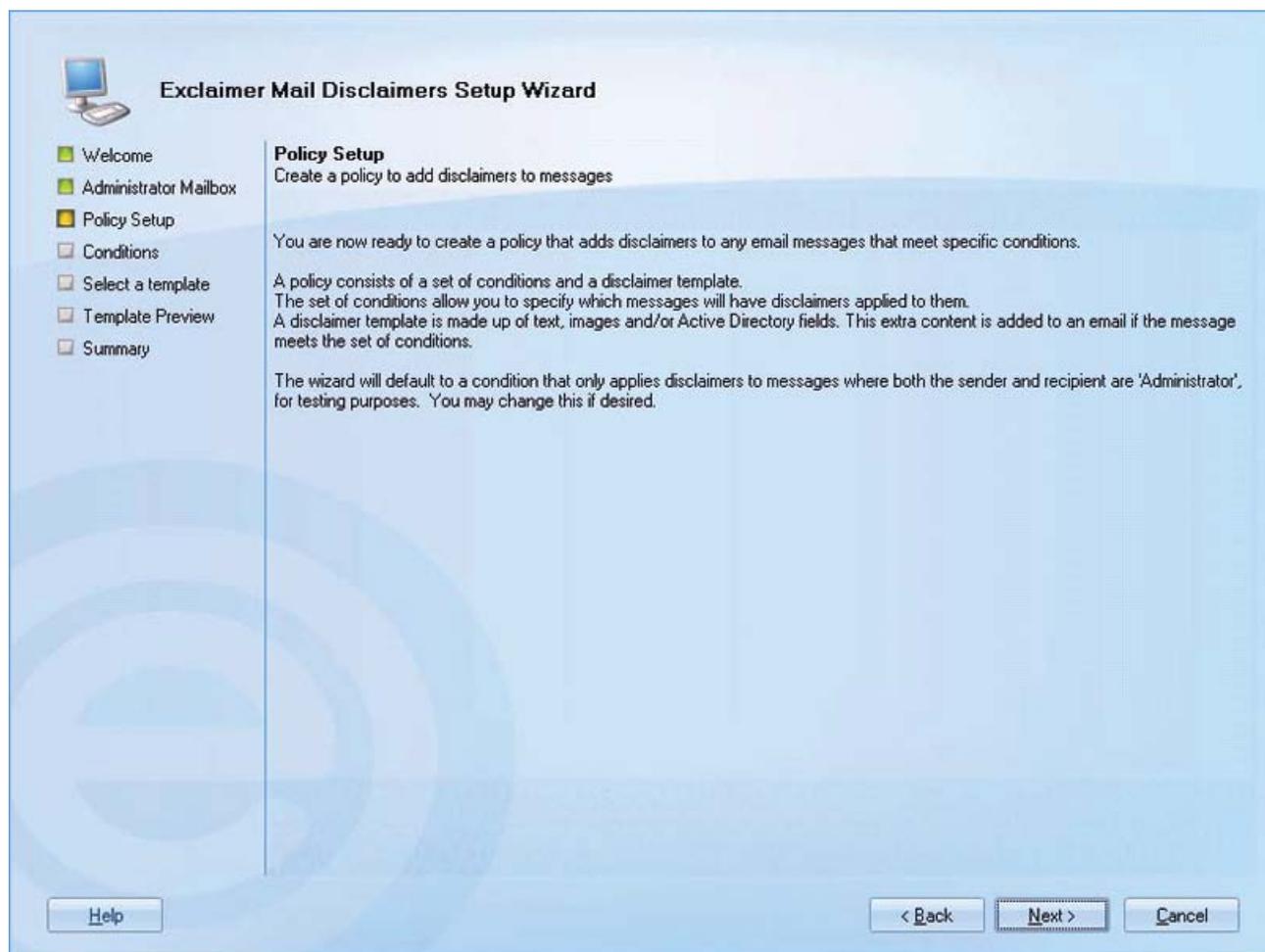
1. The first stage of the configuration wizard displays summary information about the process:



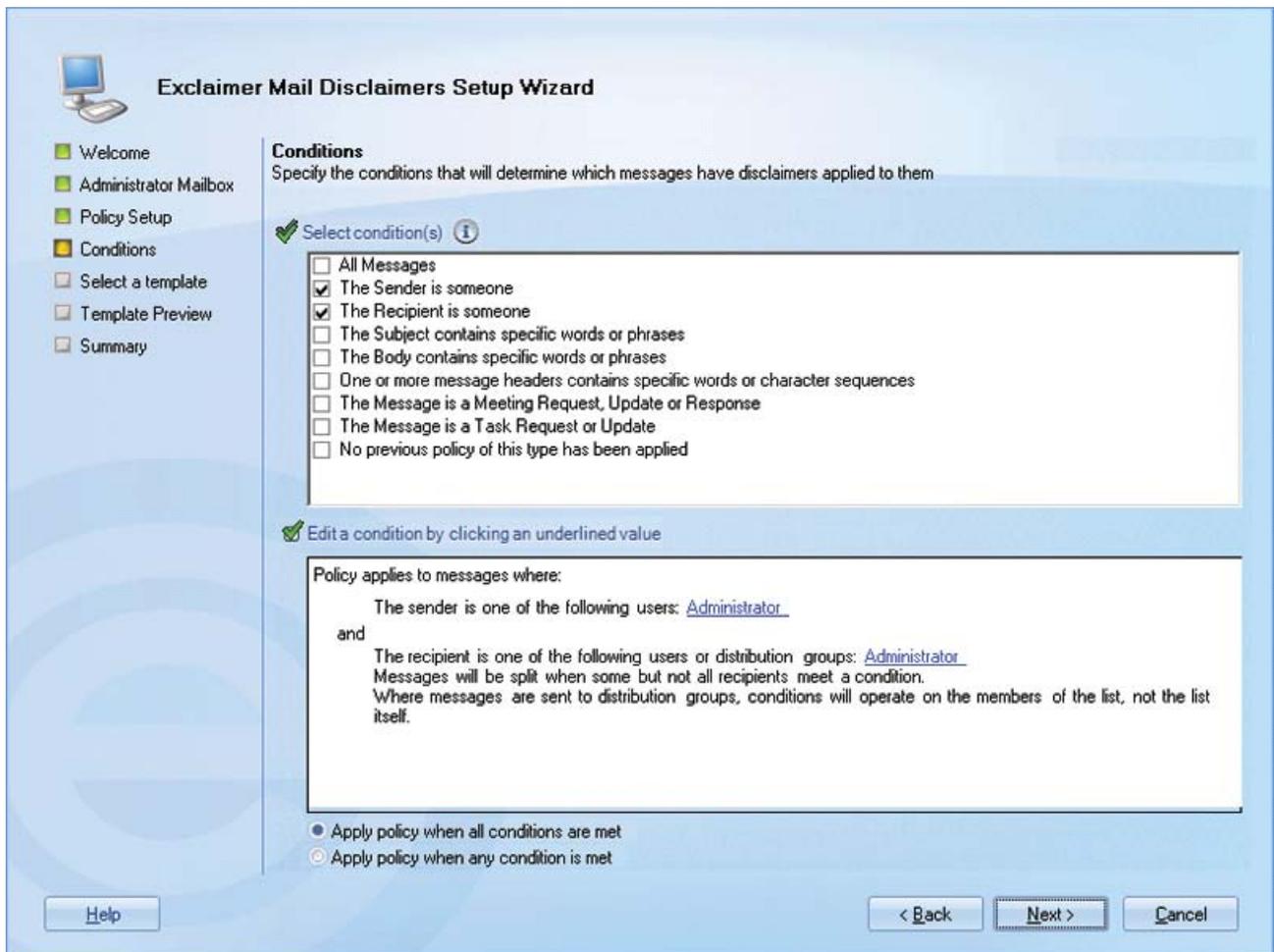
2. Click **next** to move to the next stage and set an **administration mailbox**. If required, click the browse button [...] to browse user accounts and make a selection. The account specified will receive notification emails from Exclaimer Mail Disclaimers:



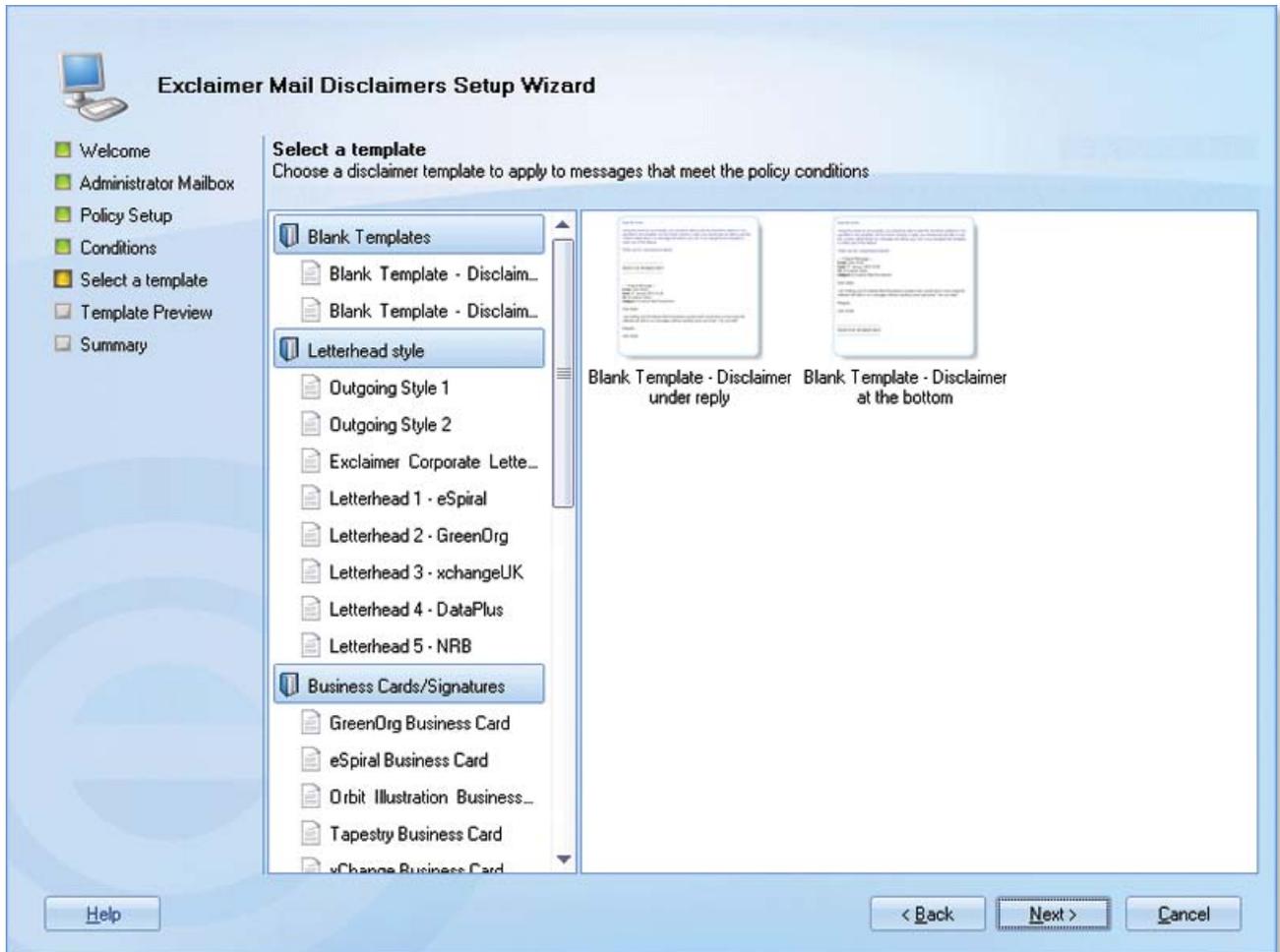
3. Click **next** to move to the next stage and view **policy setup information**:



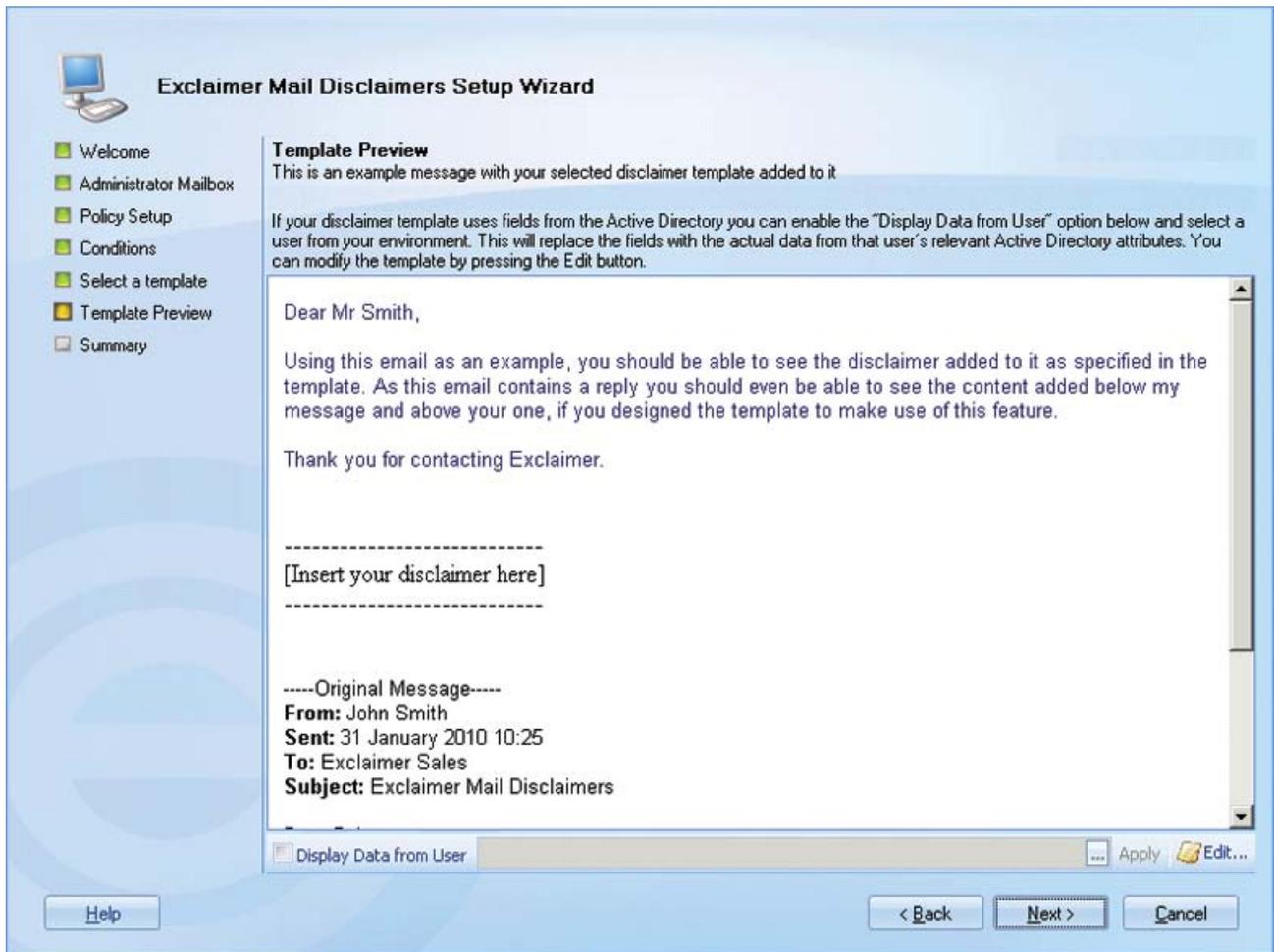
4. Click **next** to move to the next stage and set **conditions** for your first disclaimer policy. You can update this policy at any time after the installation, so if you are not sure what to set at this point, simply accept default conditions and continue:



5. Click **next** to move to the next stage and select a template to associate with your first policy. A number of standard templates are provided but you can update this template at any time after the installation. If you are not sure what to select at this point, choose the template named **Blank Template - Disclaimer under reply** and continue:



6. Click **next** to preview the selected template, to see how it would be presented in the context of an email message:



7. If the selected template contains **Active Directory** fields, the preview might vary depending on which user is associated with the message. If required, you can select a specific user via the **display data from user** option at the bottom of the preview window.
8. If you wish to edit the selected template, click the **edit** button to open the **template editor** and make required changes.
9. Click **next** to review your configuration settings.
10. Click **finish** to complete the process and start Exclaimer Mail Disclaimers.

Having completed the installation process, it is a good idea to check Exclaimer console settings. If you wish to manage multiple servers, you should also check [remote deployment options](#) (see page 18).

Remote Deployment

Exclaimer Mail Disclaimers can be run on multiple servers and managed from a single location. This means that (even on very large systems) you can ensure all of your email systems have the same policies, disclaimers and templates installed so email is processed consistently across the entire organization.

To achieve this, the installation and configuration must be run on each **Exchange Hub Transport server** and the same **remote deployment folder** should be specified on each of these.

If required, you can perform a 'silent' installation on remote servers. To do this, use [command line options](#) as detailed on page 20.

Once Exclaimer Mail Disclaimers has been installed and remote deployment options have been set, any changes made on one server can be deployed to others (each time configuration changes are saved, you are prompted to deploy them to other configured servers).

How It Works

The remote deployment folder is defined using the **remote deployment** tab within the **Exclaimer Console**. Please refer to the help file (within Mail Disclaimers) for further information about this tab.

The specified folder must be a shared folder on the network (only one remote deployment folder should be used on an entire domain). When configuration changes are saved, the computer (on which those changes have been saved) pushes new configuration data to the remote deployment folder.

Remote machines receive notification from the operating system when new configuration data is detected in the shared folder, and they then pull (i.e. import) that data into their local installation. Push and pull operations are completed via the **Exclaimer Remote Deployment** service.

The Remote Deployment Folder

Create a **shared folder** on your network that will be accessible by all machines that are running Exclaimer Mail Disclaimers.

If you do not want the share to be visible to users, you should use a **hidden share**. This is done by adding a dollar (\$) symbol to the end of the share name. Hidden shares cannot be viewed when browsing the network with Explorer, for example.

Ensure that the user who is logged into the **Exclaimer Mail Disclaimers** console (that is saving data) has **Read** and **Write** access to this folder.

The following sections detail two methods of applying folder permissions. These are applicable for both the **Sharing** and the **NTFS Security permissions** of the shared folder - i.e. you must make the same permission changes in both the **Sharing** and **Security** tabs of the folder's **properties** dialog.

Folder Permissions (Easy Method)

Allow the **Everyone** group to have **Read** permissions.

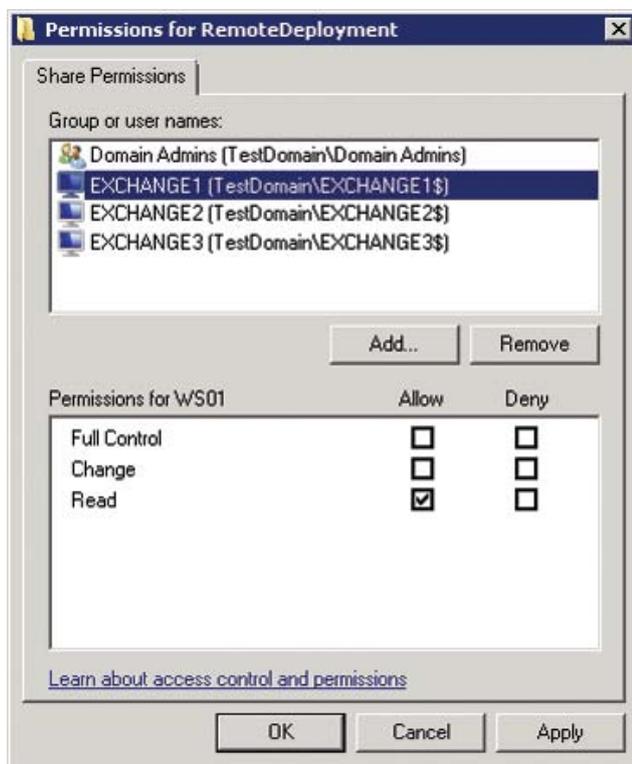
Folder Permissions (Secure Method)

Allow **Read** permissions only for the computer account of each server with Exclaimer Mail Disclaimers installed upon it.

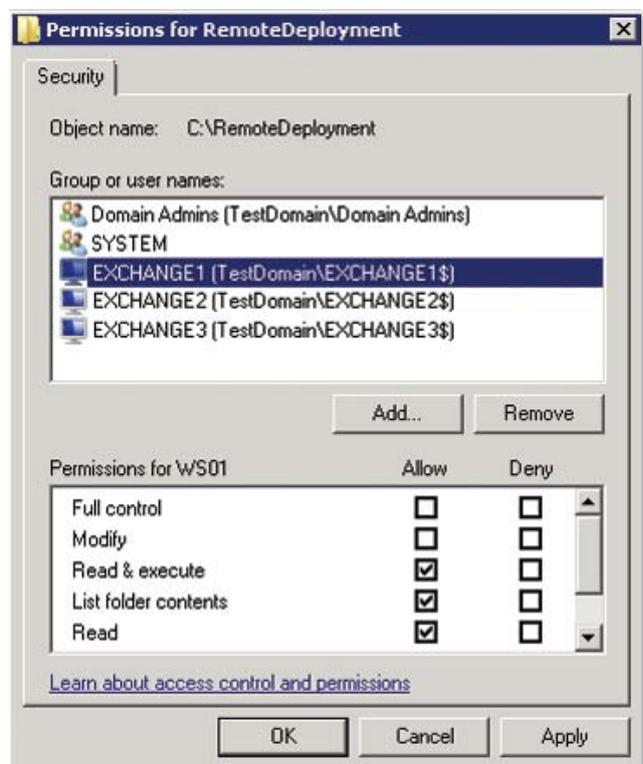
This is essential because the **remote deployment service** runs under the **LocalSystem** account; this account (as the name suggests) only has access to the local system of the machine that it is running on, not to any network resources.

The only way this account can ever see a network resource is when the computer account is given specific access to that resource – i.e. the folder on the network resource allows itself to be accessed by the **LocalSystem** account of a specific remote machine. In this case, access is restricted to only reading data from the remote deployment folder.

Example permission settings are shown below:



Share Permissions Tab



Security Permissions Tab

Command Line Installation

If you are installing Mail Disclaimers on multiple servers (for example, different offices in different locations), you can perform a 'silent' installation using command line options.

How Does It Work?

A command line installation works in conjunction with **remote deployment**.

Standard [installation](#) (see page 09) and [configuration](#) (see page 12) for Exclaimer Mail Disclaimers should be completed on one server, and a [remote deployment folder](#) must be specified (see page 18). When configuration for this server is saved, it is written to the designated **remote deployment** folder.

Once this has been done, subsequent installations on other servers can be completed using a command line instruction. The command line instruction requires you to specify:

- A **destination folder** (where Mail Disclaimers program files will be installed)
- A **remote deployment** folder (from which the Mail Disclaimers configuration will be imported)

Programs and services (see page 8) are installed and, when Mail Disclaimers starts, it is automatically configured from existing configuration files in the **remote deployment** folder.

Required Preparation

Command line installations are run using an **MSI** installation, rather than the standard **setup.exe**. To obtain the required MSI installation file, please contact [Exclaimer support](mailto:support@exclaimer.com) (support@exclaimer.com).

Supported Command Line Options

The following options are supported for a command line installation:

Parameter	Description
INSTALLLOCATION	Where the application should be installed. This corresponds to the Installation Directory screen in the standard installation wizard .
REMOTEDEPLOYMENTFOLDER	The folder used to monitor remote deployment updates. There is no installation wizard equivalent for this option - it is provided for use in multi-server environments to remove the need to run the first use configuration wizard .

For example:

```
"Mail Disclaimer Install.msi" /qn INSTALLLOCATION="D:\Program Files\Exclaimer Ltd\Mail Disclaimers\  
REMOTEDEPLOYMENTFOLDER="\\servername\share\path"
```

There are no mandatory parameters. The default installation path is **C:\Program Files\Exclaimer Ltd\Mail Disclaimers** and the **remote deployment** feature will not be configured if it is not specified.

Note that environment variables cannot be used in paths - you must specify full paths explicitly (for both installation and remote deployment).

Uninstalling Mail Disclaimers

The uninstall process removes the following items for Mail Disclaimers:

- Application program files
- The **Exclaimer Mail Disclaimers Transport Agent**
- The **Exclaimer Mail Disclaimers Configuration Service**
- The **Exclaimer Mail Disclaimers Remote Deployment Service**
- The **Exclaimer Mail Disclaimers Sent Items Update Service**

The uninstall process also restarts the **Microsoft Exchange Transport Service**.

Configuration files are **not** removed as part of the uninstall process. The location of these files on your system depends upon which operating system is in use, as summarized below:

Operating System	Location
Windows Server 2003 x64 Windows Server 2003 R2 x64	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Mail Disclaimers
Windows Server 2008 x64 Windows Server 2008 R2 x64	\ProgramData\Exclaimer Ltd\Mail Disclaimers

Preparation

The **uninstall** process does not remove any of your configuration, settings or templates. However as a backup precaution you may wish to export your configuration before running the uninstall process.

The export includes all settings, policies and templates for Exclaimer Mail Disclaimers. These are written to an **config** file a proprietary file type for Exclaimer products. To export current settings, follow the steps below:

1. Open the **Exclaimer Console**.
2. Ensure that **Exclaimer** is selected in the console tree (i.e. the topmost branch)
3. Select **export current configuration settings** from the **actions pane**, or from the **action menu**.
The **export configuration** window is displayed.
4. Navigate to the required drive and folder, to which the export file should be saved.
5. Specify the required file name for the export file.
6. Click **save** to complete the export.

Running the Uninstall Process

There are two ways to start the uninstall process for Mail Disclaimers:

- Activate the **setup.exe** or the **MSI** file and choose the **uninstall** option; then follow on-screen instructions
- Use **Add/Remove Programs** in Windows Server 2003 or **Programs and Features** in Windows Server 2008 then follow on-screen instructions.

Further Help & Support

Exclaimer Support	
Contact Details	
World Wide Email Support	support@exclaimer.com
Exclaimer Knowledge Base	http://www.exclaimer.com/support-home/KB.aspx
Exclaimer Forums	http://www.exclaimer.com/cs/forums/default.aspx
UK - Telephone	+44 (0) 1252 531 422
USA & Canada - Telephone	+1-888-450-9631
South Africa - Telephone	+27 (0) 11 561 0900
Benelux - Telephone	+31 (0) 228-567066
Germany - Telephone	+49 (0) 421 5371 458
Rest of the World, UK - Telephone	+44 (0) 1252 531 422

Exclaimer Sales		
	Email	Telephone
UK Sales	support@exclaimer.com	01252 531422
US & Canada Sales	usasales@exclaimer.com	+1-888-450-9631
Benelux Sales	sales@exclaimer.nl	+31 (0) 228-567066
Germany Sales	sales@exclaimer.de	+31 (0) 228-567066
South African Sales	sales@exclaimer.co.za	+27 (0) 11 561 0900
Hungary Sales	sales@exclaimer.com	+36 20 422 3984
France Sales	sales@exclaimer.com	+33 4 76 21 17 03
Spain Sales	sales@exclaimer.es	+34 947 257 714
Rest of the World (UK)	sales@exclaimer.com	+44 (0) 1252 531422

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