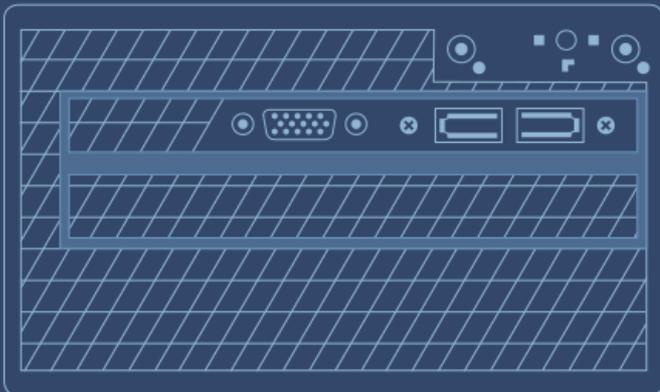




exclaimer signature manager
exchange edition

Getting Started Guide



www.exclaimer.com

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About This Guide

The aim of this guide is to provide information about installing and configuring [Exclaimer Signature Manager Exchange Edition](#). Here, you can find out about system requirements, licensing, what changes occur on your system when [Exclaimer Signature Manager Exchange Edition](#) 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 Signature Manager Exchange Edition](#), detailed help for all aspects of the application can be found in our [online user manual](#).

If you require further information, you can always [contact us](#).

Signature Manager Exchange Edition Overview

[Exclaimer Signature Manager Exchange Edition](#) allows you to create great looking, professional signatures centrally (including company branding, legal disclaimers and promotional content) and to control the circumstances (i.e. rules) under which these signatures should be applied to email messages that are sent from your organization.

Signature Content

With the ability to create rich, highly creative [templates](#) (including tables, images and dynamic [Active Directory](#) fields) and to add these before or after original email messages, a signature has the potential to be so much more than just contact details. With [Exclaimer Signature Manager Exchange Edition](#), you can consistently apply personalized signature details, legal disclaimers, corporate branding, banners (e.g. for sales promotions and corporate events) and so much more...the possibilities are immense.

[Exclaimer Signature Manager Exchange Edition](#) includes a library of professionally designed templates which can be used 'out of the box', or as a start point for creating your own versions. New templates can be created and existing templates are edited using an intuitive [template editor](#), which will be familiar to anyone who has worked with Microsoft Outlook.

Templates are created in [HTML](#), [RTF](#) and [Plain Text](#) formats to cater for all situations, with an instant [preview](#) feature so you can see, at a glance, how your template will be displayed within email messages.

Signature Rules

Having created any number of [signature templates](#), it is likely that you will want to specify criteria (i.e. rules) which must be met to determine which signature should be applied to messages.

At a basic level, this might be as simple as saying 'apply this template to all messages' - but other times you may have more complex requirements. For example, you might choose to apply different signatures according to the sender, or according to the day of the week, or dependent upon the content of the email body and/or subject line...a vast range of scenarios can be achieved using [signature policies](#).

A [signature policy](#) can be thought of as a set of rules which are specified to control how signatures are applied to email messages. With a range of [conditions and exceptions](#) (which can be applied to messages sent and received both internally and externally), you determine if, when and how signatures are applied.

Complete Control

Perhaps one policy isn't enough - perhaps you need to apply (or not apply) certain signatures according to whether or not a previous signature has already been applied. With [Exclaimer Signature Manager Exchange Edition](#), you can create [policy chains](#) to define such dependencies.

And there's no need to worry about complicated testing processes, since [Exclaimer Signature Manager Exchange Edition](#) includes an intuitive [policy tester](#) which will simulate the process of sending and receiving email messages so you can quickly see if policies are defined correctly.

How It Works

Signature [templates](#) and associated [policies](#) are defined centrally, by an administrator.

When a user sends an email message, the message is checked against all defined [signature policies](#) and, if it matches specified criteria for a policy, that policy is applied and associated signature content is added to the message.

All of this happens 'behind the scenes' - the message that is finally received at the other end can be quite different to the one that the user sees when they press 'send'. Depending on how [signature policies](#) and [templates](#) are defined, the final message might be displayed in a different way, and signature content will be included.

If required, the [sent items update feature](#) can be used to store sent messages exactly as they were received (i.e. the processed version), or to store the original version of the message AND the processed version.

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 are prompted to [register for a 30-day trial](#). During the trial period, all signatures are appended with the following text:

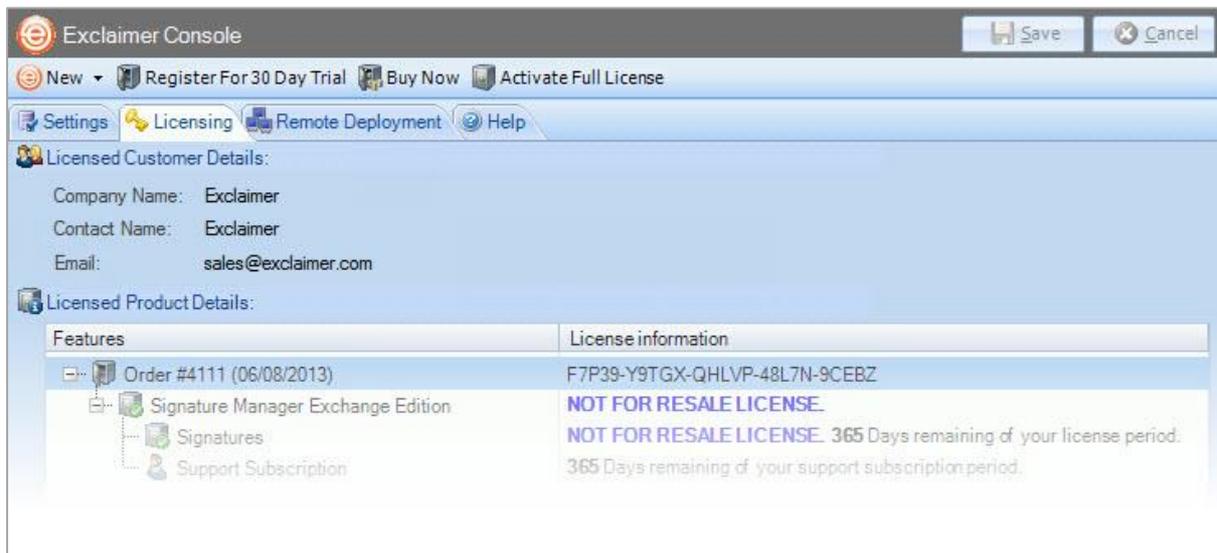
This Signature was created by Exclaimer Signature Manager Exchange Edition

This text is only added when signatures are generated within the trial period; once the license is activated the message is removed. Having completed this trial, you can either:

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

Licensing Information

Having installed [Exclaimer Signature Manager Exchange Edition](#), 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 summarized in the following sections.

Hardware

Item	Minimum Requirements	Recommended Requirements
CPU	x86 or x64 architecture-based computer. Intel Itanium family IA64 processors are not supported.	x86 or x64 architecture-based computer. Intel Itanium family IA64 processors are not supported.
Memory	2GB	4GB
Disk Space	350MB	500MB
Screen Resolution	1024 x 768 pixels	1152 x 864 or higher

Note that [Intel Itanium](#) family [IA64](#) processors are not supported.

Software

Item	Minimum Requirements
Operating Systems	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 Server 2012 Windows Server 2012 R2 Windows Small Business Server 2008 Windows Small Business Server 2011
Exchange Server	Microsoft Exchange Server 2007 SP1 Rollup 5 and above Microsoft Exchange Server 2010 RTM and above Microsoft Exchange Server 2013 RTM Microsoft Exchange Server 2016 RTM
Exchange Server Roles	Microsoft Exchange Hub Transport Server (2007 & 2010) Microsoft Exchange CAS and or Mailbox Server (2013-2016)
Microsoft .NET Framework	Microsoft .Net Framework 4.5.2+

Installation Overview

Exclaimer Signature Manager Exchange Edition serves signatures via a Microsoft Exchange Transport Agent. As such, it must be installed on a server that has the Microsoft Exchange Hub Transport Role installed.

The installation process is comprised of two parts - [installation \[pg.12\]](#) and [setup \[pg.16\]](#). Both stages are quick and easy to complete, using a familiar 'wizard' approach to guide you through each process, step-by-step.

The [installation](#) process includes the Exclaimer license agreement and copies files to your preferred destination folder. Once complete, the [setup wizard](#) is launched, so you can configure basic settings for [Exclaimer Signature Manager Exchange Edition](#), 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 Signature Manager Exchange Edition Transport Agent](#) is installed with a [Priority](#) set to [1](#)
- The [Exclaimer Signature Manager Exchange Edition Configuration Service](#) is installed.
- The [Exclaimer Signature Manager Exchange Edition Remote Deployment Service](#) is installed
- The [Exclaimer Signature Manager Exchange Edition Sent Items Update Service](#) is installed
- The [Microsoft Exchange Transport Service](#) is restarted (this is required to ensure that the [Transport Agent](#) installation change takes effect with the [Microsoft Exchange](#) server)

NOTE

In multi-server environments, **Exclaimer Signature Manager Exchange Edition** should be installed on each **Hub Transport** server that processes messages which require signatures. For further information about installing on multiple servers, please refer to the [Remote Deployment](#) [pg.22] and [Command Line Installation](#) [pg.26] sections of this guide.

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\Signature Manager Exchange Edition`.

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	Configuration Folder Path
Windows Server 2003 R2 x64	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Mail Disclaimers
Windows Server 2008 x64	\ProgramData\Exclaimer Ltd\Mail Disclaimers
Windows Server 2008 R2 x64	
Windows Server 2012	
Windows Server 2012 R2	
Windows Small Business Server 2008	
Windows Small Business Server 2011	

Downloading Signature Manager Exchange Edition

The [Exclaimer Signature Manager Exchange Edition](#) installation file is named `setup.exe` and can be downloaded from the products page on the [Exclaimer website](http://www.exclaimer.com) (www.exclaimer.com).

Once downloaded, `setup.exe` should be run on all Exchange 2007 and 2010 servers with the [Hub Transport Role](#), and on all Exchange 2013 and 2016 servers with the [Mailbox Role](#).

NOTE

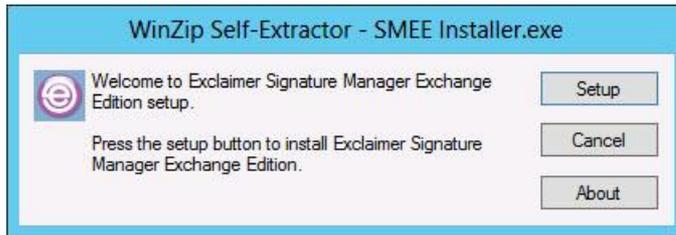
If required, an **MSI** is available from support by contacting support@exclaimer.com.

NOTE

If you are installing Signature Manager Exchange Edition on more than one Exchange server, you should also check [remote deployment options \[pg.22\]](#).

The Installation Wizard

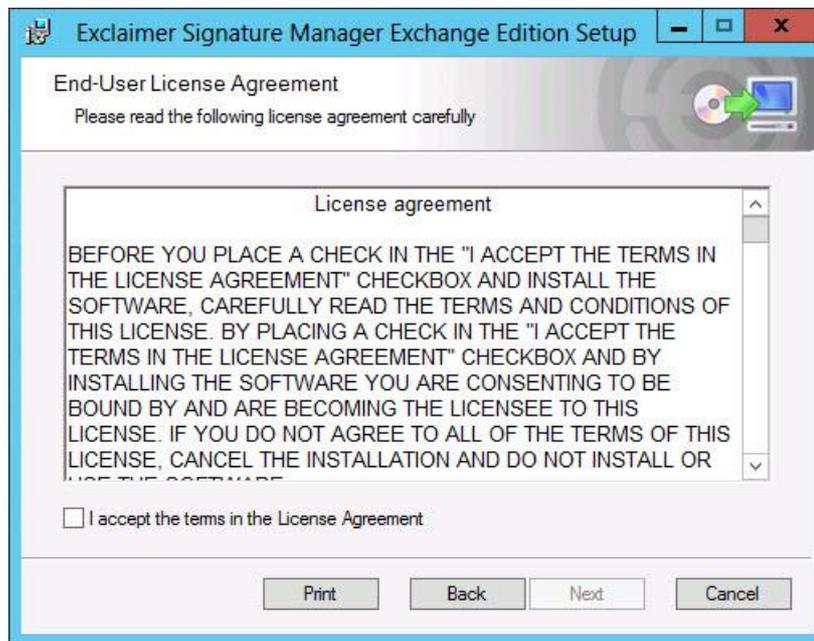
1. Double click the `setup` file to start the installation and display a welcome message:



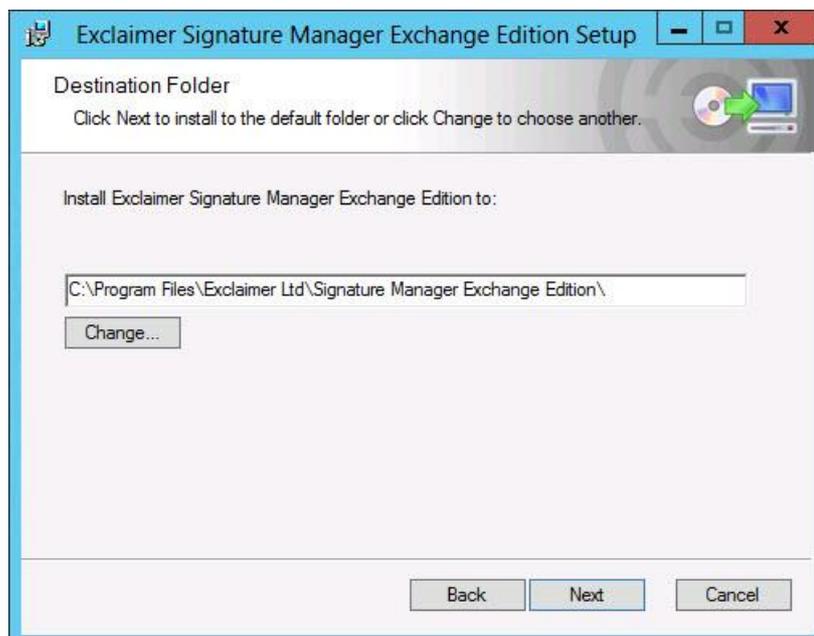
2. Click `setup` to launch the setup wizard:



3. Click [next](#) to view the [end-user license agreement](#):

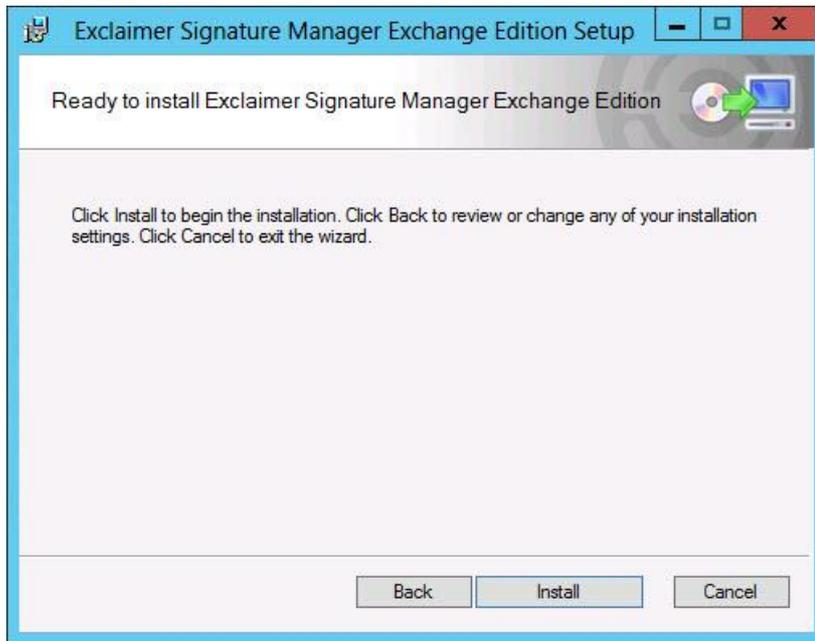


4. Having read the license agreement, check the [I accept the terms in the license agreement](#) box and click [next](#) to select a [destination folder](#) for installed files:

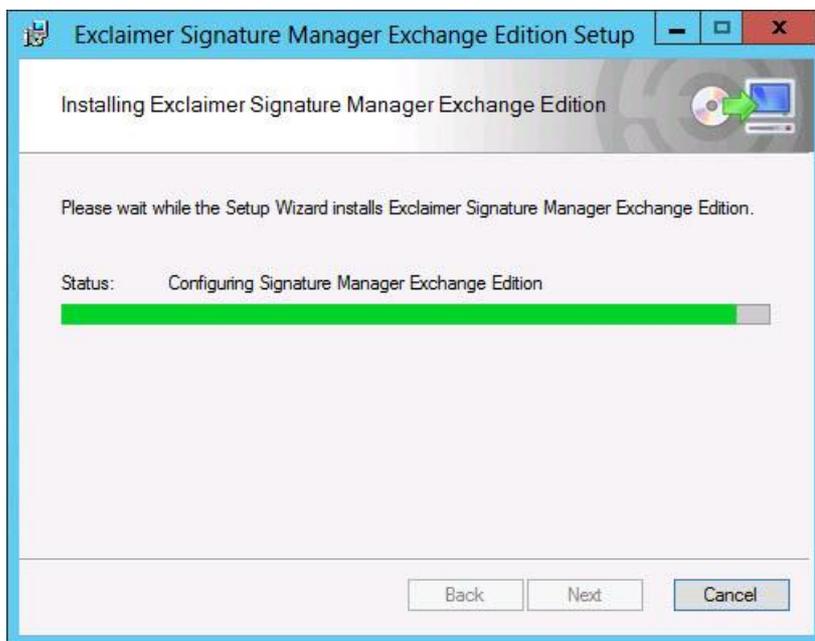


From here you can accept the default folder, or click [change](#) to specify a new location.

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](#):

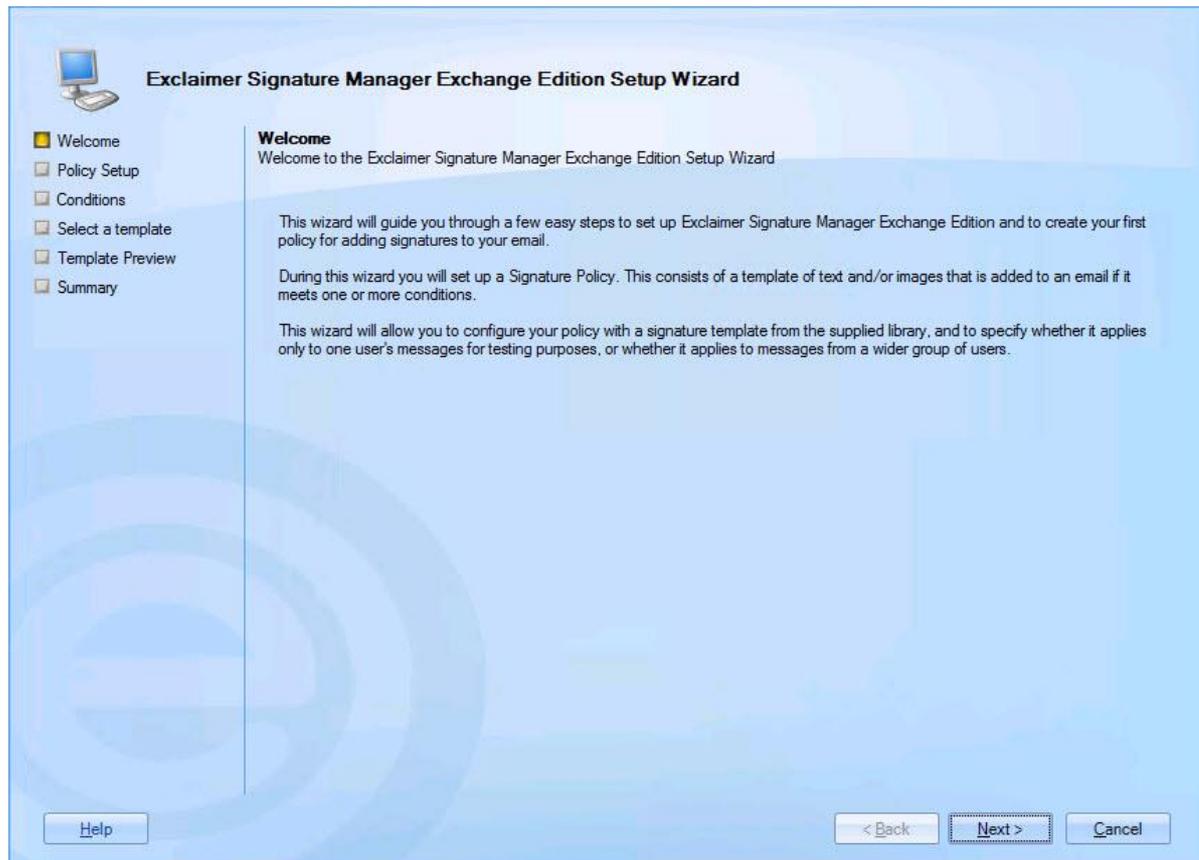


8. The installation is now complete and the [setup wizard](#) [pg.16] is launched so you can confirm basic settings and get started with [Exclaimer Signature Manager Exchange Edition](#).

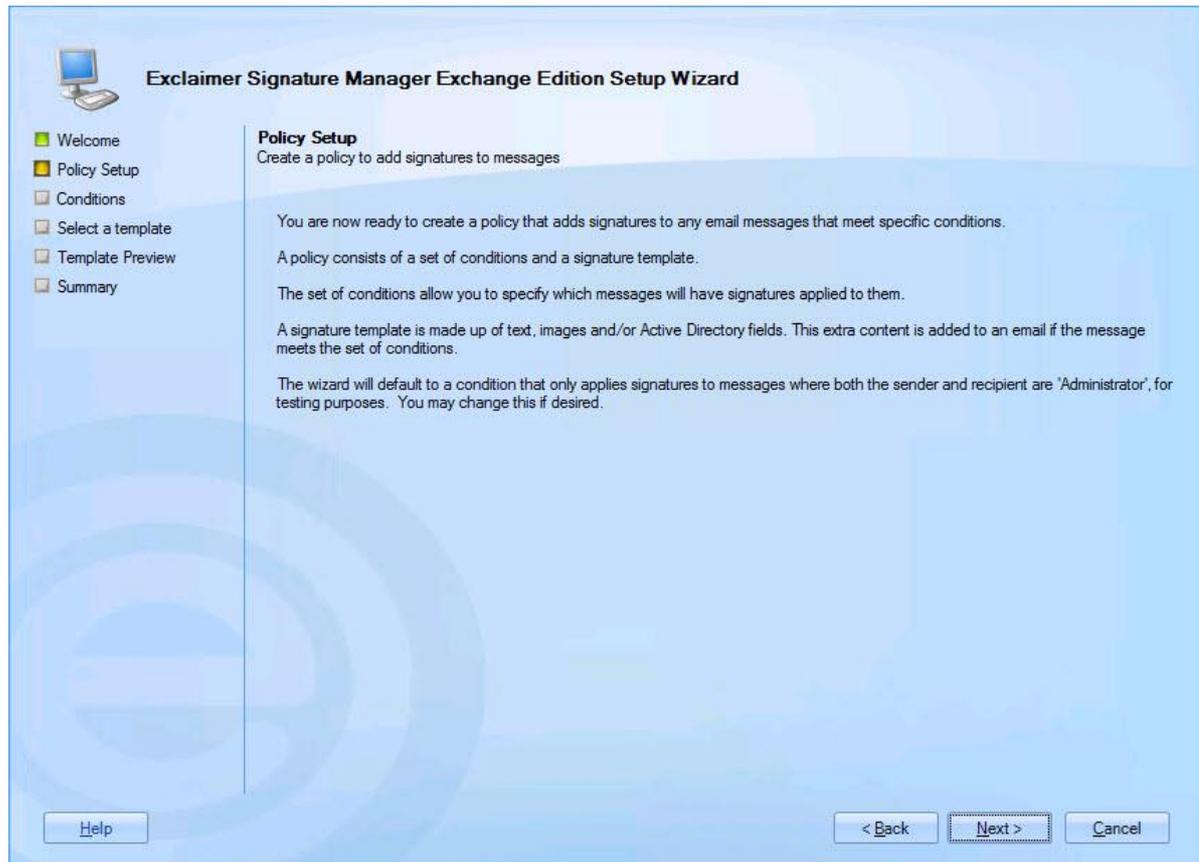
The Setup Wizard

Having installed [Exclaimer Signature Manager Exchange Edition](#), the [setup wizard](#) must be completed. This wizard takes you through the basic setup required to get started with the product, as shown below.

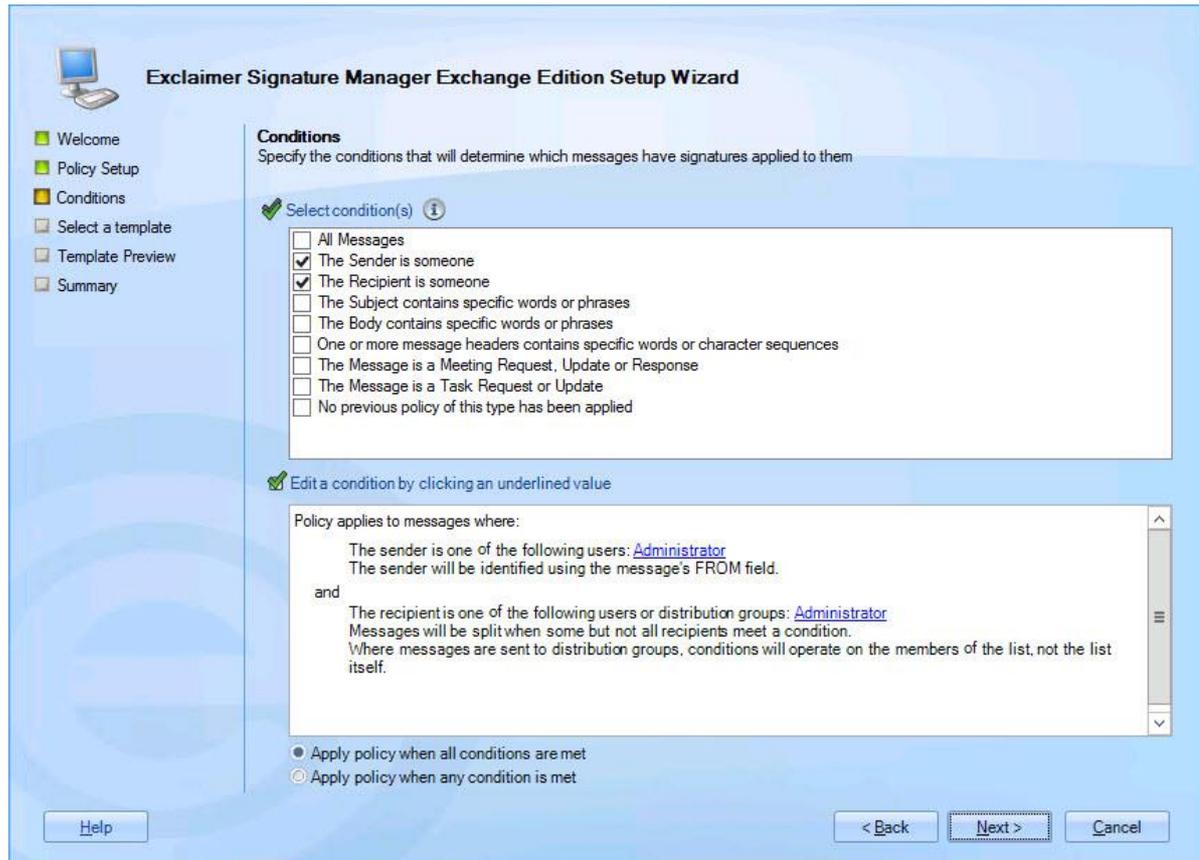
1. The first stage of the [setup wizard](#) displays summary information about the process:



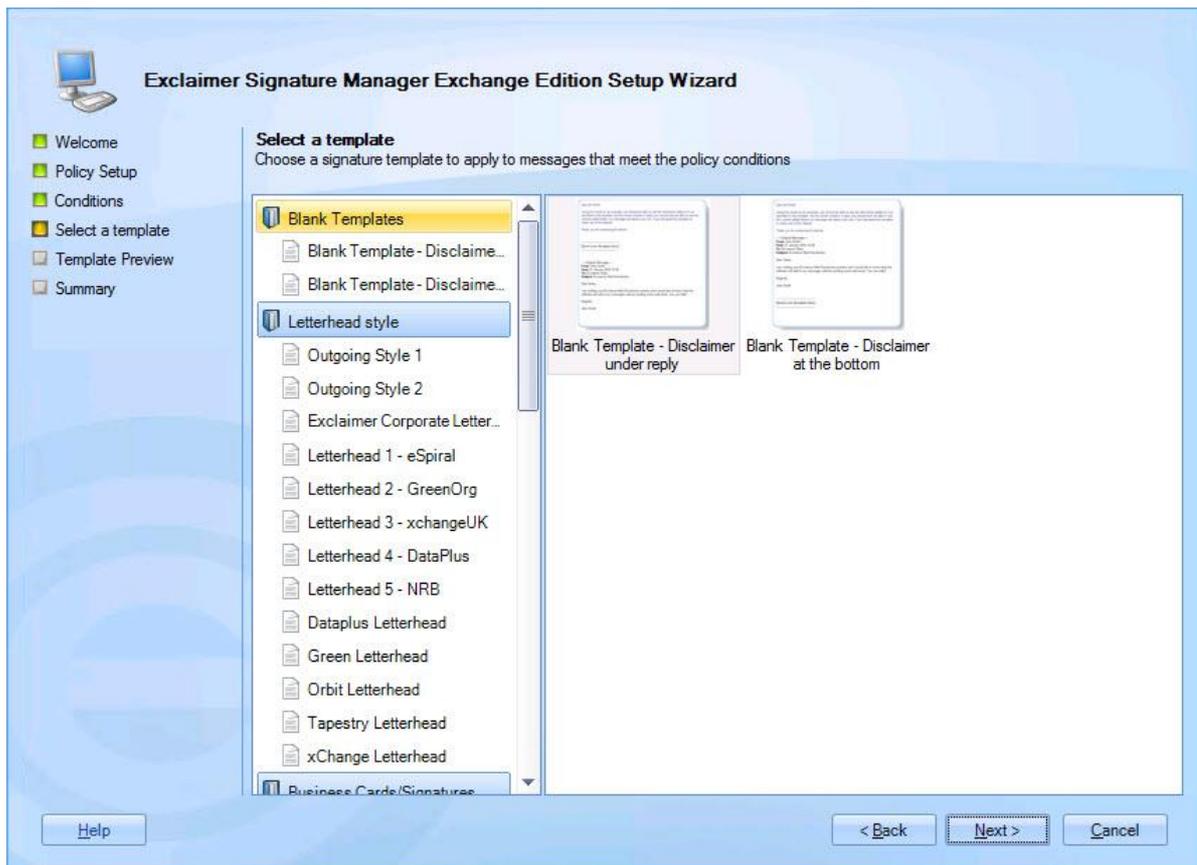
2. Click [next](#) to move to the next stage to view an introduction to the policy setup that you are about to complete:



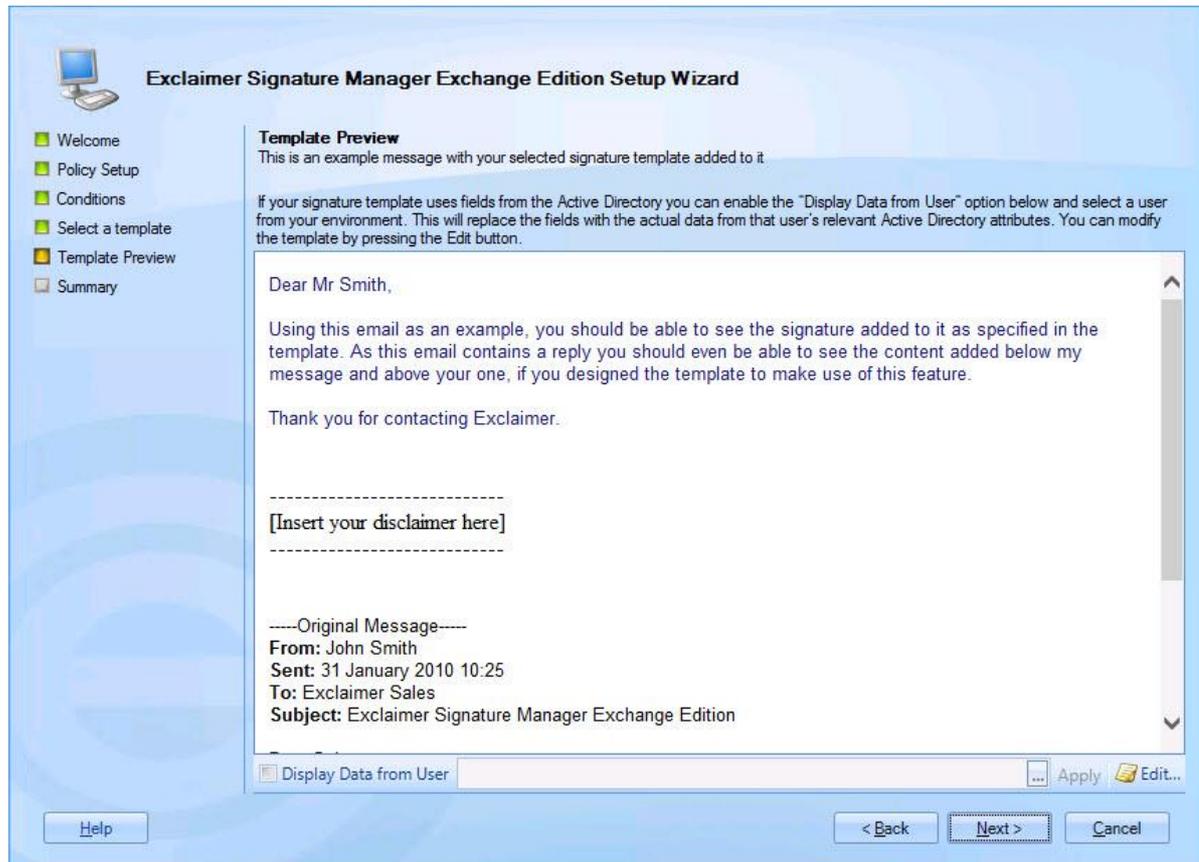
3. Click **next** to move to the next stage and set **conditions** for your first signature policy. For testing purposes, default, **conditions** are set so that the policy will be triggered for any emails where both the sender and the recipient are set to be the currently logged-in user. You can update these conditions now, or at any time after the installation, so if you are not sure what to set at this point, simply accept default conditions and continue:



4. 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, simply accept the default and continue:



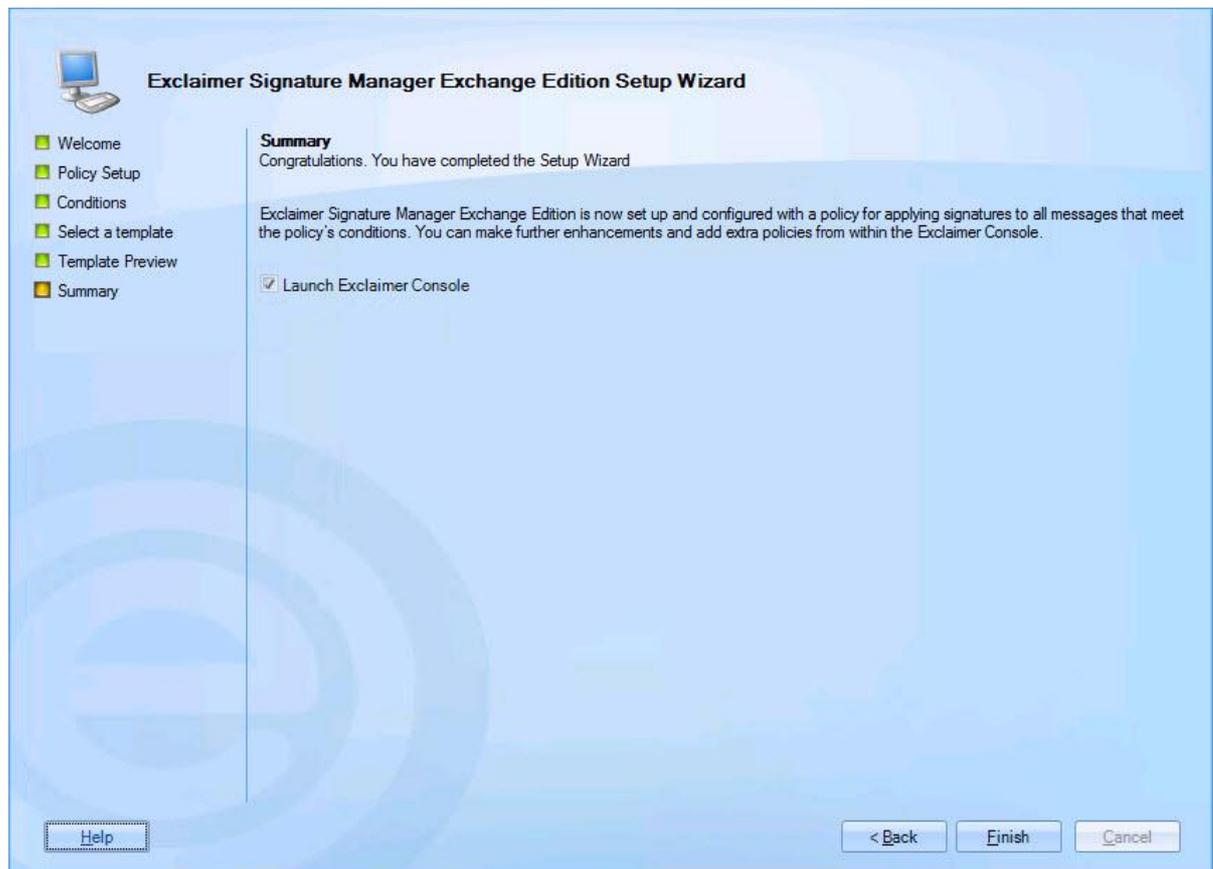
5. Click [next](#) to [preview](#) the selected template, to see how it would be presented in the context of an email message:



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.

6. If you wish to edit the selected template, click the [edit](#) button to open the [template editor](#) and make required changes.

7. Click [next](#) to complete the process and start [Exclaimer Signature Manager Exchange Edition](#) in the [Exclaimer console](#):

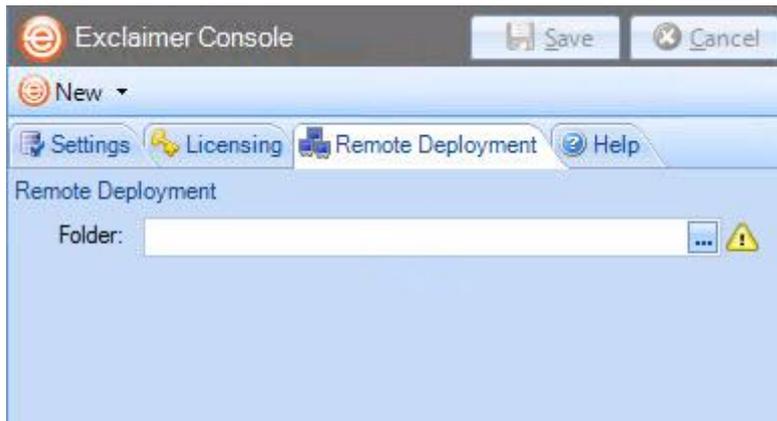


NOTE

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](#) [pg.22].

Remote Deployment

If you have multiple Exclaimer installations on your network (for example, you might have servers in different offices around the country), you can manage configuration in a single location and deploy this to all other servers. To do this, use the [remote deployment](#) tab to specify a shared location:



Then, whenever you save any changes to the configuration, you are asked to confirm if you would like to deploy them to other servers. If you opt to deploy changes, a file is written to the remote deployment folder and imported by the other installations.

NOTE

Initially, Exclaimer software must be installed on each server - installation cannot be completed via remote deployment. Once installed, specify a **remote deployment folder** to manage subsequent configuration changes with **remote deployment** (each installation must have the same **remote deployment** folder).

How It Works

The remote deployment folder is defined using the [remote deployment](#) tab within the [Exclaimer Console](#). 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 Signature Manager Exchange Edition 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 Signature Manager Exchange Edition](#).

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 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)

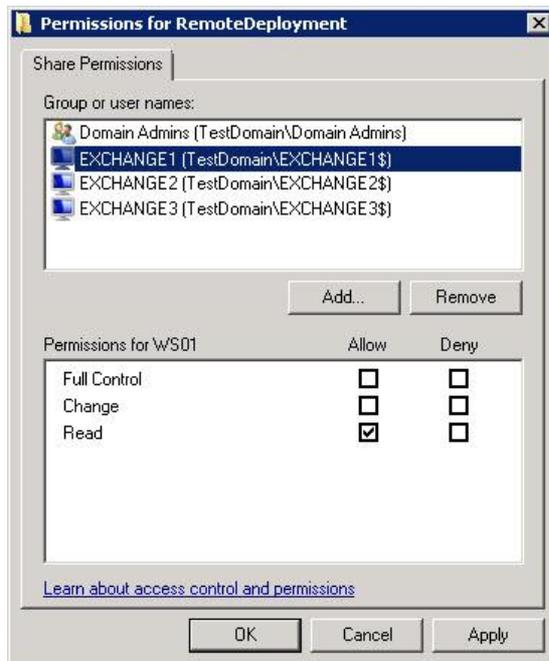
Allow [Read](#) permissions only for the computer account of each server with [Exclaimer Signature Manager Exchange Edition](#) installed upon it.

This is essential because the [Exclaimer Signature Manager Exchange Edition 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.

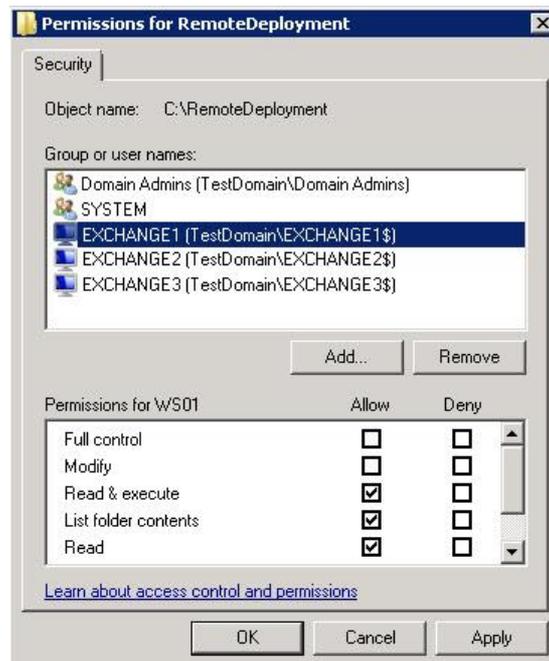
The only way this account can ever see a network resource is when the computer account is given specific access to that resource - i.e. the folder on the network resource allows itself to be accessed by the [LocalSystem](#) account of a specific remote machine. In this case, access is restricted to only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

Example permission settings are shown in the following page.

Example permission settings



Share Permissions



Security Permissions

Remote Deployment Timings

As soon as the [Exclaimer Signature Manager Exchange Edition Remote Deployment service](#) notices that there has been a change to the remote deployment folder, it starts a timer. Every **ten seconds** a check is made to see if the file has been written to in the last **five seconds**. If it has not, the file is added to a queue which will perform the actual import; otherwise the file remains in the timer list.

This means that the import should begin a maximum of ten seconds after the save finishes, though in practice it could be a little more than this depending on server load and how quickly the import thread is given control by the operating system. Similarly, the import could begin sooner, depending on when the save completes relative to the timer interval.

Before checking that configuration changes have been applied successfully on remote machines, sufficient time should be allowed for those machines to actually perform the import (the import can take some time with complex configurations).

Changing an Existing Remote Deployment Folder

If all [Signature Manager Exchange Edition](#) installations are set to point to a specific remote deployment folder and you later decide to change that folder, there is no need to manually change every server to point to the new location.

Having changed the location on one machine and saved the configuration, that machine will write a copy of the configuration data to both the old AND the new locations. Any servers pointing to the old location will import the configuration which includes the new remote deployment folder path so on subsequent deployments, they will pull data from the new location.

As such, you are advised NOT to delete the old remote deployment folder until enough time has elapsed for all remote machines to import the configuration file that contains the new folder location.

Command Line Installation

If you are installing [Exclaimer Signature Manager Exchange Edition](#) on multiple servers (for example, at different offices in different locations), you can complete all required configuration on one server, then export that configuration and import it at other locations.

To save time, you can perform a 'silent' installation at other locations, using command line options. A command line installation installs [Exclaimer Signature Manager Exchange Edition](#) without the need to step through the [installation wizard](#) [pg.12].

Programs and services are installed and when [Exclaimer Signature Manager Exchange Edition](#) is launched, the [setup wizard](#) [pg.16] is launched. You need to step through the [setup wizard](#) but once this is done, you can import your original configuration file.

NOTE

For further information about importing and exporting configuration files, please refer to the User Guide or Online Help for Exclaimer Signature Manager Exchange Edition.

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](#) (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.

For example:

```
"Signature Manager Exchange Edition Install.msi" /qn  
INSTALLLOCATION="D:\Program Files\Exclaimer Ltd\Signature Manager Exchange  
Edition\"
```

Note that environment variables cannot be used in paths - you must specify full paths explicitly.

Uninstalling Signature Manager Exchange Edition

The uninstall process removes the following items for [Exclaimer Signature Manager Exchange Edition](#):

- Application program files
- The [Exclaimer Signature Manager Configuration Service](#)
- The [Exclaimer Signature Manager Remote Deployment Service](#)
- The [Exclaimer Signature Manager Sent Items Update 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	Configuration Folder Path
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

Preparation

As a precaution you may wish to export your configuration before running the uninstall process.

The export includes all settings for [Exclaimer Signature Manager Exchange Edition](#). These are written to an [econfig](#) 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 [Exclaimer Signature Manager Exchange Edition](#):

- Activate the original [setup.exe](#) and choose the [uninstall](#) option; then follow on-screen instructions.
- Use [programs and features](#); then follow on-screen instructions.

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