

Classifier Administration Guide

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Microsoft Partner
Microsoft

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Boldon James Documentation

Boldon James has a suite of documentation that covers the Classifier and all of its applications. The following Classifier Product Guides are provided:

Deployment

- Registry Keys Deployment and Troubleshooting Guide
- Planning Considerations

Evaluation

- Evaluation Guide

Quick Start

- Administration Transition Guide
- Getting Started Guide
- Administration PowerShell Getting Started Guide

Reference

- Administration Guide
- Administration Server Installation Guide
- File Classifier Guide
- Frequently Asked Questions
- Mac Classifier Supplement
- Management Agent Guide
- Mobile Classifier Service Installation Guide
- Notes Classifier Installation Guide
- Power Classifier for Files Guide
- Power Classifier for SharePoint Guide
- SharePoint Classifier Guide
- Data Classification Service Guide

Classifier Reporting Guides (Delivered with the Reporting Product)

- Reporting Console Guide
- Reporting System Guide

Administration Guide

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector}->Properties

This Administration Guide (PDF) and on-line Help provides reference for Classifier administrators planning to use Classifier Administration. It assumes knowledge of the terminology defined in Suite Overview.

Note: In your environment you may already use the term [Classification](#) to refer to the value(s) selected to classify an item. Throughout Classifier documentation the term [Label](#) is used for this purpose, **Classification** is sometimes used in examples as the name of the first [Selector](#).

The Administration Guide describes all the features available through the Classifier Administration web interface. The [Classifier Documentation](#) topic lists the other Classifier documents and summarises their contents.

Many topics include a reference at the head of the topic to the Classifier Administration location that relates to that topic. The references are of the form:

⇒ : Indicates a sub-node in the tree in the left-hand pane.

/: Indicates a choice from the central pane.

{item}: Indicates a site defined item to be selected.

[tab]: Indicates a Tab in the central pane to be selected.

->: Indicates select the action (sometimes from a context menu).

Throughout this document, the instructions direct you to select a particular Administration action from the [Actions](#) Pane .

A list of actions is presented at the top of the Actions Pane relevant to the item selected in the left-hand pane, for example; [Marking Library](#) - [Add a new marking format](#).

In addition, a **list of actions** is presented at the bottom of the **Actions Pane** relevant to the item selected in the middle pane. Summary **Marking** - **Properties**, **Copy** and **Delete** in the example below.

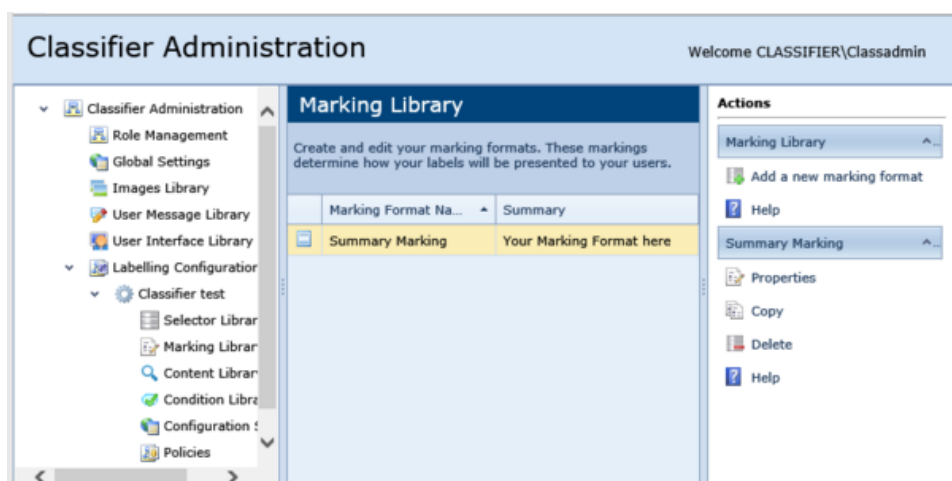


Figure: Summary Marking.

Classifier Administration lets administrators:

- Define the [Classifier Configuration](#) .
- [Publish Configuration](#) , including the **Policies** based on that **Configuration**, to **groups of users**.
- **Define SMTP domain clearances**.

If you are new to Classifier, it is recommended that you read the **Classifier Getting Started Guide**. Environment requirements are defined in the **Release Notes**. **Environment deployment** options are defined in the **Classifier Evaluation Guides**.

Note: The Classifier Administration's **target environment** assumes **screen resolutions of 1280 * 800 or better**. The application can run at smaller resolutions, but some operational issues may be encountered, particularly using minimal screen sizes. For example, running **Classifier Administration** in **Windows Safe Mode** can result in a **screen resolution of 640 x 480**. The interface will be mostly usable, but exceptions such as Buttons at the bottom of some dialogs (**Rules Wizard**, [Clearance Wizards](#)) are hidden behind the taskbar (**Windows 7**). Auto hiding the taskbar may help in this circumstance.

The document provides various general information:

- [Classifier Documentation](#)
- [Common Label Handling Features](#)
- [Common Label Interface Actions](#)

It also describes the Classifier Administration interface:

- [Classifier Administration](#)
- [Settings applicable across the organisation](#)
 - [Global Settings](#)
 - [Image Library](#)
 - [User Message Library](#)
 - [User Interface Library](#)
- [Labelling Configurations](#)
 - [Selector Library](#)
 - [Marking Library](#)
 - [Content Library](#)
 - [Configuration Settings](#)
- [PoliciesConfiguration Settings](#)
- [Clearance Settings](#)
- [Email, OWA, Mail Add-in, Notes and Mobile Differences](#)
- [Configuration deployment](#)
- [Software deployment](#)

The various topics provide details of which Classifier applications support which features. **Note:** Actual **default values** depend on the **Configuration Template** used to **establish your configuration**. Where this document defines default settings, it assumes the **'Empty'** Configuration Template has been used.

Classifier Documentation

The following documents can (mostly) be found under the [Classifier Administration](#) folder on the Classifier Product Suite Base bundle.

Note: user specific documentation is not supplied with any of the Classifier client side products. Instead Email, Office, OWA and Notes Classifier support the ability to invoke [URL links](#) to an organisation defined website, Intranet or similar to provide guidance relating to their own labelling terminology. This is implemented through [Classifier Configuration](#).

| Overview Documents | |
|---|--|
| Suite Overview | The starting point for those new to the Classifier product family. It introduces terminology used by the Classifier family of products; provides examples of how Classifier Labelling appears to the user; provides a summary of the part that may be played by Active Directory when deploying Classifier applications; and summarises some of the key features supported by the various Classifier products. |
| Quick Start Documents | |
| Getting Started Guide | Shows you how to quickly install Classifier Administration and Email and Office Classifier products; establish a test configuration on a Windows desktop and begin to explore the user effects of that configuration. |
| Administration PowerShell Getting Started Guide | Shows you how to quickly install Classifier Administration's PowerShell feature, establish a test configuration using PowerShell commands and begin to explore the user effects of that configuration |
| Administration Transition Guide | If you are familiar with Classifier Administration Console, this guide highlights key differences with Classifier Administration. It shows you how to quickly transition to using Classifier Administration to maintain your Classifier configuration. |
| Deployment Documents | |
| Registry Keys Deployment and Troubleshooting Guide | Describes the registry keys that are required for deploying Classifier software and associated labelling configurations. |
| Planning Considerations | Describes the various steps and considerations from initial familiarisation through to live deployment of the Classifier products. |
| Evaluation Documents | |
| Evaluation Guide | Describes how to create and configure a working system that you can then use for evaluation or testing. |
| Reference Documents | |
| Administration Guide (This document) | The PDF version of the Classifier Administration HTML pages, providing full details of the various features and options supported by the Classifier applications. It describes Email Classifier, Office Classifier, OWA Classifier, Mail Add-in, Notes Classifier and Mobile Classifier features. |
| Administration Server Installation | Describes installation of the Classifier Administration product. |

| Overview Documents | |
|---|--|
| Guide | |
| File Classifier Guide | Comprehensive guide to the File Classifier product which supports Labelling of files through Windows Explorer. |
| Frequently Asked Questions | Provides answers to commonly asked questions about the Classifier suite of products. |
| Mac Classifier Supplement Guide (A supplement to the main Administration Guide) | This document summarises the Classifier features of Mac Classifier. |
| Management Agent Guide | Describes the features provided by the optional Classifier Management Agent. |
| Mobile Classifier Service Installation Guide | Describes installation of the Mobile Classifier Service product. The product is a proxy server that allows the Mobile Classifier App running on mobile and tablet devices to access Microsoft Exchange and/or Office 365 mailboxes and provide Classifier functionality on the mailbox contents. |
| Notes Classifier Installation Guide | Describes installation of the Notes Classifier product. The product supports labelling of messages and the application of Classifier rules from the Classifier configuration. The features supported are summarised in Notes Classifier vs Email Classifier . |
| Power Classifier for Files Guide | Describes Power Classifier which supports Labelling of files through an application and/or using PowerShell commands. |
| Power Classifier for SharePoint Guide | Describes Power Classifier for SharePoint product which supports Labelling of items within a SharePoint library through an application and/or using PowerShell commands. |
| SharePoint Classifier Guide | Describes SharePoint Classifier which extends Microsoft SharePoint to support Classifier Labels in document library views. |
| Data Classification Service Guide | The Data Classification Service provides a capability to discover and bulk process files based on their content, or other metadata. |
| Reporting Guides (Delivered with the Reporting Product) | |
| Reporting Console Guide | Describes the Reporting Console Features supplied (Data dashboards). |
| Reporting System Guide | Describes how the product is deployed. |

Common Label Handling Features

This section describes label handling features (e.g. support for label propagation between Classifier products) that are common to the various applications (Email Classifier, Office Classifier, OWA, Notes and Mobile Classifier), and usually available if a Classifier product (e.g. Microsoft Excel, PowerPoint, Project, Visio, Word, Outlook, OWA, Mail Add-in, Mobile or Lotus Notes) is installed and enabled. Any application specific variance or licence dependence is highlighted in each topic.

These features are:

- [Label Propagation](#)
- [Printable Labels](#)
- [Recognition of Received Label values](#)
- [Mandatory Selectors](#)
- [Default Label Values](#)
- [Insert Marking as Field Code \(Word only\)](#)
- [Document Properties \(Office Classifier\)](#)
- [Message Properties \(Email, OWA, Mail Add-in, Notes and Mobile\)](#)
- [Use of Templates \(Office Classifier and Outlook\)](#)

Label Propagation

Classifier product architecture defines how products will operate to ensure that label information applied under one Classifier application can be recognised and processed by another Classifier application, or indeed a suitable third party application.

Office Classifier stores label information in the [properties of a document](#) allowing other Classifier applications to process the object according to the rules defined by the site.

Email Classifier, OWA, Notes and Mobile Classifier store label information in custom [properties of a message](#) allowing other Classifier applications to process the object according to the rules defined by the site.

Label Propagation includes the following configurable features:

- Use label values in templates as the initial label values for any derived item (see [Use of Templates](#)).
- Recognise and use label values from a received message as the initial label value for any reply or forward of that received message.
- The ability in Email, OWA and Notes Classifier to ensure that the label associated with the email message 'dominate's all labels associated with any Classifier labelled attachments (documents or messages; or for emails only, [Portion Mark](#)). This usage is described further in the section [Check for the high-water mark](#) .

Note: Further details of how one Classifier application handles label values assigned by another Classifier application can be found in the section [Appendix - Label Propagation Mechanisms](#).

Note: Saving a document as another type (e.g. Word --> TXT or EXCEL --> CSV prompts that information will be lost. The Classifier label information is one of the casualties of such operations.

Printable Labels

Office Classifier allows label values to be stored as markings in a variety of document locations that will appear when printed including:

- Header
- Footer
- Watermark (Word only)
- **Field codes** (Word only)
- [Portion Mark](#) (Word, PowerPoint and Excel)

Email, OWA, Mail Add-in, Notes and Mobile Classifier allow markings to be assigned to content and/or properties that are normally included in printed material:

- FLOT
- LLOT
- Start and/or end of Subject
- [Portion Mark](#) (Outlook only)

Note: Printing uses standard Outlook / OWA / Notes mechanisms. Therefore if the only label value on an email message is an X-Header then any hard copy of the email message will be effectively unlabelled.

Recognition Of Received Label Values

If, when an existing document is opened, Office Classifier cannot find the 'Classifier label' in the expected property, it checks the document for any recognisable label values in the defined [Label Locations](#) (e.g. Document properties).

If, when an email or web email message is received, **Email/OWA/**

Mail Add-in / Notes Classifier cannot find the **Classifier label** in the expected custom property, it will then check the message for any recognisable label values in the defined label locations (e.g. X-Header, FLOT and Subject).

If more than one label location is found containing a recognisable label value, then the configurable relative precedence defined through [Label Locations](#) is used to determine the authoritative value to use. The most significant value is then used as the document or message label value.

Note: Further details of how one Classifier application handles label values assigned by another Classifier application can be found in [Appendix - Label Propagation Mechanisms](#) . This appendix also covers files labelled by **File** or **Power Classifier** products.

Mandatory Selectors

Each **Selector** may be designated as **Mandatory** through application specific [Check these mandatory selectors](#) rules as described in [Check rules](#) .

Mandatory selectors are indicated on the label selection interface by an asterisk (*).

Display of the * can be inhibited using the [Indicate mandatory selector check failures](#) setting.

Default Label Values

Whenever a new document or email is created, Classifier must determine the initial value of the label.

This initial value will be blank for each label selector unless the Classifier policy in use specifies a **default value** for that selector, in this case the **default value** will appear as the initial value.

Default values are defined as selector options in the policy, either using [Selector Properties / Options](#) , or for assisted labelling policies using [Edit selector options](#) .

Insert Marking Label As Field Code (Word Only)

Note: If a Word document is opened via an Office Web App, all field codes will be presented as [Field] rather than the actual value as would be presented when viewed using Microsoft Word.

A label value can be inserted as a **field code** in a **Word** document. It will use the **Summary Marking format**. The feature is enabled/disabled using the [Show 'Insert label' context menu](#) setting.

This feature is designed for Administrators to create template documents with rich headers and footers containing document label information.

To insert a field code:

1. Select a **Label Value** for the document using the label drop down selectors.
2. Navigate to where the field code should be inserted.
3. On the context menu (right mouse button), click **Insert Label** . The label value is placed at the location of the cursor as a field code value.

Document Properties (Office Classifier)

Note: This feature is only applicable to **Office Classifier**.

In Excel, PowerPoint, Project or Word, when a label has been selected, a number of private properties relating to the Classifier label are stored in document properties.

Note: Visio does not support Custom Properties, and the Classifier [Label](#) value is held using a different mechanism.

Note: Saving a document as another type (e.g. Word --> TXT or EXCEL --> CSV prompts to indicate that information will be lost. The Classifier label information is one of the casualties of such operations.

Note: Saving as PDF: You can populate various standard document properties (**Title, Author, Subject** and **Keywords**) that will be propagated if you save an Office document as PDF. However, Office applications do **NOT** propagate any custom properties to the PDF. In particular the **bjDocumentSecurityLabel** is **NOT** propagated. Email, OWA and Notes Classifier will check defined [label locations](#) for recognisable labels in standard PDF file properties for the [Check for the high-water mark](#) and [Add an attachment list](#) rules.

The properties can be viewed using standard Office application actions. These vary across the applications, and Office versions:

For Office Excel, PowerPoint and Word 2010:

1. Click the **Office** button then choose **Prepare** and **Properties**. A task pane will display.
2. On the task pane, click **Document Properties** then **Advanced Properties**. A dialog will display with a number of tabs.
3. Select the **Custom** tab.

For Project 2010 or 2013:

1. Select **File / Info** and then choose **Project Information / Advanced Properties**.
2. Select the **Custom** tab.

For other Office 2013 applications along with Office 2016, 2019 and 365:

1. Select **File / Info** and then choose **Properties**.
2. Select the **Custom** Tab.

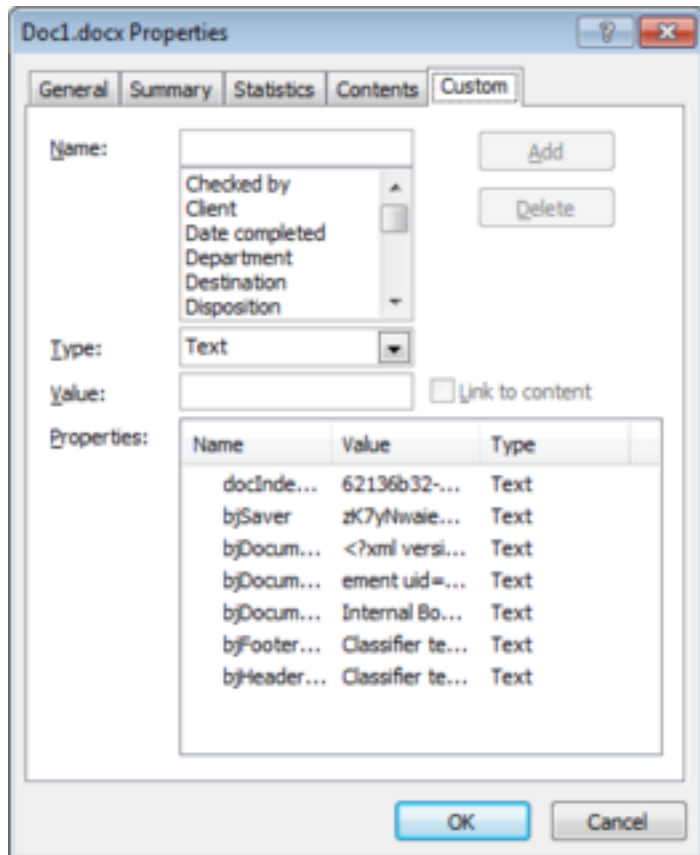


Figure: Document Properties.

The private document properties maintained by Classifier are listed below. These properties should not be modified by users or administrators:

| Property Name | Description |
|-------------------------|--|
| bjDocumentSecurityLabel | The combined markings. Format is controlled by the Custom format for Label Summary custom document property |
| bjDocumentLabelXML | XML format of the document Label. |
| bjDocumentLabelXML-0 | Internal XML identifier |
| docIndexRef | Unique document identifier. |
| bjFooterBothDocProperty | Only if a Footer rule has been applied |
| bjHeaderBothDocProperty | Only if a Header rule has been applied |

Message Properties (Email, OWA, Mail Add-in, Notes and Mobile)

Note: This topic is only applicable to Email, OWA, Mail Add-in, Notes and Mobile Classifier.

When a message is saved or sent, any label value selected is stored in a custom property. Any markings defined by applicable rules are stored in the relevant locations. The values stored may be readily visible if they are in a visible location (e.g. Subject), but others are not readily visible (e.g. x-headers).

The private properties maintained by the various Classifier mail applications should not be modified by users or administrators, but are documented here for information purposes:

| Property Name | Description |
|-------------------------|---|
| (x-)bjprotectivemarking | The Classifier encoded (SISL) label. |
| docIndexRef | Unique document identifier (used for audit trail purposes). |

Note: In a Lotus Notes environment: to cause the x-bjprotectivemarking to be transmitted across an SMTP connection, **bjprotectivemarking** must be included in the Domino server list of x-headers to be transmitted across that connection (the "x-" is automatically applied by Domino).

Use Of Templates

Note: This feature is not supported by **OWA Classifier**, **Mail Add-in**, **Mobile** or **Notes Classifier**.

The Office applications allow you to create template files that can be used as the basis for new documents.

You can set Classifier label values on these templates. When you subsequently create a new file using a labelled template, Classifier uses the template label as the initial label value, rather than using any default label setting.

If the template has no Classifier label value set then the configured default label value (if any) will be used.

Common Label Interface Actions

These mechanisms and actions relate to the interface presented to the user to select label values. They are described under:

- [Label Selection Interfaces](#) (Selectors and Values presented)
 - [Ribbon examples](#)
 - [Label Selection dialog](#)
 - [Favourites](#)
 - [Portion Mark](#)
 - [Recently Used Labels and Portion Marks](#)
 - [Single Click Operation](#)
 - [Assisted Labelling Operation](#)
 - [Tabs](#) (defined via a policy)
 - [Mobile Classifier user interface](#)
 - [Classifier Decision Tree](#)
- [Label Options](#) (Clear, [Default](#) and Link to Site Defined Help)
- [Folder View Labelling Operation](#)

Text presented to the user can be configured in one of four ways:

- [User Message Library](#) : Messages displayed to users if Rules trigger. The product provides default text.
- [Marking Library](#) : Markings that are applied to items (Messages, Documents etc.).
- [User Interface Library](#) : Text presented through standard dialogs. The product provides default text.
- Configuration of the names of Selectors, [Selector](#) Values and Alternative names using [Selector Library](#) and [Policy Label UI](#) features.

Label Selection Interfaces

Note: There is a subtle distinction between an unlabelled document (where there is no Classifier Label property), and a document that is labelled but has no selected values (where there is an empty Classifier Label property). In either case, the **Summary Marking** presented to the user will be the text configured via [Text to display if no marking is available](#).

Classifier applications allow the user to select labels from Selectors and Values presented through the **Ribbon bar**. The Selectors, Selector Values and associated options are defined in the Classifier policy configured for the current user. Further details can be found under [PolicySelector properties / Options](#).

Circumstances arise where the user needs to select a label value and the Ribbon is not available (e.g. Mandatory Label value missing when sending a message). In such situations, Classifier applications will present the selector choices in a **Label Selection dialog**.

If [Masking of Selectors against Clearance](#) is **Enabled**, then the list of values presented for each Selector will be restricted by the user's clearance.

These basic label selection mechanisms may be extended by use of [Portion Mark](#), [Favourites](#), [Recently Used Labels and Portion Marks](#), [Single Click operation](#), [Assisted Labelling operation](#) and the definition of [Tabs](#) in a Policy.

[Display selector values as buttons](#) may be **Enabled** for single selection list selectors within the policy ([Single selection list options](#)). This will affect the presentation of the [Ribbon](#), the [Label Selection dialog](#), [Assisted Labelling operation](#) and [Tabs](#) as described under those topics.

- [Ribbon Examples](#)
- [Label Selection dialog](#)
- [Portion Mark](#)
- [Favourites](#)
- [Recently Used Labels and Portion Marks](#)
- [Single Click operation](#)
- [Assisted Labelling Operation](#)
- [Tabs](#)(defined via a Policy)
- [Mobile Classifier user interface](#)

Ribbon Examples

This topic contains examples of label selection via the [Ribbon](#).

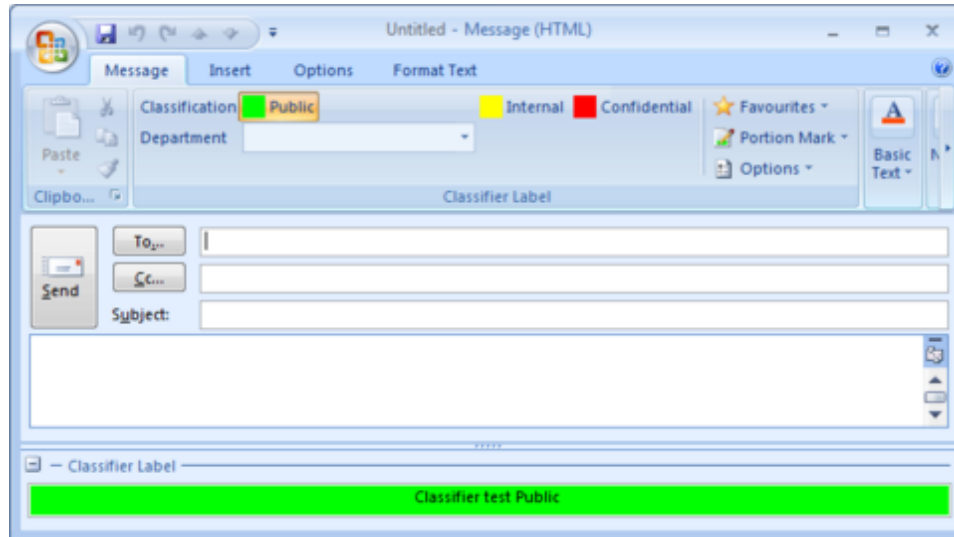
Note: The examples below show the standard operation. This will be modified if you make use of the [Favourites](#), or [Recently Used Labels and Portion Marks](#) or [Single Click operation](#) or [Assisted Labelling operation](#), or [Tabs](#) features.

Label selection is presented along with the [Label Options](#) menu in the Classifier label item in the ribbon, subject to the setting of [Remove Classifier Options from the ribbon](#).

The placement of the Classifier label item within the ribbon can be configured using the [Classifier ribbon group location](#) setting.

Note: In some circumstances (e.g. Office 2013) the ribbon will not appear when a read only document is opened until you choose Edit.

Note: For Outlook, you can use the [Show Classifier on ribbon when reading](#) to hide the Classifier Ribbon entry when reading a message.



Outlook 2010: Label Selection.

The dialog above shows the first (Single selection list) selector with **Show value as** set to **Colour and text** and [Display selector values as buttons](#) option **Enabled** ([Single selection list options](#)), the second (Single selection list) selector has the option **Disabled** and that selector appears as a drop down selection list. Note that items are displayed in columns and that the width of the 'column' is governed by the widest element.

The selector captions (**Classification** and **Department**) appear in the ribbon. You can use the policy property [Show selector captions on the ribbon](#) to change this effect.

The **Favourites** button in the examples above will only appear if [Display of Favourites button](#) is **Enabled** (see [Favourites](#) for further details).

The **Portion Mark** button shown in the examples above will only appear if the option is **Enabled** for the current application (see [Portion Mark](#) for further details).

Note: Favourites are not supported under **OWA Classifier** or the **Mail Add-in**.

Note: Portion Mark is not supported under **OWA Classifier**, **Mail Add-in** or **Notes Classifier**.

Ribbon Handling

The Office ribbon places a limit on the number of items that can be placed inside a group on the ribbon. If a single/multi selector contains many values and is configured to be shown as buttons (or checkboxes in the case of multi-select selectors) then Classifier may not display the items on the ribbon, instead the selector will need to be set via the label dialog. The limits are:

- If the policy contains at least one selector to be displayed as a button on the ribbon and no selectors that are to be displayed as checkboxes on the ribbon, then Classifier can display up to 150 items in the ribbon for the selector(s).

- If the policy contains at least one selector that is to be displayed as checkboxes on the ribbon and no selectors that are to be displayed as buttons on the ribbon, then Classifier can display up to 150 items in the ribbon for the selector(s).
- If the policy contains at least one selector that is to be displayed as buttons on the ribbon and at least one selector that is to be displayed as checkboxes on the ribbon, then we allow up to 100 items to be displayed

Label Selection Dialog

In various situations the user will need to choose a label when the ribbon is unavailable. For example if a check mandatory selectors rule detects that a mandatory selector has no value chosen.

In such situations, Classifier applications present the **Classifier Label Selection** dialog which will show the selectors and values pertinent to the current user. This dialog is also used to choose values for selectors that cannot be displayed in the ribbon. For example, more than three selectors or multiple selection list selectors.

The dialog below shows the first (Single selection list) selector with [Display selector values as buttons](#) option **Enabled**. The second (Single selection list) selector has the option **Disabled** and that selector appears as a drop down selection list. Refer to [Single selection list options](#) for more information.

The screenshot shows a dialog box titled "Classifier Label" with the subtitle "Select label values". The dialog contains several selector controls:

- Classification:** Three buttons labeled "Public" (green), "Internal" (yellow), and "Confidential" (red).
- Department:** A dropdown menu showing "Board".
- Multiple select:** A list box with three items: "A" (checked), "B", and "C".
- Text entry:** An empty text input field.
- Date Picker:** A date field showing "09 June 2014".
- Date offset:** A dropdown menu.

At the bottom of the dialog, there is a yellow bar displaying "Board" and three buttons: "Clear", "Default", and "Close".

Figure: Select Label: All selectors.

Note: The example above displays the standard operation. This is modified if you make use of the [Favourites](#) , or [Recently Used Labels and Portion Marks](#) or [Single Click operation](#) or [Assisted Labelling operation](#) or [Tabs](#) features. The presentation is slightly different under OWA.

OWA

In an OWA environment, label selection and the standard label actions appear on an extended message compose form.

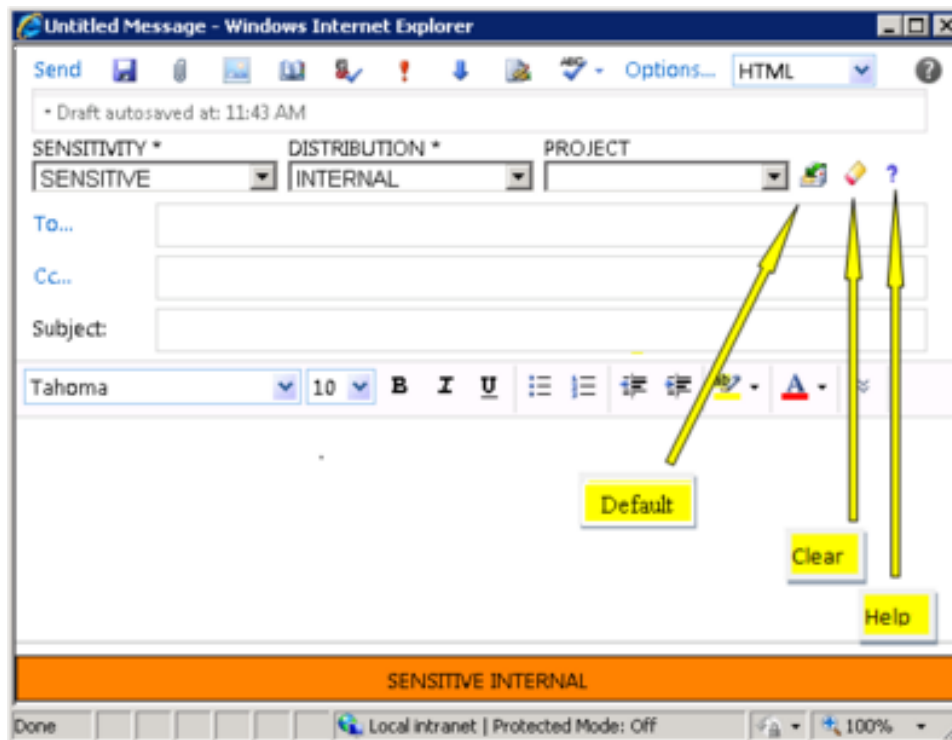


Figure: OWA Label interface actions.

Mail Add-in

In a Mail add-In environment, label selection and the standard label actions appear on an extended message compose form.

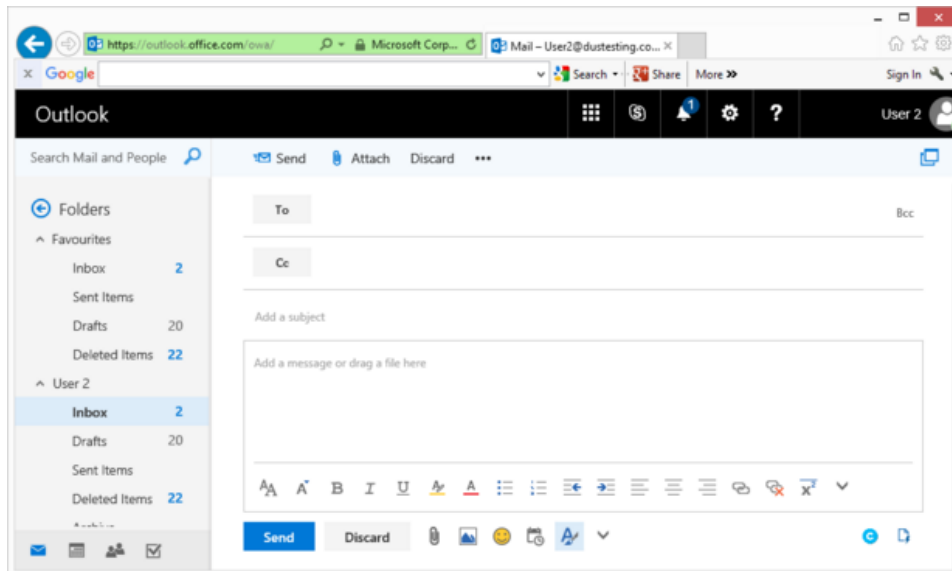



Figure: Mail Add-in New Message.

The Classifier label interface is invoked using the **Classifier button**  found in the bottom right hand corner of the **New Message** dialog. The example below does **NOT** have single click enabled.

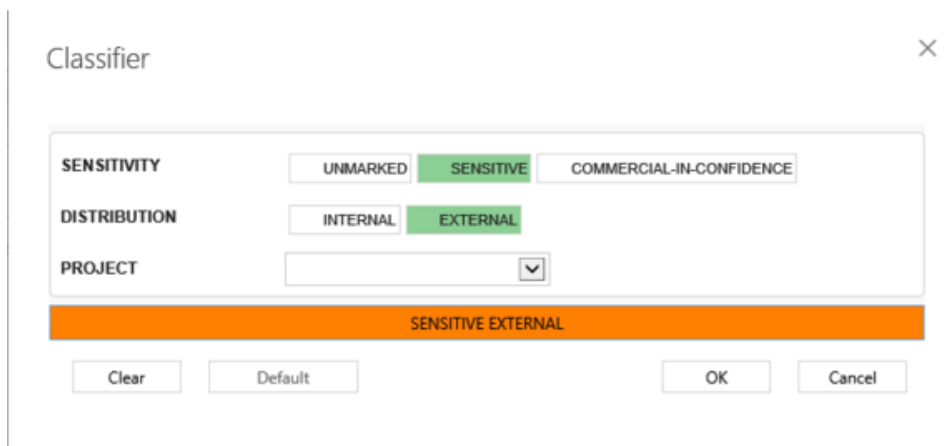


Figure: Mail Add-in Label selection dialog.

Note: In a **Notes** environment, the current label setting is displayed, but the label value is set via the configured Classifier label dialog if the **Classify button** is clicked.

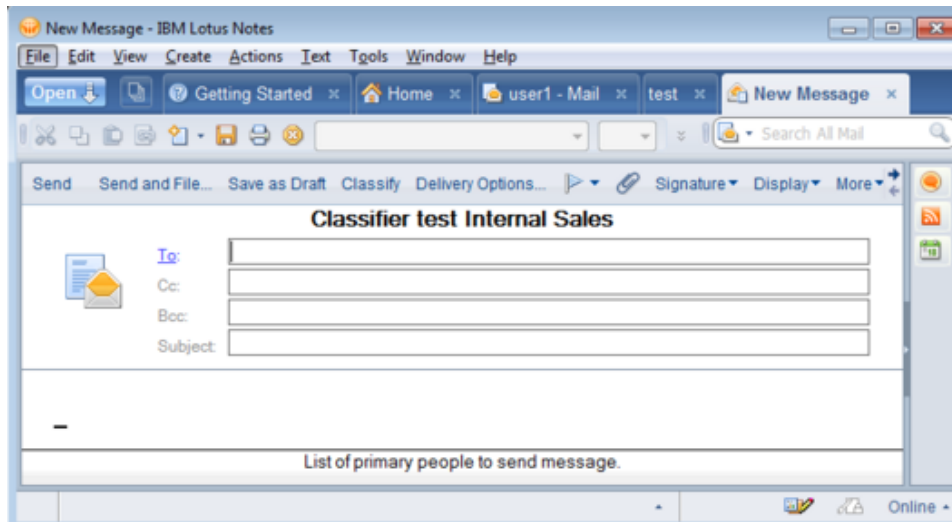


Figure: Notes Classifier New message.

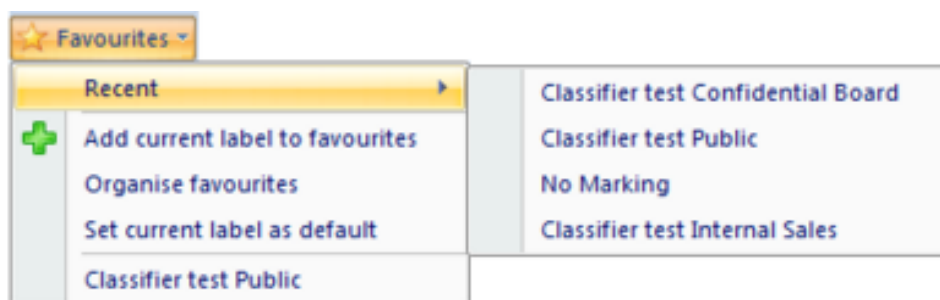
Favourites

Note: This feature is not supported by **OWA Classifier**, **Classifier Mail Add-in**, **Notes 8** and **Mobile Classifier**. **Note:** Availability of the Favourites button is controlled by the [Display of Favourites button](#) setting.

Users can use the **Favourite Labels** feature to remember their favourite label values (on that workstation), and to choose the label value directly rather than choosing each selector value in turn. The feature can be used alongside the [Recently used Labels and Portion Marks](#) features.

Access to the feature is via the **Favourites** drop down menu in the Classifier label ribbon bar with availability controlled by [Configuration Settings / General Settings / Display of Favourites button](#).

If the **Recently Used** feature is also enabled ([Maximum number of labels to show](#) > zero), then the **Favourites** menu of actions will appear as:



Favourites - Office 2010 and Recently used.

Note: The favourites and recently used values that appear in the menus are initially presented using the marking format associated with the General [Settings / Custom format for Summary Markings](#). Favourites can subsequently be renamed as described below.

The user can:

- **Add current label to favourites** : It will then appear as a sub item in the menu.
- **Organise Favourites** : Which shows icons allowing the user to manage the order in which the Favourites appear, change the name presented for a **Favourite**, or delete entries from the list:

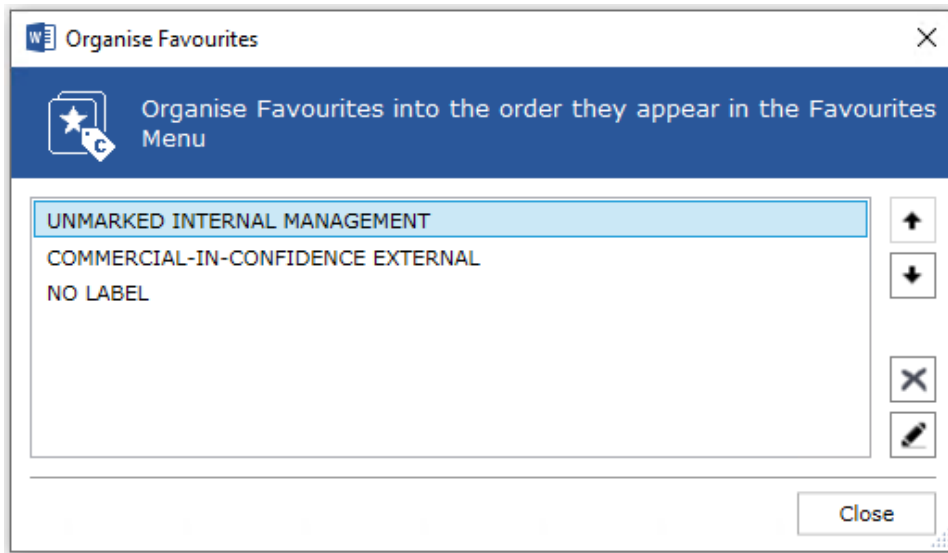


Figure: Organise Favourites.

- The **Rename** action is inline which makes it easier to replace the text presented in the favourites list.

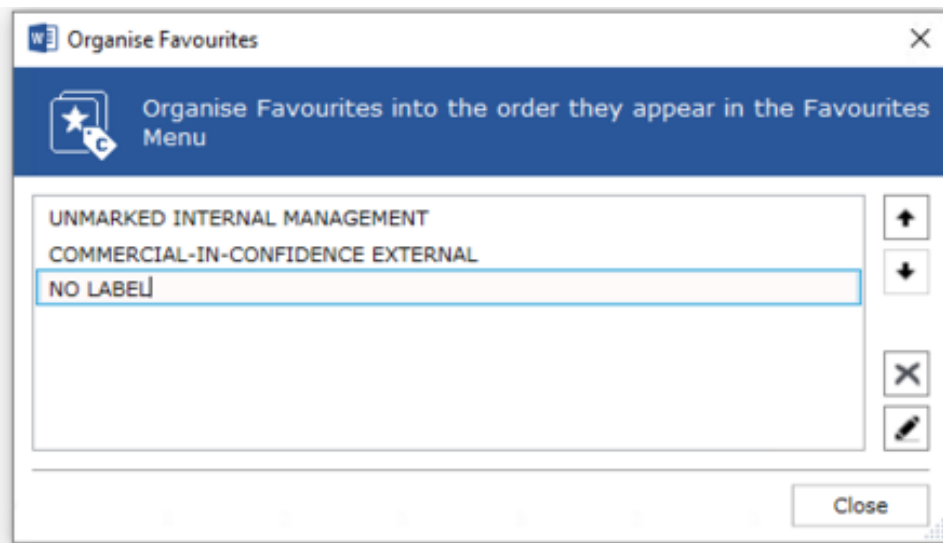


Figure: Rename Favourite.

- **Set current label as default:** Allows the user to set the current label as their own personal default rather than using any policy defined default. This option is only available if the **User Selectable [Default Classification](#)** is **Enabled** in [Properties \(Policy\)](#).
- **Select a Favourite label :** From the sub-list (e.g. Public Sales) - the label value then appears in the main label selection display.
- **Select a Recent label:** From the Recent sub-list (e.g. Public).

Portion Mark

Note: This feature is not available under OWA Classifier, Classifier Mail Add-in, Notes Classifier nor Mobile Classifier, and is not applicable to Visio and Project.

A Portion Mark is usually an abbreviated marking derived from a label value. For example, [P] for Public.

Availability of the feature is controlled by application specific options as described in [Portion Marking](#) .

If the feature is enabled, then Portion Mark appears in the Classifier label ribbon.

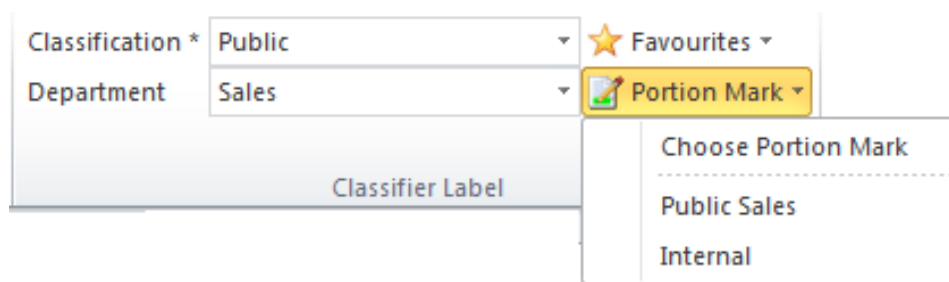


Figure: Portion Mark menu: Outlook 2010.

If the **Recently Used Labels** and **Portion Marks** feature is enabled, then the recently used portion mark (label values) will appear as a sub-list.

Note: The portion mark and recently used values that appear in the menus are presented using the marking format associated with the [General Settings / Custom format for Summary Markings](#).

The user can:

1. Select a **Recent Portion Mark** from the sub-list.
2. Choose **Portion Mark...** which will present the dialog below, allowing the user to select a specific label, or choose a favourite label, or a recent portion mark subject to their availability:

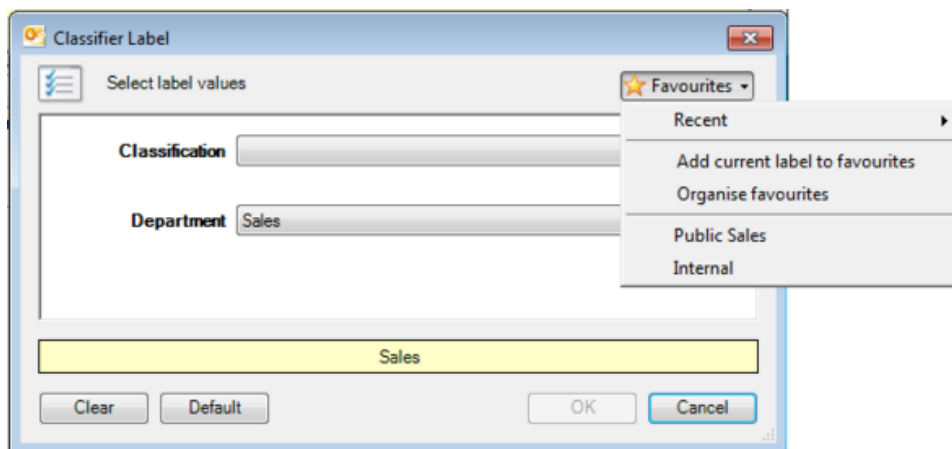


Figure: Portion Marking: [Favourites](#) and recently used.

Favourites will only appear if there are favourites stored.

Recently used values will only appear if the [Display of Favourites button](#) is **Enabled** . The number of recently used portion marks that are remembered is governed by the [Maximum number of labels to show](#) setting.

Recently Used Labels And Portion Marks

Note: This feature is not available under OWA Classifier nor Classifier Mail Add-in.

Note: The feature is unavailable unless [Display of Favourites button](#) is **Enabled**, as this is how recently used labels are accessed.

Note: Recently used labels are displayed using the [Custom format for Summary Markings](#).

These features are only enabled if [Maximum number of labels to show](#) is set greater than zero.

The **Recently Used Portion Marks** is only relevant if [Portion Marking](#) is **Enabled** in the application (see [Portion Marking](#)).

Label values are only added to the list of '**Recently used labels**' when a message is submitted or a document is saved. The selection of a label value does **NOT** update the list.

Recently used labels are available to the user under [Favourites](#) .

Recently used portion marks are available to the user under [Portion Mark](#) .

Single Click Operation

Note: This mode of operation is only available if the current policy has [Use Single Click with pre-defined labels](#) configured.

The administrator can use the [Use Single Click with pre-defined labels](#) feature to configure up to twelve separate buttons, each with its own **Label value** , **Caption** , **Tooltip** and **Colour** or **Image** that replace the standard drop downs in the Classifier Label Ribbon. **Single Click** can be used in conjunction with **Assisted Labelling** .

Note: The actual appearance shown below will be modified according to whether other features such as [Favourites](#) or [Recently Used Labels and Portion Marks](#) are in use.

Note: The matrix of single click buttons displayed is affected by a windows re-size operation, so short captions are advisable.

The user is presented with the buttons configured, and selects the associated label by clicking the appropriate button (Pub / Sales or Conf / Board in the Outlook example below, or Non-Business etc. in the OWA example).

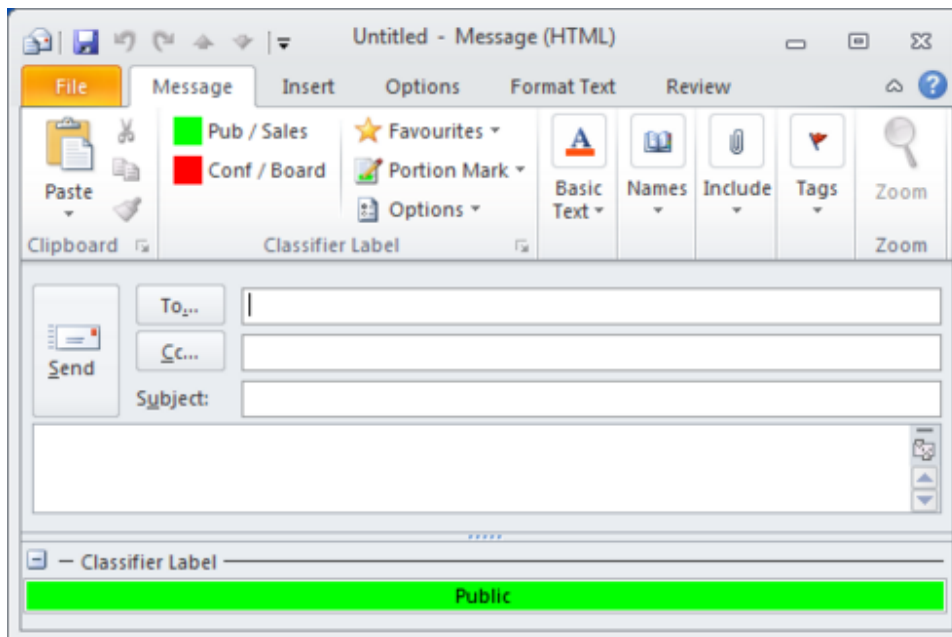


Figure: Outlook Single Click operation.

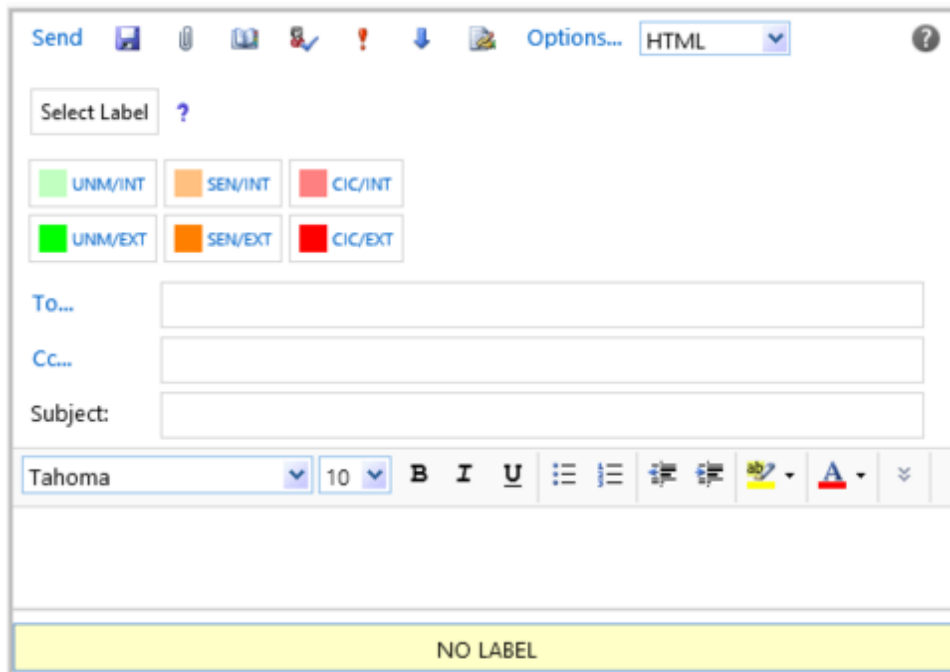



Figure: OWA Single Click UI.

The user still has the ability to select individual Selector values by clicking the Classifier label dialog box launcher  in Outlook, the **Select Label** button in OWA, to launch the general label selection dialog:

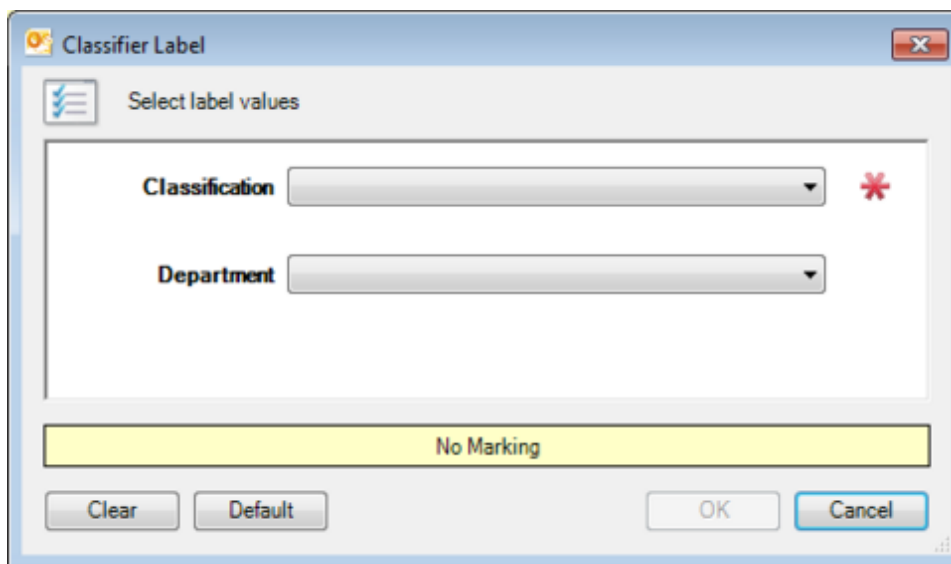



Figure: Label Selection dialog.

Note: In Outlook, the dialog box launcher  can be replaced by a button by enabling the [Display of Label Dialog launch button](#) setting.

If single click is in use; and the label selection dialog needs to be presented (e.g. mandatory selector missing when replying to an unlabelled message; and there is no default value defined; and the user clicks **Change** on the **No label Policy Check** dialog), then an intermediate dialog may be presented allowing a **Single Click** button to be clicked, or the full label selection dialog (above) to be invoked by clicking the '**Current Marking**' button (No Marking in the example below).

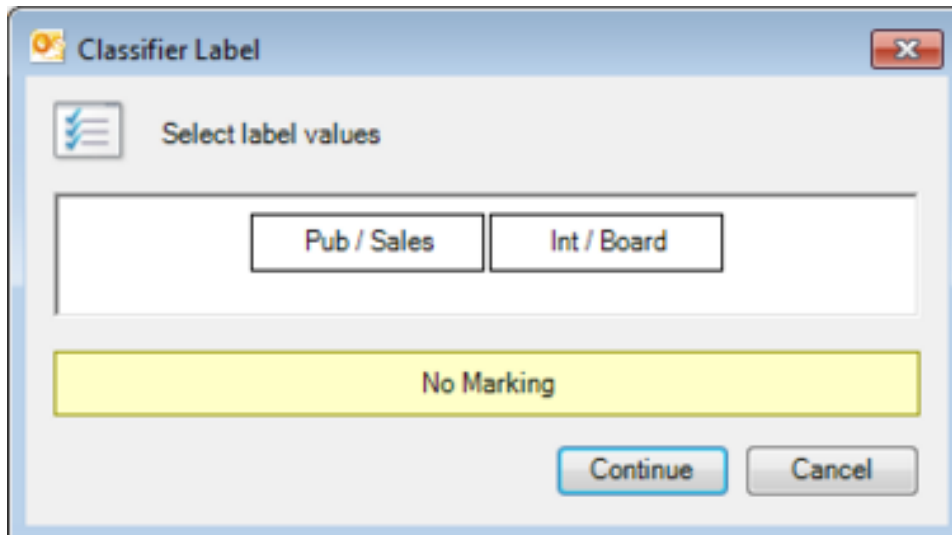


Figure: Label Selection dialog: Single Click.

The **Continue** button allows you to proceed without selecting a label value. The dialog above is changed slightly if [Display of Label Dialog launch button](#) is **Enabled**.

Assisted Labelling Operation

Note: These features are not supported by Mobile Classifier.

Assisted Labelling can be configured to guide user selection of label values by limiting the choices of selectors and / or selector values depending upon the value chosen for a preceding selector.

Note: The actual appearance shown below will be modified according to whether other features such as [Favourites](#) or [Recently Used Labels and Portion Marks](#) are in use.

The following shows a simple example of the user operation where selecting a value for the category selector in the ribbon adds a second selector (Annotation) with the values of Annotation being tailored according to the choice of Category.

Office Classifier

Initially the Classifier label shows only the category selector with no default value.

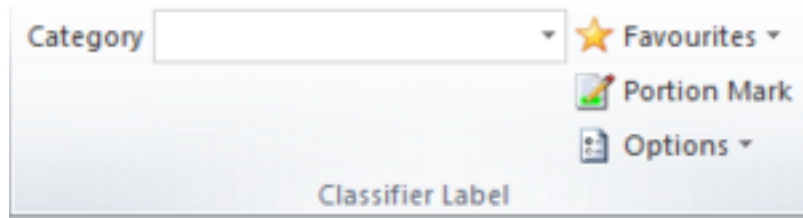


Figure: Initial state: no category selected.

The actual presentation may vary if favourites or portion mark are configured to be available.

If [Display selector values as buttons](#) is **Enabled** ([Single selection list options](#)), this dialog might appear as:

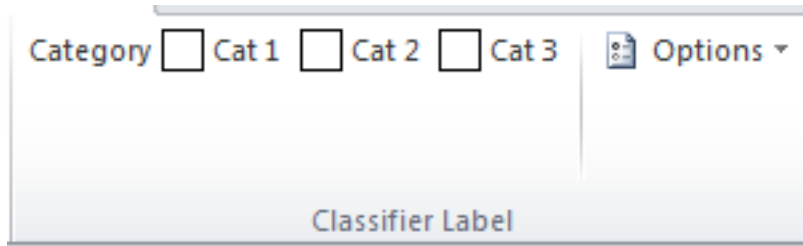


Figure: Initial state: Display as buttons.

Selecting Cat 3 will add the Annotation selector to the display and present the configured Annotation values.

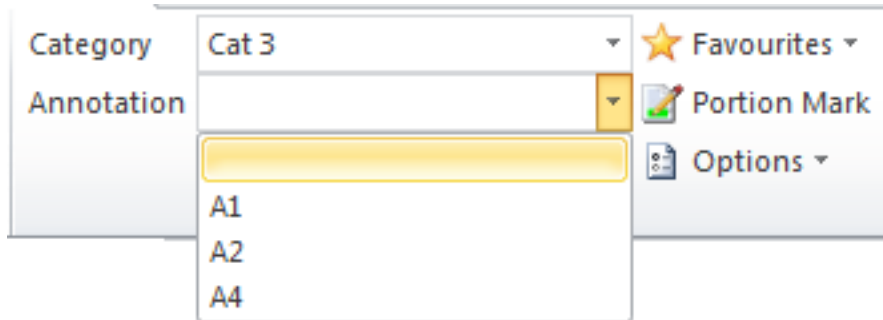


Figure: Cat 3 with Annotations.

If there are more than three selectors or selector types that cannot be shown in the ribbon, then the label selection button may appear as per the examples below depending upon space utilisation within the window:

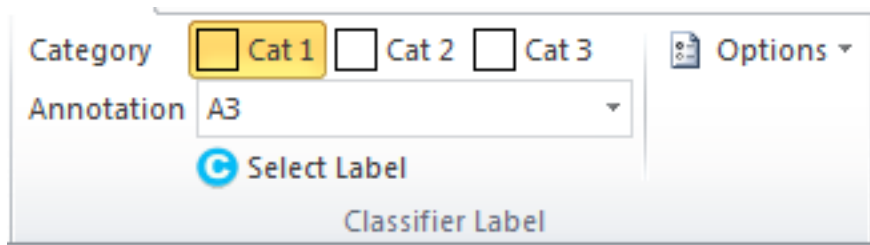


Figure: Select label (a).

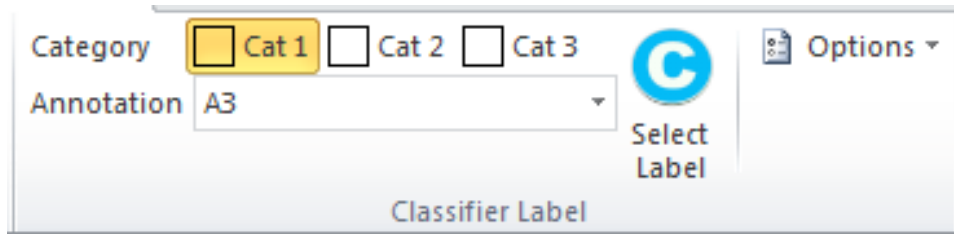


Figure: Select label (b).

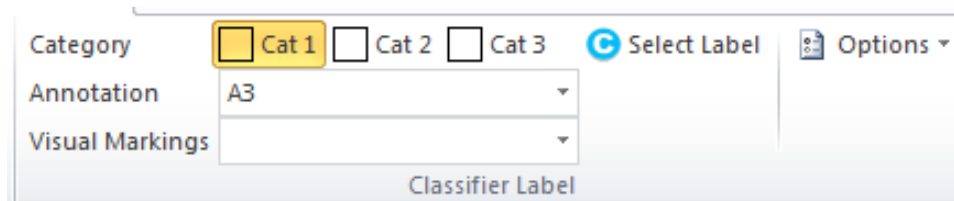


Figure: Select label (c).

More examples of the user experience can be found in the following, each of which describes the configuration and user experience for a particular scenario:

- [Example 1 - Categories with many Annotations](#)
- [Example 2 - An additional user choice if Category 2 is selected](#)
- [Example 3 - Separation of Personal and Corporate information](#)

Label Selection Dialog

The label selection dialog may sometimes be presented when assisted labelling is in use. The configured selectors and values appear / are hidden in a similar manner to the ribbon operation. In the following example the **Fourth selector** appears, but would be hidden if a different value were selected for the **Third selector** .

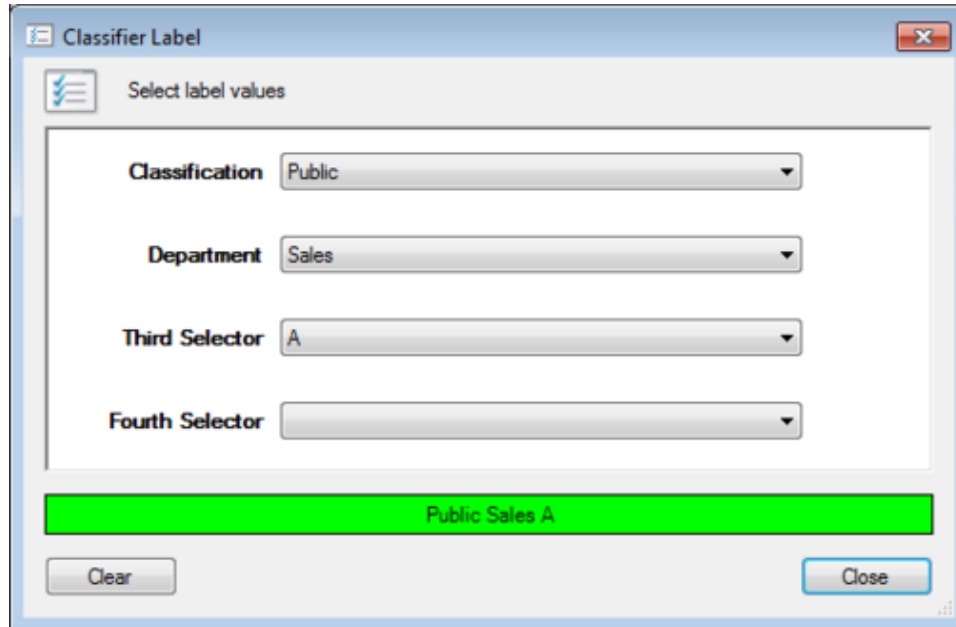


Figure: Label Selection dialog - Assisted Labelling.

The dialog will be populated with appropriate defaults.

OWA Classifier

Initially only the first selector is shown - in this example [Classification](#):

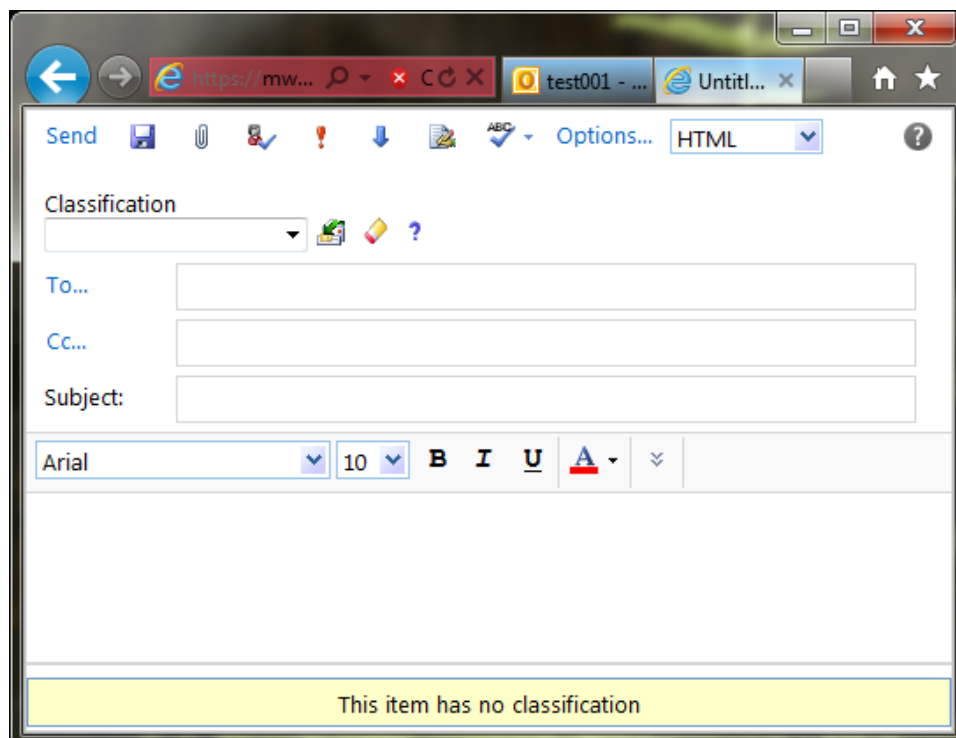


Figure: OWA Assisted Labelling initial state.

Selecting a value extend the label selection according to the configuration. In the example below, selecting General Business has made Annotation available for selection.

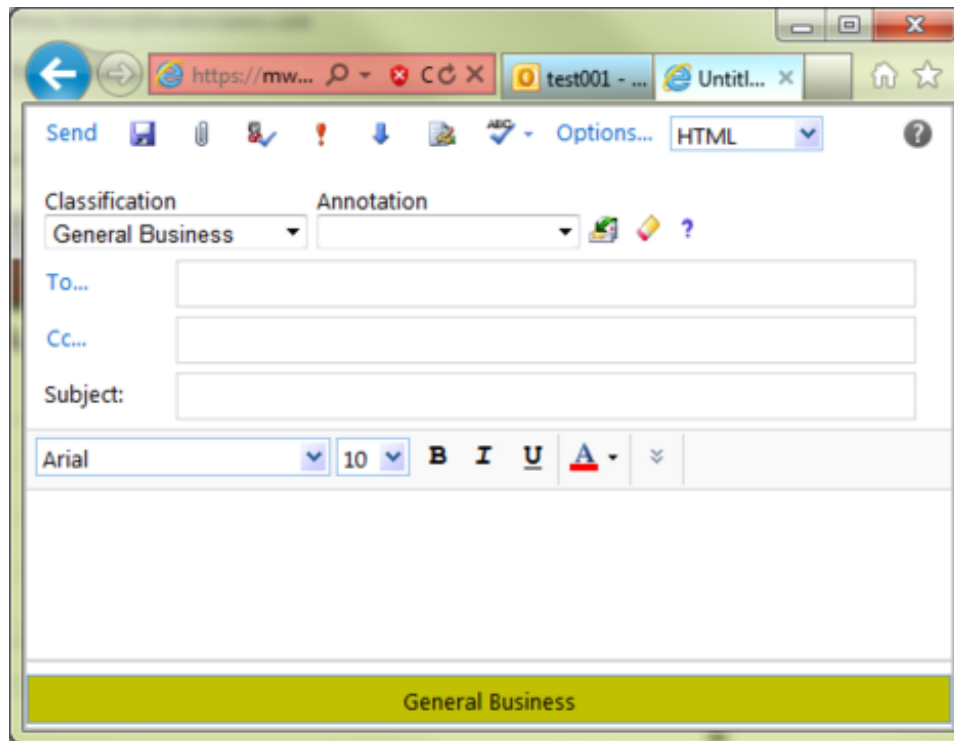


Figure: OWA Assisted Labelling General Business selected.

Notes Classifier

Notes Classifier operates only in response to the **Classify** button, (there is no ribbon equivalent), and for assisted labelling operations the [Label selection dialog](#) is always presented showing the relevant configured values for each selector.

Classifier Decision Tree

The Decision Tree is an alternative way for the user to generate a label for an email or a document.

It aims to reduce the need for the user to know details of what actual label to pick, and instead presents a series of questions for them to describe the work that they are doing. For example, it 's a personal email, it 's related to a proof of concept, research and development, a purchase request for a new toaster, etc. By answering the questions posed a user is guided to select the most appropriate label.

The **Decision Tree** is displayed in its own dialog on the client, invoked by the **user selecting a ribbon button** or from within the **Classifier Label Selection** dialog. It is independent of the other means of selecting a label. All methods; **Single-Click**, **Label Dialog**, **Decision Tree** can be configured to be available in a **policy** concurrently.

- A Decision Tree is created by referencing **Question** and **Answer** items defined in a [Question Library](#).
- A different Decision Tree may be defined for each configured [Policy](#).
- For more detailed information, see the [Question Library](#) .
- To **enable** the Decision Tree, see [Enable the Decision Tree Functionality](#) .
- To **configure** the Decision Tree, see [Decision Tree Options](#) .

Classifier Decision Tree Terminology

- **Question:** A question presented on the client dialog that offers a choice or requires some input from the user, e.g. Is this a personal or business email?
- **Answer:** The choices available in response to the question, e.g. It ' s a personal email.
- **Label:** A specific label, label(or part of a label) to be applied as a result of a user choosing a specific action, e.g. It's a personal email – the label is then set to **“UNMARKED EXTERNAL”**.
- **DT:** Decision Tree.
- **QL:** Question Library.

Decision Making Process Example

This is a simple example configuration. The user is asked to select the department that will own the document and what type of data the document contains. If a user chooses a particular answer then a label can be set.

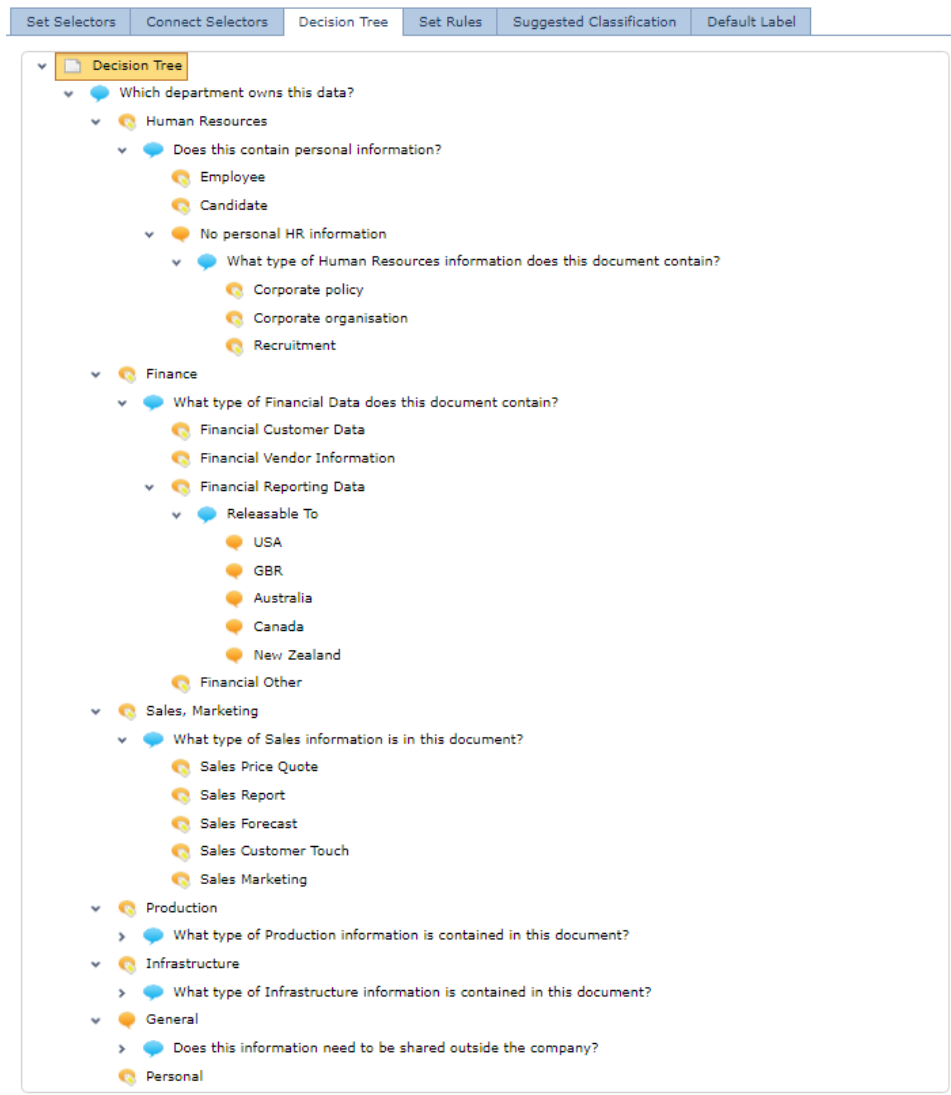


Figure: An example configuration of a Decision Tree.

Classification Guide

Answer the following questions to determine a data classification label.

Which department owns this data?

- Human Resources
- Finance
- Sales
- Production
- Infrastructure
- General
- Personal

What type of Financial Data does this document contain?

Reporting Data

Which countries are represented in this information?

- USA
- GRB
- AUS
- CAN
- NZL

Financial Reporting and Statements (CONFIDENTIAL - INTERNAL | FINANCE)

Clear OK Cancel

Figure: The data classification label questions follow the example configuration of the Decision Tree in the previous picture.

Configuration of the Decision Tree

An Administrator can use the decision tree as an alternate way to generate a label for an email or document. It presents a series of questions such that a user can describe the work they are doing allowing them to be guided to select the most appropriate label.

[Question Library](#)

The Question Library (QL) contains questions and pre-defined answers for each question. It enables the reuse of questions between policies and groups potential answers together. This is a new section within the admin tool and is located together with the other libraries outside of and available to the policies. It will contain a collection of independent questions, each having a number of associated answers.

[Decision Tree Editor](#)

A different Decision Tree may be configured for each policy. The Decision Tree Editor operates in a similar way to the Assisted Labelling Editor and when enabled is presented on a new Decision Tree tab in the admin tool.

[User Interface Library](#)

There is a user interface area for the Decision Tree dialog allowing customisation of the dialog that appears on the client. See the [User Interface Library](#).

Refreshing the User Interface

- Renaming of selectors and selector values will be applied to any in use in the Decision Tree. Therefore renaming then switching back to the Decision Tree will show the new names in the configured labels.
- Changes of selectors in the policy (unless prevented by the 'in use' check) will be reflected in the label dialog in the Decision Tree editor. That is, the currently available selectors and values, together with colours and captions, will be shown when the Add Label dialog (or its corresponding Properties instance) is next opened.
- Question Library changes are monitored and updated where they are used in the Decision Tree Editors (all policies).

For more detailed information, see the [Question Library](#).

Decision Tree in the Client

The **Decision Tree dialog** in the client is launched by a **ribbon** button. This button is available when composing emails and when editing documents. The **Decision Tree dialog** may also be invoked from the **Label Selection dialog**.

Note: The Decision Tree in the client feature will not be available for Sent Item email messages.

The following images show examples of how the **Decision Tree Dialog** may appear in the **Client**.

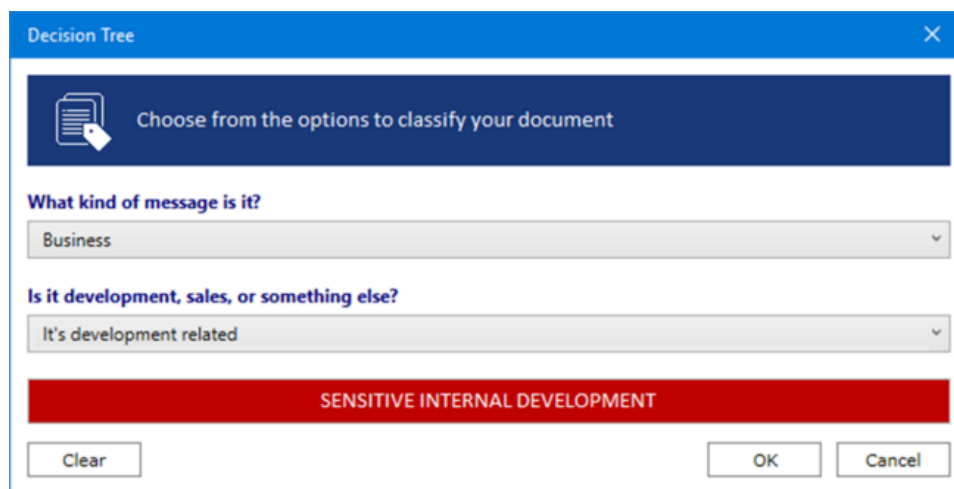
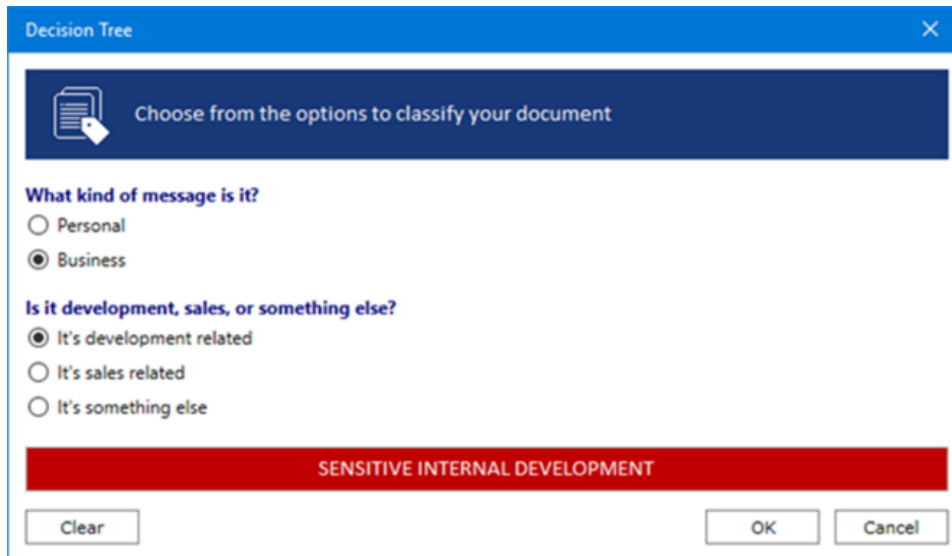


Figure: Single-select example using combo style options.



The screenshot shows a 'Decision Tree' dialog box with a blue header and a close button. Below the header is a dark blue bar with a document icon and the text 'Choose from the options to classify your document'. The main area contains two questions: 'What kind of message is it?' with radio buttons for 'Personal' and 'Business' (selected), and 'Is it development, sales, or something else?' with radio buttons for 'It's development related' (selected), 'It's sales related', and 'It's something else'. At the bottom, a red bar displays the classification 'SENSITIVE INTERNAL DEVELOPMENT'. There are 'Clear', 'OK', and 'Cancel' buttons at the bottom.

Figure: Single-select example using radio buttons.



The screenshot shows a 'Decision Tree' dialog box with a blue header and a close button. Below the header is a dark blue bar with a document icon and the text 'Choose from the options to classify your document'. The main area contains two questions: 'What kind of message is it?' with radio buttons for 'Personal' and 'Business' (selected), and 'Is it development or sales?' with checkboxes for 'It's development related' and 'It's sales related' (both checked). At the bottom, a red bar displays the classification 'SENSITIVE INTERNAL DEVELOPMENT'. There are 'Clear', 'OK', and 'Cancel' buttons at the bottom.

Figure: Multi-select example using check boxes.

Decision Tree Option in Outlook

Note: Check that the Decision Tree has been enabled in the Classifier Administration User Interface. This is found under **Labelling Configuration>Policies(Policy)>Properties>Use Decision Tree**.

Note: More questions can be added under **Labelling Configuration>Policies (Policy)>Decision Tree** tab.

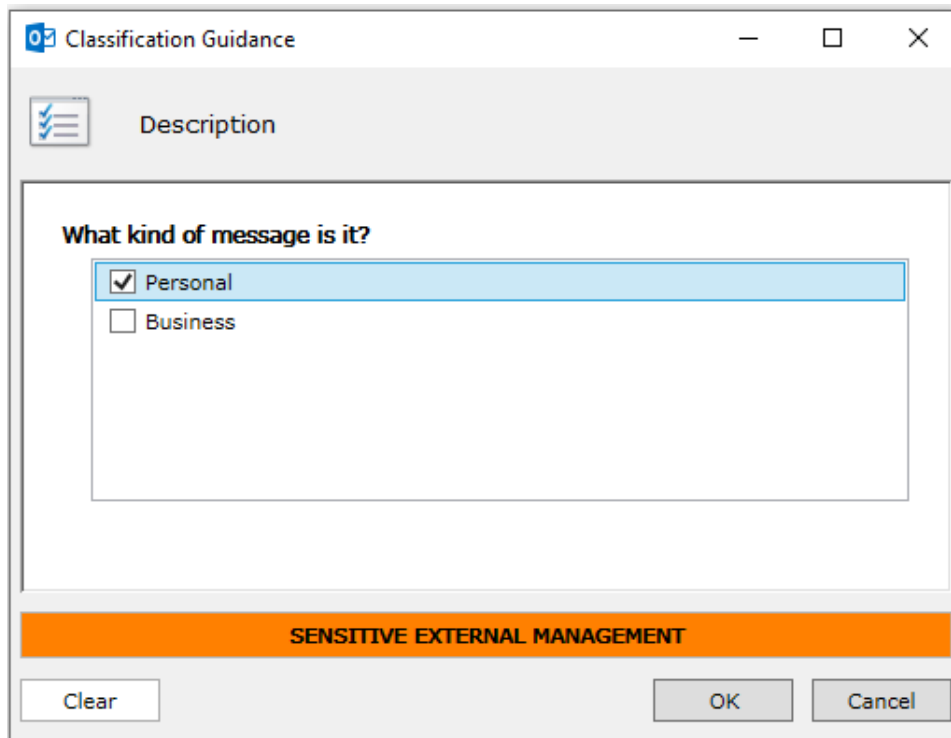



Figure: Selecting a message option label.

Decision Tree Feature in Outlook

To see the Decision Tree Feature in Outlook:

1. In the Message menu, select the **Use Guidance**  icon. A Classification Guidance window will appear.
2. The description will ask, What kind of message is it? Select an option in the list. Once the option is selected a label will appear.
3. Click on the **OK** button. The resulting label will be applied to the email. Other options are:
 - **Clear:** The Clear button will reset the label back to its initial state, i.e. empty.
 - **Cancel:** If Cancel is chosen, no changes will be made to the label.

Mobile Classifier User Interface

Mobile Classifier is an email App that can be installed on a supported mobile device. The App will appear as an entry in the App list either as an icon, or as an icon with associated text:



Figure: Mobile App.

When viewing messages in a folder the classification value (if any) appears as follows:

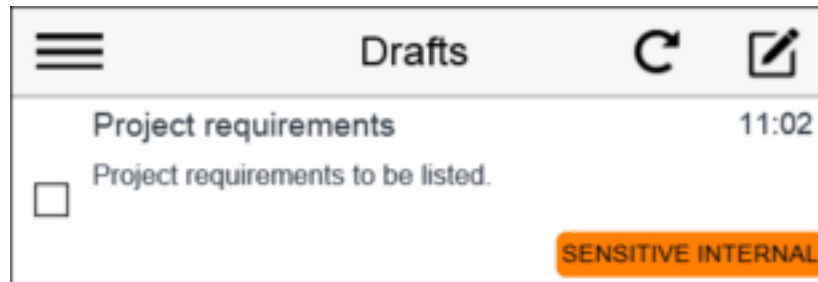


Figure: Mobile folder view.

When composing a message the classification value is shown as a **summary marking**:

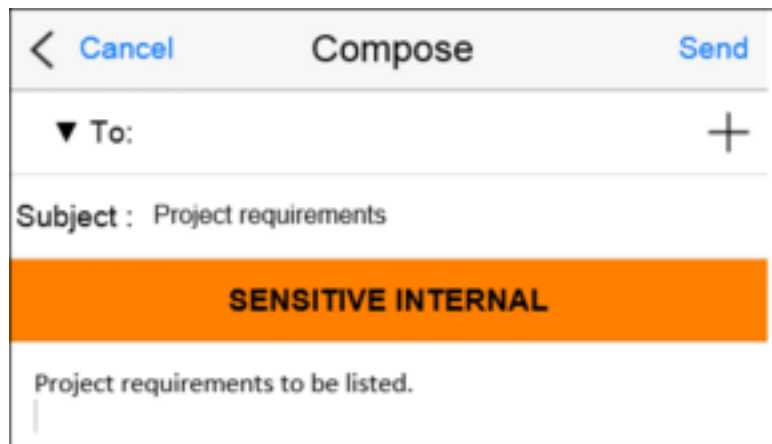


Figure: Mobile compose message.

Clicking on the **classification** value displays the single click selection list:

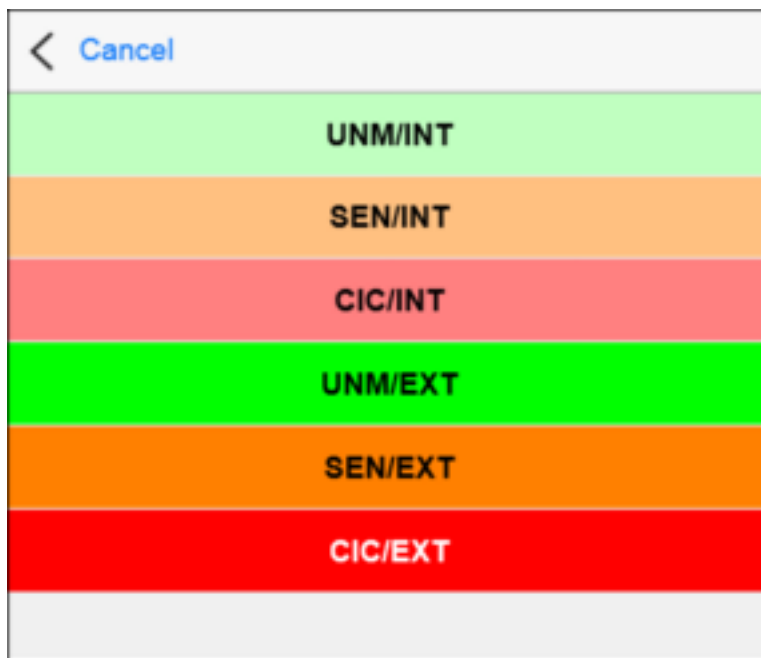
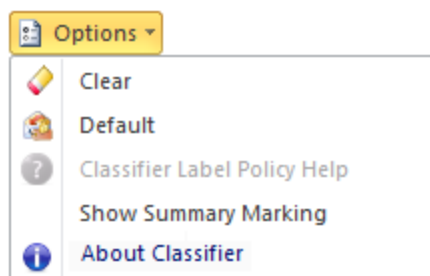


Figure: Mobile classification selection.

Label Options

Email, Office and OWA Classifier present the standard label options menu. The actions supported are:

- [Clear](#) (for Notes Classifier this only appears on the label selection dialog).
- [Default](#) (for Notes Classifier this only appears on the label selection dialog.)
- [Link to site defined help](#) (for Notes Classifier this only appears on the label selection dialog).
- [Show Summary Marking](#) (only appears if relevant).
- [About Classifier](#) (not available under Notes Classifier).



Label Interface Options.

There are some differences between Outlook and OWA as per the examples in [Ribbon examples](#).

This menu is by default displayed in the ribbon bar (see [Ribbon examples](#)). This operation can be modified under Office Classifier using the **Remove Classifier options** from the ribbon.

Clear (Label Value)

Note: For Notes Classifier this only appears on the label selection dialog. Not available under Mobile Classifier.

This action clears the current values for each selector.

You can control whether this option appears using the [Show labeller 'Clear' button](#) setting.

Default

Note: For Notes Classifier this only appears on the label selection dialog. Not applicable under Mobile Classifier.

This action restores the label value to the [default label values](#) defined by the policy.

You can control whether this option appears using the [Show labeller 'Default' button](#) setting.

Link To Site Defined Help

Note: Not supported by Mail Add-in or Mobile Classifier. Only appears on the [Label](#) selection dialog for Notes Classifier.

This action will open the link configured in [URL for your labelling help site](#).

This action will be unavailable (greyed) if the setting is not configured.

Note: Whilst OWA Classifier supports the **Help** links defined in a Classifier Configuration, the nature of OWA access may mean that a defined link is not accessible due to external access controls (e.g. additional authentication requirements). Classifier Mail Add-in does not support this feature.

Show Summary Marking

Note: This is only applicable to Office Classifier. OWA Classifier and Mail Add-in Classifier do not allow the user to close the Summary Marking area.

This action allows the user to re-instate the **Summary Marking** area. The action will only appear if the following are all true:

- [Show Summary Marking in task pane](#) is **Enabled** (Disabled means the summary marking area never appears).
- [Force Summary Marking in task pane](#) is **Disabled** (Enabled means the summary marking area cannot be closed).
- The user has closed the summary marking area that normally appears at the bottom of the application window, **AND** the current environment does not provide another means of restoring the summary marking area (e.g. Outlook provides an expand option after closure).

About Classifier

Note : Not available under Notes Classifier, Classifier Mail Add-in, nor Mobile Classifier.

Selecting **About Classifier** shows information about the installed Email or Office Classifier product including the licence state for that client, and configuration location etc.



Figure: About Classifier.

Folder View Labelling Operation

Note: This feature is only applicable to **Email Classifier (Outlook)** and **OWA Classifier**.

If the [Allow Folder View labelling](#) is **Enabled** , the user has access to two additional actions:

1. A **Label selected message(s)** button when viewing a folder summary in Outlook (not available under OWA)

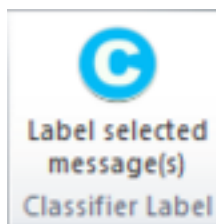


Figure: Folder View: Label selected messages.

2. A **Set Label...** button when viewing an open message.

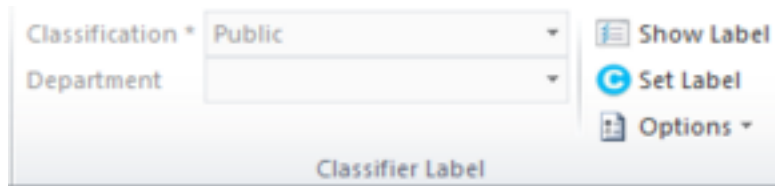


Figure: Folder View: Set label.

3. The ribbon may include an additional action (**Show Label** in the above) because there are either selectors not visible on the ribbon (e.g. insufficient space, text selectors etc.) or assisted labelling is in operation. Show label will present the current settings.



Figure: Folder View: Set label OWA.

4. To label one or more messages in a folder, select the required messages and click **Label selected message (s)**. To change the label on a message that is open, click **Set Label**.
5. In either case the usual label selection dialog (**Single Click if enabled**) will appear allowing choice of the label to be applied to the message(s). The dialog will show the existing label of the message(s) except if at least one message has a different label in which case the label values are blank.

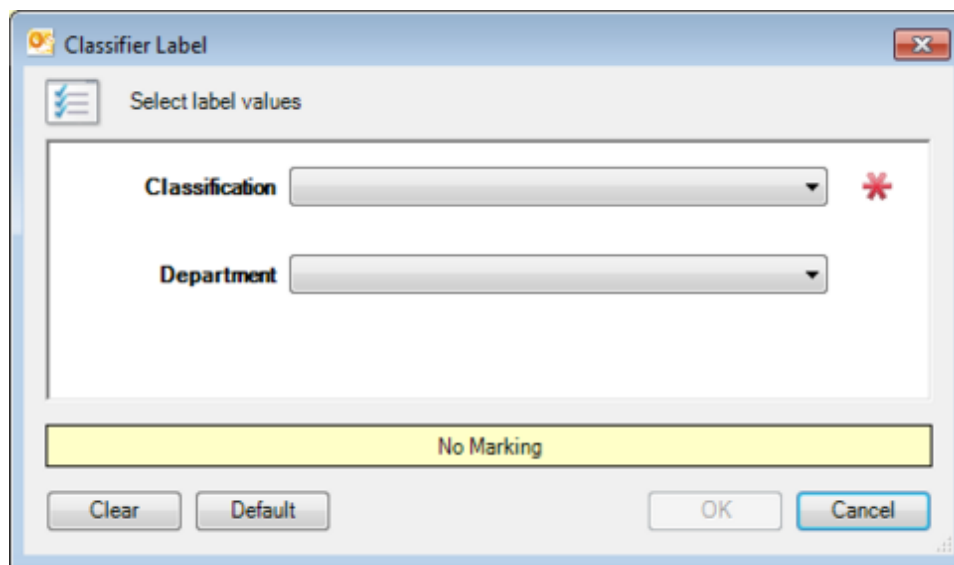


Figure: Label Selection dialog.

6. Select the required selector values and click **OK** to apply the change.
7. If you label a message **AND** a label change rule is triggered, then a standard policy check dialog is presented. If you use Label selected messages with multiple messages selected **AND** more than one message triggers a label change rule, then the following dialog appears enabling user modification of the affected message labels individually by selecting a **message** and then clicking **Label selected message**.

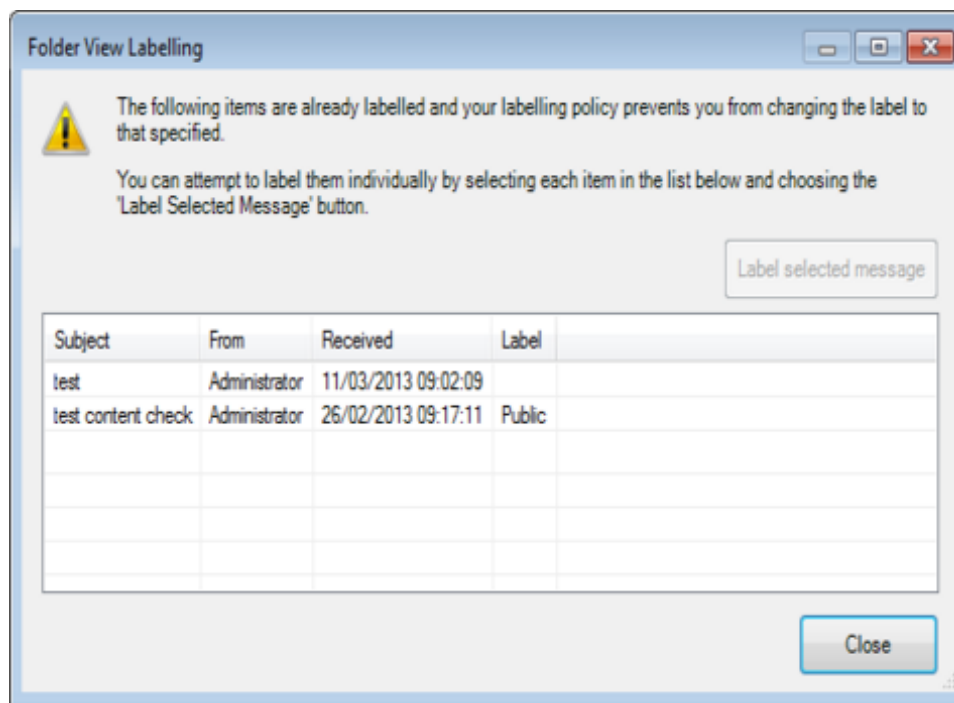


Figure: Folder View Labelling: multiple message check.

Classifier Administration

Selecting the root node of Classifier Administration presents the initial display.

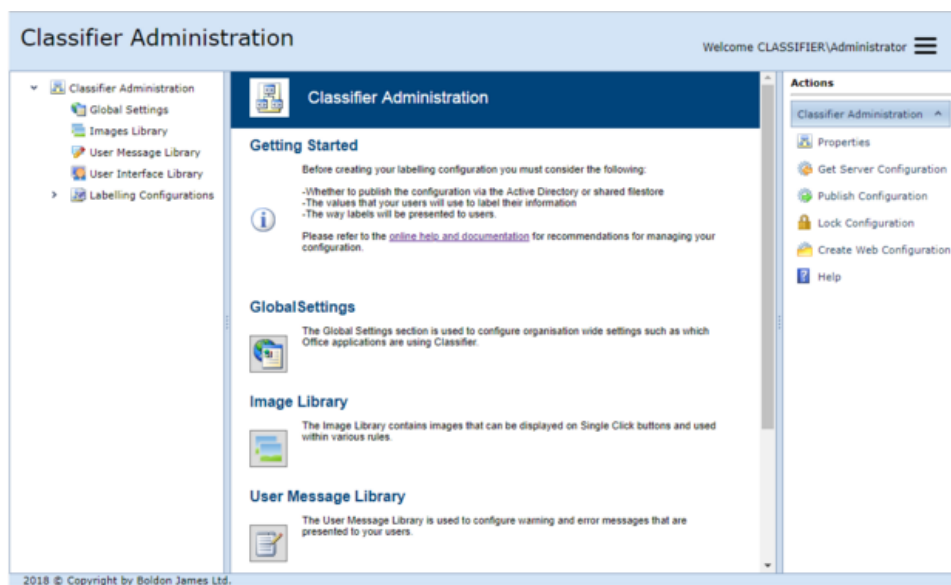



Figure: Top Level display.

Note: It is possible for multiple administrators to maintain the published labelling configuration using the [System Role Management](#) and [Lock / Unlock Configuration](#) . in conjunction with [Get Server Configuration](#) and [Publish Configuration](#) .

The following courses of action are available:

- The [Administrator Management Menu](#)  provides access to features relating to the control of Administrator activities.
- To establish a Classifier configuration for the first time, choose [Labelling Configurations](#) .
- To administer an existing local configuration, expand the [Labelling Configurations](#) node and proceed.
- To **set/view** Classifier administration (**audit control**) properties, choose [Properties \(Classifier Administration\)](#) .
- To **retrieve** an existing **master configuration** to your local **File Store**, choose [Get Server Configuration](#) .
- To publish the current configuration, choose [Publish Configuration](#) .
- To publish a test configuration choose [Publish Test Configuration](#) . This **test configuration** can then be **accessed** using the [Test Mode Administration](#) application.
- To **lock / unlock** the **configuration**, choose [Lock / Unlock Configuration](#) .
- To generate **configuration information** suitable for **retrieval from a URL**, choose [Create Web Configuration](#) .

Administrator Management Menu

Admin: [Classifier Administration](#) -> Administrator Management Menu

This menu  is available at the top right of the Classifier Administration window. It provides access to the following features:



Figure: Administrator Management menu features.

- [Configuration Folder Paths](#)
- [System Roles Management](#)
- [Custom Roles for Policies](#)
- [User Roles and Permissions](#)

Configuration Folder Paths

Admin: [Classifier Administration](#) -> [Administrator Management Menu](#) -> Configuration Folder Paths

This dialog lets an administrator define the folder locations pertinent to Get Configuration , [Publish Configuration](#), [Create Web Configuration](#) and Test Mode .

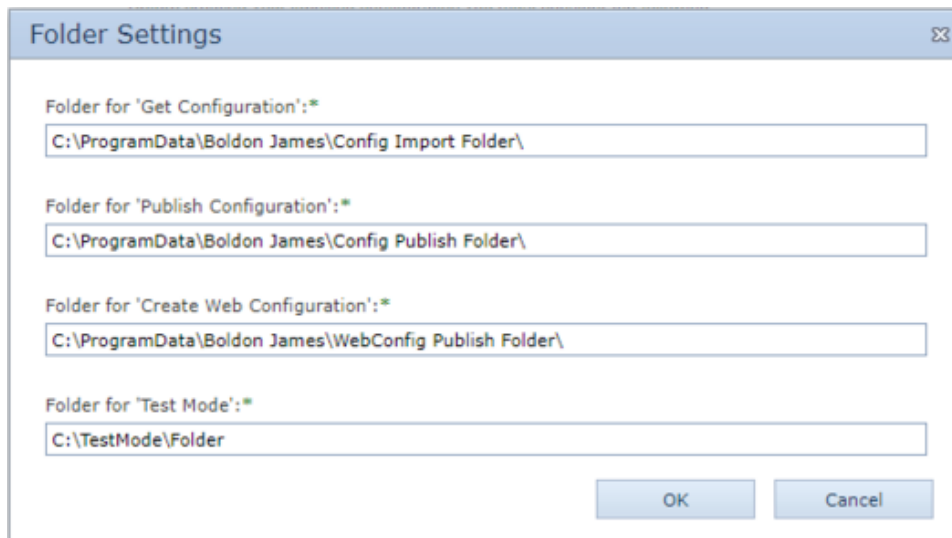


Figure: Configuration Folder Paths.

The current values are stored in registry entries on the system running the Administration Web UI. The registry keys and initial values are held below: HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\BoldonJames Classifier Management WCF Service\:

| Item | Initial Value | Further Information |
|------------------------|---|--|
| ConfigImportFolder | C:\ProgramData\Boldon James\ Config Import Folder\ | Get Server Configuration |
| ConfigPublishFolder | C:\ProgramData\Boldon James\ Config Publish Folder\ | Publish Configuration |
| WebConfigPublishFolder | C:\ProgramData\Boldon James\WebConfig Publish Folder\ | Create Web Configuration |
| TestFolderRoot | C:\ProgramData\Boldon James\TestMode Folder\ | Publish Test Configuration |

System Roles Management

Admin: [Classifier Administration](#) -> [Administrator Management Menu](#) -> System Roles Management

This allows a Full Administrator to assign various Classifier configuration administration capabilities to individual users or groups.

Initially, at installation, the installer and the user under which the service runs (specified during installation) are assigned as **Full Administrators** .

Note: All other users who might logon to the Classifier Administration Service will see the basic Classifier Administration interface, but will have no access to any sub-categories. If you see a blank screen that says **Access Denied-Contact Personnel** then contact Support.

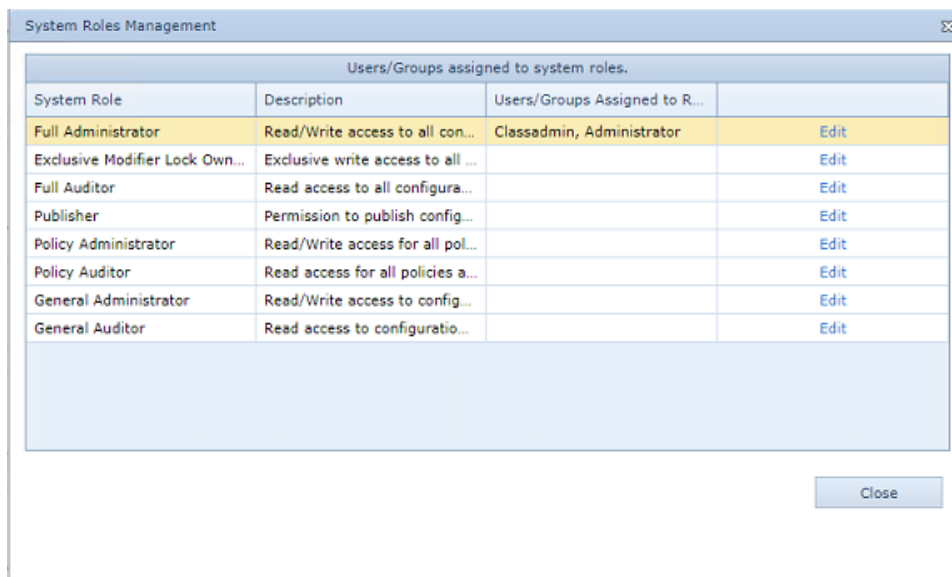


Figure: System Roles Management.

To change the users/groups assigned to a role:

1. Select the role and click **Edit** . A dialogue is presented that allows you to **Delete** existing entries, or to use the **Find** option to supply a value and search for a user/group.
2. Select a found entry and then click **Add User / Group** .

System Role

Note: The current administrator cannot delete themselves from the Full Administrator set.

Note: Only a user in the **Full Administrator** role can modify the roles and configuration.

The system role capabilities of each category are described in the following table.

| Role | Description |
|-------------------------------|--|
| Full Administrator | <p>Read and write access to all elements of the configuration.</p> <p>The ability to manage these capabilities, and to manage Custom Roles for Policies .</p> <p>Includes Publisher capability. Only a user in the Full Administrator role can modify the roles and configuration.</p> <p>Note: Only the Full Administrator can perform the Get Server Configuration action.</p> |
| Exclusive Modifier Lock Owner | Exclusive write access to all configuration elements. |
| Full Auditor | Read access to all elements of the configuration (e.g. to produce reports). |
| Publisher | Permission to publish the configuration. This role also includes the permissions that the General Administrator role has. |
| Policy Administrator | <p>Read and write access to configuration for all policies. Can lock / unlock the publication of the configuration.</p> <p>Includes Policy Auditor role and General Auditor capabilities .</p> <p>Can Publish Test Configuration .</p> <p>Further delineation between users capabilities regarding policies is possible by configuring Custom Roles for Policies allowing you (for example) to assign specific policy capabilities to specific users/groups.</p> |
| Policy Auditor | Read access for all policies and policy settings. Includes the General Auditor role. |
| General Administrator | Read and write access to configuration libraries and settings, but NOT to policies. Can lock / unlock publication of the configuration. |
| General Auditor | Read access to configuration libraries and settings, but not to policies. |

Add a User or Group To a Role


An Administrator can add a user or group to system roles in [System Roles Management](#) .

Note: The operations for working with roles can only be performed by full Administrator users.



Figure: Role Menu.

To add a user(s) and/or group(s) to a role:

1. Go to the **Classifier Administrator User Interface** and click on the right hand **Administration Management** menu with 3 lines  and select **System Roles Management**. The **System Roles Management** window will appear. The user roles are defined in [System Roles Management](#).

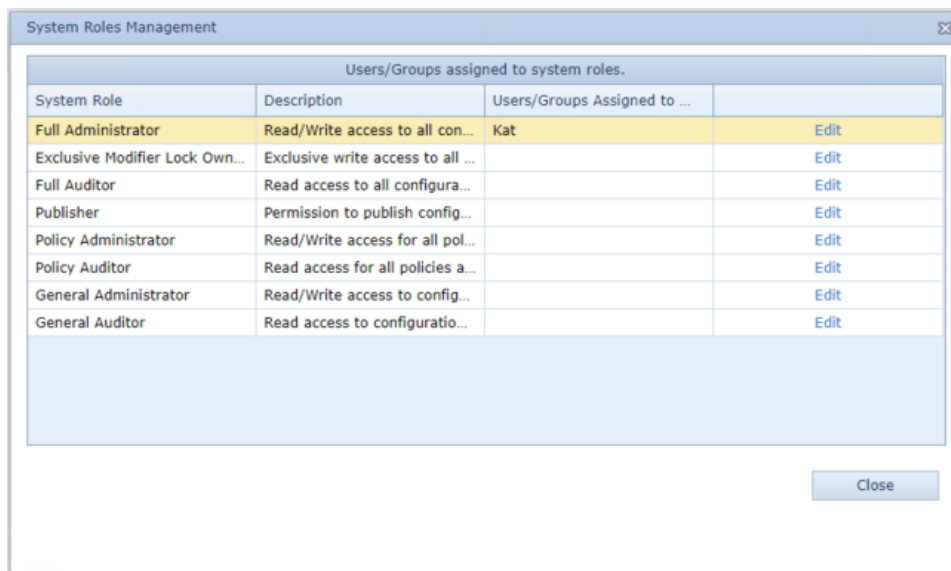


Figure: Edit the System Role.

2. To add a user or group to the System Role, click on the highlighted **Edit** link. An **Edit Role** window will appear.
3. Enter the name of the user(s) and/or group(s) and click on the **Find** button.

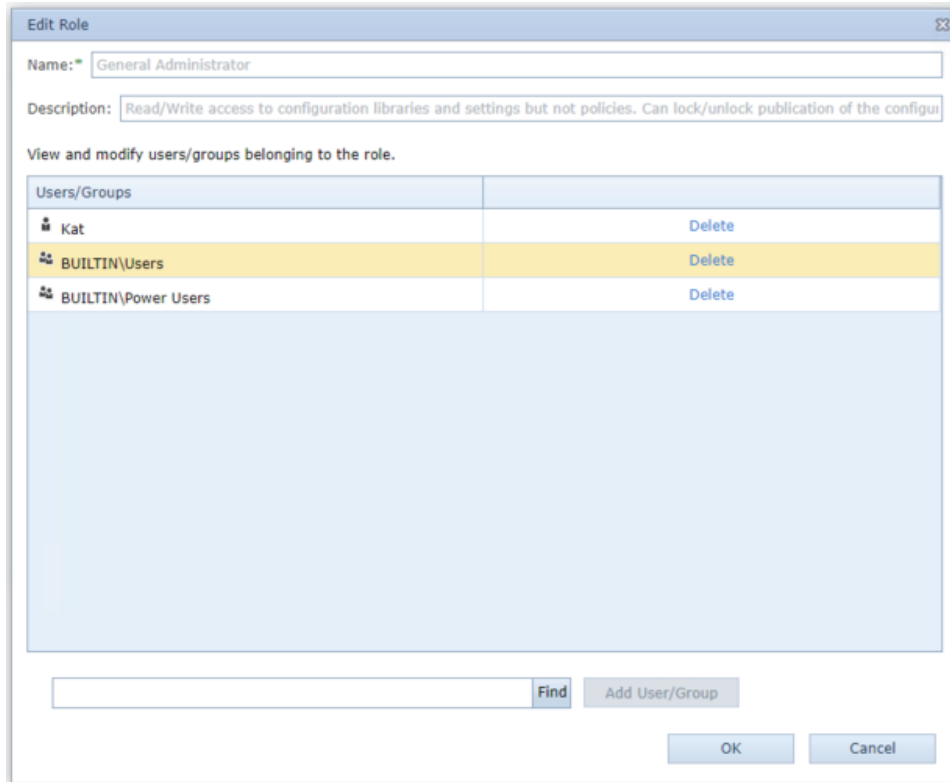


Figure: Adding a user and a few groups.

4. Select an the appropriate user(s) and/or group(s) and then click on the **Add User/Group** button.

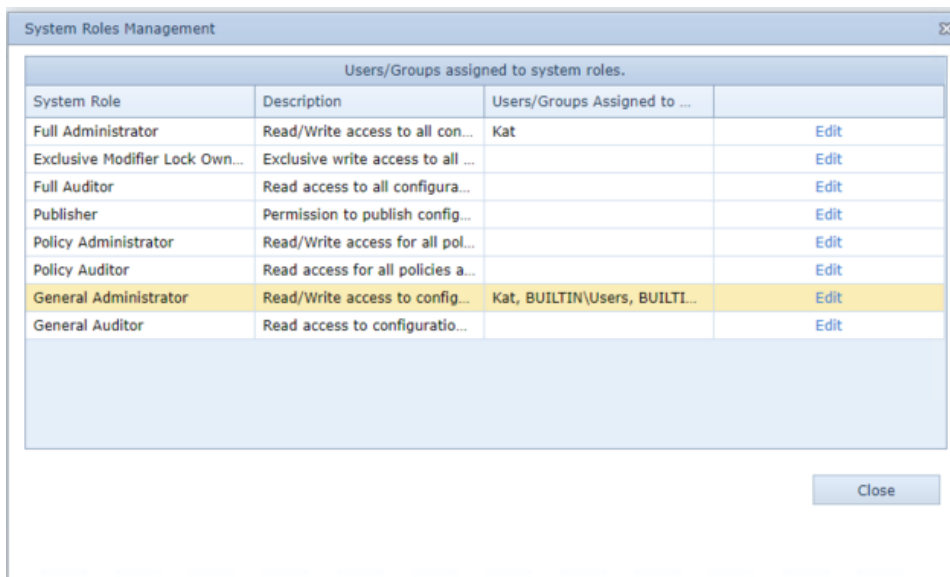


Figure: The users and groups assigned to a system role.

5. Add more user(s)/group(s) as required. click **OK**. The custom role has been added to the parent dialog. In the **System Roles Management** window the user and groups that were added will appear in the **Users/Groups Assigned to...** column under the **System Role** that was initially selected.

Edit a System Role


An Administrator can edit a system role in [System Roles Management](#).

Note: Role operations are audited.



Figure: Role Menu.

To edit a system role:

1. Go to the **Classifier Administrator User Interface** and click on the right hand **Administration Management** menu with 3 lines  and select **System Roles Management**. The System Roles Management window will appear.

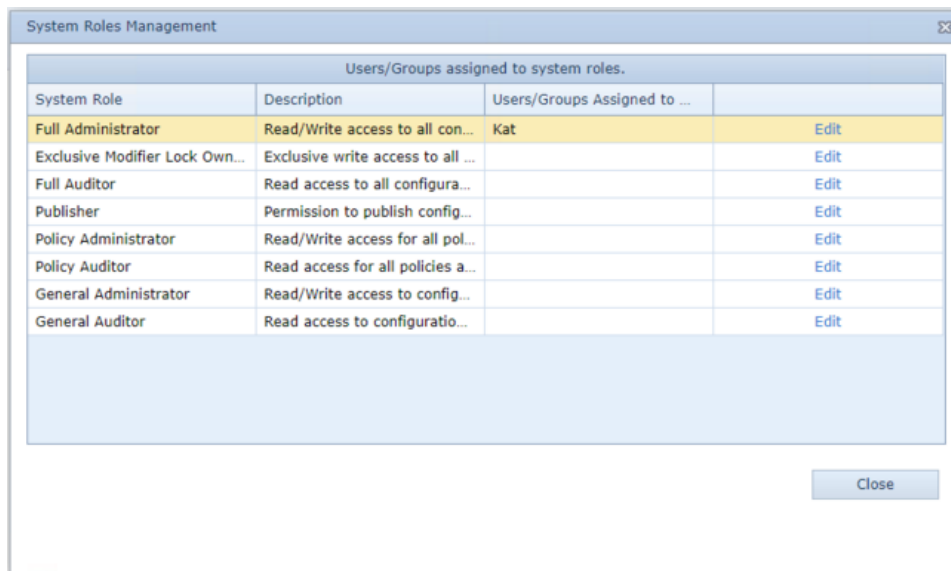


Figure: Edit the System Role.

2. To edit the **System Role** click on the highlighted **Edit** link. An Edit Role window will appear.
3. Enter the **name** of the user/group and click on the **Find** button.

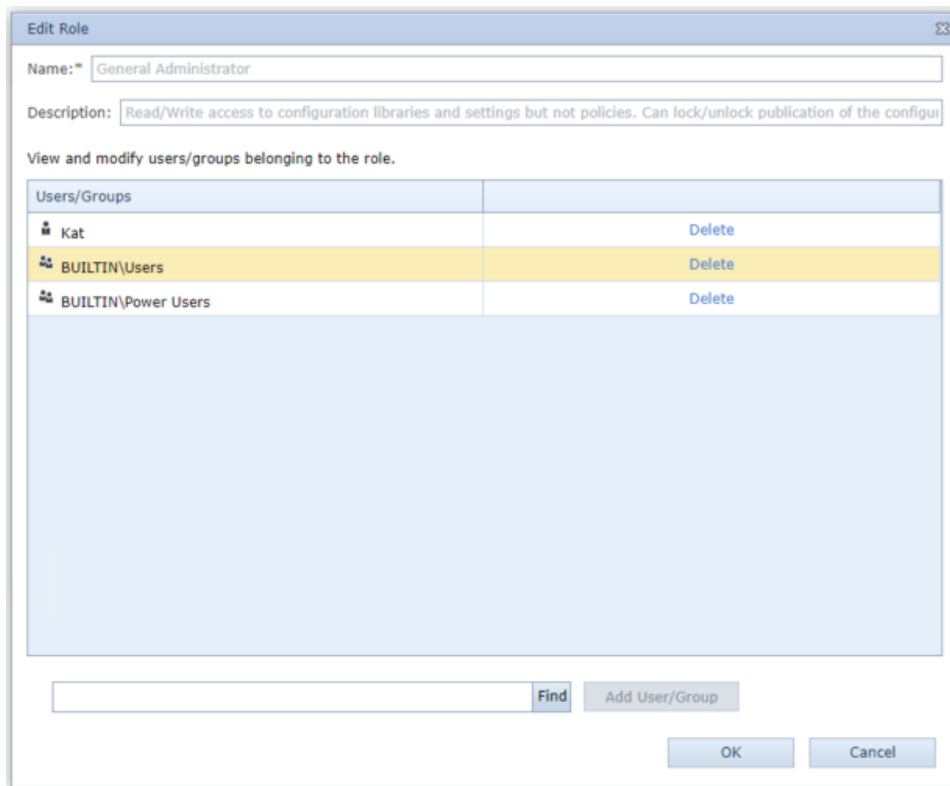


Figure: Adding a user and a few groups.

4. Select an the appropriate user or group item(s) and then click on the **Add User/Group** button.

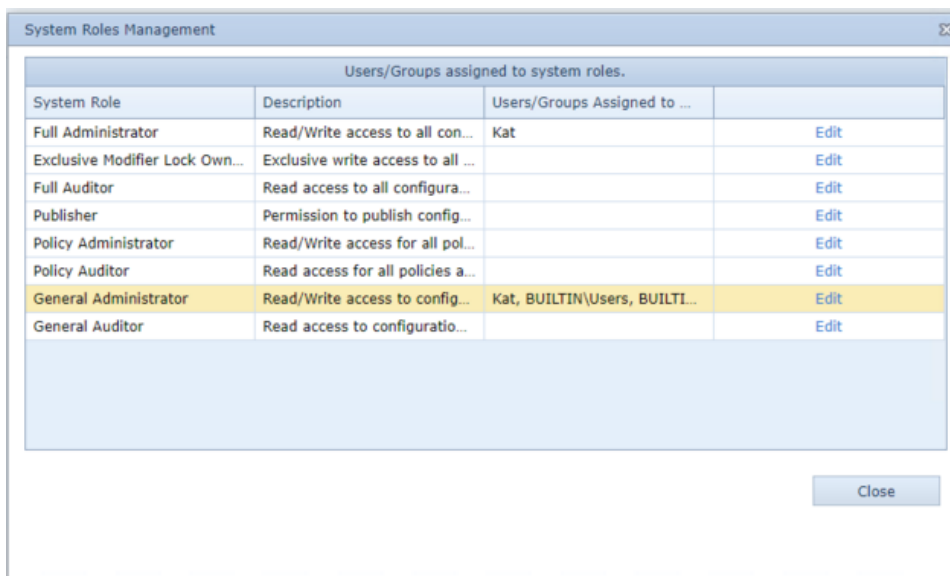


Figure: Users and groups assigned to a system role.

5. Add more **users/groups** as required. click **OK**. The custom role has been added to the parent dialog. In the **System Roles Management** window the user and groups that were added will appear in the **Users/Groups Assigned to...** column under the **System Role** that was initially selected.

Delete a User or Group from a Role

An Administrator can delete a users or groups from a role in [System Roles Management](#).

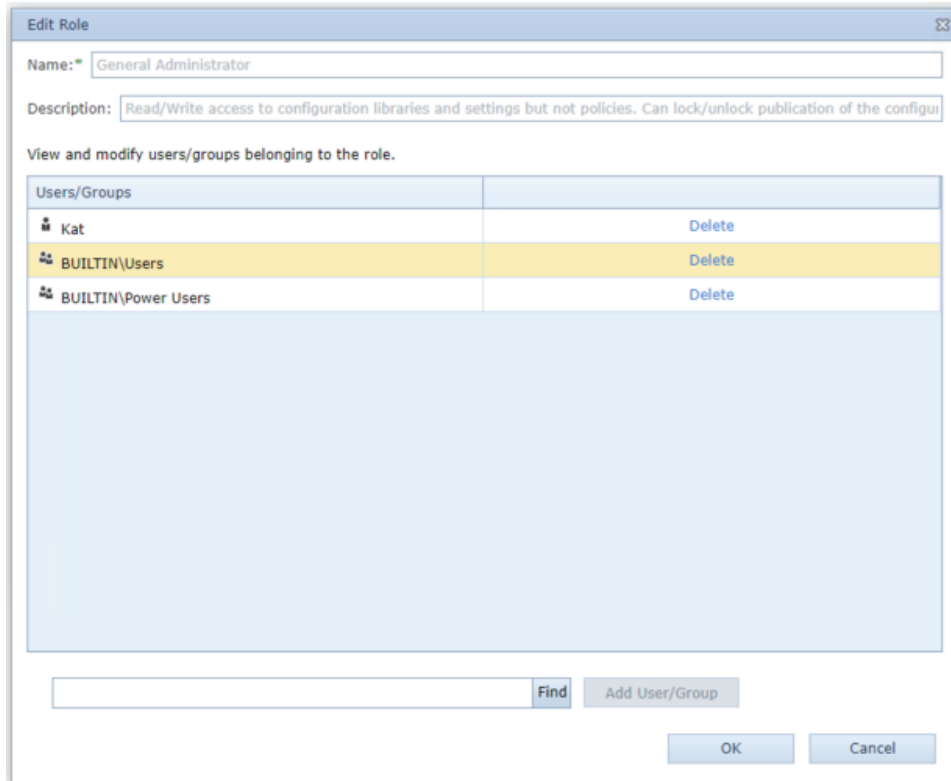



Figure: Deleting a user.

To delete a user or group from system role:

1. Go to the **Classifier Administrator User Interface** and click on the right hand **Administration Management** menu with 3 lines  and select **System Roles Management**. The System Roles Management window will appear.
2. Click on the highlighted **Edit** link. An **Edit Role** window will appear.
3. To delete the user or group click on the **Delete** link next to the user or group. The user or group will be deleted.
4. To save, click on the **OK** button otherwise click on the **Cancel** button.

Custom Roles for Policies

Admin: [Classifier Administration](#) -> [Administrator Management Menu](#) -> Custom Roles for [Policies](#)

If no **Custom Roles** are established for a policy, then that policy may be administered by any user that has **Policy Administrator / Auditor** capability.

If one or more **Custom Policy Roles** are defined for a policy, then that policy may only be Administered / Audited by users defined by the assigned Custom Policy Roles .

A user may be designated as having a **Policy Auditor System Role** (but not Policy Administrator), but be assigned read/write capability through the Custom Policy Roles mechanism - the latter will take precedence for policies that have the relevant **Custom Policy Role** assigned.

Custom Roles for Policies

Admin: [Classifier Administration](#) -> [Administrator Management Menu](#) -> Custom Roles for [Policies](#)

If no **Custom Roles** are established for a policy, then that policy may be administered by any user that has **Policy Administrator / Auditor** capability.

If one or more **Custom Policy Roles** are defined for a policy, then that policy may only be Administered / Audited by users defined by the assigned Custom Policy Roles .

A user may be designated as having a **Policy Auditor System Role** (but not Policy Administrator), but be assigned read/write capability through the Custom Policy Roles mechanism - the latter will take precedence for policies that have the relevant **Custom Policy Role** assigned.

User Roles and Permissions

Admin: [Classifier Administration](#) -> [Administrator Management Menu](#) -> User Roles and Permissions

When groups are assigned roles, it is sometimes difficult to understand the effective permissions that an individual group member possesses. This is especially true when a user is a member of multiple groups.

To view the effective permissions for a User or Group:

1. Invoke **User Roles and Permissions** from the **Administration Management menu**  , this will present the following:

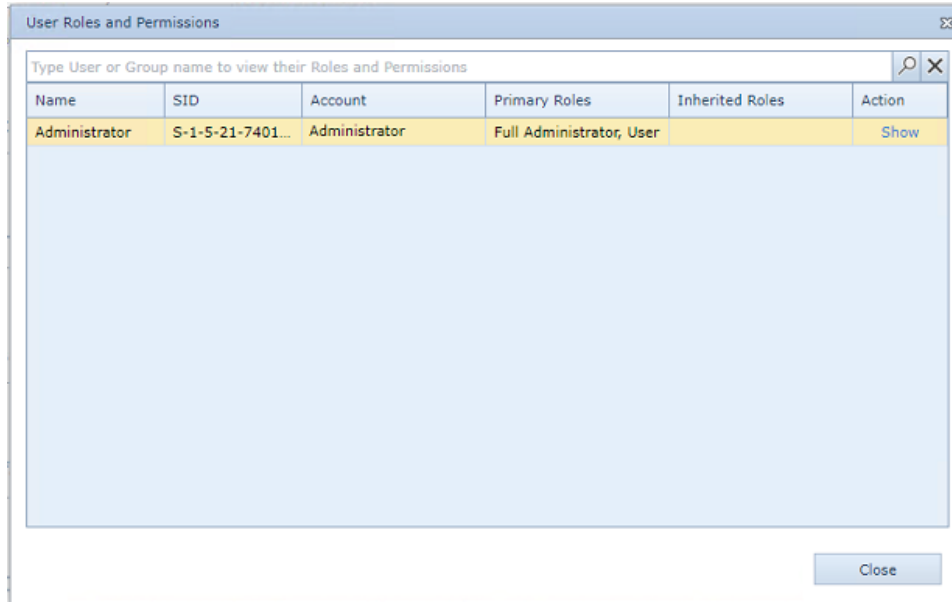


Figure: User Roles and Permissions.

2. You can use the search field to enter the User or Group of interest and then click the search button represented by the magnifying glass icon.
3. Once you have found the **User** or **Group** that you are interested in, click the **Show hyperlink** in the **Action** column. The effective permissions will be presented:



Figure: Selecting permissions for the Administrator user.

Properties (Classifier Administration)

Admin: [Classifier Administration](#) -> Properties

These top-level settings allow you to configure the audit information tracking you require.

Indicate the operations, performed under the various **Classifier Administration functional groups** such as **Selectors** or **Rules** that you wish to be audited.

Separate controls are available for auditing run time **Email** and **Office** Classifier operations which are described in [Settings](#) applicable across the **Organisation/Global Settings/ Audit Settings** .

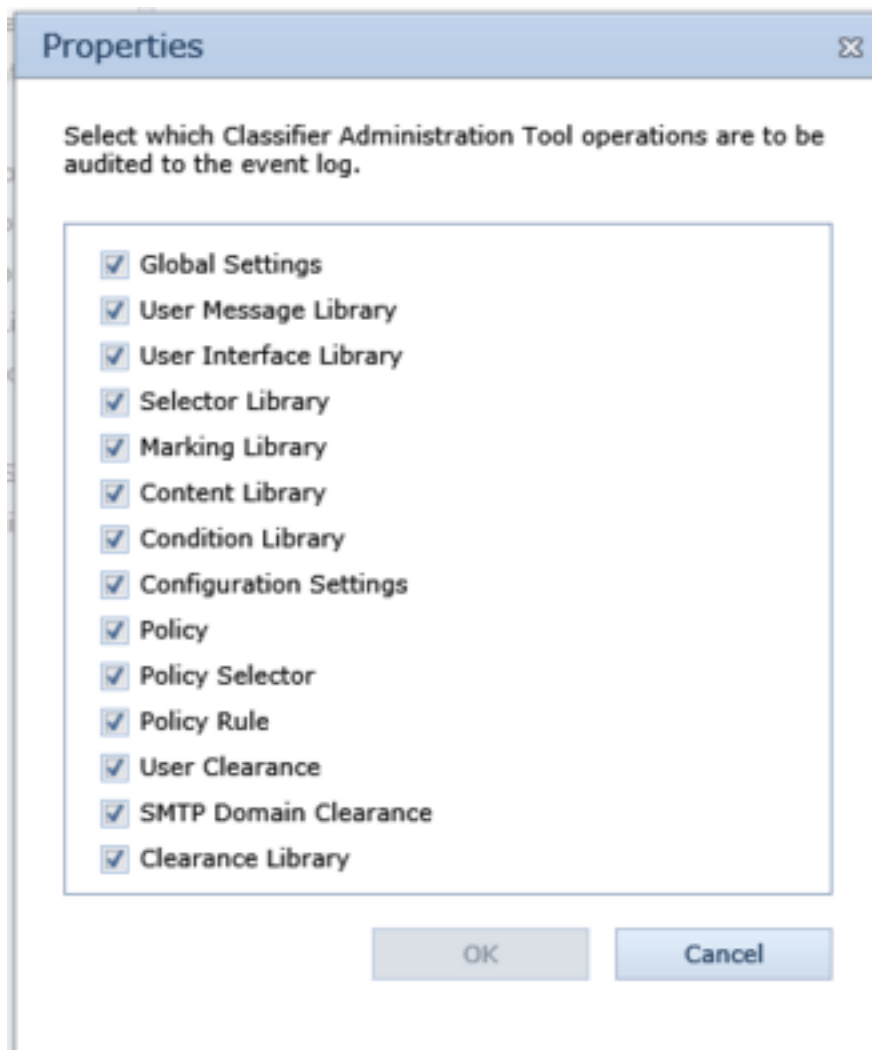


Figure: Classifier Administration Properties.

Get Server Configuration

Admin: [Classifier Administration](#) -> Get Server Configuration

This is used to retrieve a copy of the deployed configuration to your local machine. It is typically used when you wish to apply changes to the existing master configuration. You retrieve a local copy, make the required changes then (re-)publish the configuration to the master location. Further details of how this fits into the overall process can be found in [Configuration Deployment](#).

Note: This can only be performed by a **Full Administrator** role.

1. Select **Classifier Administration** and choose **Get Server Configuration**.
2. Click **Yes** if a confirmation dialog appears to draw your attention to the fact that it will overwrite any existing local configuration.

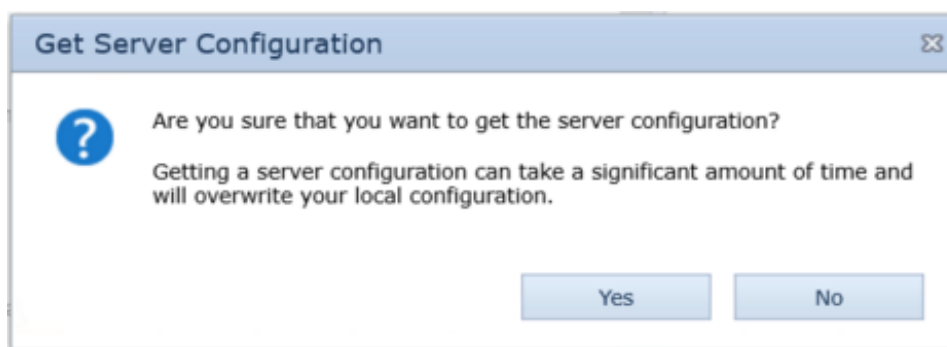


Figure: Get Configuration warning.

3. Select the **Active Directory** or **File Store** option as required.

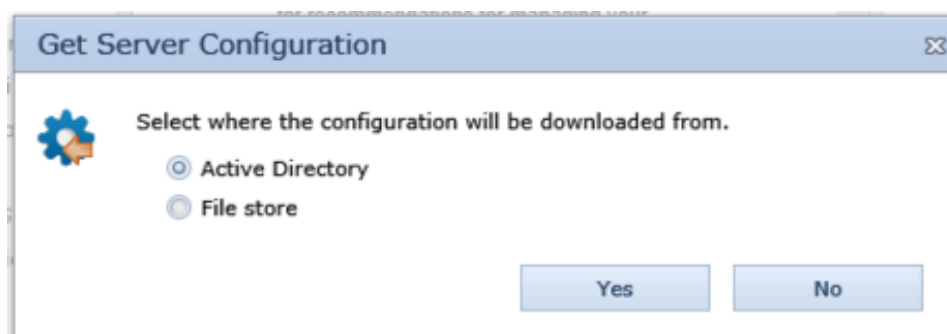


Figure: Get Configuration from location.

4. If you choose **File Store**, the **Configuration** is retrieved from the location defined by the following registry setting:
 - HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\Boldon James Classifier Management WCF Service\ConfigImportFolder. By default this points to c:ProgramData\Boldon James\Config Import Folder.

5. By default this points to **C:\ProgramData\Boldon James\Config Import Folder** .
6. **Acknowledge** the retrieval complete dialog.

Note: Getting the server configuration has no effect on any local [Configuration Archives](#) .

Publish Configuration

Admin: [Classifier Administration](#) -> Publish Configuration

Note: If the action is unavailable, it may be because a policy is locked.

Once your configuration is stable you need to publish it to make it available to the wider community using either Active Directory or the file system. For an overview of these mechanisms see [Configuration Deployment](#) .

Every time you publish a configuration, an archive copy is stored locally as described in [Configuration Archives](#) .

Note: The configuration space requirements are outlined in [Configuration size estimation](#) .

Note: If you wish to publish the Classifier configuration via Active Directory then the Active Directory Schema must be updated ([Extending the Active Directory Schema](#)). Schema update is not required if you intend to publish the configuration via file store.

Publishing a configuration replaces any version previously stored in that location.

To publish a configuration:

1. Select the **Classifier Administration** node and choose **Publish Configuration** which will display the following:

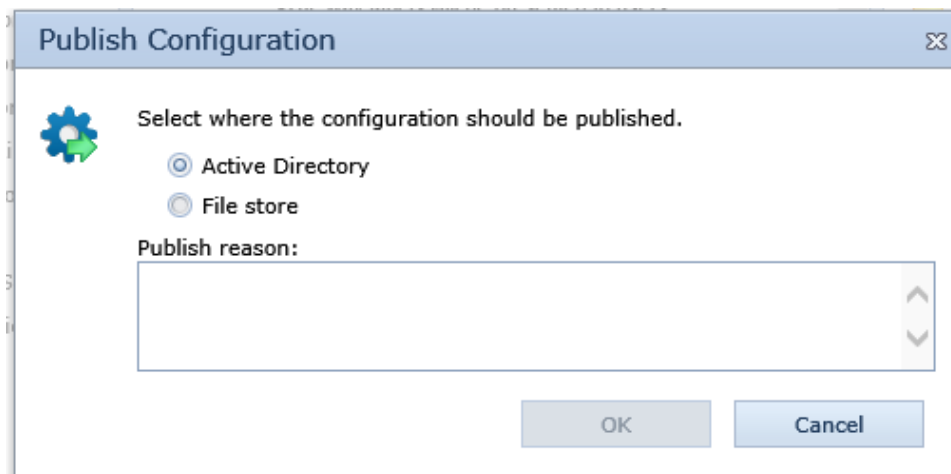


Figure: Publish Configuration.

2. Select the **Active Directory** or **File Store** option as required.
3. If you choose **File Store** , the configuration is retrieved from the following registry setting: HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\Boldon James Classifier Management WCF Service\ConfigPublishFolder. By default this points to **c:\ProgramData\Boldon James\Config Publish Folder** .

4. The **OK** button is disabled until you enter a **Publish Reason** . The text entered will appear in the event log entry that records the publication.
5. If a policy has been configured in either of the following ways:
 - To use the [Use Single Click with pre-defined labels](#) feature, but no buttons are configured.
 - To use [Connect Selectors - Assisted Labelling](#) but no connected selectors are configured you cannot publish the configuration and a suitable dialog will be presented:

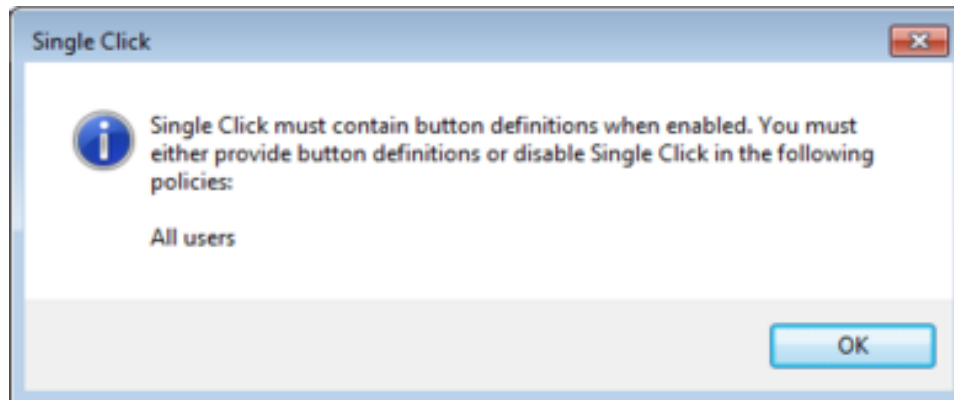


Figure: Publish: Single click ill defined.

5. Click **OK** . The following reminder appears:

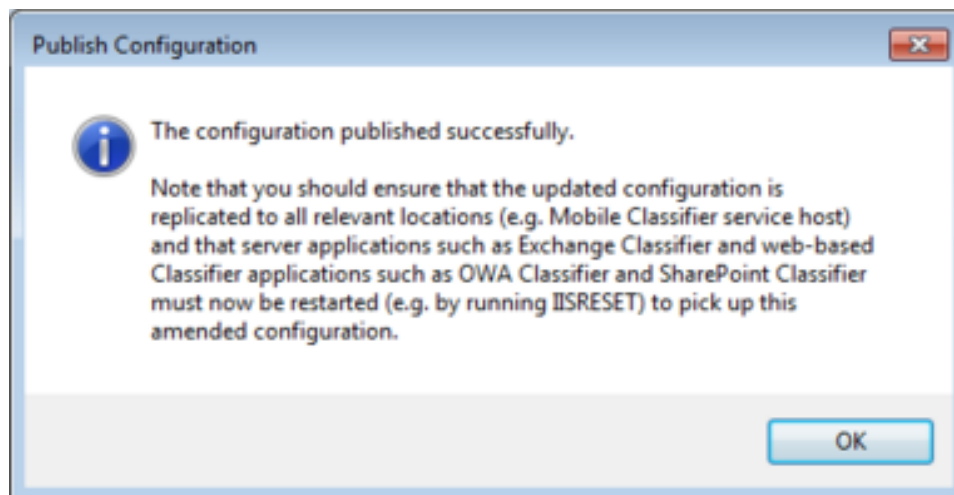


Figure: Publish reminder.

Note: Each time you publish a configuration, an archive copy is stored locally. See [Configuration Archives](#) for full details.

6. Click **OK** on the confirmation dialog.

Notes

- Publishing to Active Directory requires particular permissions that may not be available by default to Domain Administrators on systems other than the Domain Controller. See [Permissions for Publish to AD](#) for details of the permissions required.
- If you publish the configuration to file store you must ensure that the target (master) location has suitable permissions. End users should have the ability to read from that location and administrators that are to modify the master configuration must also have the ability to write to that location using the network path.
- Changes made to the Classifier configuration must be published to ensure that Classifier environments access the updated information.
- OWA Classifier only changes its configuration after a restart. Thus after publishing an updated configuration, an IISRESET would be required to cause OWA Classifier to use that new configuration.
- SharePoint Classifier only picks up changes to the configuration after a restart or recycle of the website where SharePoint Classifier WCF service is installed. This is done through Internet Information Services or on the command line through the Microsoft provided tool.
- Email and Office Classifier only pick up updated configuration on application restart. It is advisable to restart all applications (Outlook, Word, Excel etc.) to avoid applications using different versions of the configuration.
- Users of File Classifier must Logoff/logon to pick up changes to the published configuration. This is because explorer.exe stays running in the background (using the Classifier configuration available at the start) even if the user closes the Explorer window.

Configuration Archives

Every time you publish a configuration, an archive copy is stored locally (on the Server system).

Note: The files in a configuration should NOT be edited manually - the configuration is signed, and almost any change invalidates the configuration.

Archives are stored in a separate folder structure:(C:\ProgramData\Boldon James\CustomConfigurationArchives).

Each time you publish a configuration, a copy of the configuration being published is stored in a new folder below CustomConfigurationArchives. The folder names start at zero and are incremented by one each time.

The example below shows an archive structure of four archives (0 to 2):

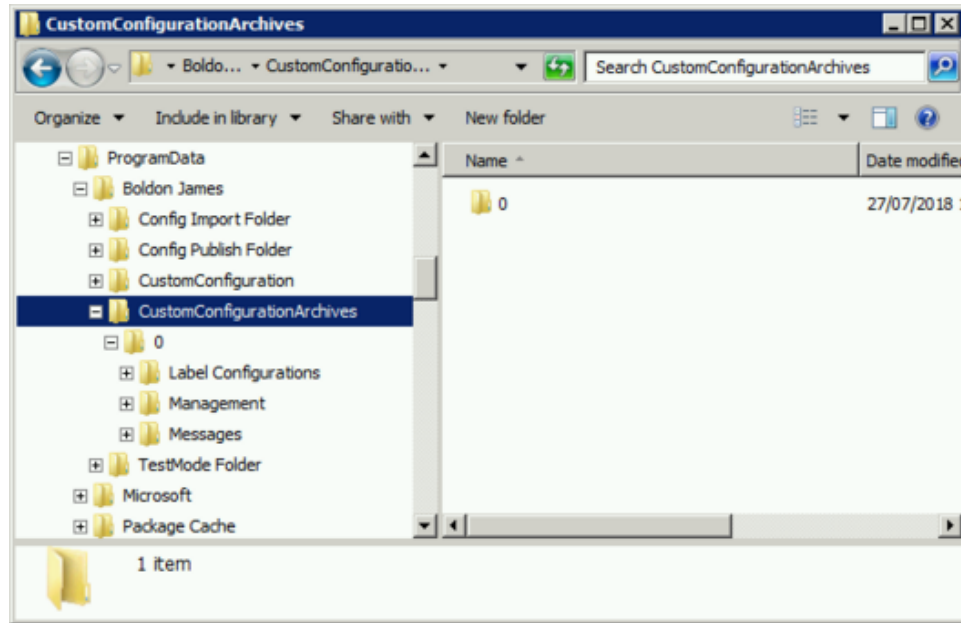


Figure: Archive file structure.

The archive copies mean that it is possible to manually roll back to an earlier configuration as follows:

1. Choose the archive to which you wish to revert.
2. The contents of description.txt (...ConfigurationArchives\n\Label Configurations**<Classifier test>**\description.txt) can be checked for the publish reason associated with that archive - the publish reason supplied appears at the end of each entry made to the file.
3. Delete the current contents of the ConfigImportFolder Configuration folder (**Label Configurations, Management and Messages**).
4. Copy the same folders (**Label Configurations, Management and Messages**) from below the relevant archive and into the configuration folder.
5. Invoke [Get Server Configuration](#).
6. Check that the restored configuration is the one you want.

Note: Housekeeping and backup of these archive folders is a matter for the user.

Permissions For Publish To AD

Publishing the configuration to Active Directory requires the ability to delete (and re-create) relevant objects below the cn=Boldon James node. These permissions are not assigned by default to Domain Administrators.

The following sequence shows you how to check / assign the relevant permissions:

1. Logon as a user that has **Enterprise Administrator** capabilities.
2. Run **ADSIedit**.
3. Choose **Connect to ...** and select **Configuration** from **Select a well-known Naming Context**.

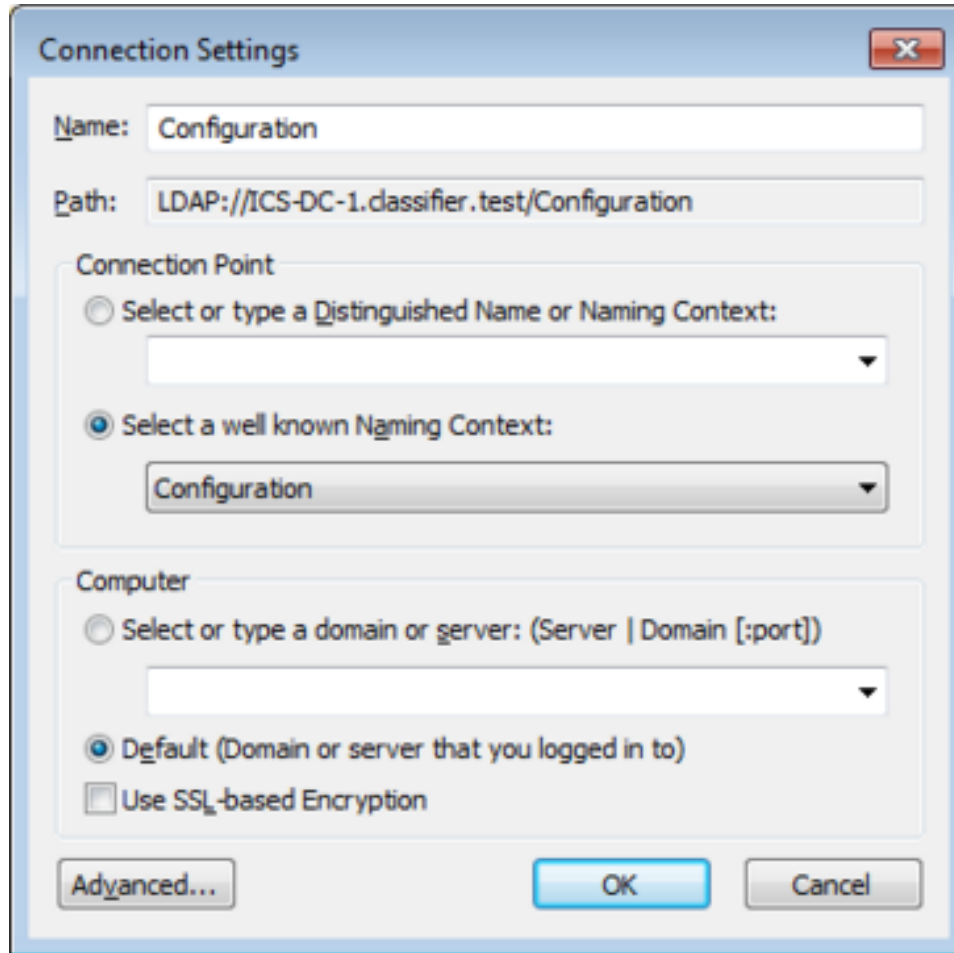


Figure: Connect to Configuration.

4. Expand the **Configuration** and select the **CN=Services/CN=Boldon James** node.

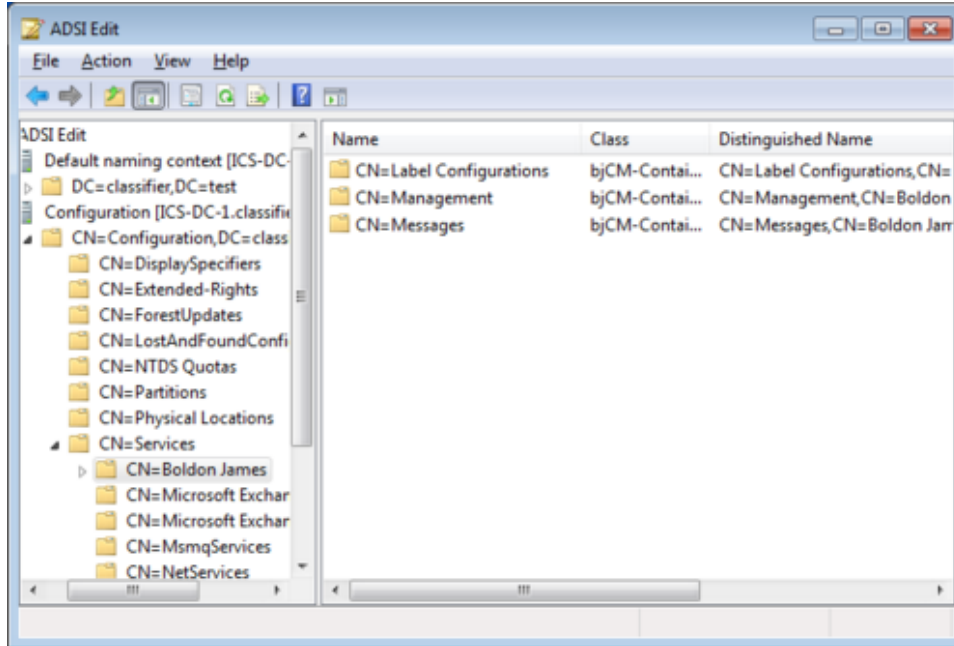


Figure: Select CN=Boldon James node.

5. View Properties/Security.

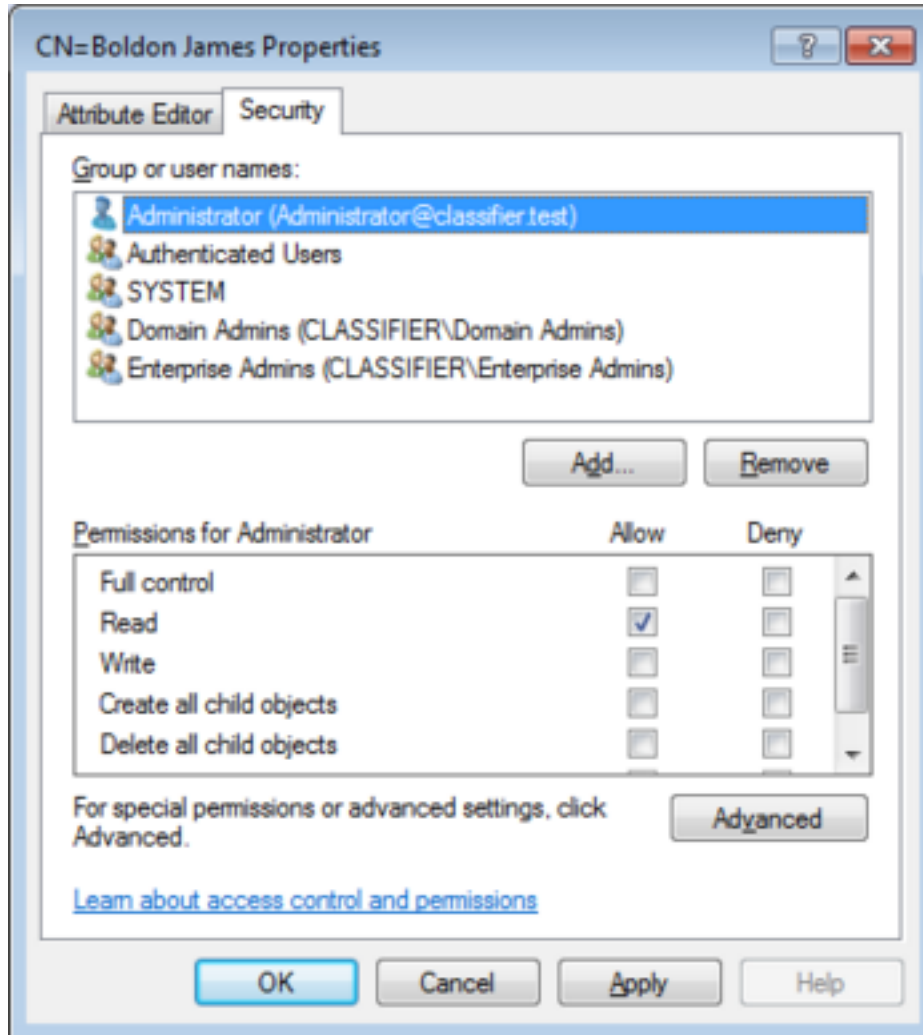


Figure: View Properties: Security.

6. Select an existing <Group or user> (or add a new entry if required).
7. Click **Advanced** .
8. Select the relevant <entry> from the list presented. Click **Edit** .

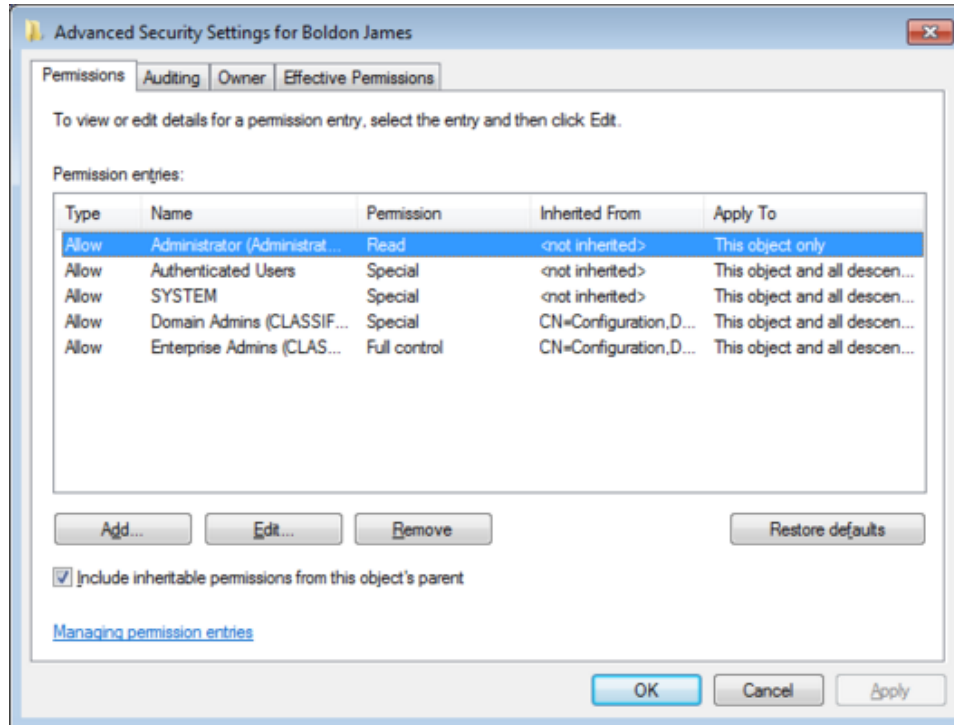


Figure: Advanced Security Settings.

9. All permissions are required except for **Full control** and **Modify** permissions.

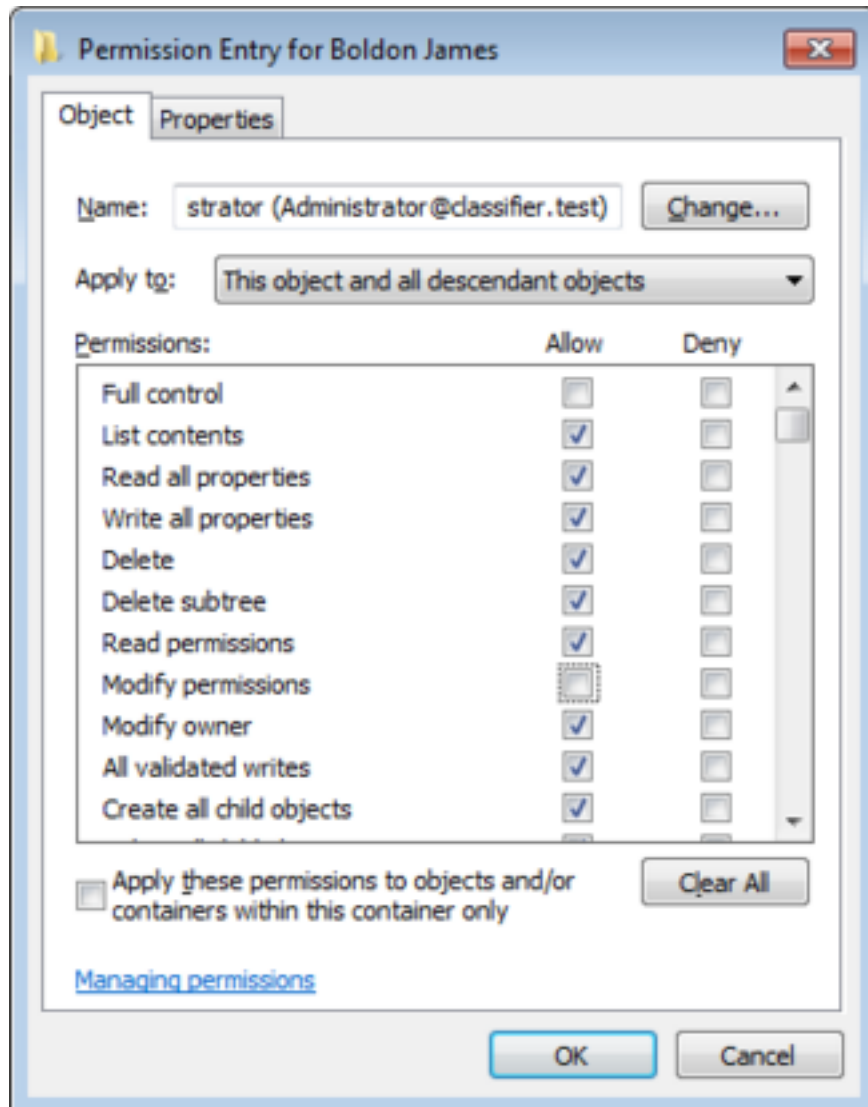


Figure: Boldon James: Object Permissions.

10. A key requirement is that **Apply to:** must be set to This object and all child objects .
11. Click **OK** and then ensure Include inheritable permissions from this object's parent is checked on the previous dialog.
12. Click **OK** on extant dialogs to complete the sequence.

Audit Non-Privileged Attempts to Publish Configuration

You can get Active Directory to report attempts by a non-privileged user to publish a Classifier configuration to AD.

Group Policy Management Editor MMC Snap-In

For 2008 using the Group [Policy Management](#) Editor MMC snap-in:

1. Edit the **Default Domain Policy** and navigate to **Computer Configuration > Policies > Windows Settings > Security Settings > Local Policies > Audit Policy**.

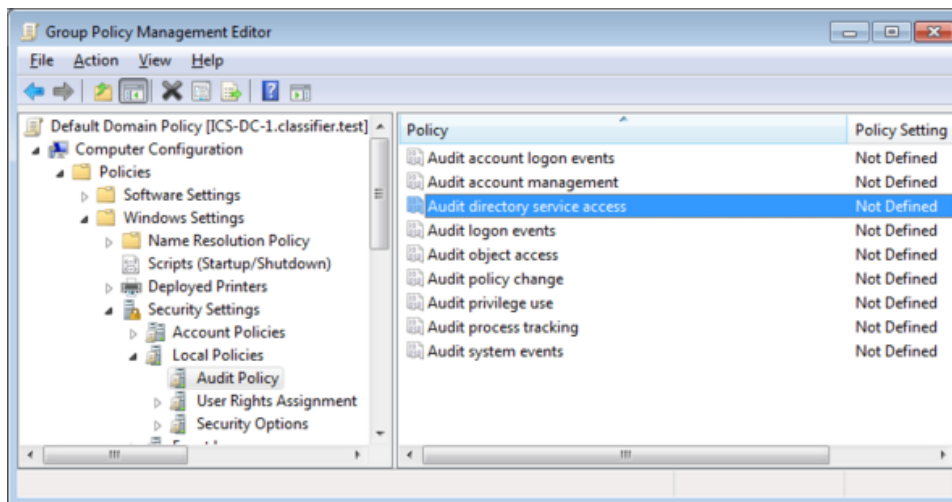


Figure: Audit Policy.

2. Select Audit directory service access and edit the properties - enabling both Success and Failure.

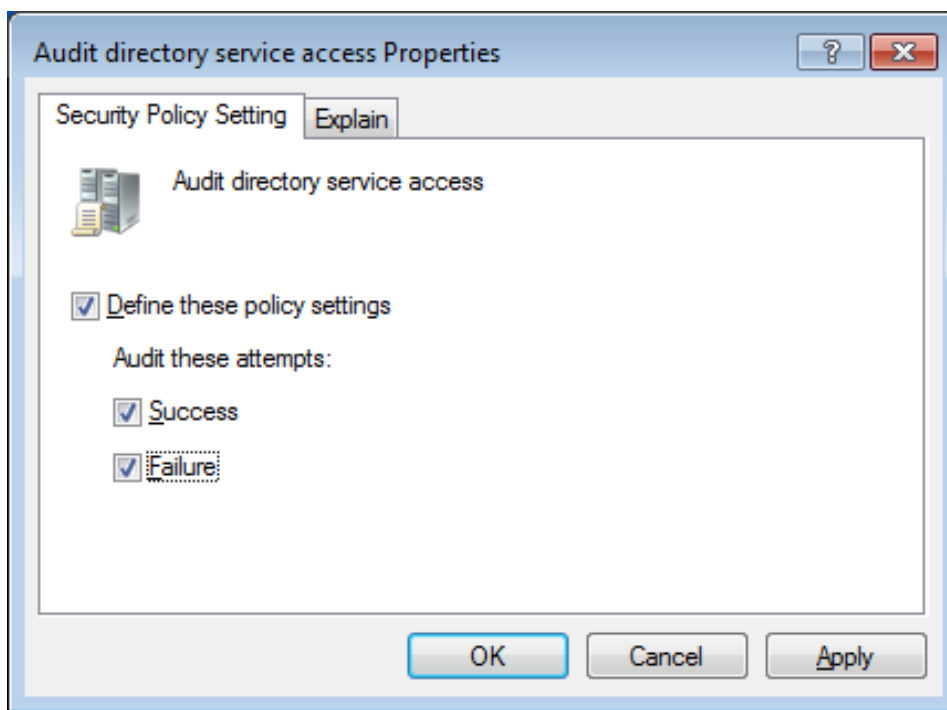


Figure: Audit directory service access.

3. Repeat for Audit object access and enable Success and Failure .

ADSIEdit

Now using ADSIEdit:

1. Navigate to **Configuration > CN=Configuration,DC=classifier,DC=test > CN=Services > CN=Boldon James**.

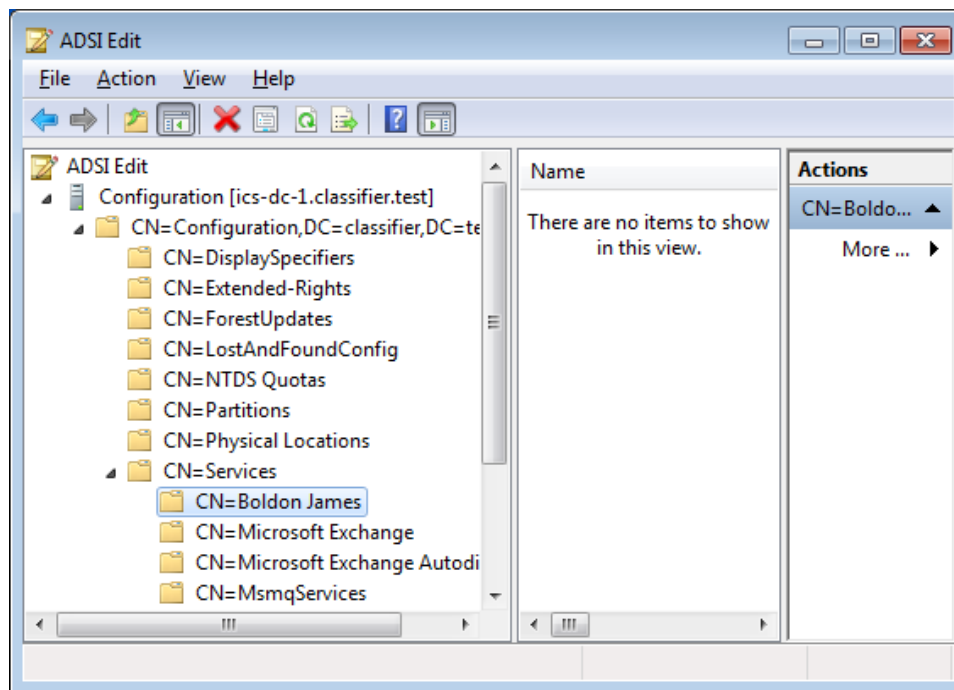


Figure: ADSIEdit - Boldon James.

2. Select the node and choose Properties ; select the Security Tab and click Advanced .

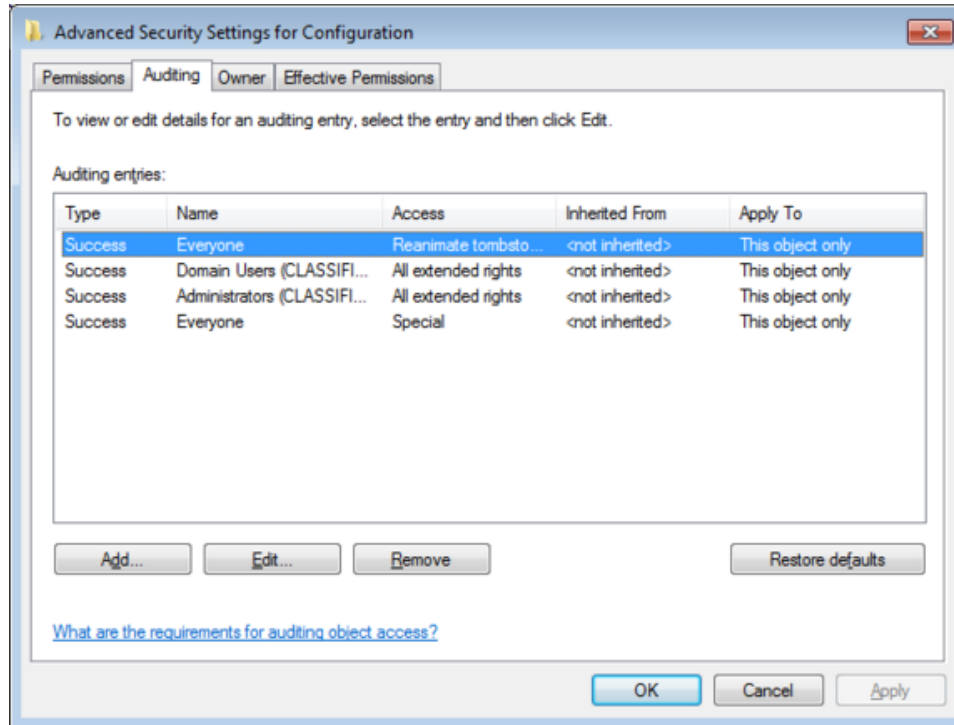


Figure: Auditing tab.

3. Select the **Auditing** tab and click **Add** . Add Everyone and click **OK**.

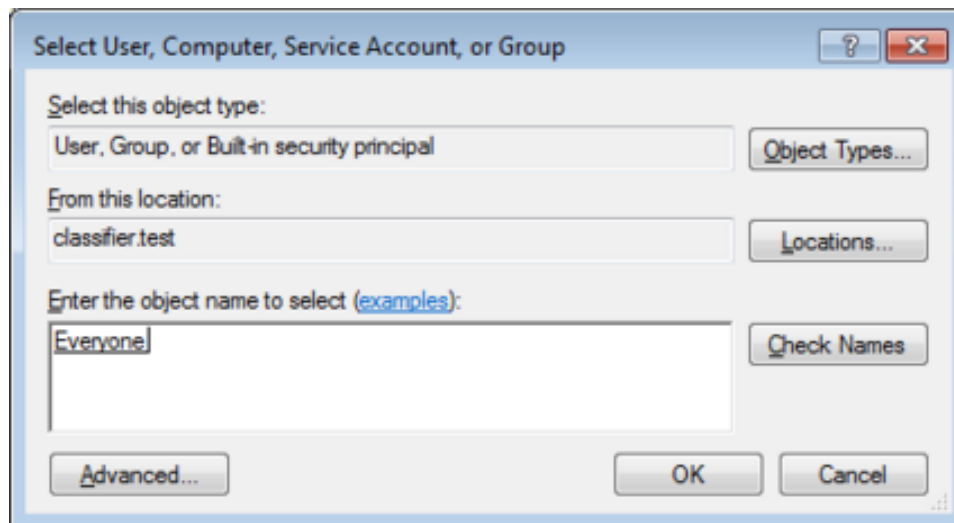


Figure: Add everyone.

4. In the Auditing Entry for Boldon James presented for Everyone , enable Success and Failure for each of the following:

- Delete
- Delete Subtree
- Modify permissions
- Modify Owner
- All validated writes
- Create all child objects
- Delete all child objects
- Create account objects
- Delete account objects

Configuration Size Estimation

The Classifier configuration comprises a set of folders and files that are published.

Publication to file store is a copy process and the size is easily determined (e.g. the structure below:
C:\Users\\Appdata\Roaming\Boldon James\ConfigurationNote: These folders may be hidden:

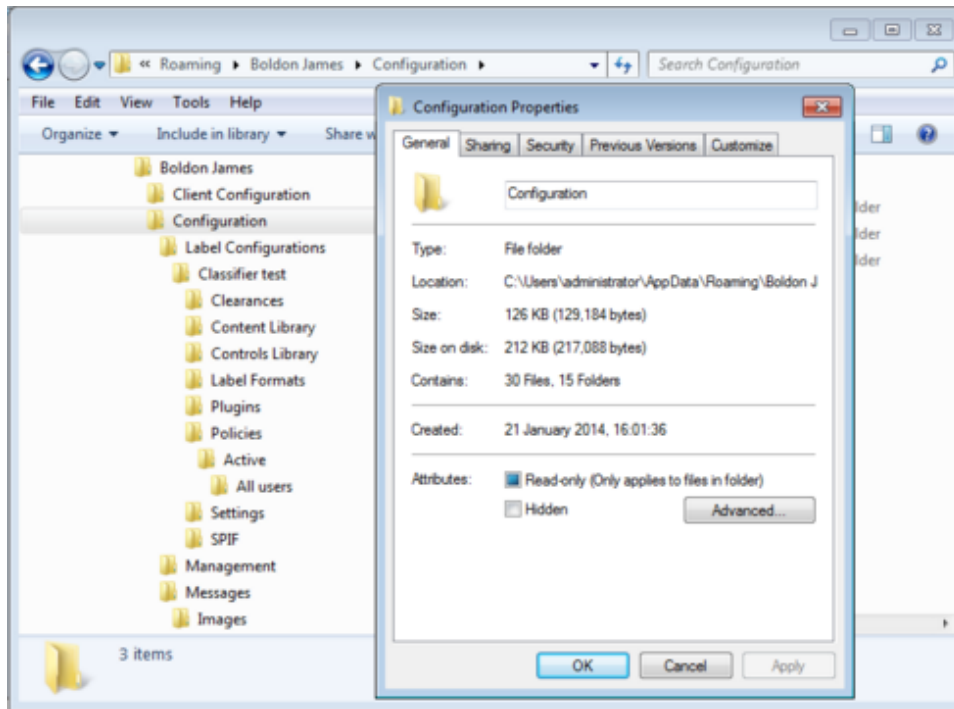


Figure: Configuration folder structure and size.

Publication to Active Directory maps each folder and file to an individual object in Active Directory, and requires base-64 encoding for image files. This encapsulation process incurs an overhead. The impact on the Active Directory (the NTDS.dit file typically found in the Windows\ntds folder) can be estimated using the following:

| Component | Impact on Active Directory (Kb) |
|------------------------|-----------------------------------|
| Configuration content. | Configuration size in file store. |

| Component | Impact on Active Directory (Kb) |
|---|---|
| Overhead estimate per object in AD (1.1 Kb per item). | The number of folders plus the number of files in the configuration *1.1. |
| Overheads for base-64 encoding of image files. | The size of image files *33. |
| Total | Sum of the above |

A typical Classifier configuration contains about 15 folders and 16 files; **plus** 1 folder and 7 files per policy; **plus** however many image files are added. With no image files and a single policy the configuration within Active Directory would typically be less than 300 Kb.

Publish Test Configuration

Admin: [Classifier Administration](#) -> Publish Test Configuration

Note: This action is not applicable to server based Classifier applications (e.g. OWA Classifier) as it is designed to operate in conjunction with [Test Mode Administration](#) which operates in a local desktop environment.

Once you have completed configuration of a policy (including the [Label](#) UI and Rules) you should check that the policy produces the desired effect for the end user. The **Publish Test Configuration** action facilitates this without disturbing the deployed configuration.

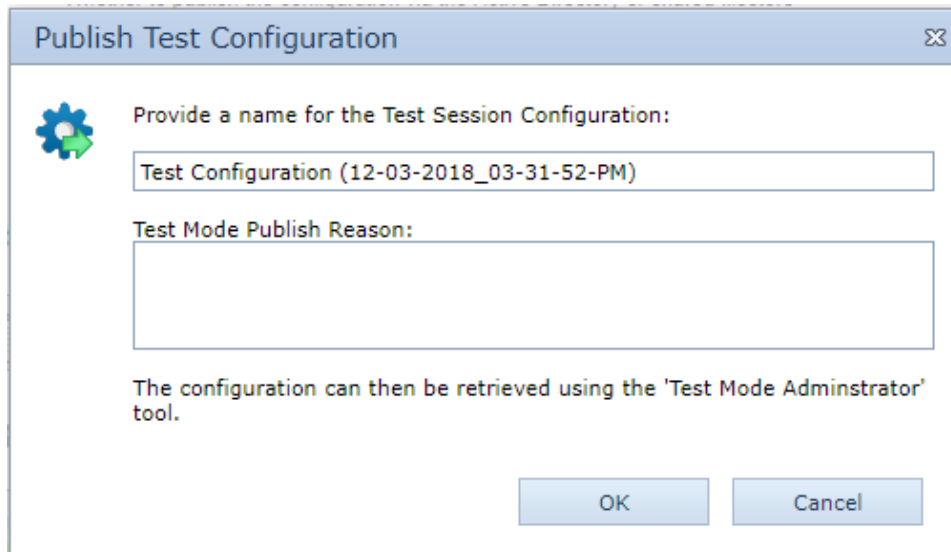
Note: If you just wish to see how the label selection interface will look for a policy, you can use the [Label Preview](#) action rather than starting an application after **Publish Test Configuration**.

Note: There is a [Test mode auditing](#) setting that can be used to stop the capture of audit information when **Publish Test Configuration** is invoked.

There are a number of steps, most only apply the first time the test configuration mechanism is used.

To test a configuration:

1. Establish a **configuration** that you wish to **test**.
2. Establish a **folder** in a suitable **location** into which test configurations can be published (e.g. \\ICS-DC-1\TestMode. This needs to be a file store folder:
 - That can be written to by the Classifier Administration Service (and by the user under which that service is running).
 - That can be accessed (read) by the user(s) who will use [Test Mode Administration](#).
3. The path to the test folder can be set using **Administrator Settings** menu -> [Configuration Folder Paths](#) .
4. Select **Classifier Administration** then choose **Publish Test Configuration** and provide a name for the sub-folder that will hold the test configuration, and a reason for the publication.



Publish Test Configuration.

5. Click **OK** to publish the test configuration.
6. See [Test Mode Administration](#) for details of how to use the test configuration.

Test Mode Administration

Admin: [Classifier Administration](#) -> [Publish Test Configuration](#) -> Test Mode Administration

This topic describes how you can explore the effects of a test configuration published using [Publish Test Configuration](#).

For each system that is to be used as a platform for exploring test configurations:

1. Ensure that the relevant **base applications** (e.g. Microsoft Office) are **installed** and **working**.
2. Ensure that **Email** and **Office Classifier** is installed.
3. Ensure that **Classifier Test Mode Administration** is **installed** (this is a separately installable item that can be found in the TestModeAdministration folder under the Classifier Administration installation structure).
4. Ensure that none of the **Classifier applications** (Word etc.) is **running**.
5. Invoke **Classifier Test Mode Administration** from the **start** menu. This will present a dialog allowing you to define the location containing the test configurations (e.g. \\ICS-DC-1\TestMode). The dialog is updated to show the available test configurations.

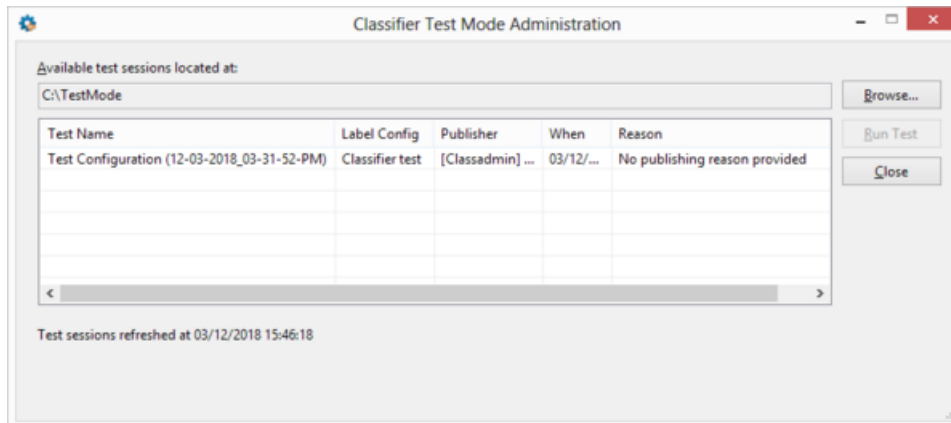


Figure: Choose Test Configuration.

6. Select the required **Test Configuration** and click **Run Test** .
7. If the configuration contains multiple policies, you are prompted to select the **policy** to be used:

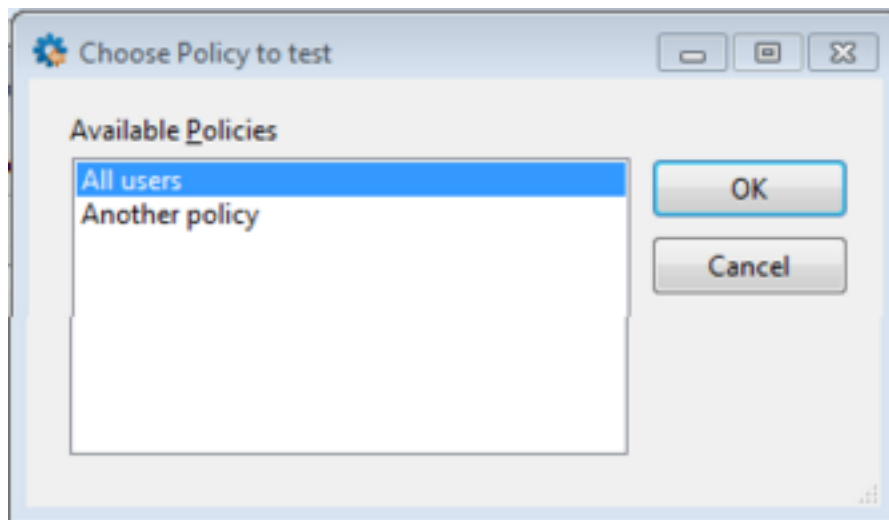


Figure: Available Policies.

This test sequence will temporarily set specific registry settings that direct Classifier applications to use the chosen test configuration and policy, rather than any deployed configuration.

3. Start the **application(s)** to be tested. A dialog shows the currently **active (Classifier) applications**.

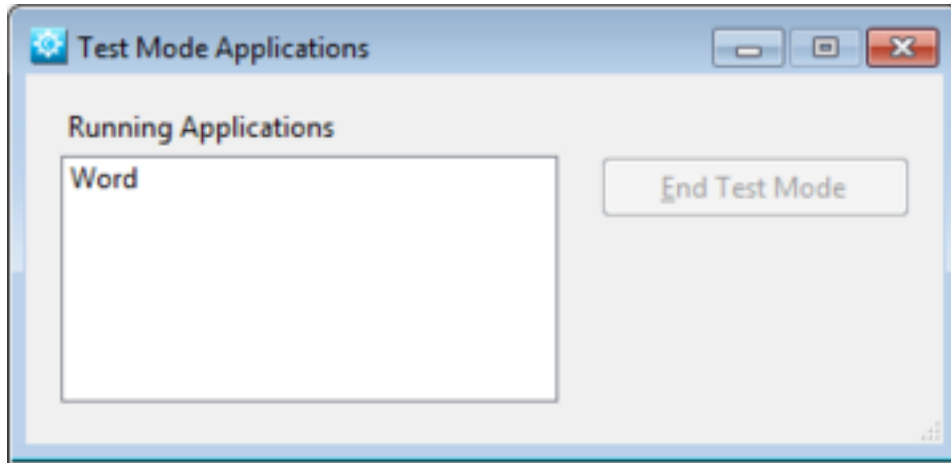


Figure: Running Applications.

4. **End Test Mode** is only enabled if there are no Classifier applications running.

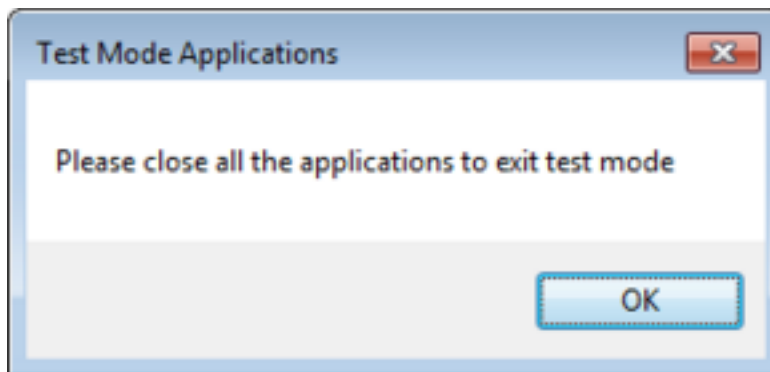


Figure: Close Applications.

5. When a Classifier application starts running it indicates that it is operating in **Test Mode**.

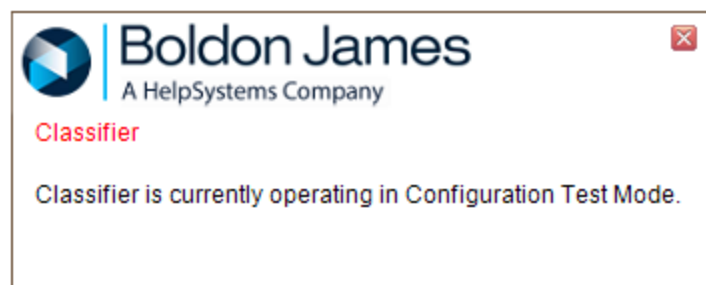


Figure: Application Test Mode warning.

6. **End Test Mode** is only **enabled** if there are **no Classifier applications running**.
7. Once you have checked the **Classifier functionality**, close **all** open affected **applications** (e.g. Word and Outlook).
8. Then click **End Test Mode** on the **Classifier Administration Policy Test** dialog. When the applications are restarted, they revert to standard operation.

Lock / Unlock Configuration

Admin: [Classifier Administration](#) -> Lock / Unlock Configuration

The **Lock Configuration** action can be used to indicate to other Classifier administrators that the configuration should not be published at the moment (e.g. because configuration changes are incomplete).

If the configuration is locked, the **Unlock Configuration** action is displayed and the [Publish Configuration](#) action is inhibited (greyed).

There is a similar [Lock / Unlock Policy](#) actions. Note, however, that **Unlock Configuration** will **NOT** affect any policy lock, they will remain in effect.

Create Web Configuration

Admin: [Classifier Administration](#) -> Create Web Configuration

Note: If the action is unavailable, it may be because a policy is locked.

Classifier clients and Classifier Management Agent retrieve master configuration updates from the location defined using **Classifier Configuration Settings** . These may point to a file store location, Active Directory, or a URL location.

This topic describes how to produce a copy of the Classifier configuration in the format required in support of this feature (retrieval from a URL).

For more detailed information about registry keys and entries see the **Classifier Registry Keys Deployment and Troubleshooting Guide**.

It is assumed that you already have:

- An established Classifier configuration.
- If Classifier Management Agent is to be used, then you have already deployed the **Classifier Management Agent version 3.8.1 or later** BUT configured to retrieve the master configuration from the **Active Directory** or **File Store**, (i.e. you have established the relevant registry entries described in the Classifier Management Agent Guide (UM6411)).

The general steps to support retrieval of configuration from a URL by Classifier Management Agent are:

1. Establish a **zipped version** of the **master configuration** and associated **version.txt** file as described below.
2. Establish the **zipped version** of the **master configuration** and associated **version.txt** file on your **designated web page**.
3. Establish the necessary [Web Host Settings](#) .
4. When the **Clients / Management Agent** restarts, they retrieve the **master configuration** from the **designated web location**.

To establish the encrypted version of the master configuration:

1. Select the **Classifier Administration** node and choose **Create Web Configuration** which will display the following:

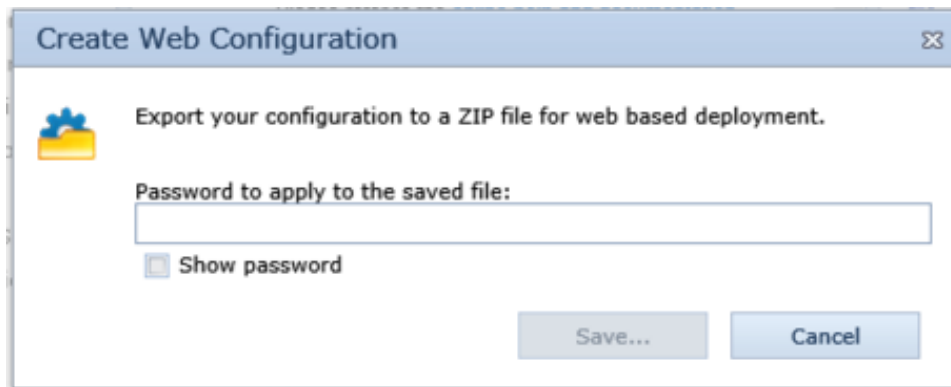


Figure: Create Web Configuration.

2. Supply a password and click **Save** . The configuration (config) and version file are saved to the folder defined by Folder for '**Create Web Configuration**' described under Administration Management Menu -> [Configuration Folder Paths](#).
3. The dialog presented shows an encrypted form of the password. For example:

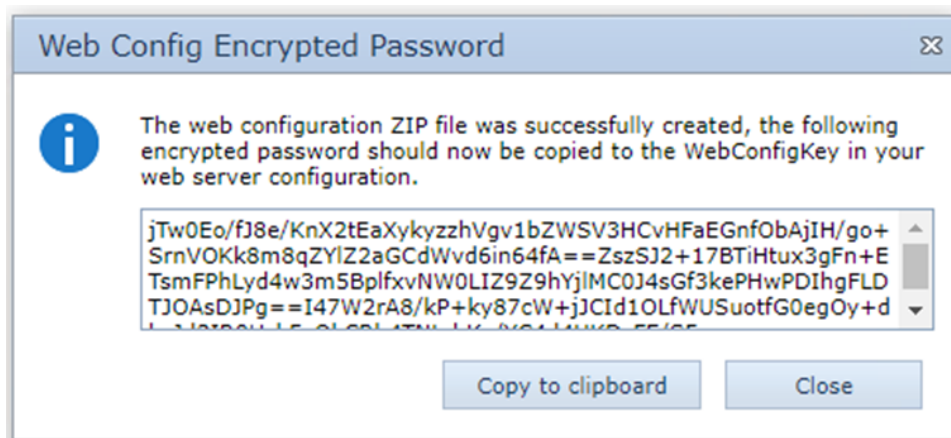


Figure: Encrypted Password.

The value shown is required to populate the [WebConfigKey](#) registry entry (see [Web Host Settings](#)) that allows the Classifier Clients or the Classifier Management Agent to decrypt the configuration from the configured URL.

4. Click **Copy to clipboard** , and then **Close** .

Note: It is a matter for site policy as to whether the same password is used to encrypt subsequent iterations, but if the plain text password value changes, the WebConfigKey registry entry must be updated accordingly. If the plain text password value doesn't change the displayed WebConfigKey will be updated. However, there is no need to update the registry entry for previously deployed clients. The default location for Web Configuration publishing is under C:\ProgramData\BoldonJames\WebConfig Publish Folder. This setting can be found in the **Administration Management Menu>Configuration Folder Paths** of the Classifier Administration Web UI.

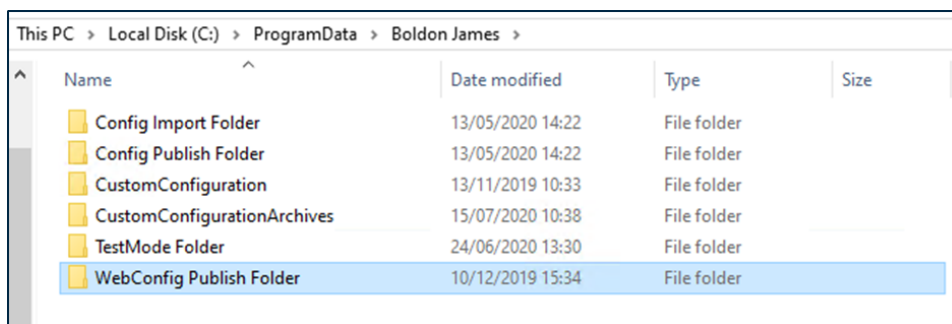


Figure: The default location for publishing a web configuration.

5. Check that the target (**Zipped Configuration**) folder contains both **zip** and **version.txt** files.

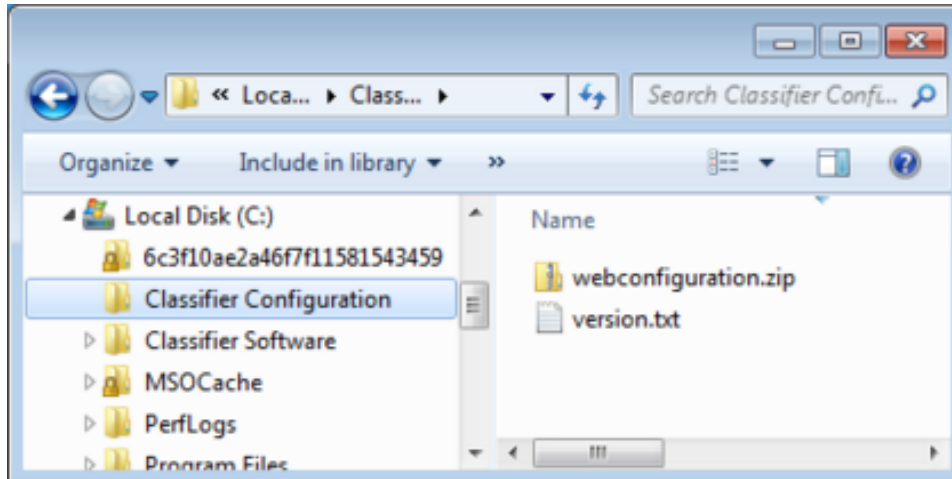


Figure: Generated Web Configuration files.

6. Copy both the **zip** and **version.txt** files to your intended web location.

Note: Each time the Classifier Configuration is published the version.txt file is re-written containing a unique value. Management Agent uses the contents of this file on the URL site to ascertain whether the (encrypted) configuration has changed.

7. Ensure that the relevant [Web Host Settings](#) are established, in particular that the encrypted password value is stored in **WebConfigKey**.
8. Maintain the URL configuration by repeating the steps above every time a new master configuration is published.

Internet Information Services (IIS)

For Internet Information Services (IIS) it is recommended to:

1. Create a separate virtual directory to provide remote access to the 2 Classifier web configuration files (the config.zip file, and the version.txt file).
2. Map the virtual directory to a separate physical folder on the IIS server machine to contain just those 2 files.
3. Use a secure connection (HTTPS) for client access to this virtual directory.

Settings Applicable Across The Organisation

This section describes the configuration wide settings which apply to all users of Classifier applications. They cannot be modified through the labelling policy.

- [Global Settings](#)
- [Image Library](#)
- [User Message Library](#)
- [User Interface Library](#)

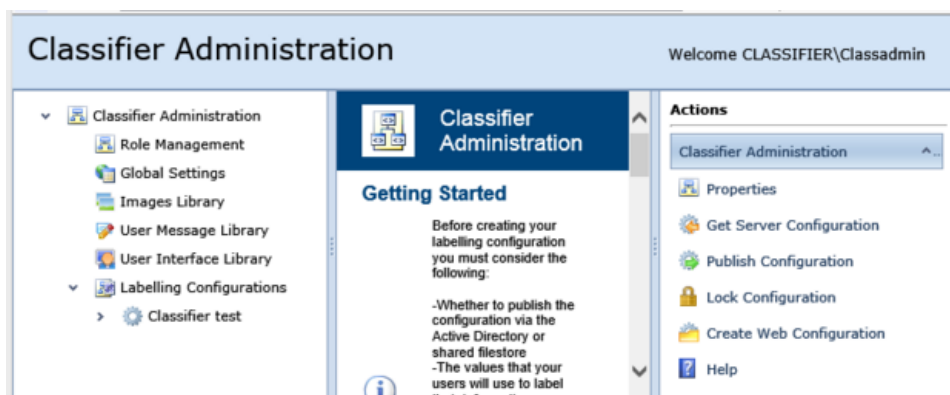


Figure: Configuration Wide Settings.

Global Settings

Admin: [Global Settings](#)

Global Settings apply to all users in the site that have **Office Classifier** functionality installed. For example you can disable each Office application whilst leaving the software installed. The settings available are:

- [Application Settings](#)
- [Audit Settings](#)
- [Languages](#) (only visible if Allow multiple languages is enabled in [Properties \(Classifier Administration\) / View](#))
- [Licence](#)

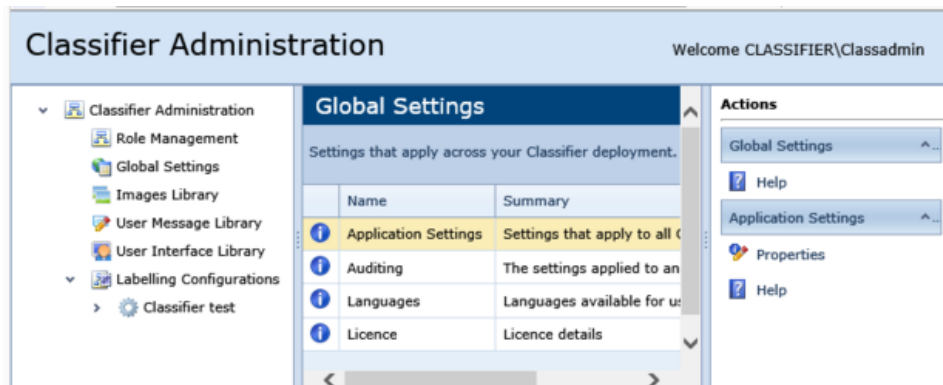


Figure: Global Settings.

The individual settings are available through **Properties**.

Application Settings

Admin: [Global Settings](#) / Application [Settings](#)

Global Application Settings apply to all users in the site that have Classifier functionality installed or which control the availability of Administration functionality.

The list of settings appears in a table with alternative setting values (**Enabled / Disabled**) selectable from a drop down list available if you select the current value.

The settings supported are summarised in the table below. Changes will only take effect after policy changes have been deployed and affected applications have been restarted.

| Setting | Link to Description |
|---|---|
| AutoDesk CAD | (These options only appears if the relevant component licence has been applied). |
| Dassault DraftSight | Allows you to Enable / Disable CAD Classifier operation for the specific application post installation. |
| Clearance check Email Domains | <p>Enabled - The Email Domain Clearance features of Classifier Administration are available. Email Domain Clearance is supported by Email, OWA and Notes Classifier. See Email domain clearances for details of this functionality.</p> <p>Disabled - The Email Domain Clearance features are NOT available. within Classifier Administration</p> |
| Clearance Library | <p>Enabled - The Clearance Library features of Classifier Administration are available. Clearance Library entries are used by SharePoint Classifier. See Clearance Library for further details.</p> <p>Disabled - The Clearance Library features are NOT available within Classifier Administration</p> |
| Dynamic Clearances | <p>Enabled - The Dynamic Clearance features of Classifier Administration are available. See Dynamic Clearances for details of this functionality.</p> |

| Setting | Link to Description |
|---|---|
| | <p>Disabled - The Dynamic Clearance features are NOT available within Classifier Administration.</p> <p>Note: For new Classifier configurations this settings will be Enabled by default. For existing configurations the setting is Disabled by default.</p> |
| Maximum file size for icon overlay (in KB) | <p>Defines the maximum size file (in KB) that File Classifier will attempt to generate an icon overlay for. If no value is set the file size is unlimited.</p> <ul style="list-style-type: none"> • Type: integer (stored as string in config) • Default Value: Not set, which means no restriction to supported file size. |
| <p>Microsoft Excel</p> <p>Microsoft Excel for Mac</p> <p>Microsoft Outlook</p> <p>Microsoft Outlook for Mac</p> <p>Microsoft PowerPoint</p> <p>Microsoft PowerPoint for Mac</p> <p>Microsoft Project (2010 onwards only)</p> <p>Microsoft Visio (2010 onwards only)</p> <p>Microsoft Word</p> <p>Microsoft Word for Mac</p> | <p>Enable / Disable for each individual application.</p> <p>The Classifier functionality for an application can be activated using this setting (Enable / Disable). Any Classifier configuration associated with application is retained unchanged even if the setting id disabled.</p> <p>The Mac options only appear if a suitable Classifier for Mac licence has been applied.</p> |

Note : There is no Enable/Disable setting for **Outlook Web Access (OWA Classifier)** or **(Lotus) Notes Classifier** as these are Enabled / Disabled by server based Installation / Removal in conjunction with a component licence.

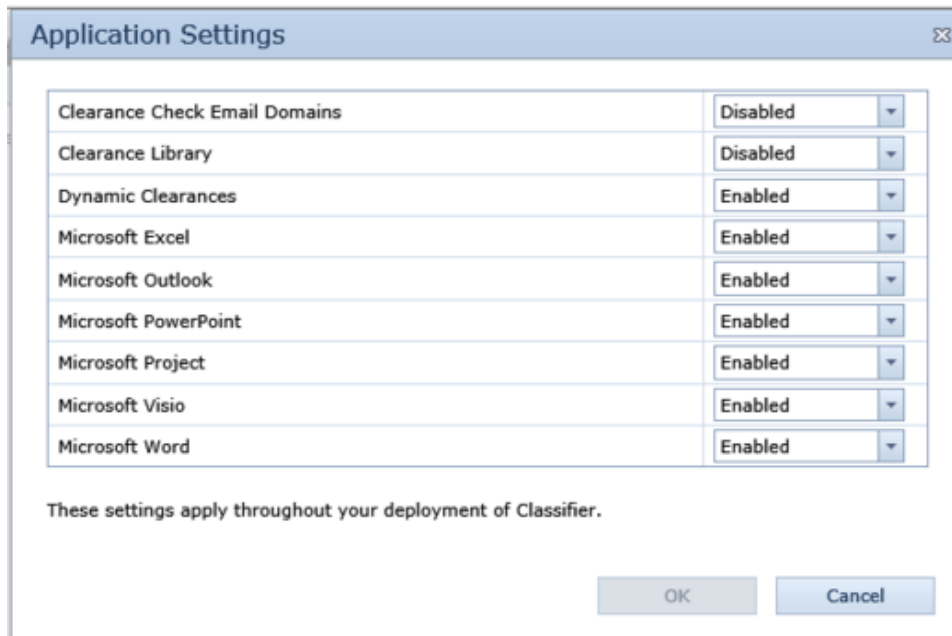


Figure: Application Settings window.

Audit Settings

Admin: [Global Settings](#) / Auditing

Audit settings allow the administrator to control which operations are audited by applications that have Classifier capabilities. Some settings may apply to most applications (e.g. Open), others are only pertinent to a subset of the applications (e.g. Send is not applicable to documents – sending a document will invoke Outlook which will take notice of this setting). Some actions are not audited because of environment limitations (e.g. Save is not audited by OWA). Each setting takes the value **Enabled** or **Disabled**.

Note: Classifier Mail Add-in does not perform any auditing.

Classifier [Actions](#) and Events Audit [Settings](#)

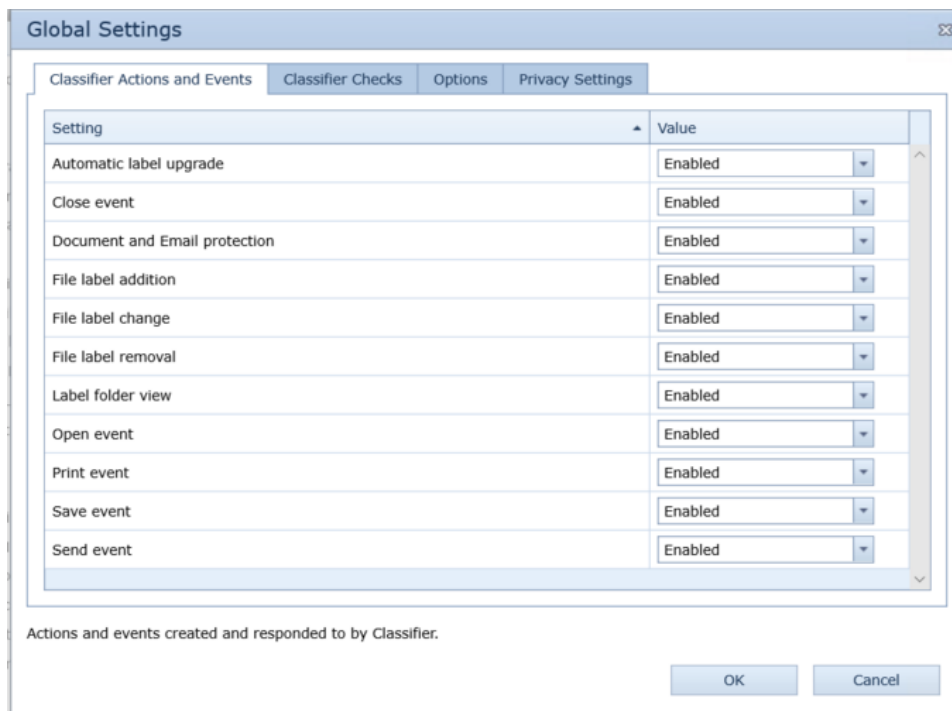


Figure: Classifier Actions and Events.

Classifier Actions and Events Audit Settings Table

| Setting | Description |
|-------------------------------|--|
| Automatic label upgrade | Audit the application of an automatic label upgrade. Enabling this option audits if a rule applying this check succeeds or fails – e.g. A message label is automatically upgraded as a result of the addition of an attachment not dominated by the message label. |
| Close event | Audit the close action in Classifier-enabled Office applications. Enabling this option audits if a Microsoft Office document is closed. |
| Document and Email Protection | Audit the application and email protection, either RMS or S/MIME. Enabling this option audits if a rule applying S/MIME or RMS is actioned i.e. S/MIME security or RMS policy is applied to a document or email. |
| File label addition | Audit when the file labels are added. Note: Only available if File Classifier is licensed. Enabling this option audits if File Classifier adds a label to an item. |
| File label change | Audit when file labels are changed. Note: Only available if File Classifier is licensed. Enabling this option audits if File Classifier changes the label on an item. |
| File label removal | Audit when file labels are removed. Note: Only available if File Classifier is licensed. |

| Setting | Description |
|-------------------|---|
| | Enabling this option audits if File Classifier removes a label from an item. |
| Label Folder View | <p>Audit the labelling of email items in a folder.</p> <p>Note: This option is only applicable if you have the Allow Folder View labelling Outlook option is Enabled.</p> <p>If the Label Folder View setting is Enabled, Email Classifier audits any use of the Folder View Labelling feature, recording the new label value, and any previous label value.</p> |
| Open event | Audit the Open action in Classifier-enabled Office applications. Enabling this option audits if an existing classifier document is opened |
| Print event | <p>Audit the Print action in Classifier-enabled Office applications. Enabling this option audits if a request is made to print an object.</p> <p>(This setting is not supported by Visio nor Outlook nor OWA).</p> |
| Save event | Audit the Save action in Classifier-enabled Office applications. Enabling this option audits if an object is saved. Note that this will also be triggered by any background automatic Save actions (This setting is not supported by OWA Classifier). Email Classifier will audit saving of Draft messages, Outlook msg and template formats, but other formats including Html and Word docs are not audited. |
| Send event | Audit the Send action in Classifier-enabled Office applications. Enabling this option audits if Outlook sends a message. |

Classifier Checks Audit Settings

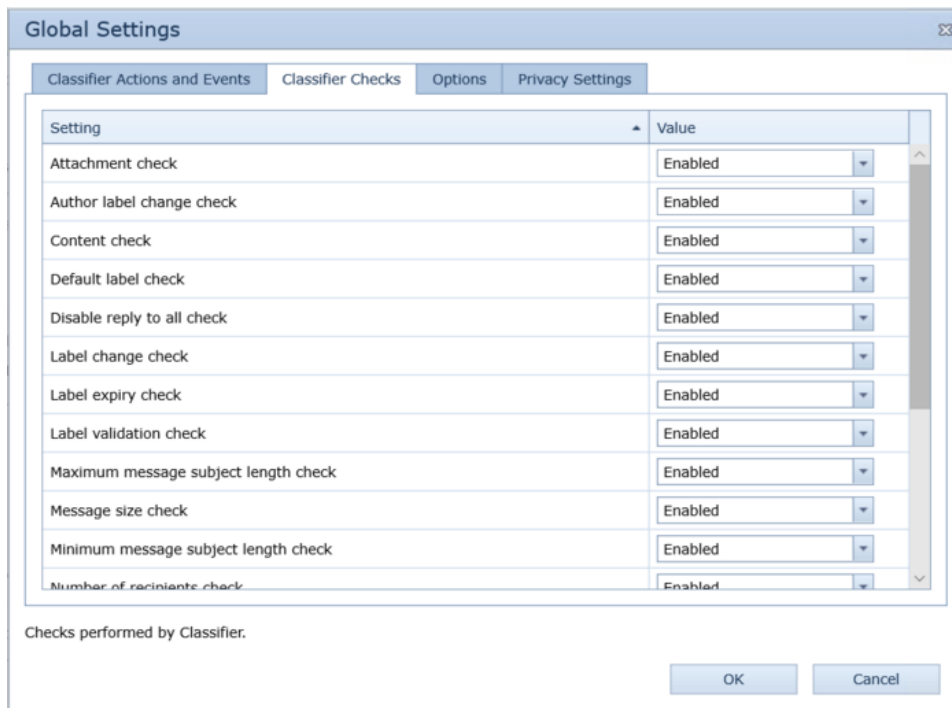


Figure: Classifier Checks.

Classifier Checks Audit Settings Table

| Setting | Description |
|--------------------------------------|---|
| Attachment Check | Audit the outcome of checking the labels of attachments against that of the containing message. Enabling this option audits if a rule applying this check succeeds or fails – e.g. An attachment is found with a label not dominated by the message label. |
| Author label change check | Audit the outcome of performing an author label change check. Enabling this option audits if a Check for Author label change rule succeeds or fails – i.e. The 'Author' tries to change the value of a label element when this is inhibited by such a rule for Office applications. |
| Content check | Audit when the user uses content checking. Enabling this option audits if a Content Checking rule is actioned. That is when a message Subject, Body or Attachment contains a 'checked for phrase'. The audit entry will contain the groups checked, the element (Subject / Body / Attachment) that contained a 'checked for phrase'. |
| Defaultlabel check | Audit when the default label check is triggered. Enabling this option audits every time the configured Default Label Check rule is actioned. |
| Disable reply to all check | Audit the outcome of performing a message disable reply to all check. Enabling this option audits every time the Disable reply to all rule is actioned. |
| Label change check | Audit the outcome of performing a label change check. Enabling this option audits if a Check for label change rule applying this check succeeds or fails – i.e. The user tries to change the value of a label element but the action is inhibited by the rules for application (Office,Email, OWA, Notes or Mobile Classifier (Warn or Prevent)). |
| Label expiry check | Audit the outcome of performing a label expiry check. Enabling this option audits if a Check these selectors for expiry rule succeeds or fails. |
| Label validation check | Audit the outcome of validating the completeness of a label. Enabling this option audits if a rule applying this check succeeds or fails. |
| Maximum message subject length check | Audit the outcome of performing a minimum message subject length check. Enabling this option audits if the Check subject length does not exceed rule is actioned. |
| Message size check | Audit the outcome of performing a message size check. Enabling this option audits if the Check message size does not exceed rule is actioned. |
| Minimum message subject length check | Audit the outcome of performing a minimum message subject length check. Enabling this option audits if the Check subject length exceeds rule is actioned. |
| Number of recipients check | Audit the outcome of performing a number of recipients check. Enabling this option audits if the Check number of recipients does not exceed rule is actioned. |
| Originator clearance check | Audit the outcome of a clearance check on the message originator. Enabling this option audits if a rule applying this check fails – i.e. the Originator tries to send a message but does not have the required clearance. |
| Recipient Clearance Check | Audit the outcome of a clearance check on the message recipients. Enabling this option audits if a rule applying this check succeeds or fails – e.g. Originator tries to send a message to recipients that do not have the required clearance |
| Recipient list addition check | Audit outcome of performing a recipient list addition check. Enabling this option audits if a Check for additional recipients rule is actioned. That is the user replies to or forwards a message that triggers such a rule. |
| Recipient Type check | Audit the outcome of performing a recipient type check. Enabling this option audits if |

| Setting | Description |
|---------------------------------------|--|
| | a Check recipient type rule is actioned. |
| Suggested Classification check | Audit the outcome of performing a suggested classification check. Enabling this option audits if a Suggested classification check is actioned. |
| Unlabelled attachment check | Audit when the unlabelled attachment check is triggered. |
| User warning check | Audit when the user warning check is triggered. Enabling this option audits if a User Warning check rule is actioned. |

Options Audit Settings

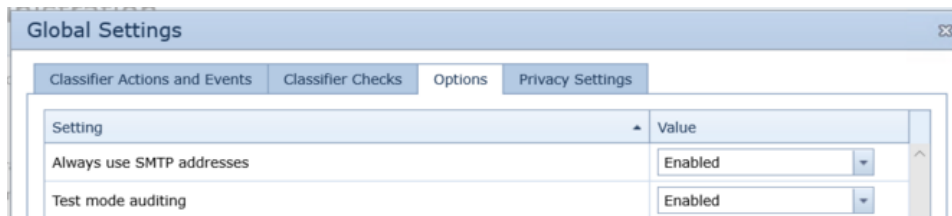


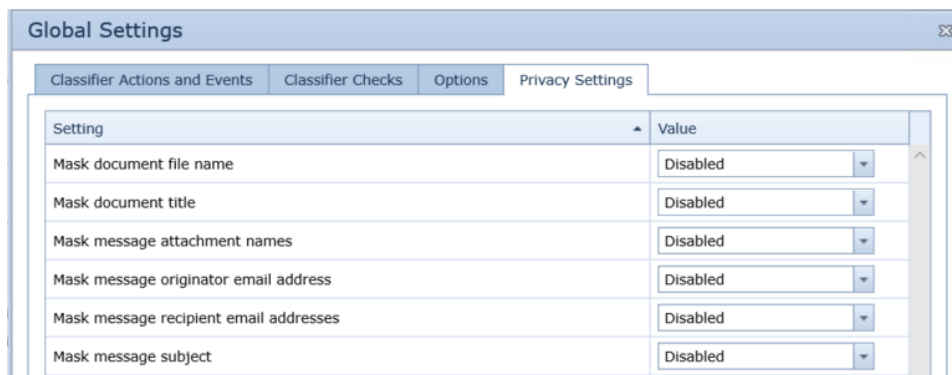
Figure: Options.

Options Audit Settings Table

The other settings configure whether an audit message is logged to the system application event log. The audit message describes the event which has taken place. An event ID and user ID is included when an audit takes place.

| Setting | Description |
|----------------------------------|---|
| Always Use SMTP addresses | When auditing email addresses always try to obtain an SMTP address. Note: This setting applies to Email Classifier, OWA Classifier and Notes Classifier. Enabled - Auditing will attempt to obtain an SMTP address for the sender and all recipients. In some situations this can lead to significant delays because no SMTP address can be found. Disabled - Classifier auditing will use the email address it has available. |
| Test mode auditing | Perform selected auditing operations even in the `test` mode. mode. Enabling this option audits activities performed whilst running in Test Mode. Disabling this setting will stop events being logged when in Test Mode. |

Privacy Settings Audit Settings



Privacy Settings Audit Settings Table

There are five privacy settings in the list that affect all auditing. These allow you to mask selected pieces of information from audit logs. The privacy settings are:

| Setting | Description | Enabled/Disabled |
|--|--|--|
| Mask document file name | Obscure the document file name on save. | Enabled - The item is replaced in the audit entry by *** (three asterisks). |
| Mask document title | Obscure the document title on save. | |
| Mask message attachment names | Obscure the message attachment names on submission. | Disabled - The item is included in the audit entry. |
| Mask message recipient email addresses | Obscure the message recipient email addresses on submission. | |
| Mask message subject | Obscure the message subject on submission. | |

An example of event message content and a list of the different event messages can be found in [Auditing Event Messages](#).

Languages

Admin: [Global Settings](#) / Languages

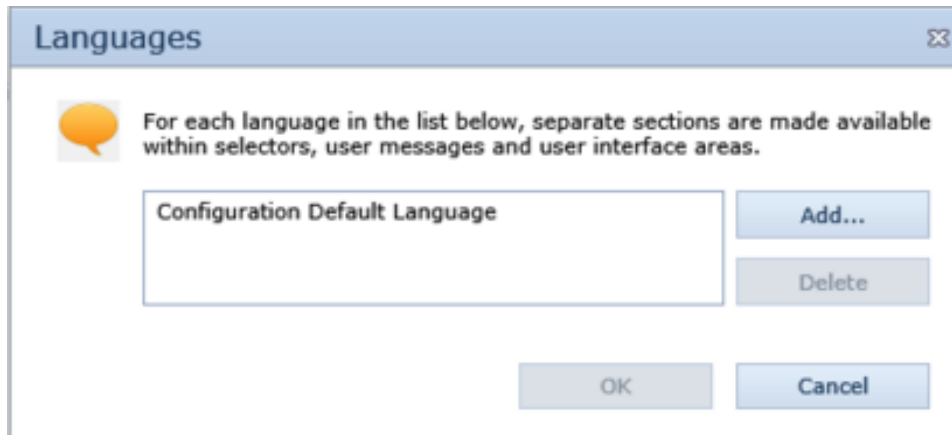
Classifier Administration allows you to configure all the text presented to users through the various Classifier features (e.g. [User Message Library](#), [User Interface Library](#) etc.). However, these basic facilities support a single set of definitions which equate to a **Configuration default language**.

The **Configuration default language** is initially English, but you can change the presentation values configured for this 'language' using the language mechanisms described in this document.

Classifier **Languages** mechanisms allow you to support multiple languages such that the text presented to each user is appropriate (site configurable) for their chosen Language / Country.

Overview of the Languages mechanisms:

- The Languages to be supported are defined by selecting the [Global Settings / Languages](#) node. Initially the list only includes the **Configuration default language** entry.



Languages initial state.

- When a Language is added to the configuration it has no language specific values defined. You must configure each required value, if an item does not have a language specific value defined, the **Algorithm** (below) will be used to produce a value for display.
- You can **Add** additional language entries, and **Delete** any language entry except for the **Configuration default language** (you will be warned that all associated values will be lost). This list of languages is presented wherever per Language values may be configured (see table below).
- Selected languages can be of the form **Language (Country)** or **Language** (e.g. **French(Belgium)** or **French**).

Algorithm for finding the text to display

Once the language configuration is complete and deployed, the Classifier applications (e.g. Office Classifier) will observe the algorithm below to obtain the 'appropriate' text to display (e.g. button caption, User message etc.):

- If the item of interest (e.g. User message) has a value defined (not blank) for a **Language (Country)** setting that exactly matches the current environment, then use that value, otherwise:
- If the item of interest has a value defined for the (culture neutral) **Language** , that matches the current environment then use that value, otherwise:
- If the item of interest has a value defined for the **Policy Default Language** , then use that value, otherwise:
- If the item of interest has a value defined for the **Configuration Default Language** , then use that value, otherwise:
- There is no defined value.

Thus you only have to define Language specific values if the algorithm described above would not yield an appropriate value from one of the other Languages.

As an example you might have a French speaking community to serve, where most users can use general French, but a few settings require community specific values (e.g. a Swiss variant of French). You would then:

- Define French and French/Swiss as your supported languages;
- Configure the full range of values (actually only those essential for your environment) for French;

- Set French as your policy default;
 - Configure French/Swiss variants only for those items that specifically require a different value.

Features supporting Language mechanisms

| Global Settings | No Facilities (Not Applicable). |
|--|---|
| User Message Library | <p>You can define per language Title , Text and Help URL link values for each message through the Message Properties as described in Add a new message .</p> <p>You can select which Language settings the User Message List presents.</p> |
| User Interface Library | <p>You can define per language values for each of the configurable text items as described in the sub-topics below User Interface Library / Properties (UI Definition Items) .</p> |
| Selector Library | <p>Limited facilities are provided (see features excluded table below).</p> <p>Per language values for the Caption and Tooltip can be defined for each selector as described in Add a new selector . Equivalent policy settings are also available.</p> <p>Single selection list supports localisation (Languages) of selector Value Name , Tooltip , Portion and Alternate Name /2/3 .</p> <p>You can select which Language related settings the Set Selector view presents.</p> <p>You can also make use of the Alternate names which can be defined for Single Selection Lists , Multiple Selection lists and Date offset Lists as described under Selector Library / Selector Actions / Edit Selector .</p> |
| Marking Library | No facilities (see features excluded table below). |
| Content Library | No facilities (not applicable). |
| Configuration Settings | No facilities (not applicable). |
| Policies | <p>The Policy default language can be defined as described in Properties (Policy) .</p> <p>Per language values for the Caption and Tooltip can be defined for each selector (Set Selectors) as described in Policies / Policy Label UI / Selector Properties (Policy) / Selector Properties / General .</p> |
| Policy / Single Click | Per language values for the Caption and Tooltip can be defined for each Single Click button as described in Use Single Click with pre-defined labels. |
| Clearance Settings | No facilities (not applicable). |

The following Classifier features **are excluded** from the Languages mechanisms (are not site translatable):

| Features | Description |
|------------------------|--|
| Marking Formats | <p>Markings present business policy information (e.g. sensitivity) which must be meaningful to all users. Supporting different markings for different locales would be confusing to end users.</p> |

| Features | Description |
|--|--|
| | Sites can make their Markings multi-language (e.g. include both German and English in a LLOT disclaimer). (Not recommended) Sites may assign separate policies (applying different Markings) to different groups (languages) of users. |
| "No Marking" text is not translatable | For the same reasons as Marking Formats above. Sites can define composite text if required, e.g. No Marking / Pas Marking / Nein Marking / ... |
| Selector values are not translatable | Multiple selection list and Date offset list do NOT support localisation (Languages) of selector Value Name, Tooltip, Portion and Alternate Name /2/3. Note: Selector Captions and Tooltips do support the Languages mechanisms. |
| Classifier Administration Interface | English only. |
| Administrators Documentation | The product as shipped provides English only. |
| Administrators on-line Help | |
| Auditing | English only. |
| User URL help page (available on the Label selection interface). | A single link can be defined. The site can provide language related redirection at the web server using the browser supplied locale. |

Licence

Admin: [Global Settings](#) / Licence

The features available to users are determined by the configuration established using [Classifier Administration](#) and deployed to those users.

Classifier Administration only enables configuration of features for which the site is licensed. The available features for each licence can be seen in the table [Features versus Licence](#) . The licence status can be inspected from Email and Office Classifier as described in [View Client Licence Status](#) .

A Licence may be effective for a limited duration (e.g. for evaluation), subscription or in perpetuity (Full).

Note: This document (Classifier Administration Guide) describes all features supported by Classifier. Depending upon the licences you have, some features may not appear or be greyed out. For example, if you do not have a licence for OWA Classifier, then OWA Classifier features will be unavailable.

Initial installation will supply one or more Classifier licence files in the Licence sub-folder on the Classifier Administration CD image. Each licence file has a name of the form IMP **xxx** .LIC, where **xxx** relates to the feature or option (e.g. **IMPCEM - Email Classifier; IMPCOF - Office Classifier; IMPCOW - OWA Classifier; IMPCLN - Notes Classifier**).

The initial installation has no licence files applied to the configuration. Each licence is applied using the sequence described below. If a site purchases additional options, an additional licence file is supplied which can be merged into the existing licence settings.

Note: For Citrix environments: Classifier licences are on a per user basis, thus there is no difference if a user is using Email or Office Classifier using Citrix or that same user is using a Windows desktop, or using Windows Terminal Server. OWA Classifier requires its own licence.

To install a license file:

1. Run **Classifier Administration**.
2. Select **Global Settings**.
3. Choose **Licence**. This presents the current licence information in the dialog below. Initially this is empty.

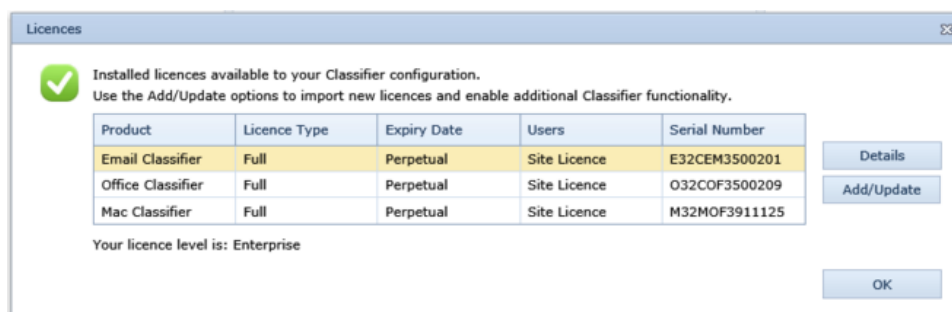


Figure: Licence management interface.

4. To merge in a new licence file (enabling additional features) click **Add / Update**.
5. Browse to the location of the new licence file, **select** the file and click **Open**. For an initial installation the default location to find Licence files is in folders (**one per licence**) below the **Licence** sub-folder on the **Classifier Base** bundle.
 - The selected file is merged into the existing licence file and the Licence Management dialog will be updated to reflect the changes.
 - Licence consistency will be checked when you click **OK**. When upgrading existing licences to a new level you may have to **Update** all current licences to the new level before clicking **OK**.
 - Selecting an entry in the list and clicking **Details** will show further information about the licence.

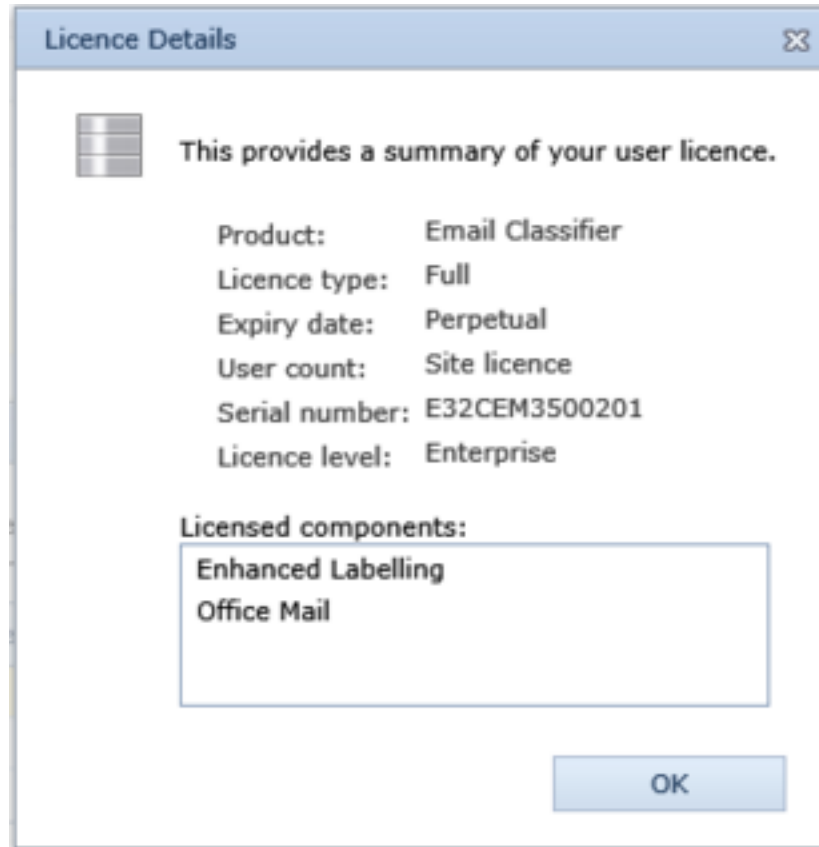


Figure: Licence details.

Note: If you have difficulty merging a new licence on to an existing system, it is likely that what you are attempting is breaking the restrictions below (e.g. you have Evaluation licences and are attempting to update only one of your products to a Full licence - you must update all installed products at the same time (do not exit the licence dialog until all product licences have been updated),

Restrictions

There are certain limitations applied by the licence management software:

- **All licences must be at the same level (3 or 4).** For example you cannot use an (historic) Email Classifier Standard Edition licence (Level 3) and an Enterprise Edition (Level 4) Office Classifier licence. Therefore, to add the Enterprise Edition Level 4 licence for the Office Classifier to a configuration that contains Email and Office Classifier, you need to obtain and apply an Enterprise Edition (Level 4) licence for Email Classifier at the same time.
- **You can update Evaluation licences to a Full licences, but not revert from a Full to an Evaluation licence.** You can have a configuration that includes a mixture of Full and Evaluation licences. If an Evaluation licence expires, the features it licences are disabled/unavailable.

- If you wish to stop using one licensed feature (e.g. OWA Classifier), and want to ensure that only the relevant features are made unavailable in Classifier Administration, you may have to reimplement your configuration using only the subset licences now required, or request assistance from Classifier support.
- **Historic: You must use at least a Standard Edition (Level 3) licence** if you have an existing configuration created with Classifier Administration Console Version 1.0.

Licence Filenames

- impBOX Box Classifier
- impCAD CAD Classifier for AutoCAD
- impCAD (DraftSight) CAD Classifier for DraftSight
- impCEM Email Classifier
- impCLN Notes Classifier
- impCMB Mobile Classifier
- impCOF Office Classifier
- impCOW OWA Classifier and Classifier Mail Add-in
- impBLK Power Classifier for Files
- impCRP Classifier Reporting Console
- impCRS Classifier Reporting Service
- impCPA Power Classifier for Administration
- impDCS Data [Classification](#) Service
- impEXC Exchange Classifier
- impMOF Mac Classifier
- impFCF File Classifier
- impSPC SharePoint Classifier

Licence Codes

These are the licence codes associated with each licensed Classifier product. The licence file supplied will be made up of this code prefixed with "**imp**", e.g. impCRS for the Classifier Reporting Service. This applies up to and including version 1.3.1 and has been superseded by the Classifier Reporting Service CRS licence for v1.4 onwards.

- Box Classifier BOX
- CAD Classifier CAD
- Classifier API CPI
- Classifier Reporting Service CRS
- Data Classification Service DCS
- Email Classifier CEM
- Exchange Classifier EXC
- File Classifier FCF
- Mac Classifier MOF
- Mobile Classifier CMB

- Notes Classifier CLN
- Office Classifier COF
- OWA Classifier COW
- Power Classifier BLK
- Power Classifier for Administration CPA
- SharePoint Classifier SPC

Note: This applies up to and including version 1.3.1 and has been superseded by the Classifier Reporting Service CRS licence for v1.4 onwards.

- Classifier Reporting Tool CRP
- Classifier API CPI

Features Versus Licence

This topic summarises various features indicating Classifier product support (**Email, Office, OWA, Notes, Mail Add-in and Mobile Classifier**) and the release versions in which they were first supported.

Note: This document assumes that the Classifier Licence(s) are Enterprise Level. Some features may not be available on systems using (historic) Standard level 3 licences. These are annotated as **[NH]** in the table below.

In the table below, x.y (e.g. 3.5) indicates a feature that is new in that version of Classifier products. Versions of Classifier products prior to that number do NOT support the feature (Classifier 1.3 (which preceded 3.4) is assumed as the baseline). For products other than Email and Office Classifier, and Classifier Administration you should also check the Application (e.g. OWA Classifier) Release Notes for Application specific limitations additional to those in the table below and in individual topics.

Note: A summary of functional differences for the various mail Classifier products (Email Classifier, OWA Classifier, Notes Classifier, Mobile Classifier and Classifier Mail Add-in) can be found in [Email, OWA, Mail Add-in, Notes and Mobile Differences](#).

| Features | Enterprise Edition Level 4 |
|---|-------------------------------|
| Applications | |
| Support for 32-bit Microsoft applications | Y |
| Support for 64-bit Microsoft applications | 3.6.4 |
| Outlook | Y |
| Word, Excel and PowerPoint | Y |
| MS Project (Office Classifier) [NH] | Y |
| Visio (Office Classifier) [NH] | Y |
| AutoCad | 3.7 |
| McAfee HDLP integration (Outlook only) | 3.7.4 |
| General Features | |

| Features | Enterprise Edition Level 4 |
|---|---|
| Common Label Handling Features | Y |
| Common Label Interface Actions | Y |
| Label Selection dialog | Y |
| Label Options | Y |
| Favourites [NH] | Y |
| Recently used labels [NH] | Y (not OWA or Mail Add-in or Mobile) |
| Folder View Labelling (Email) | Y (not Notes, Mail add-in or Mobile) OWA - 3.6.4 |
| Portion Mark | Y (not OWA, Mail Add-in, Notes or Mobile) |
| Control of options shown and ribbon location | 3.6.4 3.7.4 |
| Remove Classifier Options from the ribbon | (Not Mail Add-in nor Mobile) |
| Show 'Help' button on ribbon | 3.6.6 (Not Mail Add-in nor Mobile) |
| Global Settings | Y |
| Configuration Settings | Y |
| Policies | |
| One or more policies may be defined | Y |
| Users see a policy view of the features | Y |
| Outlook specific policy | 3.6 (not OWA or Notes) |
| File Classifier specific policy | 3.7 |
| Policy control of Rules (Rules supported) | Y |
| Challenge option | 3.6.4 |
| Mobile Classifier rules | 3.7.4 |
| Policy UI controls | |
| Display selector values as buttons (Single selection list only) | 3.6.6 |
| Show selector captions in ribbon | 3.6.6 |
| Suggested Classifications [NH] | 3.9 |
| Default Clearances (SharePoint related only) | 3.10.1 |
| Selectors and Label selection interface | |
| 3 selectors | Y |
| Up to 3 Selectors in Label Ribbon / ribbon | Y |
| Additional selectors (no specific limit is imposed, but Classifier testing has exercised up to 12) [NH] | 3.5 |
| Label Selection interface Tabs [NH] | 3.5 |

| Features | Enterprise Edition Level 4 |
|---|-------------------------------|
| Single selection list | Y |
| Multiple selection list [NH] | 3.5 |
| Text entry selector [NH] | 3.5 |
| Date picker selector [NH] | 3.5 |
| Date offset list selector | 3.5 |
| Masking of selectors against clearance | Y (Not Notes) |
| Single Click [NH] | 3.4 |
| Best match option [NH] | 3.6.4 |
| Assisted Labelling [NH] | Y (not Mobile) |
| Marking Formats | |
| Marking Formats with Hyperlinks | 3.4 |
| Environment Variables in Marking Formats [NH] | Y |
| Document properties in Marking Formats (Office) [NH] | Y |
| Email properties in Marking Formats [NH] | Y |
| Use plain text style | 3.7.4 |
| Other Features | |
| User features controlled by Classifier Policy | Y |
| Configuration in Active Directory or File store | Y |
| Extensive audit features | Y |
| Dynamic Clearances | 3.11 |
| SMTP domain clearances | Y |
| Clearance Library (SharePoint related only) | 3.10.1 |
| User Interface Library | 3.4 |
| Content Library Email [NH] | 3.4 |
| Office [NH] | 3.6 |
| Conditions Library [NH] | 3.9 |
| Multiple Language support | 3.6 |
| Localisation of selector value Name, Tooltip, Portion, Alternate Name /2/3 (Single selection list only) | 3.7.4 |
| Licence control of feature availability | Y |
| Image Library | 3.6.4 |
| Images for Single Click | 3.6.4 |
| Rules for Word and PowerPoint | 3.6.4 |
| Site control of user messages | Y |
| File Type Support (Label Propagation mechanisms) | |

| Features | Enterprise Edition Level 4 |
|---|-------------------------------|
| Microsoft Office types (Word, Outlook etc.) | Y |
| JPEG (manual configuration) | 3.4 |
| HTML (manual configuration) | 3.5 |
| Open Office file types (manual configuration) | 3.5 |
| AUTOCAD files (DWG and DXF) | 3.7 |

Note: SharePoint Classifier, File Classifier and Power Classifier each have their own licence, and each provides a single level of features.

Note: OWA Classifier and Notes Classifier each have their own licence. They support a subset of the features supported by Email Classifier as summarised in [Email, OWA, Mail Add-in, Notes and Mobile Features](#).

View Client Licence Status

The current Classifier Licence status can be inspected from Email and Office Classifier (e.g. Outlook, Word etc.) applications by selecting [About Classifier](#) from the Options menu on the Classifier Label interface. Not available under Classifier Mail Add-in or Mobile Classifier.

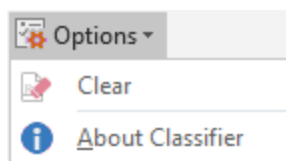


Figure: Select About Classifier.

This will present a dialog showing the licence state:

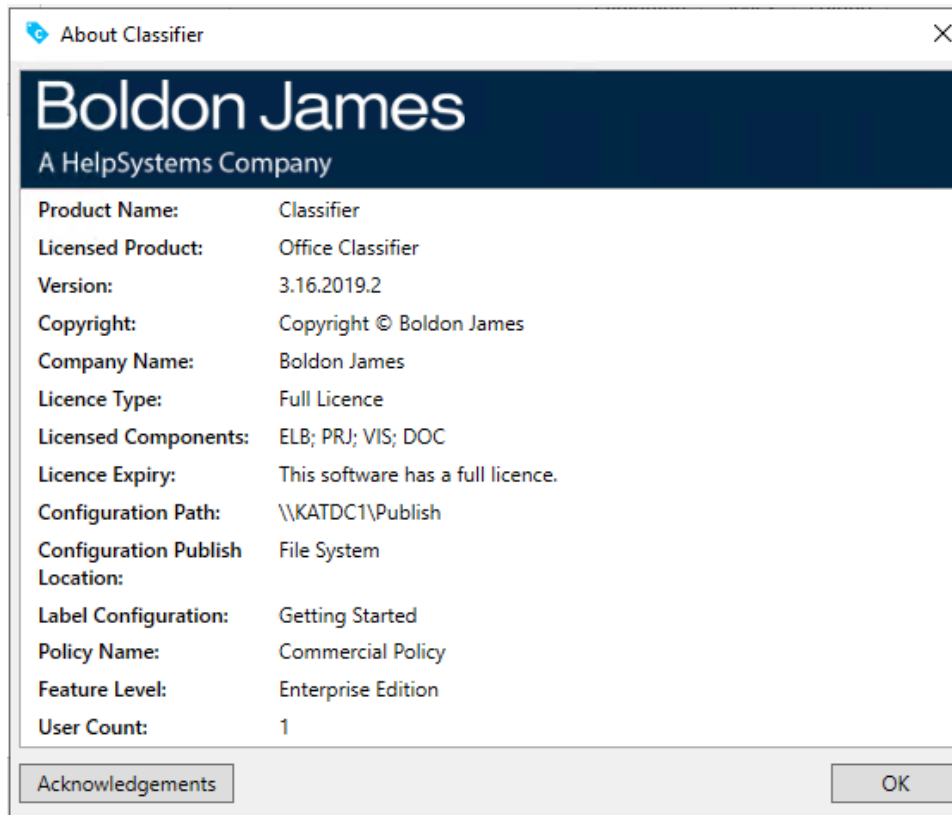


Figure: Current Licence state.

Image Library

Note: Classifier currently only supports images stored as .JPG, .JPEG or .PNG files.

Note: Images stored in the configuration are limited to a maximum size of 5Mb, and if you add an image greater than 500Kb a warning will be presented.

The Image Library allows you to define site specific images to be presented to the end user in some circumstances (Single Click configuration option, and specific Word, PowerPoint rules). This section describes how you establish these images and their usage.

The set of images is managed through the Image Library node in the [Classifier Configuration](#). The full set of images is available for the Administrator for selection in all Classifier [Policies](#).

If you intend to configure a Rule that supports an image, you should ensure that a suitable image is available before defining the rule, or define the image at the image selection point in the rule definition sequence using the "New..." option.

The rules that support images are described under [Rules supported / Add rules](#):

- [Add this image into header](#) with this text wrapping and this alignment (**Word**)
- [Add this image into footer](#) with this text wrapping and this alignment (**Word**)
- [Add this image as a watermark](#)(**Word/Outlook**)
- [Add this image to top of page](#) with this text wrapping and this alignment (**PowerPoint**)
- [Add this image to bottom of page](#) with this text wrapping and this alignment (**PowerPoint**)

The optional ability to display an image for Single Click items is described in [Use Single Click with pre-defined labels](#)

The set of actions supported by the Image Library are:

- [Add a new image](#)
- [Properties \(Image\)](#) [Provides the ability to view and change selected Properties of the image, including changing the associated image].
- [Delete \(Image\)](#)

Selecting the **Image Library** node displays a list of the currently defined images. This list is initially empty.

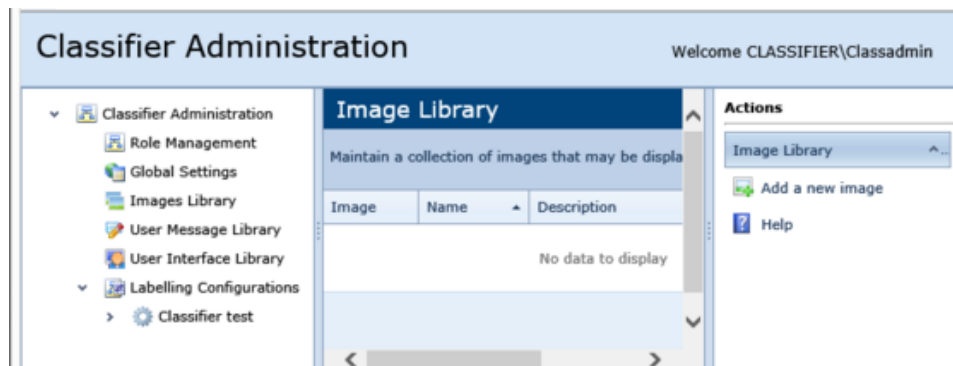


Figure: Image Library initial state.

Add a New Image

Admin: [Image Library](#) → Add a new image.

Note: Images stored in the configuration are limited to a maximum size of 5 Mb, and if you add an image greater than 500 Kb a warning will be presented.

Note: Any image assigned to a Single Click button is scaled to appear as 16*16 pixels.

To add a new image:

1. Select the **Image Library** and choose the **Add a new image** action. This will present a Windows Explorer window.
2. Select the required image file and click **Open** . This will present a dialog:

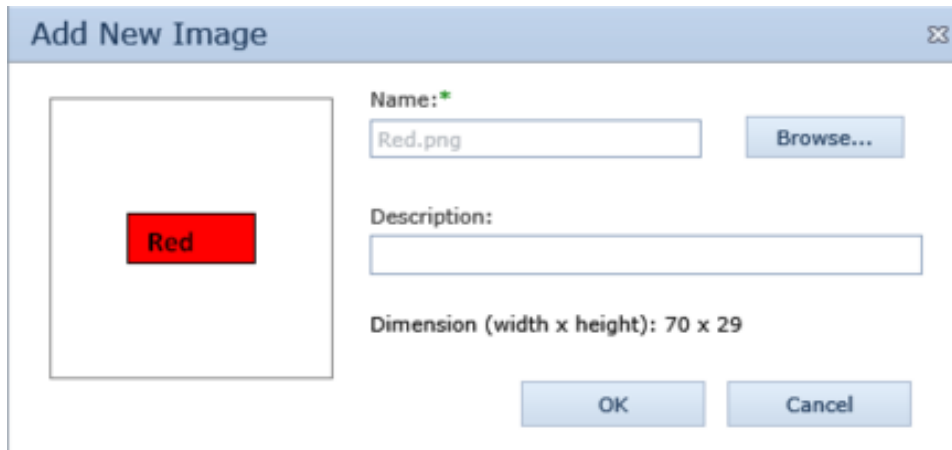


Figure: Add a new image.

3. Fill in the **Description** if required. The description is only relevant to the Classifier Administrator.
4. Click **OK** and the new image will appear in the image list.

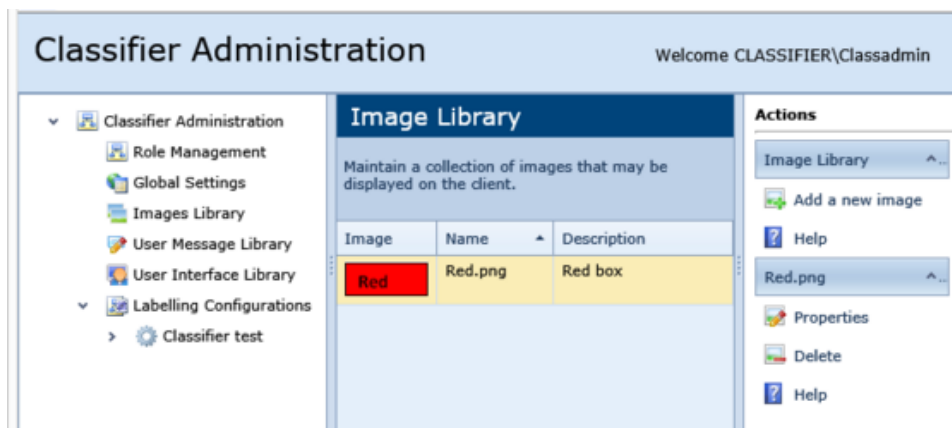


Figure: Image list.

Properties (Image)

Admin: [Image Library](#) / {image} → Properties

You can view the properties of an image (e.g. its size), or change the description associated with the image.

To view the properties of an image or change the image description:

1. Select the **Image Library** and select the relevant **image**.
2. Choose the **Properties** action (see [Add a new image](#) for a description of the properties).
3. **View / Change** the relevant details. Changing the image file will replace the existing image wherever it is used.
4. Click **OK**.

Delete (Image)

Admin: [Image Library](#) / {image} → Delete

You may delete an image that you have created. You should confirm that there are no outstanding uses of that image before proceeding. If you attempt to delete an image that is still referenced from one or more rules for example, the action fails and you will be presented with a list of the rules that use the image.

To delete an image:

1. Select the **Image Library** and select the **image** to be deleted.
2. Choose the **Delete** action.
3. Click **Yes** on the delete confirmation.

User Message Library

The **User Message Library** allows you to define site specific messages to be presented to the end user instead of default product messages. This section describes how you establish these messages and their usage.

The set of User Messages is managed through the User Message Library node in the Classifier Configuration. The full set of messages is available for the Administrator for selection in all Classifier Policies. If you use multiple Classifier Policies you may find it useful to define alternative texts for use in different policies.

If you intend to configure a Rule that presents a User Message configuration option, you should ensure that a suitable message is available before defining the rule, or define the message at the message selection point in the rule definition sequence using the **New...** option. The set of rules that require User Messages is defined in [Use of User Messages](#).

The following actions are supported on User messages:

- [Add a new message](#)
- [Language \(Message\)](#) - [Only available if [Languages](#) support is enabled. Provides the ability to switch the view to see the message configuration for a specific Language.]
- [Properties \(Message\)](#) - [Provides the ability to change any of the Properties of the message including its name (i.e. Rename)].
- [Copy \(Message\)](#)
- [Delete \(Message\)](#)

Selecting the **User Message Library** node displays a list of the currently defined messages. This list initially contains pre-defined messages which you can use as you wish (adapt, delete, etc.).

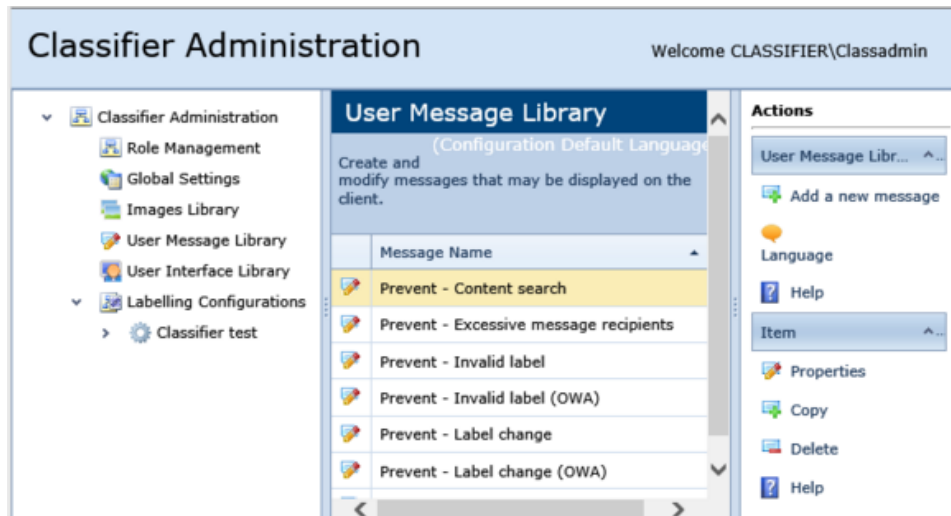


Figure: User Messages List.

Use Of User Messages

[Check rules](#) in the Policy configuration, perform checks that allow you to select the **message** that is displayed to the end user, or to define **reasons** presented to users if you use the [Challenge Options](#).

For example an Outlook rule to check recipient clearance refers to a **this message** item:

Check clearance for recipients. Warn user if check fails with **this** message.

The rule template is presented with a value (**Warn - Unapproved recipients**) supplied as a placeholder for this as in the example below:

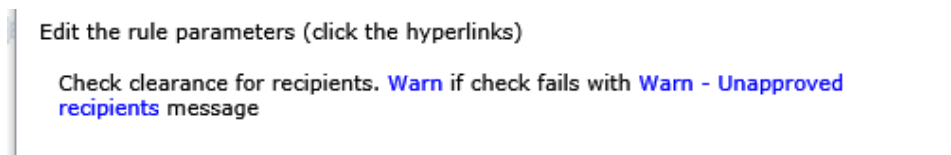


Figure: Rule showing message token.

You can click on the current value (**placeholder**) and it will present a list showing the set of configured messages from which you can select the one you want.

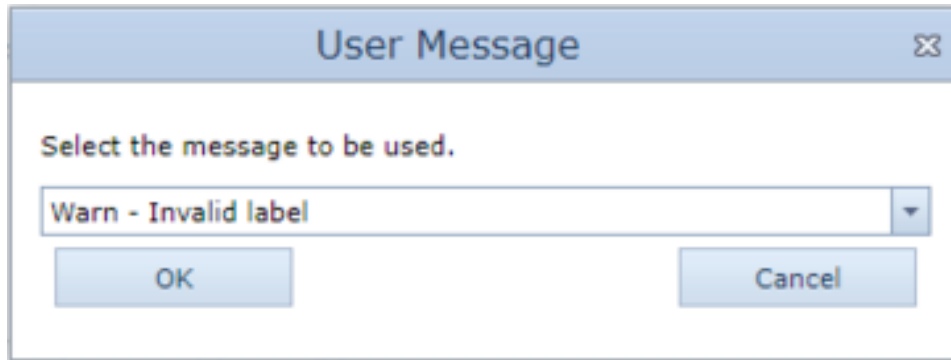


Figure: Available Message List.

The full set of rules requiring User messages is defined in [Check rules](#) .

Add a New Message

Admin: [User Message Library](#) → Add a new message

To add a new message:

1. Select the **User Message Library** and choosing the **Add a new message** action.
2. Fill in the fields as required:
 - **Name:** (Mandatory) The unique name of this message. This is the value that will appear in a list of messages available to you when defining various rules.
 - **Language:** You only need to define Language specific values if the algorithm defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the **Title / Message text / Help URL** as required.
 - **Title:** (Mandatory) This is the title that will appear on the dialog presented to the end user if this message is to be displayed.
 - **Message Text :** (Mandatory) This is the text that will be presented to the end user. Note: The display area in the run time dialog only shows the first three lines of the message text. The user may click for more information to see the rest of the text.
 - **Help URL (Optional):** A site accessible URL that you can use to provide users with access to further information pertinent to this message. If this is not configured, but the General Setting [URL for your labelling help site](#) is configured. If this is populated, the dialog that presents the message will provide a Help button, otherwise the Help button will be disabled.

Add User Message

Provide the details of the message that will be presented to your users. The name is used for reference within your configuration.

Name: *

You can enter different captions and for each language you have chosen in Global Settings.

Language:

Title:

Message text:

Help URL:

OK Cancel

Figure: Add a new Message.

4. Click **OK** and the new message will appear in the message list.

Language (Message)

Admin: [User Message Library](#) → Language

By default the User Messages list will present the messages and associated text for the Configuration default language.

You can select the Language action to see a drop down list of the currently configured languages.



Figure: Languages list.

Selecting a language will update the message list to show the Message Text configured for each message for that language.

Properties (Message)

Admin: [User Message Library](#) / {message} → Properties

You can change any aspect of a message definition. Changing the name of a message (Rename) essentially deletes the selected message and creates a new one, updating any references to the message in existing Rules.

To change a message definition:

1. Select the **User Message Library** and select the relevant **message**.
2. Choose the **Properties** action (see [Add a new message](#) for a description of the properties).
3. Change the relevant **details**.
4. Click **OK**.

Copy (Message)

Admin: [User Message Library](#) / {message} → Copy

You can create a new message by using an existing one as a base.

1. Select the **User Message Library** and select the relevant **base message**.
2. Choose the **Copy** action. This will create a new **Message** entry with the name "<original name> - Copy".
3. Select the **Copy** and click **Properties** to change the relevant details (Name etc.).
4. Click **OK**.

Delete (Message)

Admin: [User Message Library](#) / {message} → Delete

You may delete a message that you have created. **Messages** that are created from a **Label Configuration** template cannot be deleted since they are associated with rules in the template.

You should confirm that there are no outstanding uses of that message before proceeding. If you attempt to delete a message that is still referenced from one or more rules, the action will fail and you will be presented with a list of the rules that use the message.

To delete a message:

1. Select the **User Message Library** and select the **message** to be deleted.
2. Choose the **Delete** action.
3. Click **Yes** on the delete confirmation.

User Interface Library

Admin : User Interface Library

Classifier is highly configurable. Some user visible text controlled by the site through the [User Message Library](#). However, other aspects of user presentation (e.g. Button captions and tooltips) have default values built in to the code.

The User Interface Library allows you to create and manage one or more User Interface Definitions which can override these default values. Each policy then defines, through [Properties \(Policy\)](#) the [User Interface Definition](#) (UI definition) it is to use - there is a fixed default UI definition (named as [Default](#)) which is the UI definition assumed when policies are created.

The initial state of the User Interface Library shows no UI definitions, the **Default** UI definition is always hidden and cannot be changed.

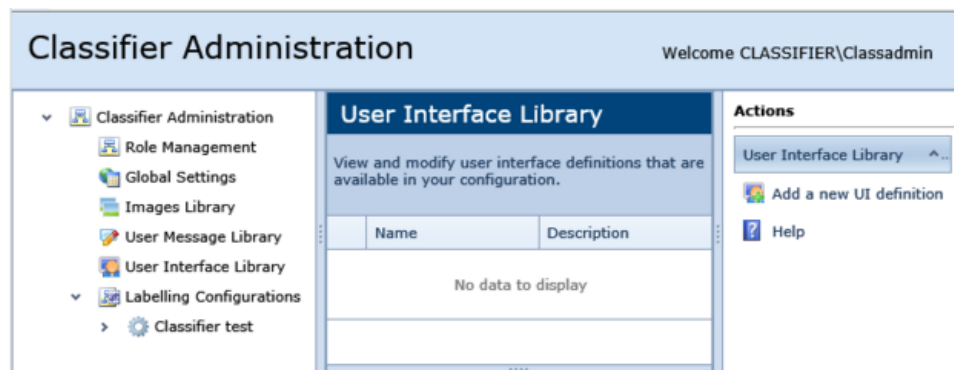


Figure: User Interface Library.

This Library supports the following actions:

- [Add a new UI definition](#)
- [Properties \(UI definition\)](#)
- [Copy \(UI definition\)](#)
- [Delete \(UI definition\)](#)

To view or modify the settings in a UI definition:

1. Select the relevant **UI definition** (e.g. **Test UI definition**).
2. Select the required **<Item>** from the list displayed. One of:
 - [Challenge \(UID\)](#)
 - [Classification History \(UID\)](#)
 - [Content Inspection Check \(UID\)](#)
 - [File Classifier \(UID\)](#)
 - [Folder View Labelling \(UID\)](#)
 - [General Messages \(UID\)](#)
 - [Label Selection \(UID\)](#)
 - [Management Agent \(UID\)](#)
 - [Menus \(UID\)](#)

- [Organise Favourites \(UID\)](#)
- [Policy Check \(UID\)](#)
- [Ribbon \(UID\)](#)
- [RMS Apply Template \(UID\)](#)
- [RMS Apply User Permissions \(UID\)](#)

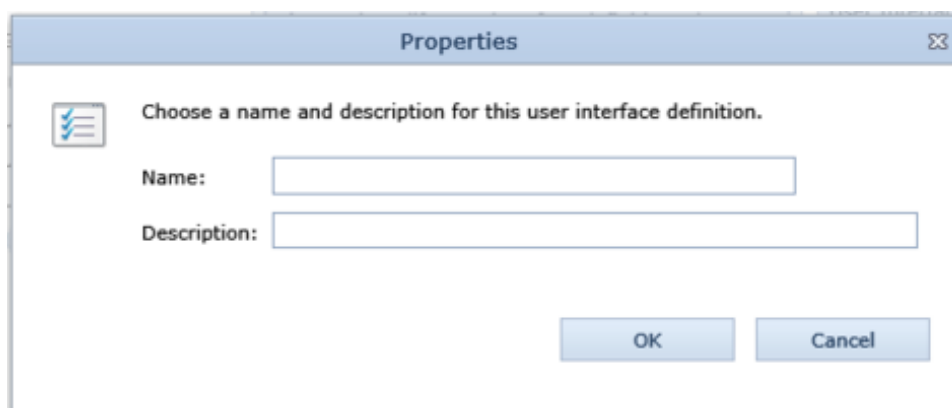
3. Select the **<Item> Properties** action (the lower of the two instances in the action pane) which will present the settings available for modification under that item. (See the topic for the relevant action for details of the settings.)
4. Make any changes required and click **OK**.

Add a New UI Definition

Admin: [User Interface Library](#) → Add a new UI definition

To add a new UI definition:

1. Select the **User Interface Library** and choose the **Add a new UI definition** action.



The screenshot shows a 'Properties' dialog box with a close button in the top right corner. The main content area contains a list icon on the left and the text 'Choose a name and description for this user interface definition.' Below this text are two text input fields: 'Name:' and 'Description:'. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

Figure: Add a new UI definition.

2. Provide a unique **Name** and (optional) **Description**.
3. Click **OK** - the UI Definition list will be updated.

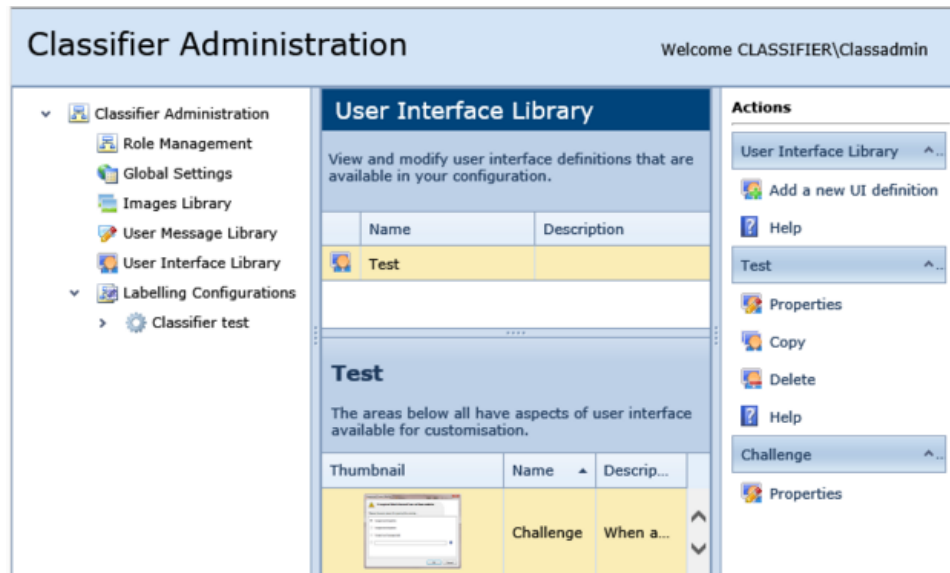


Figure: UI Definitions list.

The initial state of a UI definition is a straight copy of the **Default UI** definition .

You can view or change the settings associated with a UI definition as described in [Properties \(UI Definition Items\)](#)

Properties (UI Definition)

Admin: [User Interface Library](#) → Properties

To view and modify the Properties of a UI definition:

1. Select **User Interface Library** and select the relevant **UI definition** .
2. Select the **Properties** action.
3. Change the **Name** or **Description** as required.

Copy (UI definition)

Admin: [User Interface Library](#) → Copy (Properties)

You can delete a UI definition by:

1. Select the **User Interface Library** and select the **UI definition** you wish to copy.
2. Click **Copy**. This will clone the existing UI definition with a name of **<original name>(1)**.
3. Select the **new copy UI definition** and change its name etc. as required.

Delete (UI Definition)

Admin: [User Interface Library](#) → Delete

To delete a UI definition:

1. Select the **User Interface Library** and select the **UI definition** you wish to delete.
2. Select **Delete**.
3. Click **OK** on the delete confirmation dialog presented.
4. You will not be allowed to delete the UI Definition if it is in use in a policy.

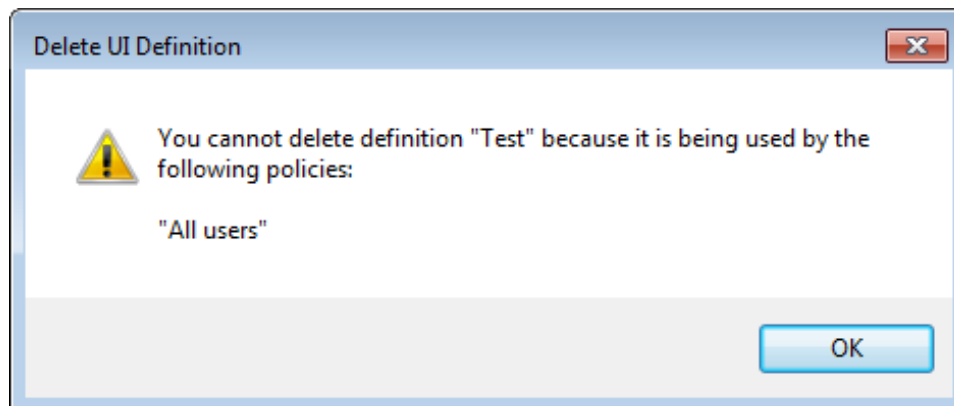


Figure: Delete UI Definition.

Properties (UI Definition Items)

Admin: [User Interface Library](#) / {UI definition} / {definition item} → Properties

To view or change the settings associated with a UI definition:

1. Select the **User Interface Library** and select the relevant **UI definition** (e.g. Test UI definition).
2. Select the required **<Item>** from the list displayed. One of:
 - [Challenge \(UID\)](#)
 - [Classification History \(UID\)](#)
 - [Content Inspection Check \(UID\)](#)
 - [File Classifier \(UID\)](#)
 - [Folder View Labelling \(UID\)](#)
 - [General Messages \(UID\)](#)
 - [Label Selection \(UID\)](#)
 - [Management Agent \(UID\)](#)
 - [Menus \(UID\)](#)
 - [Organise Favourites \(UID\)](#)
 - [Policy Check \(UID\)](#)
 - [Ribbon \(UID\)](#)
 - [RMS Apply Template \(UID\)](#)
 - [RMS Apply User Permissions \(UID\)](#)

3. Select the **<Item> / Properties** action which will present the settings available (described under the appropriate sub-topic) for modification under that item.
4. Make any changes required and click **OK**.

Challenge (UID)

Admin: [User Interface Library](#) / {UI definition} / [Challenge](#) → Properties

This User Interface item allows you to change the text presented to the user through the **Challenge** dialog which appears after the user chooses **Continue** during a **Policy Check** sequence **AND** the rule has been configured with the [Challenge Options](#).

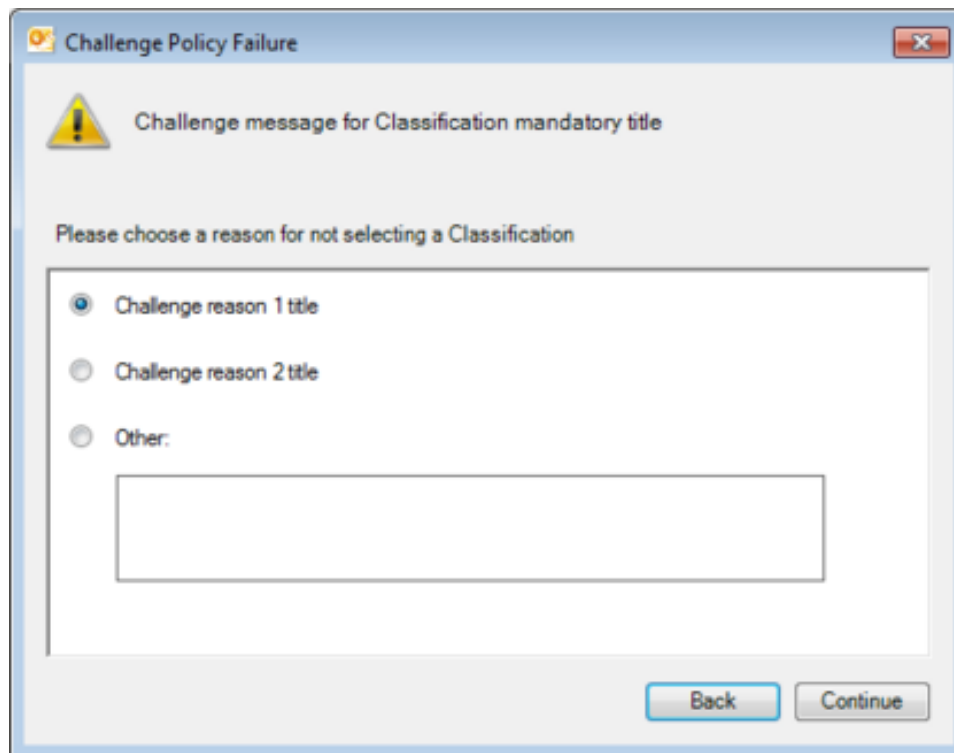


Figure: Challenge Policy Failure.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the Language and then define the relevant values.

Note: The rule specific text (**A required label element....** above) is the same as appears on the parent Policy check dialog.

Challenge Properties

Language: Configuration Default Language

Window Title
Challenge Policy Failure:

Label Text
Other:

Button Text
Back:
Continue:

Default Button
Back:

OK Cancel

Figure: Challenge Properties.

Classification History (UID)

Admin: [User Interface Library](#) / {UI definition} / [Classification History](#) → Properties

This User Interface item allows you to change the text presented to the user through the **Classifier History** Display dialog which appears subject to the [Classification History](#) and [Classification History Display](#) settings.

Classification History

View and clear the document's label history

| User Name | Date/Time | Label |
|--------------------------|---------------------|--------------------------------|
| CLASSIFIER\Administrator | 10/09/2018 13:19:04 | Classifier test Public |
| CLASSIFIER\Administrator | 10/09/2018 13:19:19 | Classifier test Internal Sales |
| CLASSIFIER\Administrator | 10/09/2018 13:19:24 | Classifier test Public |

Clear Close

Figure: [Classification History Display](#).

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

- **Language:** [Only visible if **Allow multiple languages is enabled**. See [Properties \(Classifier Administration\)](#)]. You only need to define **Language** specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

Figure: Classification History Properties.

This also includes a section that applies when viewing within **Office's BackStage View**.

Content Inspection Check (UID)

Admin: [User Interface Library](#) / {UI definition} / Content Inspection Check → Properties

Note: These items are only relevant to Email Classifier (Outlook) and Office Classifier.

This User Interface item allows you to change the text presented to the user if a content check rule detects content of interest, and the user then selects **View**.

Note: The text presented to the user in the initial [Policy](#) Check dialog is configured either via the [User Message Library](#), or through the User Interface Library / [Policy Check](#) item.

The default Content Matches dialog appears as follows:

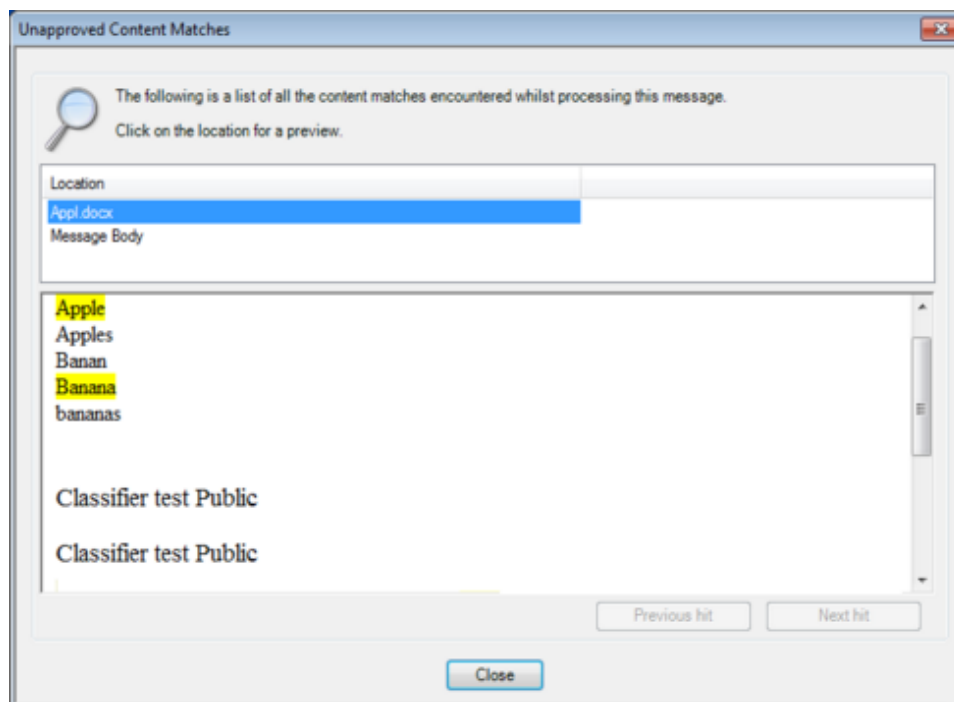


Figure: Content Matches.

The properties contained in the dialog shown below can be set. The default value appears to the left, you supply the replacement text in the right-hand side.

Language [Only visible if Allow multiple languages is enabled: See [Properties \(Classifier Administration\)](#)]. You only need to define **Language** specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the Language and then define the relevant values.

Figure: Content Inspection Check Properties.

Decision Tree (UID)

The Decision Tree guides the user to select labels using question and answer combinations. The Decision Tree area can be customised. A user can view and modify user interface definitions that are available for configuration.

The properties contained in the dialog shown below can be set. The default value appears to the left, you supply the replacement text in the corresponding fields.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant **values**.

Decision Tree Properties

Language: Configuration Default Language

Window Title

Classification Guidance:

Description

Description:

Button Text

OK:

Cancel:

Clear:

OK Cancel

Figure: File Classifier Properties.

File Classifier (UID)

Admin: [User Interface Library](#) / {UI definition} / File Classifier → Properties

Note: These items are only relevant to File Classifier [licence](#) has been applied.

This User Interface item allows you to change the text presented to the user if a File Classifier policy check fails.

The default File Classifier policy check dialog appears as follows:

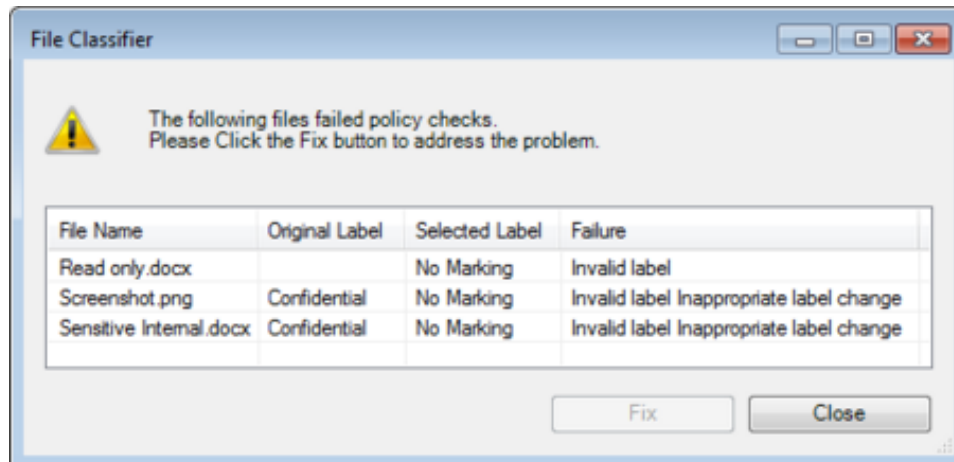


Figure: File Classifier policy check dialog.

The properties contained in the dialog shown below can be set. The default value appears to the left, you supply the replacement text in the right-hand side.

- **Language** - [Only visible if Allow multiple languages is enabled, see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

File Classifier Properties

Language: Configuration Default Language

Window Title

File Classifier:

Description

The following files failed policy checks. Please Click the Fix button to address the problem.:

The following files could not be written to by File Classifier.:

Multiple files selected.:

Label Text

File Name:

Original Label:

Selected Label:

Failure:

OK Cancel

Figure: File Classifier Properties.

Folder View Labelling (UID)

Admin: [User Interface Library](#) / {UI definition} / Folder View Labelling → Properties

Note: This feature is only relevant to **Email Classifier (Outlook)**.

This User Interface item allows you to change the text presented to the user through the Folder View Labelling dialog that can appear in some circumstances as described in [Folder View Labelling Operation](#)

Note: The text presented to the user in the initial [Policy Check](#) dialog is configured either via the [User Message Library](#), or through the [User Interface Library / Policy Check](#) item.

The default **Content Matches** dialog appears as shown below.

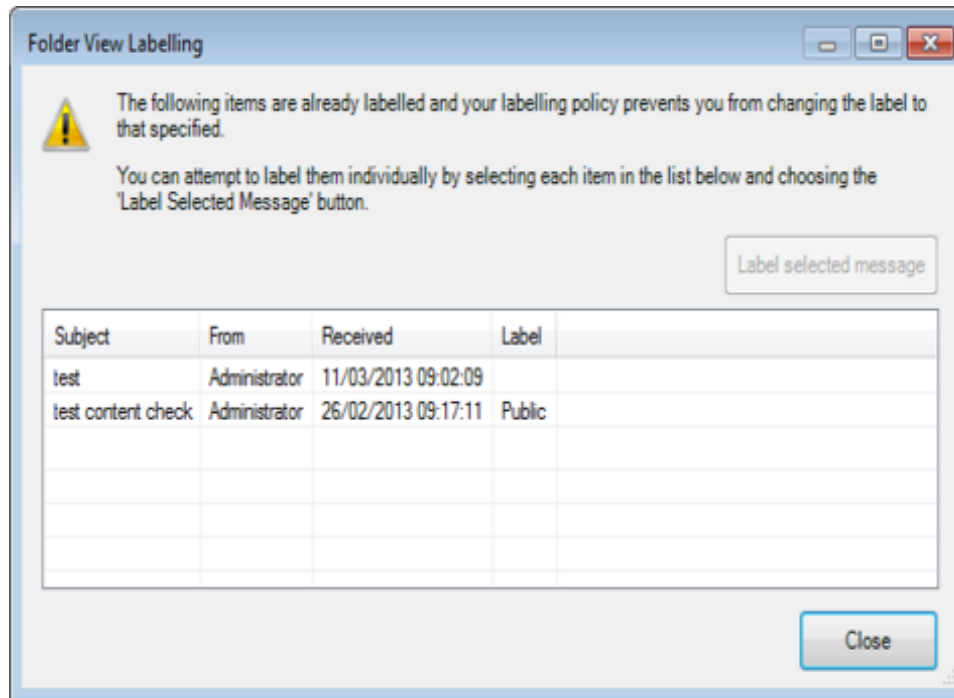


Figure: Folder View Labelling: multiple message check.

The properties contained in the dialog shown below can be set. The default value appears to the left, you supply the replacement text in the right hand side.

- **Language:** [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

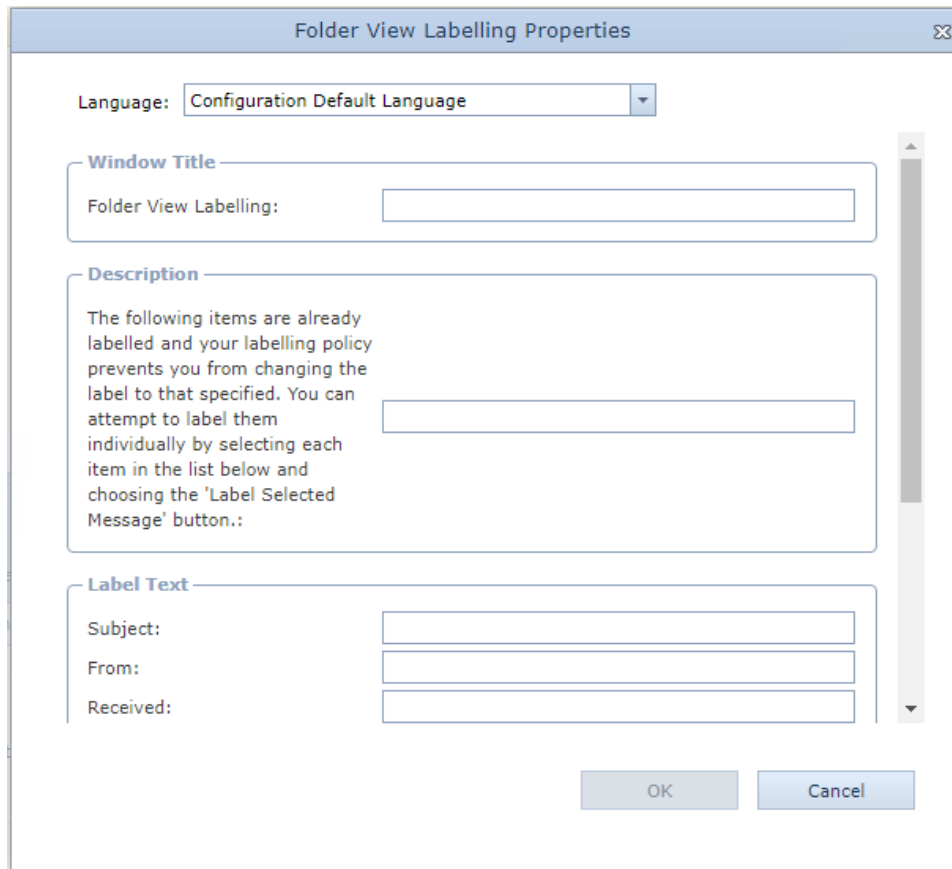


Figure: Folder View Labelling Properties.

General Messages (UID)

Admin: [User Interface Library](#) / {UI definition} / General Messages → Properties

There are miscellaneous values that do not relate to any other item in a UI Definition and are grouped under this General Messages item.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right hand side.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

The last few (**Please Wait...**, **Updating workbook...** etc.) all relate to a progress dialog that appears when saving Excel workbooks.

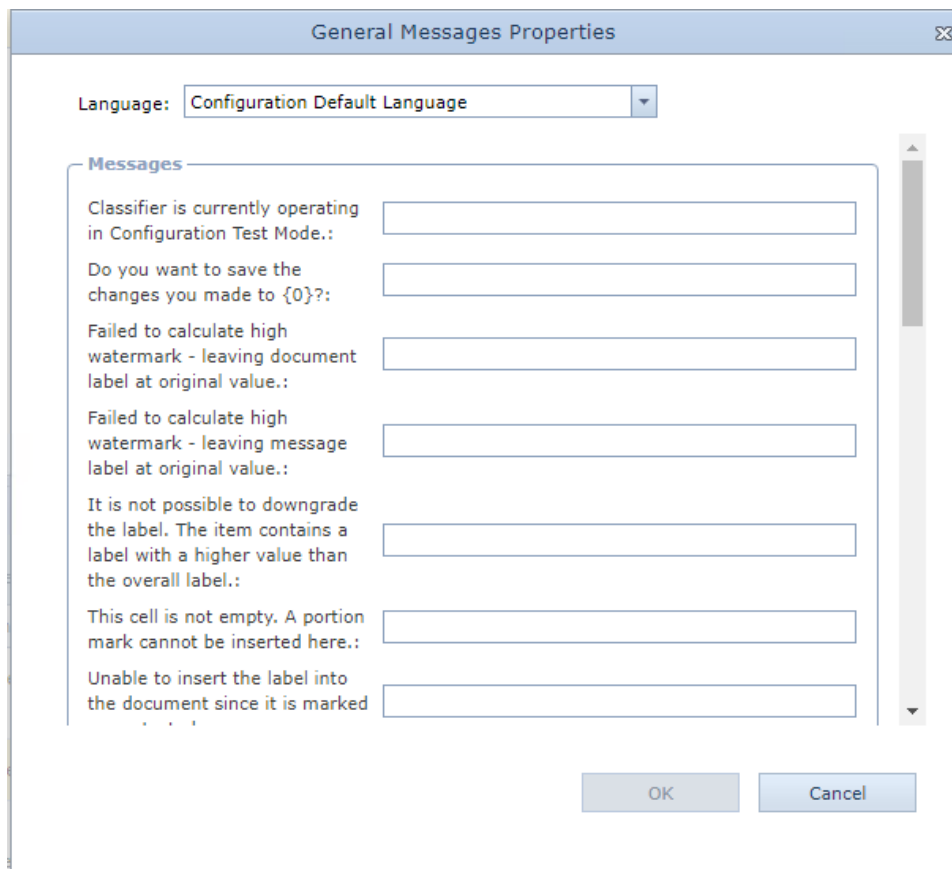


Figure: General Messages Properties.

| General message | Relevance |
|--|---|
| Classifier is currently operating in Configuration Test Mode. | Classifier Administration Publish Test Configuration. |
| Do you want to save the changes you made to {0}?: | Only applicable to Microsoft Excel. Classifier has to replace the standard application dialog to ensure consistent operation. |
| Failed to calculate high watermark - leaving document label at original value. | Check for the high-water mark |
| Failed to calculate high watermark - leaving message label at original value. | Check for the high-water mark |
| It is not possible to downgrade the label. The item contains a label with a higher value than the overall label. | Check for label change Portion Mark Ensure attachment markings are consistent |
| This cell is not empty. A portion mark cannot be inserted here. | Portion Mark |
| Unable to insert the label into the document since | An attempt to set the label on an item. |

| General message | Relevance |
|---|--|
| it is marked as protected. | |
| Unable to insert a portion marking since the document is protected. | Portion Mark |
| Unable to insert the label into the document since it is marked as read-only. | An attempt to set the label on an item. |
| Unable to insert a portion marking since the document is read-only. | Portion Mark |
| Your labelling policy requires you to save this document before you send it. | Microsoft Project only. |
| Your labelling policy requires you to save this document before you send it. Would you like to save the document now? | Office 2003 obsolete |
| Your labelling policy requires you to save this presentation before you send it. Would you like to save the presentation now? | Office 2003 obsolete |
| Your labelling policy requires you to save this workbook before you send it. Would you like to save the workbook now? | Office 2003 obsolete |
| Failed to access attachment. | Warn if file contents cannot be accessed |
| It is not possible to change the label at this time as this item is protected. | An attempt to set the label on an item. |
| Please Wait... | Whenever a progress dialog is presented. |
| Updating workbook... | Indicates Classifier is applying policy rules etc. |
| Updating workbook footers... | No longer used |
| Updating workbook headers... | No longer used |
| Completing update of workbook... | Indicates Classifier is applying policy rules etc. |
| New DefaultLabel applied successfully. You must restart Office for your change to take effect. | User Selectable Default Classification - Properties (Policy) . |
| Classifier Attachment List | General Email content |

Label Selection (UID)

Admin: [User Interface Library](#) / {UI definition} / [Label Selection](#) → Properties

This User Interface item allows you to change the text presented to the user if the **Label Selection** dialog appears.

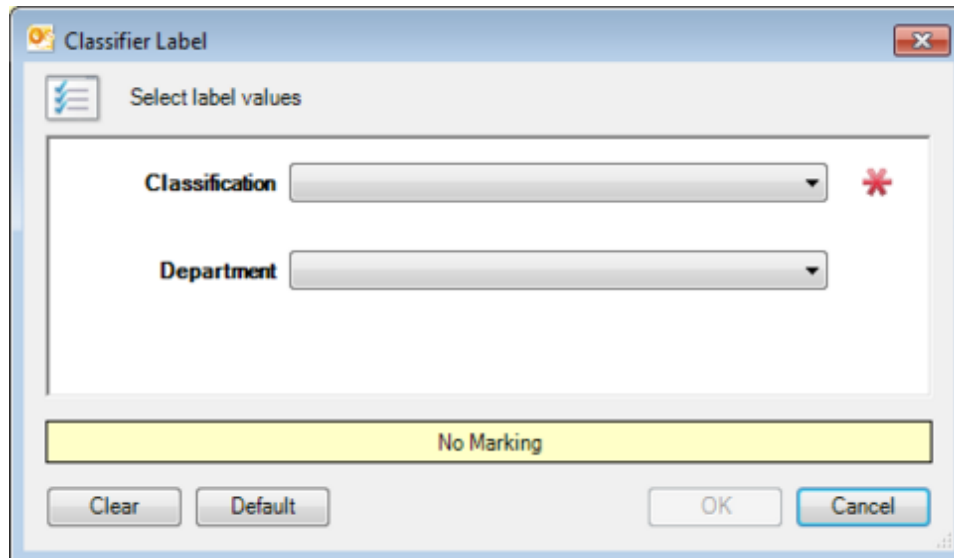


Figure: Label Selection dialog.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

Figure: Label Selection Properties.

Note: The settings for **Clear** and **Default** above relate to the Label selection dialog. There are similar settings (Clear and Default) found under [Menus](#) which relate to the text shown in the [Ribbon](#).

Management Agent (UID)

Admin: [User Interface Library](#) / {UI definition} / Management Agent → Properties

Note: These items are only relevant if you are using the Classifier Management Agent which is configured to **Show the System Tray Icon**.

This User Interface item allows you to change the text presented to the user through the various dialogs documented in the Classifier Management Agent Guide.

The properties contained in the dialog shown below can be set. The default value appears to the left, you supply the replacement text in the right-hand side.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

Figure: Management Agent Properties.

Menus (UID)

Admin: [User Interface Library](#) / {UI definition} / Menus → Properties

This User Interface item allows you to change the text presented to the user through the various menus as per [Label Selection Interfaces](#), [Label Options](#), [Favourites](#) and [Portion Mark](#).

Note: Some of these items will only appear if an **Enterprise license** is applied and/or a feature is **Enabled**.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

Multiple Languages

Language : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

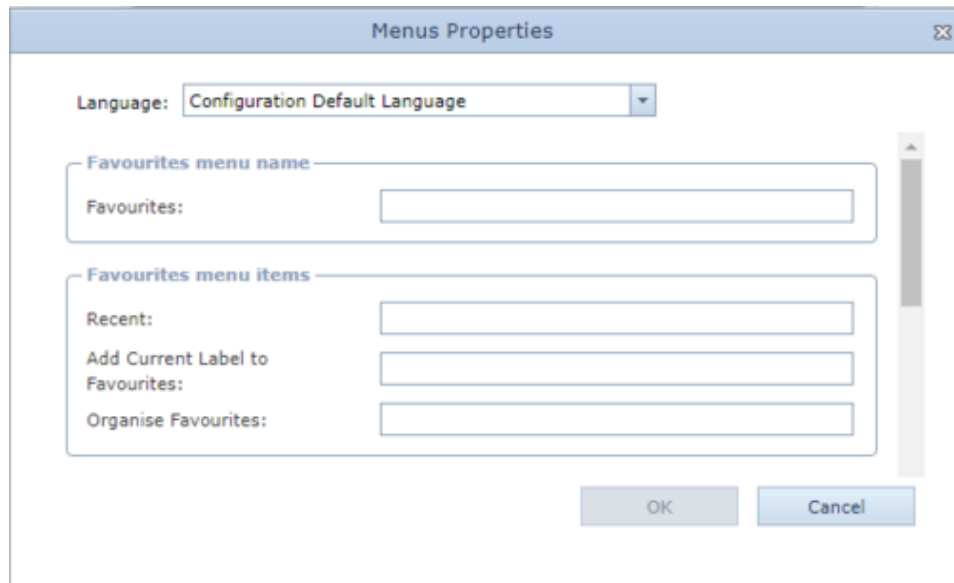


Figure: Menu Properties.

This also includes a section that applies when viewing within Office 's BackStage View.

Note: The settings for **Clear** and **Default** above relate to the text shown in the [Ribbon](#). There are similar settings (Clear and Default) found under [Label Selection](#) which relate to the text shown in the Label selection dialog.

Menu Tooltips

- **Label Dialog:** Create or change the label using the label dialog.
- [Favourites](#) : Choose a favourite label.
- **Add Current Label to Favourites:** Add the current label to your favourites (Under Favourites).
- **Organise Favourites:** Change the order your favourites appear in the Favourites menu (Under Favourites).
- **Set current label as default:** Set the current label as the user defined default label (Under Favourites).
- **Clear User Defined Default** : Clear the current user defined default label (Under Favourites).
- [Portion Mark](#): Choose a portion mark to apply.
- **Use Guidance** : Get assistance when applying a classification to this document.
- **Classifier Label Policy Help:** Click here for help.
- **Options** : Display additional options for labels and other advanced features.
- **Clear:** Clear the current label for this document. (Under Options)
- **Portion Mark:** Choose a portion mark to apply.
- **Choose Portion Mark:** Choose a portion mark to apply. (Under Portion)
- **Classifier Visual Markings:** Image in header (Word).
- **Classification History:** View the history of the label changes on this document (Word)
- **Default:** Apply the default label to this document/email.

- [Show Summary Marking](#): Show the summary marking of the current label in the pane below the document (**Note**: This only becomes active on the **Option** menu if the summary label is not displayed).
- **Track Document**: [Azure RMS Document Tracking](#) (**Note**: This only becomes active if enabled in the CAS and the client is using RMS.)

Organise Favourites (UID)

Admin: [User Interface Library](#) / {UI definition} / Organise [Favourites](#) → Properties

This User Interface item allows you to change the text presented to the user through the Organise Favourites dialog.

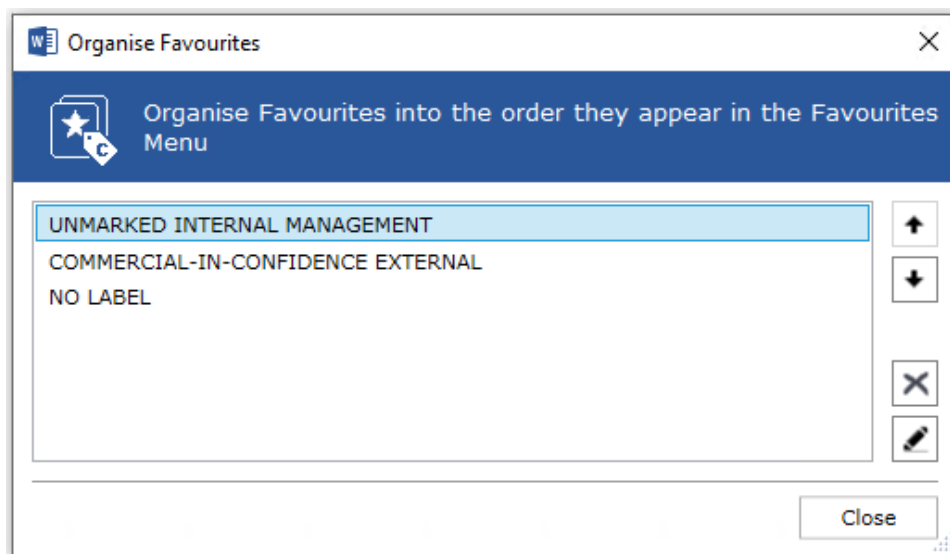


Figure: Organise Favourites.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

Language : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

Organise Favourites Properties

Language: Configuration Default Language

Window Title
Organise Favourites:

Description
Organise Favourites into the order they appear in the Favourites Menu:

Button Text
Move Up:
Move Down:
Delete:
Rename:
Close:

Window Title - Rename Favourite

OK Cancel

Figure: Organise Favourites Properties.

Policy Check (UID)

Admin: [User Interface Library](#) / {UI definition} / [Policy](#) Check → Properties

This User Interface item allows you to change the text presented to the user through the Policy Check dialog. The Policy Check dialog appears if a configured policy rule **'fails'**. Different buttons may be presented depending upon the rule (e.g. Content Check, Recipient check, Check clearance for attachments...) and rule settings, but the dialog structure is the same.

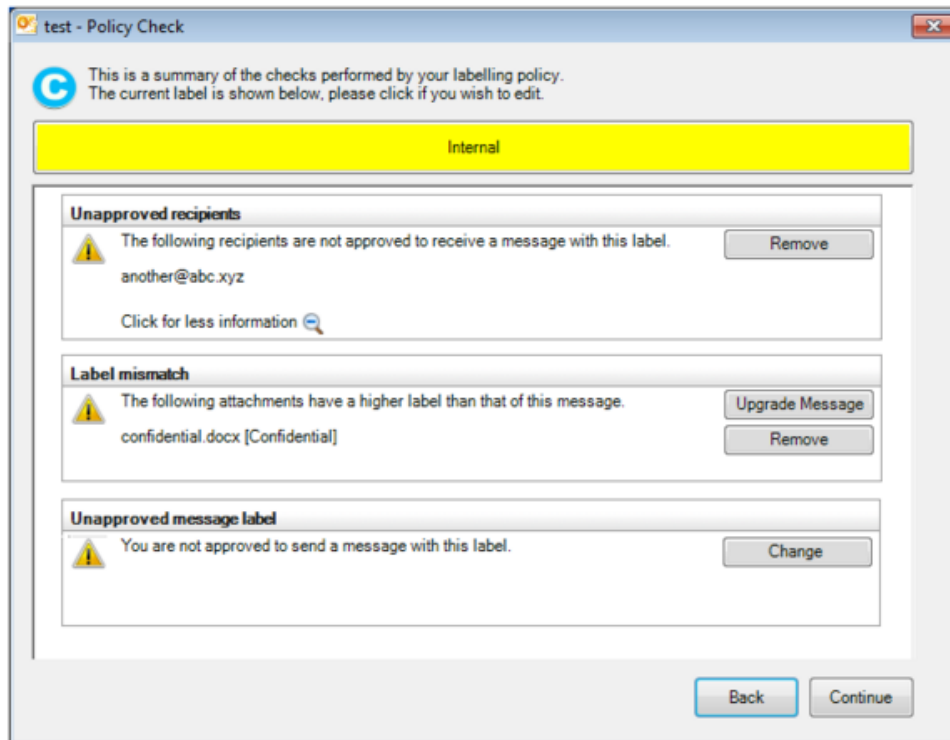


Figure: Policy Check dialog.

Note: The **Back** button may be unavailable in some circumstances. See [Process rules when printing](#) and [Process rules when saving](#).

Note: The subordinate box titles (e.g. Unapproved recipients) are taken from the 'Title' of the user message associated with the rule, not the Name of the message (e.g. Name = Warn - Unapproved recipients / Title = Unapproved recipients).

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

Language : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

Policy Check Properties

Language: Configuration Default Language

Window Title

Policy Check:

Description

This is a summary of the checks performed by your labelling policy. The current label is shown below, please click if you wish to edit.:

Label Text

Click for more information:

Click for less information:

Attachment:

Recipients:

Button Text

OK Cancel

Figure: Policy Check Properties.

Ribbon (UID)

Admin: [User Interface Library](#) / {UI definition} / [Ribbon](#) → Properties

This User Interface item allows you to change the text presented to the user through the Classifier Ribbon. The ribbon holds the selectors in a Classifier application, together with some associated options. The menus can be configured in the separate [Menus \(UID\)](#) section.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right hand side.

Figure: Classifier Ribbon Properties under the [User Message Library Properties](#).

This also includes a section that applies when viewing within Office 's BackStage View.

Definitions for the button text are:

- **Select Label:** The text of the ribbon menu that displays the labeller dialog to create or edit a label.
- **Show Label :** The text of the ribbon menu to show the label dialog in read-only mode.
- **Label selected message(s) :** For Outlook Explorer folder view labelling.
- **Set Label :** The text of the ribbon menu to change a label on an existing received message (only applies if Folder View Labelling is enabled)
- **Label Dialog :**The text of the ribbon menu that allows a user to add additional label elements that are not available on the ribbon when in single click mode.

Other settings that appear in the primary label interface can be found under:

- [Label Selection \(UID\)](#)
- [Menus \(UID\)](#)
- [Organise Favourites \(UID\)](#)

RMS Apply Template (UID)

Admin: [User Interface Library](#) / {UI definition} / [Ribbon](#) bar → Properties

This User Interface item allows you to change the text presented to the user as a result of an [Apply RMS policy or option](#) rule.

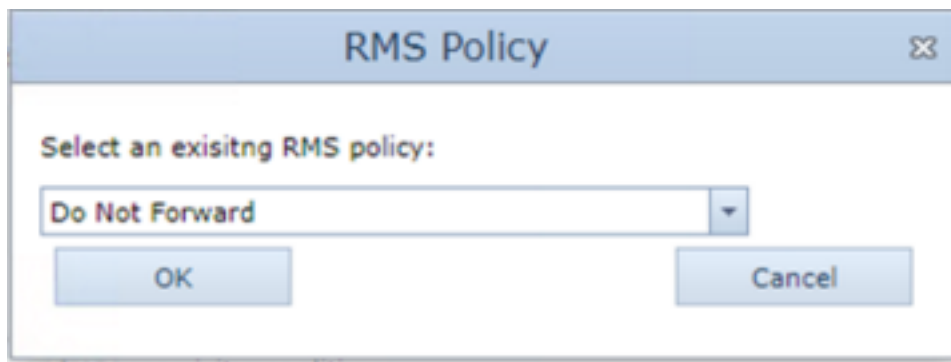


Figure: RMS policy or option.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the algorithm defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

The screenshot shows a dialog box titled "RMS Apply Template Properties". At the top, there is a "Language:" dropdown menu set to "Configuration Default Language". Below this are four grouped sections, each with a title and a text input field:

- Window Title:** "Apply RMS Template:"
- Description:** "Select an RMS Template to apply:"
- Column Headings:** "Name:" and "Description:" (two separate input fields)
- Button Text:** "OK:" and "Cancel:" (two separate input fields)

At the bottom right of the dialog are "OK" and "Cancel" buttons.

Figure: RMS Apply Template Properties.

RMS Apply User Permissions (UID)

Admin: [User Interface Library](#) / {UI definition} / [Ribbon](#) bar → Properties

This User Interface item allows you to change the text presented to the user through when they click the **Apply Ad Hoc protection** button on the policy check dialog shown in response to a [Check for RMS protection](#) rule.

[The UID configuration settings (buttons and tool-tips) for the RMS protection policy check dialog are found under the [Policy Check \(UID\)](#) item.]

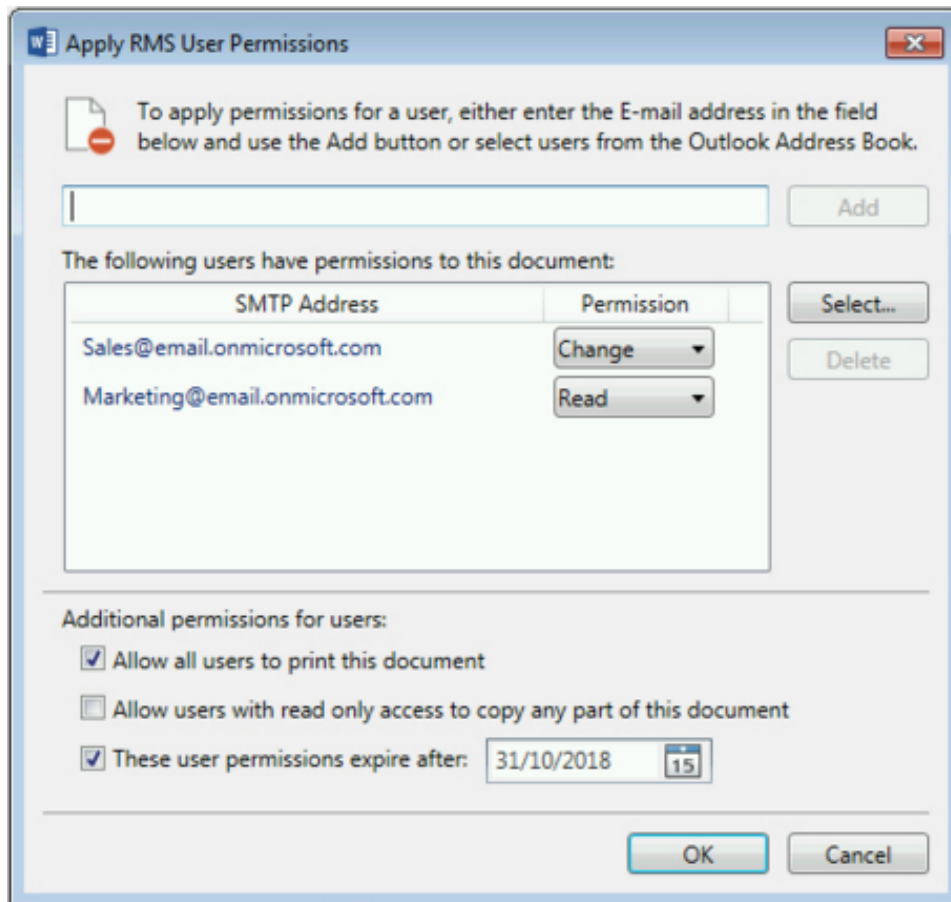


Figure: RMS Apply Ad Hoc Protection.

The settings are contained in the dialog shown below. The default value appears to the left, you supply the replacement text in the right-hand side.

Language [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the algorithm defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then define the relevant values.

The image shows a dialog box titled "RMS Apply User Permissions Properties". It contains the following elements:

- Language:** A dropdown menu currently set to "Configuration Default Language".
- Window Title:** A section containing a text input field labeled "Apply User Permissions:".
- Description:** A section with the text: "To apply permissions for a user, either enter the E-mail address in the field below and use the Add button or select users from the Outlook Address Book.:". Below this text is a text input field.
- Label Text:** A section with two text input fields. The first is labeled "The following users have permissions to this document:" and the second is labeled "Additional permissions for users:".
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Figure: RMS Apply User Permissions Properties.

Labelling Configurations

Note: At this time only a single Labelling Configuration is supported.

Most Classifier settings are held in a Labelling Configuration (with the exception of the Settings applicable across the organisation). The initial installation has no labelling configuration defined. A Configuration is established by an administrator who can then [Publish](#) that configuration to a master location. To make a change to the master configuration you should retrieve the master configuration, operate on it locally and then publish the update. Care should be taken if more than one person is making changes to the configuration, and further details of this process can be found in [Configuration Deployment](#).

The following actions are relevant:

- [Add a new Label Configuration](#)
- [Properties \(Label Configuration\)](#)
- [Delete \(Label Configuration\)](#)

Immediately after installation there is no Label Configuration defined. Once you have established your local configuration (using [Add a new label configuration](#)) you will have access to the various configurable features summarised below.

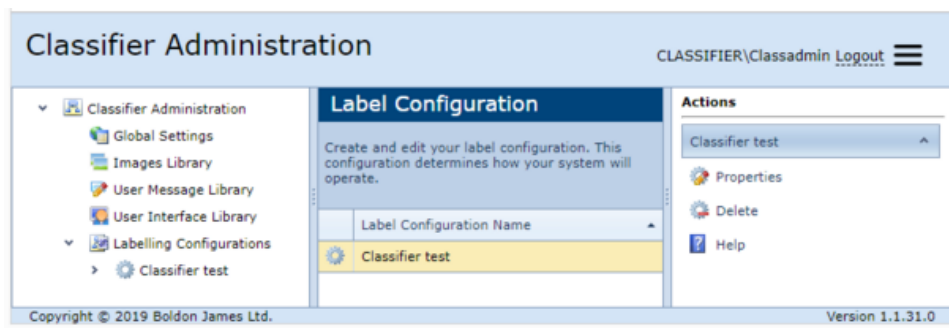


Figure: Labelling Configurations.

The Configuration (including the [Global Settings](#) and User Message Library) can be Published and retrieved using:

- [Publish Configuration](#) (available from the Classifier Administration node)
- [Get Server Configuration](#) (available from the Classifier Administration node)

You have access to the following top level features:

| Feature | Description |
|--|--|
| Selector Library | The set of Selectors and Selector values defined for this configuration |
| Marking Library | The set of Marking Formats defined for this configuration |
| Content library | The set of definitions to be used by Content Checking |
| Condition Library | The set of Conditions that can be used with Add Rules and Apply Rules . |
| Configuration settings | Settings that apply to all users of the Label Configuration. |
| Policies | One or more Policies that tailor the features to meet the requirements for a group |

| Feature | Description |
|------------------------------------|--|
| | of users. |
| Clearance Settings | (Optional) Provides access to the settings that manage Domain (if enabled) and Dynamic Clearance features. |

Add a New Label Configuration

Admin: [Labelling Configurations](#) → Add a new label configuration

Note: Configuration features are made available according to the features licensed. Before creating a configuration you must apply at least one suitable licence using the features described under [Licence](#). If you try to create a configuration before you apply a licence, [Classifier Administration](#) will direct you to supply a licence.

A new Labelling Configuration can be established as described below. Any existing local Configuration must first be deleted [[Delete \(Label Configuration\)](#)].

You should consider if there is an existing (Master) configuration that you should retrieve from a central location using [Get Server Configuration](#) .

A labelling configuration is based on a template configuration. The product is supplied with a number of template configurations including an Empty Configuration.

To add a new label configuration:

1. Select **Labelling Configurations** and choose **Add a new LabelConfiguration** to display the following:

Figure: Add a new label configuration.

2. Enter the **Name** of your Labelling Configuration. This name may be included as the **Configuration Name** element in [Marking](#) Format definitions (e.g. Classifier test).
3. Choose a **Category** and select the **Template** most appropriate to your environment (this document has used the Miscellaneous / Empty Configuration template).
4. If there is no licence currently applied (e.g. immediately after installation) when you invoke **Add a new Label Configuration** you will need to add apply a licence file as follows.
5. Click on the **Browse** button which will present an Open dialog. Navigate to the location of the licence file to be applied (e.g. below **Base Bundle\Licence** and open a suitable folder (e.g. **Email Classifier**).
6. Select the .LIC file presented (e.g. **IMPCEM.LIC**) and click **Open** . This will populate the Licence File field. [These licence files are limited period evaluation licences).

7. Click **OK**.
8. You can apply additional licences as described under [Licence](#) .
9. You now have a complete configuration that can be explored or modified.

Properties (Label Configuration)

Admin: [Labelling Configurations](#) / {configuration} → Properties

You can view and change the properties of the selected [Label](#) configuration. Changing the Name field effectively performs a rename as per the sequence below.

To view and change the properties of the selected label:

1. Select **Labelling Configurations** and select the relevant **configuration** .
2. Choose **Properties** .
3. Change the contents of the **Name** field and then click **OK** .

Note: This will change the local name of the configuration. To make this Configuration operational you will have to Publish the configuration and ensure that all client environments are updated to refer to the new configuration.

Note: 'Renaming' a Configuration changes how the Configuration name appears (e.g. in an applied Marking). Classifier maintains the unique identifier originally assigned, and so pre-existing Label values are still valid.

Delete (Label Configuration)

Admin: [Labelling Configurations](#) / {configuration} → Delete

You can delete your local **Labelling Configuration**. This removes the local information, but will not affect any published location.

To delete your local Labelling Configuration:

1. Select **Labelling Configurations** and select the relevant **configuration**.
2. Choose **Delete** which will present the following dialog.

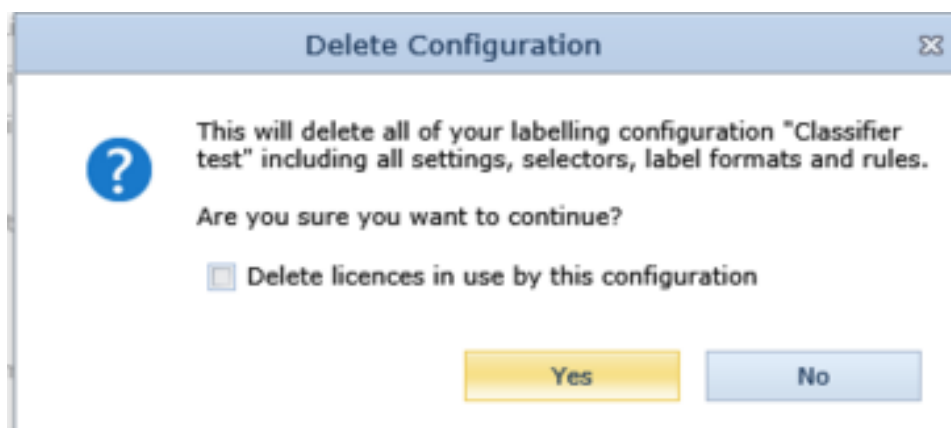


Figure: Delete Label Configuration.

3. By default any licences applied are retained and available in a **Label Configuration** you then **create**. If for some reason you need to remove the existing licences, check the **Delete licences in use by this configuration** option. You will then have to apply licences to any new configuration you create.

Selector Library

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ Selector Library

Note: The names of Selectors and Selector values must be unique within the configuration to avoid ambiguities when parsing text labels.

A Label (Classification) is made up of one or more Selector Values that together “classify” an object (document / message) with that label having meaning within the organisation, defining qualities such as its sensitivity / importance / operational handling. For example, a label may just contain non-disclosure information.

Selecting the Selector Library node shows a list of the configured Selectors (initially empty if you are using the Empty Configuration Template) and the Values defined for the currently selected Selector.

Each Selector defines one or more Values that may be selected by the end user (using the Label Selection interface). The Selector Library defines the Selectors and Values supported by this Label Configuration. However, the Selectors and Values actually available to end users are defined through a Policy which allows Selectors and / or Values to be hidden from selected users according to the policy that is assigned to them.

Control over which Selectors and values are presented to end users is actually controlled as part of Policy definition. Selectors and Values must be specifically chosen for presentation in a policy.

You should define all Selectors that are meaningful in your Label Configuration. This may include Selectors that are not included in all policies. This may arise for example because one of your Selectors is only relevant to a specific set of users. This does not preclude those (limited) users from receiving labels containing values from the ‘hidden’ selector.

All Selectors can be shown through the standard Marking Format mechanisms. The behaviour when a user receives a document or email message containing a value relating to such a ‘hidden’ selector is described in [Retained](#) (Retained Selectors being the term used to refer to Selectors NOT available for selection in the current policy).

By default a Selector is not Mandatory – that is a Label may be valid if it has no Value selected for this Selector. You can ensure that a user chooses a value for a Selector (it is Mandatory) by configuring [Check these mandatory selectors](#) rules.

- Selector values are relevant to any [Check for the high-water mark](#) rules (Email, OWA and Notes).
- Selectors and their values are usually Active, but may be [Active, Obsolete or Retained](#) .
- The actions supported are described in [Selector Actions](#).
- Once you have defined some selectors the display appears as follows:

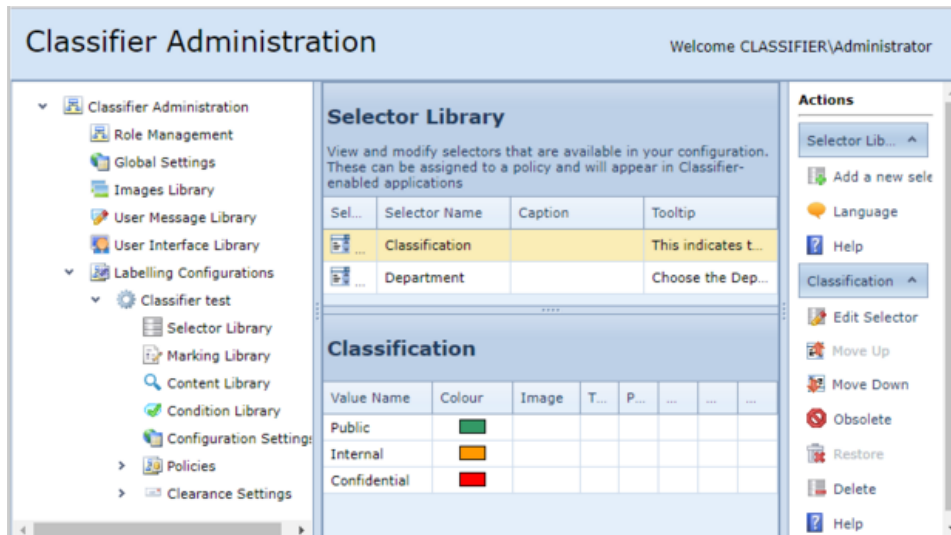


Figure: Selector Library.

Selector Actions

The actions supported for Selectors are:

- [Add a new Selector](#) one of the following:
 - [Single selection list](#)
 - [Multiple selection list](#)
 - [Text entry](#)
 - [Date picker](#)
 - [Date offset list](#)
- [Language \(Selectors\)](#) - [This is only available if [Languages](#) support is enabled. Provides the ability to switch the view to see the selector configuration for a specific Language.]

Once you have selected a Selector:

- [Edit Selector](#)
- [Move Up / Move Down](#)
- [Obsolete / Restore Selector](#)
- [Delete \(Selector\)](#)

Add a New Selector

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) → Add a new selector

The following Selector types are supported and appear as choices below the **Add a new selector** action:

- [Single selection list](#): Appears to the user as a drop down list from which they can choose zero or one Value from the set of values allowed through the current policy.

- [Multiple selection list](#) : Appears to the user as a drop down list from which they can choose zero, one or more Values from the set of values allowed through the current policy.
- [Text entry](#): Appears to the user as a (possibly constrained) text entry field.
- [Date picker](#) : Appears to the user as a (possibly constrained) date selection field.
- [Date offset list](#): Appears to the user as a drop down list from which they can choose one Value from the set of values configured in the current policy. The associated configuration is used to produce an offset to the current date.

To add a new selector:

1. Select the **Selector Library** and choose **Add a new selector** and choose the required selector type from the those presented:

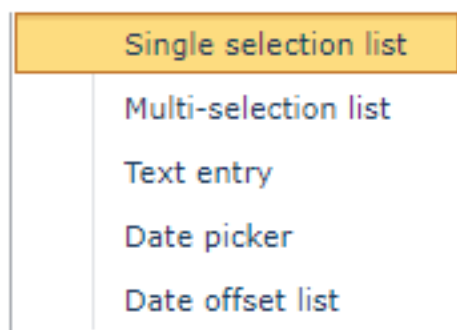


Figure: Selector types.

2. This will present a dialog showing the selector Properties. The example below shows a Single selection list selector.

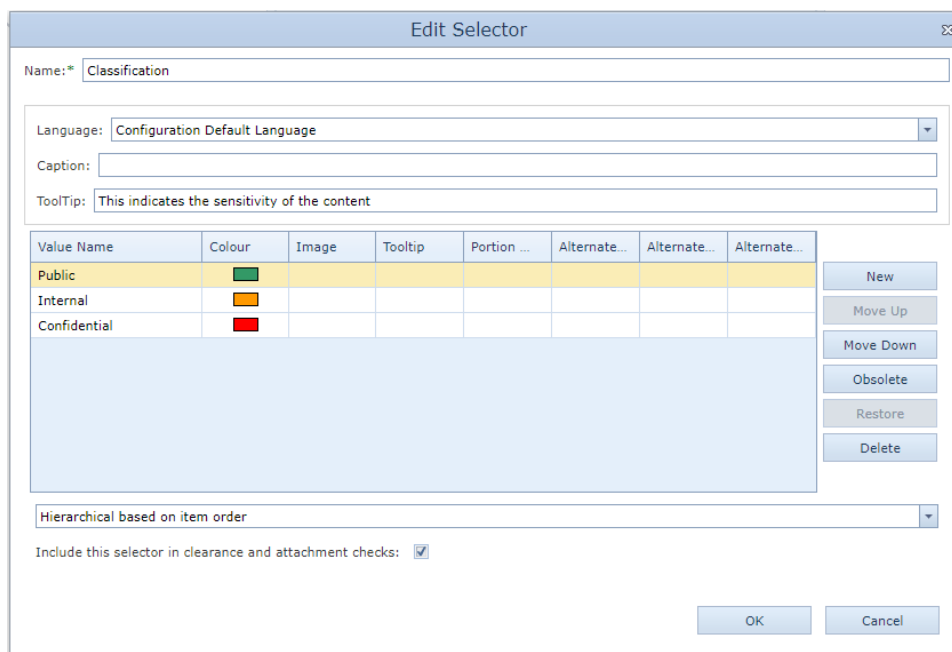
A screenshot of the "Edit Selector" dialog box. The title bar says "Edit Selector". The "Name:" field contains "Classification". The "Language:" dropdown is set to "Configuration Default Language". The "Caption:" field is empty. The "ToolTip:" field contains "This indicates the sensitivity of the content". Below these fields is a table with columns: "Value Name", "Colour", "Image", "Tooltip", "Portion ...", "Alternate...", "Alternate...", and "Alternate...". The table has three rows: "Public" with a green square, "Internal" with an orange square, and "Confidential" with a red square. To the right of the table are buttons: "New", "Move Up", "Move Down", "Obsolete", "Restore", and "Delete". Below the table is a dropdown menu set to "Hierarchical based on item order". At the bottom, there is a checkbox labeled "Include this selector in clearance and attachment checks:" which is checked. "OK" and "Cancel" buttons are at the bottom right.

Figure: Edit Selector (Single selection List).

3. Some Properties (Name etc.) are common to all Selector types and are described under [Edit Selector](#).
4. Other Properties vary with the Selector type and are described in the appropriate sub-topic:
 - [Date offset list](#)
 - [Date picker](#)
 - [Multiple selection list](#)
 - [Single selection list](#)
 - [Text entry](#)
3. Enter the appropriate **property values** (see [Edit Selector](#)).

Note: The selector type cannot be changed. If you need to change the selector type (and retain the name), you must delete the existing selector and create a new selector with the same name.

4. Click **OK**.
5. The Selector Library display is updated to show the Selector you have just created.

Move Up / Move Down

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) → Set selector order

The order that Selectors appear to the user is determined by the order they appear in the selector library.

You can change this order using the Move Up and Move Down actions:

1. Select **Selector Library** and select the **Selector** to be moved.
2. Choose **Move Up / Move Down** as required.

Language (Selectors)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) → Language

By default the Selector Library list presents the selector Captions and Tooltips defined for the Configuration default language.

You can select an alternative language by clicking on the Language action and choosing the required language from the list presented.

Any **Caption** or **Tooltip** shown in the upper pane which has not had a language specific value defined will be blank. The lower pane will show the Value Name, Tooltip, Portion, Alternate name /2/3 values defined for that language. If no specific value has been defined then a value is derived using the Algorithm defined in [Languages](#) .

Edit Selector

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) /{selector} → Properties

When you [Add a new selector](#), or choose the **Edit Selector** action you are presented with a dialog showing the various **Selector** properties described.

There are some properties common to all selector types (Name etc.), and other properties which vary with the selector type.

Note: The selector type property is defined at creation time and is not changeable (or visible) through the **Properties** action.

There are some properties common to all selector types (Name etc.), which are described below, and other properties which vary with the selector type.

Properties common to all selector types:

- **Name** : This is the name of the selector in the Classifier configuration. This name is used when assigning selectors for inclusion in a policy. The name must be unique in the configuration. You may change the Name of a Selector (Rename) using the Properties action– it will change all instances of the Selector name throughout the Label Configuration.
- **Language**: [Only visible if **Allow multiple languages** is **enabled** - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Selecting the language allows you to define the values to be displayed for that Language. Choose the **language** and then set the **Caption and/or Tooltip** and other values as required.
- **Caption** : This is the name presented to the end user. The value may be overridden by a Caption setting at the Policy level.

If you do not set this explicitly then the Selector Name is used as the Caption.

Note: The value should be short enough to fit into the ribbon bar area that presents the label selection interface. It is sensible to check that the effects are reasonable in all relevant environments (e.g. Outlook / OWA / Notes / Office etc.).

- **ToolTip** : This is an optional string that appears if a user hovers over the **Selector** in the **Label Selection** area of the ribbon bar (maximum length 1000).

Note: The **Include this Selector in Clearance Checks setting** can now be found on the **Edit values (Selectors)** dialog.

Properties that vary with the selector type are described in the following:

- [Single selection list](#)
- [Multiple selection list](#)
- [Text entry](#)
- [Date picker](#)
- [Date offset list](#)

Some properties and actions are common to **Single selection / Multiple selection / [Date offset list](#)** selector types and are described in detail in:

- [New \(Selector value\)](#)
- [Properties \(Selector values\)](#)
- [Buttons \(Selector values\)](#)

Single Selection List

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: Single selection list selectors can take part in Clearance checking, high-water mark checks (**Label Dominance**) and [Check for Label Change](#) on Reply/Forward.

Single selection list selectors can be presented in the [Ribbon](#) Bar.

Choosing Edit values for a Single selection list presents a dialog similar to below allowing you to view and modify the various Properties.

| Value Name | Colour | Image | Tooltip | Portion ... | Alternate... | Alternate... | Alternate... |
|--------------|--------|-------|---------|-------------|--------------|--------------|--------------|
| Public | Green | | | | | | |
| Internal | Orange | | | | | | |
| Confidential | Red | | | | | | |

Figure: Edit Selector (Single Selection list).

The language selection drop down menu is only presented (**Configuration default language** in the screen shot above) if **Allow multiple languages** - [Properties \(Classifier Administration\)](#) is **Enabled** . This indicates support for localisation (Languages) of selector value **Name**, **Tooltip**, **Portion** and **Alternate name 1/2/3**. Further details can be found under Properties (Selector Values).

Note: Multiple languages are **NOT** supported by [Date offset list](#) selectors.

Features and properties common to **Single selection / Multiple selection** and **Date offset list** are described in:

- [New \(Selector value\)](#)
- [Properties \(Selector Values\)](#) (**Name** , **Colour** , **Image** , **Tooltip** , **Portion** , **Alternate name / 2 / 3**).
- [Buttons \(Selector values\)](#) (**Move up / down** , **Obsolete / Restore / Delete** buttons).

The remaining settings have specific relevance to **Single selection lists** :

Include this selector in clearance and attachment checks. This setting should be checked if any of the following apply:

- You intend to configure rules to [Check for the high-water mark](#).
- You intend to configure rules to [Check for Author label change](#) or [Check for label change](#) ([Check rules](#)).
- You intend to perform Label dominance checks and use Portion Marking ([Portion Marking](#)). It allows the software to ascertain whether one label 'dominates' another to ensure that the email message label "dominates" all attachment labels for example (see also [Label Dominance](#)).
- You intend to configure rules to [Check for Author label change](#) or [Check for label change](#) ([Check rules](#)) under **Email**, **OWA** or **Notes Classifier** and this selector is to be included in those checks ([Application Settings](#) / **Clearance check** [Email Domains](#) or **Clearance check Users** must be **Enabled**).
- **Hierarchy** : This setting is only relevant if **Include this selector in clearance and attachment checks** is set. [Hierarchy has no impact on Clearance checks, since all clearances are specific]. Three choices are available via the drop down list.
- **No Hierarchy**: This Selector does not operate as a Hierarchy. The Hierarchy column is removed from the dialog above.

Note: Selecting **No Hierarchy** in conjunction with **Include this selector in clearance and attachment checks** will cause the user to have to resolve issues such as High-water mark checks detecting differences between message label and attachment label(s) that might be resolved automatically if the selector was Hierarchic.

- **Hierarchical based on the value order:** The Selector operates as a Hierarchy and the order of appearance is the same as the display order (The value at the top of the list is dominated by the second in the list in turn dominated by the third...). The hierarchy value is automatically derived from the position (and is sequential - 1,2,3...).
- **Hierarchical with manual configuration** : The Selector operates as a Hierarchy but you must set the relative order manually (through the Edit Values dialog / Hierarchy column). The value assigned a hierarchy value of 1 is dominated by the value assigned 2, which is dominated by 3 etc. Choosing this value makes the relevant cells editable, and allows the display order to be different to the hierarchy order.

Note: If you happen to define the hierarchy values sequentially starting at 1, then Classifier will detect this and automatically switch the setting to Hierarchical based on the value order. You can change this subsequently by assigning different values.

Multiple Selection List

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: Multiple selection list selectors can take part in [Clearance](#) checking, high-water mark checks ([Label Dominance](#)) and [Check for Label Change](#).

Choosing Edit values for a Multiple selection list presents a dialog similar to the following allowing you to view and modify the various Properties.

Figure: Edit selector (Multi-selection list).

Features and properties common to **Single selection / Multiple selection** and [Date offset list](#) are described in:

- [New \(Selector value\)](#)
- [Properties \(Selector Values\)](#) (**Name** , **Colour** , **Tooltip** , **Portion** , **Alternate name/ 2/ 3**).
- [Buttons \(Selector values\)](#) (**Move up/down** , **Obsolete/Restore/ Delete** buttons).

The remaining settings have specific relevance to **Multiple selection lists** :

- **Minimum:** Defines the minimum number of values the user should select for this Selector.

Note: Setting a value does **NOT** make the selector mandatory, it merely defines the lower bound if at least one value is selected. A mandatory rule is required to make the selector mandatory.

- **Maximum:** Defines the maximum number of values the user should select for this selector.
- **If the user has too many or too few values then display this message:** This allows you to choose which message is presented to the user if they have chosen either less than **Minimum** or more than **Maximum** number of values for this selector. You can [Add a new message](#) to create a New user message by clicking **Add** .
- **Include this selector in clearance and attachment checks:** This setting should be checked if any of the following apply:
 - You intend to configure rules to [Check for the high-water mark](#).

- You intend to configure rules to [Check for Author label change](#) or [Check for label change](#) ([Check rules](#)).
 - You intend to perform Label dominance checks and use [Portion Marking](#) ([Portion Marking](#)) . It allows the software to ascertain whether one label ‘ dominates ’ another to ensure that the email message label ‘ dominates ’ all attachment labels for example (see also Label Dominance).
 - You intend to configure rules to **Check for Author label change** or **Check for label change** ([Check rules](#)) under Email, OWA or Notes Classifier and this selector is to be included in those checks ([Application Settings](#) / **Clearance check** [Email Domains](#) or **Clearance check Users** must be **Enabled**).
- Permissive/Restrictive:** This radio button is only available if **Include this selector in clearance and attachment checks** is set and only applicable if Clearance Checks are configured. The setting indicates if a Domain or User must be Cleared for one of (**Permissive**) or all of (**Restrictive**) the selected values. See also [Label Dominance](#) for further details).

Text Entry

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: Freeform text selectors take no part in Clearance checks, or high-water mark checks ([LabelDominance](#)); but can be included in [Check for Label Change](#).

Note: Text entry selectors **cannot** be presented in the Ribbon Bar.

Choosing **Edit values** for a Text entry selector presents a dialog similar to below allowing you to view and modify the various Properties.

Figure: Edit selector (Text entry).

- Allow any text** : All text is allowed.
- Restrict user input. Allow only these characters to be entered:** Only text indicated by the subordinate settings is valid (**Alphabetic** (a regular expression mask of "([a-zA-Z])+" - English only) / **Numeric** / **Punctuation** / **Space**). For character sets other than English use the Custom Format features below.

Note: The following characters are always restricted even if all the subordinate options are checked: -"£\$%^&* _+= {}@~#\|<>

- **Define a custom format using a regular expression:** Only text conforming to the defined regular expression is permitted. Classifier invokes the Microsoft .NET Framework Regex object to perform the checks (see [http://msdn.microsoft.com/en-us/library/az24scfc\(v=vs.90\).aspx](http://msdn.microsoft.com/en-us/library/az24scfc(v=vs.90).aspx) for more details).
- **If the user enters some invalid text then display this message:** This allows you to choose which message is presented to the user if the current selector value contains text that does not conform to the configuration. In many cases Classifier inhibits user input of 'invalid' text, but circumstances will arise where this is not possible (e.g. Forward of a message containing invalid value for this selector). You can [Add a new message](#) to create a New user message by pressing **Add** .
- **Enter text to see how this freeform text selector will behave:** Allows you to see how the configured settings affect the user interaction.

Date Picker

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: Date picker selectors take no part in Clearance checking, but are included in high-water mark checks ([Label Dominance](#)), and [Check for Label Change](#).

Note: Date picker selectors **cannot** be presented in the [Ribbon Bar](#) .

To select edit values:

1. Choose **Edit Values** for a **Date Picker** selector presents a dialog similar to the following allowing you to view and modify the various **Properties**.

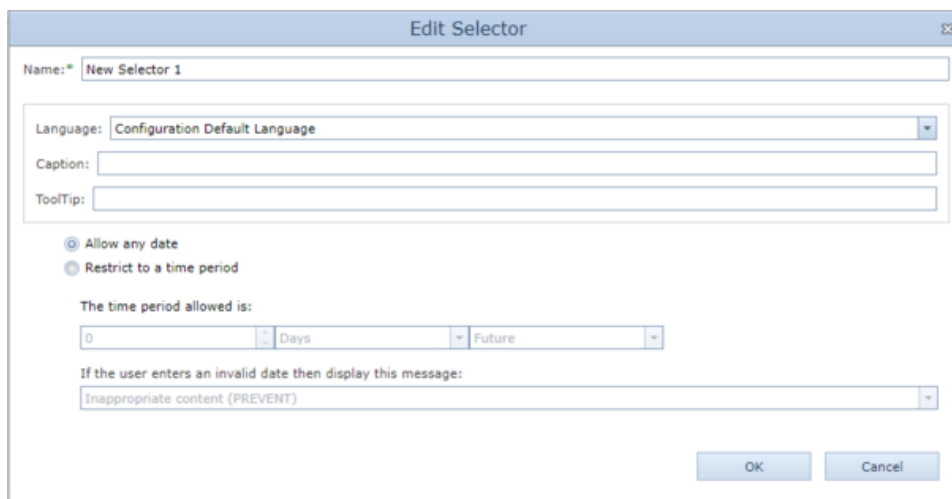


Figure: [Edit Selector](#) (Date picker).

- **Allow any date:** A standard date selection calendar is presented.

- **Restrict to a time period:** The dates available for selection by the user will be limited according to the configuration of The time period allowed is : that is a number of days/weeks/months/years from the current date either in the future or the past.
- **If the user enters an invalid date then display this message:** This allows you to choose which message is presented to the user if the current selector value contains a date that does not conform to the configuration. In many cases Classifier inhibits user input of 'invalid' dates, but circumstances will arise where this is not possible (e.g. Forward of a message containing invalid value for this selector). You can [Add a new message](#) to create a New user message by clicking **Add** .

Note: Information on the formatting of Date selectors in markings can be found in [Date Format](#).

Date Offset List

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#)/ {selector} → Edit values

Note: Date offset selectors take no part in Clearance checking, but are included in high-water mark checks ([Label Dominance](#)), and [Check for Label Change](#) . Date offset list selectors **can** be presented in the [Ribbon](#)Bar.

Choosing Edit values for a Date offset list presents a dialog similar to the following allowing you to view and modify the various Properties. The user sees the names of the configured values, but markings include the date derived at run time.

Figure: [Edit Selector](#) (Date offset list).

Features and properties common to **Single selection / Multiple selection** and **Date offset** list are described in:

- [New \(Selector value\)](#)
- [Properties \(Selector Values\)](#) (**Name, Colour, Tooltip, Portion, Alternate name / 2 / 3**).
- [Buttons \(Selector values\)](#) buttons (Move Up / Down , Obsolete / Restore / Deletebuttons).

The remaining settings have specific relevance to **Date offset list** :

- **Number:** The number of days / weeks / months / years (as defined by Period) to be added to the current date to produce the actual date value to be stored in any applied Markings.
- **Period :** Defines how Number is to be used to provide the offset to today's date to produce a marking value.

Note: Information on the formatting of Date selectors in markings can be found in [Date Format](#) .

New (Selector Value)

Admin : [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: If you add a new value to a Selector that is already assigned to a policy, you will have to explicitly enable the new value in the policy as described in [PolicyLabel UI](#) / [Selector Properties / Options](#) (Available Values).

To add a new Selector Value:

1. Select the relevant **selector** and choose [Edit Selector](#) .
2. Click **New** to insert a new row at the bottom of the **Values** list.
3. Double click on the **entry** and a form is displayed allowing you to edit the various settings.

Figure: Edit selector values.

4. Enter a **name** for the **Value**. The Name must be unique for this Selector, and it is recommended that the name is unique in the Configuration to avoid confusion and potential miss parsing of text markings.
5. **Amend** other [Properties \(Selector Values\)](#) of the new value to match your requirements. Click **OK**.

Properties (Selector Values)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: These features are only applicable to Single selection, Multiple selection and [Date offset list](#) selector types.

Note: Localisation (Languages) is not supported for Date offset list selectors).

[Selector Values](#) and their properties are managed through the Edit Values window in three ways:

1. By direct edit of a cell in the [Edit Selector](#) window (text entry or drop down). Simply select the cell and perform the change.
2. By selection from a drop down list from which you can choose the setting you require (e.g. a colour)
3. By use of the [Buttons \(Selector values\)](#) to perform an action on the selected Value (e.g. Move up / Move down)

Multiple Language Support For Selector Values

[Single selection list](#) and [Multiple selection list](#) selectors optionally provide multiple language support allowing you to configure language specific values for selector value Name, Tooltip, Portion and Alternate name 1/2/3.

Selecting a configured language will show the values associated with that language. If there is no language specific value defined for a property then the [Algorithm for finding the text to display](#) defined in [Languages](#) is used to determine a value to be displayed and associated with the chosen language.

Supported Properties

- **Name:** This is the string that by default is presented to the end user for selection of this Value via the [Label Selection](#) interface; assuming the Selector and Value are available in the policy applicable to the user. You can choose to present the **Portion** or **Alternate** value rather than the **Name** in the Label selection interface as described in [Policy Label UI / Selector Properties / Options](#).
- **Colour :** This allows you to associate a colour (selected from the drop down colour dialog). Setting the colour property for a Selector Value means that any marking which contains that Value will automatically adopt the associated colour as the text colour. This is subject to the proviso that the marking location must be capable of presenting colour (e.g. It would be Ok in a Summary [Marking](#) presented in information bar, but not applicable to Meta data locations). Marking formats may override the colour setting. By default there is no colour setting.

Note: You can 'unset' an existing colour setting by: selecting the selector, choosing Edit Values, clicking on the Colour cell to display the Colour Picker dialog. Then press CTRL + DEL to revert to no colour setting.

- **Image: (Only applicable to Single and [Multiple selection list](#) selectors and only relevant if [Use Single Click with pre-defined labels](#) is enabled).** You can associate an image from the [Image Library](#) with the chosen selector value.
- **Tooltip:** This is an optional text value (maximum length 1000 characters including CR/LF etc.) that will appear if a user hovers over the Selector value in the label selection dialog. If no value is chosen, or there is no Tooltip defined for the selected value, then the Tooltip defined for the parent Selector will be shown.

Note: Due to the nature of the environment, certain unusual characters within a tooltip (e.g.

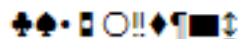


Figure: Selector value tooltip.

- **Portion :** This is a text string that can be defined to make use of the Classifier [Portion Marking](#) features. It allows you to allocate a short form of the Label Value so that when you wish to mark parts of a Word document or email message as (for example) "Confidential" or "Public" the short form (portion marking value) is inserted instead. For example: **[P]** indicating that this text may be circulated publicly. **[C]** indicating that this text is confidential and must not be circulated publicly

If you are not using Portion marking in emails or Word, then you can leave this setting blank. Please see [Portion Marking](#) for further details on the use of this mechanism.

You can choose to present the **Portion** or **Alternate** value rather than the **Name** in the Label selection interface as described in Policy Label UI / [Selector Properties / Options](#) .

- **Alternate name / Alternate 2 / Alternate 3.** These values may be defined if you wish to establish different Marking Formats to encode the current label value in different ways.

For example you may wish to establish a [Marking Format](#) which presents the selected values in full and perhaps use that format in Headers and Footers; but for Subject Prefix in email messages you may require shortened forms (e.g. Public -> Pub). Up to three “**alternate names**” for a value can be defined using these properties. When you configure a Marking Format you can use either the Value Name, or any configured Alternative name.

You can choose to present the **Portion** or **Alternate** value rather than the **Name** in the Label selection interface as described in [Policy Label UI / Selector Properties / Options](#).

Buttons (Selector Values)

Admin: [Labelling Configurations](#) ⇒ (configuration) ⇒ [Selector](#)Library / {selector} → Edit values

Move Up/Down

The order values appear in the Values area (and the Edit values area) is the order in which they are presented to end users. This order may be changed by moving the values up and down.

Note: Changing the order of display also affects the hierarchical order if **Hierarchical Based** on the value order is set.

To move a value up/down:

1. Select a **Value**. Click **Move up/Move down** to reorder the values.
2. Click **OK** to complete the changes and return to the summary view.

Obsolete / Restore

Note: These actions relate to obsoleting and restoring Selector values. Equivalent actions for a whole Selector can be found under [Obsolete/Restore Selector](#).

Over time your labelling requirements may change and you may decide to stop using a Selector Value in the labels created, but you may have existing documents and emails that include that Value.

The Obsolete and Restore buttons allow you to retain the Value so that existing labels are still meaningful, but remove it from the set of Values available when creating new documents and email messages. An obsolete Selector value will never be retained on a new email Message/Document/Spreadsheet/Presentation.

To set a value to Obsolete:

1. Select the relevant **value**.
2. Choose **Obsolete**.
3. The value name is marked by strike through.

You may Restore an obsolete value by a similar sequence.

To restore an obsolete value:

1. Select the relevant (obsolete) **value**.
2. Choose **Restore**.

Delete

This button allows you to delete a value.

Note: Deleting a Selector Value should only be used if you are sure that there are no documents or emails in existence that use that value. It may be more appropriate to mark the value as Obsolete using the Obsolete button.

To delete a value:

1. Select the relevant **selector**.
2. Choose **Delete**.
3. A confirmation dialog is presented. Click **Yes** / **No**.

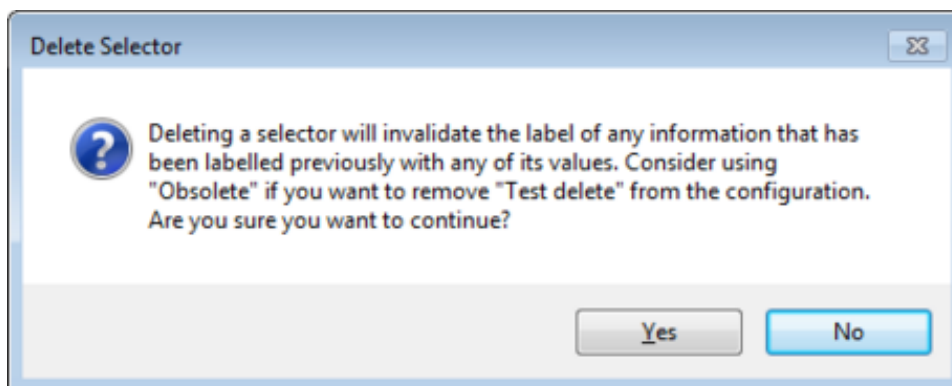


Figure: Delete Selector Value.

4. If the Selector value is still in use in a Policy you are prompted and the action disallowed.

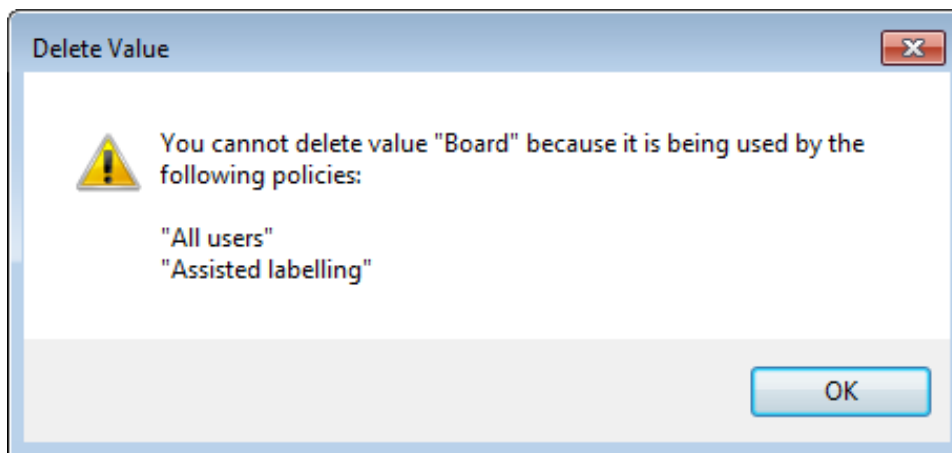


Figure: Delete Selector Value warning.

Obsolete / Restore Selector

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Edit values

Note: This topic relates to obsoleting and restoring a Selector. Equivalent actions for individual Selector values can be found under Edit Values / [Buttons \(Selector values\)](#) .

Over time your labelling requirements may change and you may decide to stop using a Selector in new labels. However you may have existing documents and emails that include Values from that Selector.

The Obsolete feature allows you to retain a Selector so that existing labels are still meaningful, but remove it from the selectors available to users when creating new documents and emails (including Reply / Forward actions). An obsolete Selector is never retained on a new email Message / Office Document.

To **Obsolete** a selector:

1. Select the relevant **selector** . Choose **Obsolete**.
2. Click **Yes** to confirm the obsolete action or **No** to abandon the action.

To **Restore** an obsolete Selector by a similar sequence:

1. Select the relevant (obsolete) **selector** . Choose **Restore**.
2. Click **Yes** to confirm the Restore action or **No** to abandon the action.

Note: You cannot Obsolete a Selector until all Rules referencing the Selector have been deleted or modified to avoid any reference to that Selector. You are warned if there are outstanding Rules when you attempt an Obsolete action and the action is not allowed.

For further information see also [Active Obsolete and Retained Selectors and values](#) .

Active Obsolete and Retained Selectors and Values

Selectors and [Selector](#) Values can be referred to as Active / Obsolete or [Retained](#) as described below. In the simplest mode of operation selector values available in the current policy (via [Policy](#) / Set Selectors display) are available to the user when setting the label value.

Active

Selector values '**added**' into a policy are deemed **Active** . They are available for the user to choose as a label value. Active values in an existing label are used as the initial value for a new object (e.g. forward an email).

Obsolete

Over time you may find that some Selector values fall into disuse and should no longer be applied to new objects. Classifier accommodates this circumstance by allowing you to designate Selector values and/or Selectors (all values) as **Obsolete** .

Designating a Selector or Selector Value as obsolete means that it can still be recognised and presented when it is found in an existing object (e.g. in the summary label for a document labelled with an Obsolete value); but the user is not allowed to select that selector/value when creating a new object.

So for example, if you forward or reply to an existing email that contains an obsolete Selector Value, the obsolete value is dropped from the new email message, and replaced by the default value (if any) for that selector. So obsolete selectors/selector values do not contribute to label downgrade checks .

Saving a document containing an Obsolete selector value is treated as a new document, and any Obsolete selector values are replaced by default values. .

Obsolete Selectors take no part in Rules because Rules only apply to new objects (which by definition cannot include Obsolete values). Whilst there is at least one Selector value active in a policy the Selector can contribute to Rules.

You cannot obsolete a Selector until all Rules referencing the Selector have been deleted or modified to avoid any reference to that Selector.

Note: If you have a Selector that is not Active or Retained in the current Policy AND is not marked as Obsolete in the [Selector Library](#) it operates as though it was actually marked as Obsolete - i.e. presented if found, but not propagated.

Retained

You may have Selectors that are only available for selection by some users. Other users may only be able to receive email messages containing those Selector values, but you want such users to be able to forward an email containing the **restricted** selector value - i.e. to retain the label value when Forwarding. You can mark a selector as being [retained](#) via the appropriate checkbox on the selector in the Selectors in Policy dialog. **Retained Selectors** can be used in Policy Rules in the same way as active selectors and is processed by downgrading rules. Thus if you add a Selector to a Policy as a retained selector, then any rules associated with that selector and its values are retained and applied in the policy.

Delete (Selector)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Selector Library](#) / {selector} → Delete

Note: Deleting a **Selector** should only be used if you are sure that there are no documents or emails in existence that use that selector. It may be more appropriate to mark the selector as [Obsolete](#) .

Deleting a Selector removes all associated **Values**. You cannot delete a selector if it is still in use in a policy.

To delete a selector:

1. Select **Selector Library** and choose the relevant **S elector** .
2. Select **Delete**.
3. Click **Yes** to confirm the Delete action or **No** to abandon the action.
4. If the selector is still in use in a policy you are prompted and the action disallowed.

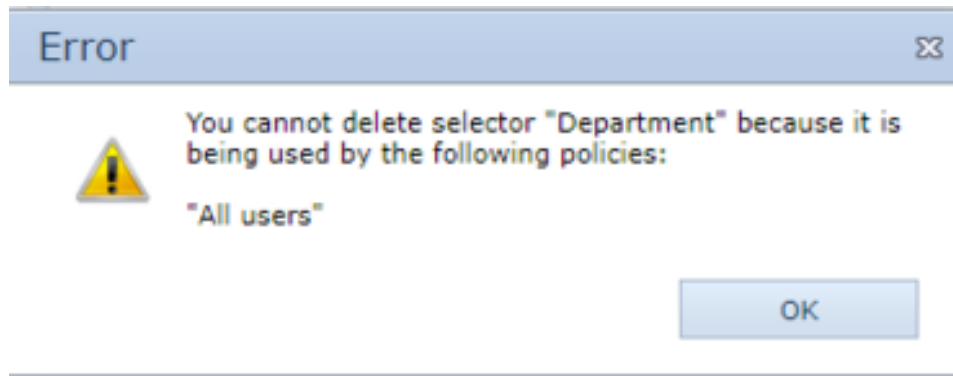


Figure: Delete Selector warning.

Label Dominance

If **high-water mark (HWM)** checks are configured by a rule, then when a mail message is sent the message label must 'dominate' the labels of any attachments (and optionally Portion Marks).

Note: If you are using [Portion Marking](#) in Email Classifier and require message labels to dominate all Portion marks in the email message body you must also **Enable** - [Ensure label dominates all portion marking](#).

The Label Dominance algorithm employs a different check depending upon the selector type:

| Selector Type | Notes |
|---|---|
| Single selection list | <p>(If Include this selector in clearance and attachment checks is un-checked the selector takes no part in label dominance operations)</p> <p>The operation depends on the Hierarchy setting for a Single selection list :</p> <p>Hierarchic : The message label value is set to the 'highest' value from the message and attachment labels.</p> <p>No Hierarchy : The user will have to be involved in resolving any incompatible label issues*.</p> |
| Multiple selection list | <p>(If Include this selector in clearance and attachment checks is un-checked the selector takes no part in label dominance operations).</p> <p>The union of all values for the selector from the message and attachments is formed, and subject to the configured Maximum , is applied to the message label. If the Maximum is exceeded, then the user will be involved in resolving the issue*.</p> |
| Freeform text | Freeform text selectors take no part in Label Dominance (HWM) checks. |
| Date pick Date item | The message label value will be set to the 'highest' date of those set on the label and attachments. |

* For Single valued selectors, it may be not be possible to modify the message label to fully dominate the attachment labels. For example:

Consider two selectors Classification (Hierarchic) and Department (non-hierarchic) and an email message containing two attachments labelled as **Unmarked / Sales** and **Confidential / Engineering** . While setting a message label of Confidential would address the Classification values, there is no single Department value that can encompass both Sales and Engineering.

Similar difficulties can arise with Multiple selection list selectors if more values would be required than are allowed by the maximum number of values allowed.

In either of the above circumstances, the user should resolve the issue (e.g. modify the attachments, or use the override check option if available).

Marking Library

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ Marking Library

A **Marking Format** defines how selected labels are presented to end users. Each Marking Format defines how to construct a Marking using any or all of the features below in an order defined by the Marking Format:

- Fixed Text
- Label Elements from the selected label (Labelling Configuration, Policy and Selector Values).
- Hyperlinks
- Alternative Selector Value Names available as rendering qualifier to Label Element choice.
- Environment / Document Properties.
- Directory Attributes
- Rich text formatting.

Note: Saving a document as another type (e.g. Word --> TXT or EXCEL --> CSV prompts to indicate that information will be lost. The Classifier label and marking information is one of the casualties of such operations.

Rules that apply a Marking indicate the Marking Format to be used. The following Marking Format actions are supported:

- [Add a new Marking Format](#)
- [Properties \(Marking Format\)](#): (invoked by Add and Properties - includes the ability to Rename)
- [Copy \(Marking Format\)](#)
- [Delete \(Marking Format\)](#)

The example below shows an example Marking Library display.

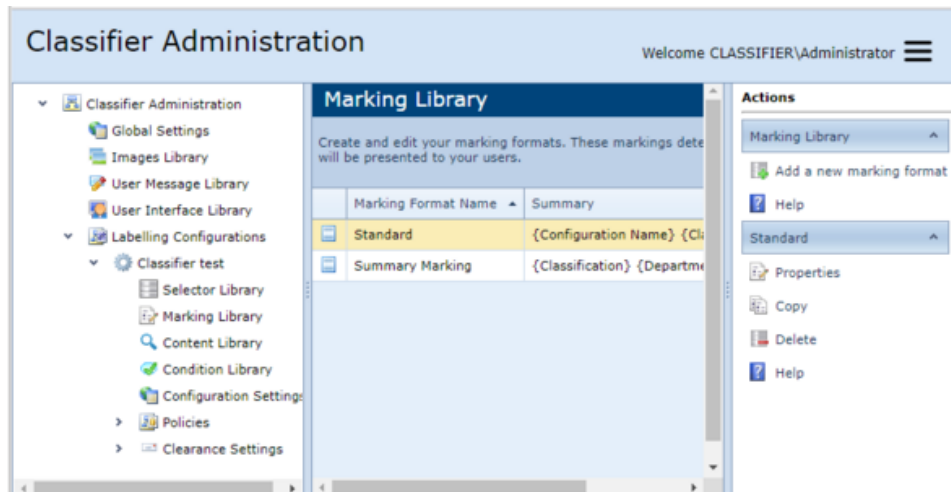


Figure: Marking Library.

Add a New Marking Format

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) → Add a new marking format

To add a new [Marking Format](#) :

1. Select the **Marking Library** node and choose **Add a new Marking Format** .
2. This will present the [Properties \(Marking Format\)](#) dialog which will allow you to set all properties of the Marking Format.

Properties (Marking Format)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

- Marking formats that are to be used for FLOT , LLOT , [Portion Marking](#) or email message **Subject** markings should include clear delimiters around the entire marking so that Classifier can 'find' the markings. For example:
 [{Configuration Name} {Classification}]. See [Recognising and Parsing Label Markings](#) for further information.
- Using <whitespace> to separate marking elements can lead to unexpected effects and difficulties when parsing labels. Additional control to avoid these issues is provided for Selector Elements through the [Text Display](#) and [Marking Selector options](#) .
- You can define Marking Formats that span multiple lines. If you insert a 'newline' using SHIFT+Enter, the Marking will NOT appear correctly in Microsoft Office Headers or Footers (it will be correct in Outlook FLOT/LLOT). Use Enter (rather than SHIFT + Enter) to insert the 'newline' and the Marking will appear correctly.

Add a New [Marking Format](#) will invoke this Properties (Marking Format) sequence.

To configure a Marking Format:

1. Select the **Marking Library** node and select the relevant **Marking Format** entry .
2. Choose **Properties** . This presents a dialog which shows the current state.
3. You can **Rename** a Marking Format simply by updating the **Name** field and saving the change. It will update all instances of that **Marking Format Name** in the current configuration.
4. The initial state for a new Marking Format shows place holder text “Your Marking Format here”.

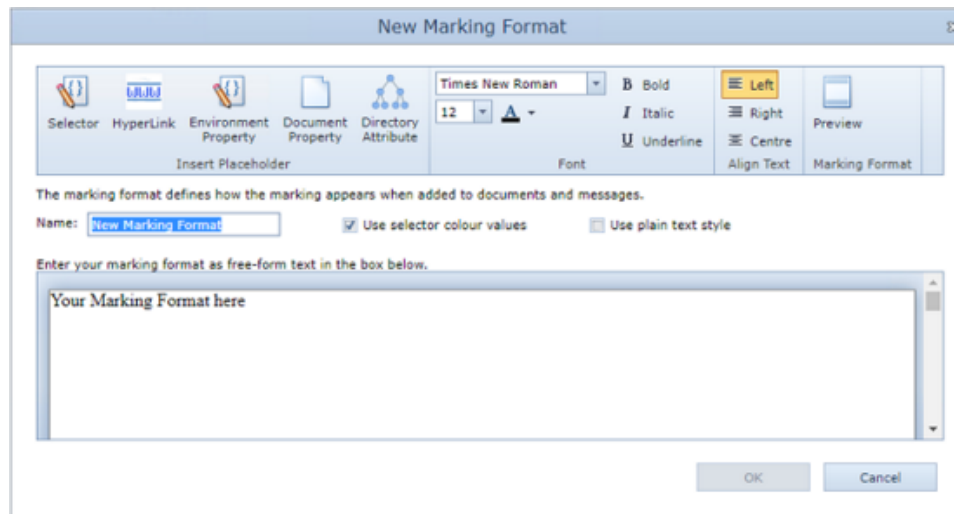


Figure: New Marking Format.

5. Define the **Marking Format** in the scrollable text area. This is accomplished by one or more of the following (performed in any order):
6. Select an **insertion point** and type **text** (see the notes at end of this section).
7. Select **text** and **delete** it.
8. Select an **insertion point** then choose [Insert Placeholder / Selector element](#) , or [Insert Placeholder / Hyperlink](#) or [Insert Placeholder / Environment Property](#) , or [Insert Placeholder / Document Property](#) or [Insert Placeholder / DirectoryAttribute](#) and choose the item to be inserted (and its rendering options if applicable).
9. Select **text** or an **insertion point** and then apply a **presentation effect** using the [Font options](#).
10. Select the Alignment (**Left, Right or Centre**) from the [Align Text](#) options. Note that this aligns the whole format, not just a selected portion of the text.
11. **Set or unset** the **Use Selector colour values** option. By default any colour value associated with a Selector value will be used by the Marking Format even in a sequence that has the font colour set. You can unset this option so that any colour associated with a selector value is ignored when producing the Marking value.
12. **Set or unset** the **Use plain text style** option. By default the text generated from a marking format will always include formatting settings - even if you have not set any explicitly. A plain text variant is inserted in contexts that do not support formatting. This setting has an effect on the operation of Add a textbox on the header / footer (Word only) as described under [Add rules](#) .

However, in some circumstances the formatting defined for an inserted marking may interfere with formatting your site has set by other means. This option allows you to direct Classifier to use the plain text marking variant even though the context supports formatting. For Word and Excel any pre-defined formatting in headers/footers

is removed. For PowerPoint any pre-defined formatting is applied to the plain text variant of the marking. If you enable this option, [Preview a Marking Format](#) will only show the plain text version.

Any formatting you have specified in the marking format definition is remembered regardless of whether this option is set or unset.

13. Select a **label element / environment property / document property** that you have inserted and click to launch the modify dialog.
14. Select a **label element** and press **DEL** to delete it.
15. You can check the effects of your configuration by clicking the [Preview a Marking Format](#) button.
16. Once you finish amending the Format, save it by clicking **OK** (not available until you make a change).

Note: The appearance of any marking should be checked in the target application(s) to ensure that the end effect is suitable. For example, Word Watermarks apply auto-sizing and using a 'long' Marking Format may be ineffective as some applications apply limits to the size of headers/footers (including formatting control information). If limits are exceeded, Classifier first removes formatting information before truncating the text.

Note: The following characters (i.e. \:*\?"<>|) should not be used in a Marking Format either in Selector value names, or as part of the Marking Format text supplied. Usage of these characters may result in unexpected presentation effects in the current or future versions of Classifier, E.g.

- All formatting is lost (colour, font and alignment) (Office applications).
- The Selector value does not appear in the applied marking (Outlook).
- Run time errors.

Inserting A Selector Element

Admin : [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

Note: If Text / [Date picker](#) / Date offset selectors are to be included a Marking format that will be used to parse a text label (e.g. Externally defined label, FLOT, LLOT, [Portion Marking](#) or Subject), Prefix and Suffix ([Marking Selector options](#)) must be specified so that Classifier can find the start and end of the string which contains the associated selector value.

To insert a Selector Element into a format:

1. Select the **Marking Library** node
2. Select the relevant **entry** and choose **Properties**.
3. Select an **insertion point**.
4. Choose the **Insert Placeholder / Selector** action.
5. This will present the following dialog containing a list of the available Label Elements (**Configuration Name, Policy and Selectors**).

Marking Format - Selector configuration

6. Select the required **Label Element**.
7. If required, choose an alternative presentation from those available, as described in [Text Display](#).
8. If required, apply additional selector formatting as described in [Marking Selector Options](#).

9. Click **OK**.

10. A placeholder for the selector element will appear at your selected insertion point. For example:

{Configuration Name} {Classification}

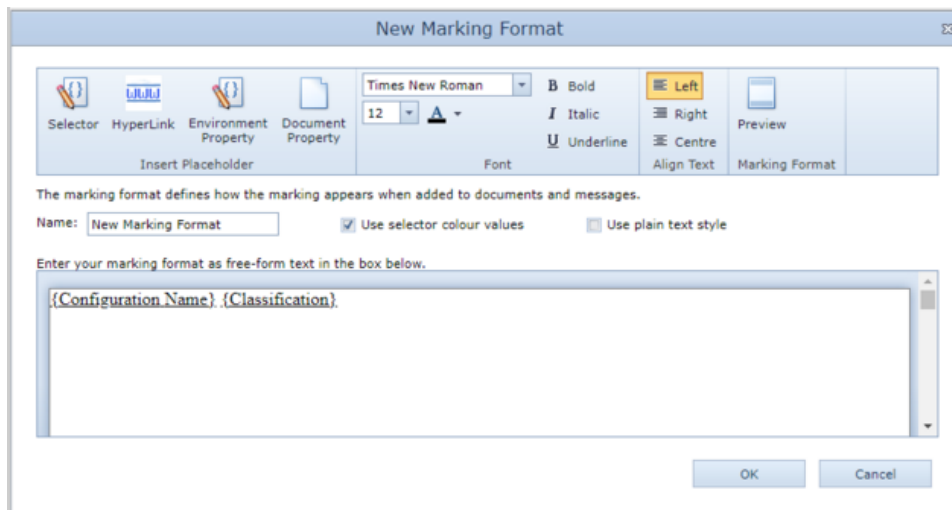


Figure: Marking Format: Configuration and Selector inserted.

One or more spaces may be defined as an Alternate value for a selector. If, when a marking is being constructed a value consists only of spaces:

- Classifier will not check for duplicates in the selector.
- Any number of spaces (up to field size limit) will be allowed.
- You will always see delimiters plus however many spaces are defined - there is no way of totally omitting a selector.

If a value contains anything in addition to spaces then:

- The leading and trailing spaces will be removed.
- The duplicate check will take place.

Note: The **Separator** field is only relevant to **Multi-select selectors**. **Note:** Date type selectors present date format options under [Text Display](#).

Text Display

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

You can control how a selector appears in the marking by selecting one of the values presented under Text Display.

For non-date type selectors the list will include [Portion Marking](#) or **Alternate name / Alternate 2/ Alternate 3** Selector value Properties shown in selector configuration [Edit Selector](#) . The **ID** entry represents the unique identifier allocated to the Selector.

Date type selectors are configured in a similar manner, but the date format choices as described in [Date Format](#) .

To apply or modify these alternative presentations:

1. Select the relevant **element** in the **Marking Format Editor** window.
2. Choose the **Text display** item you wish to use.

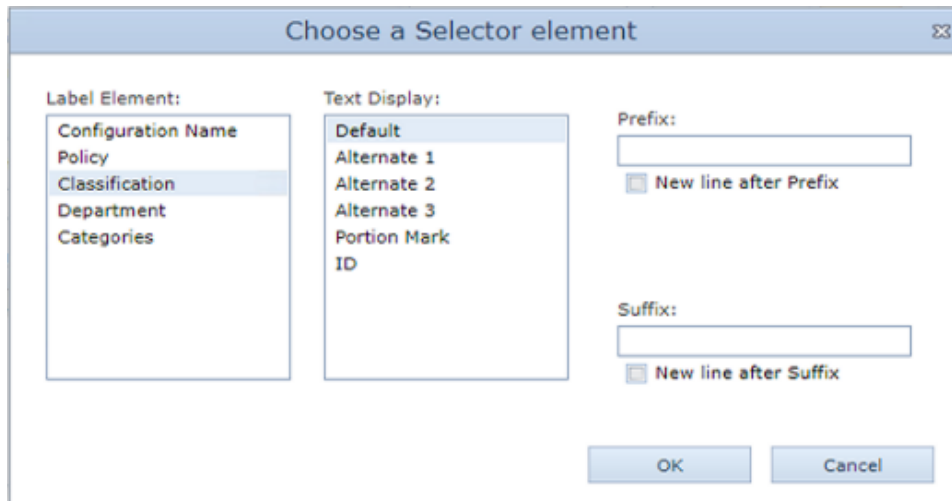


Figure: Text display: Alternate 1 option.

3. Click **OK** and the parent edit dialog will be updated to reflect the change (e.g. {Configuration Name} {Classification (Alternate 1)}).

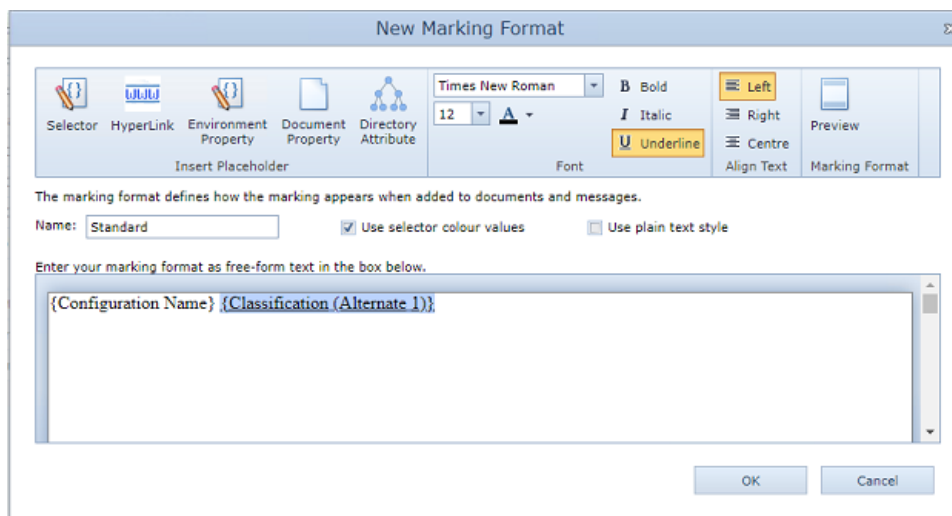


Figure: Alternate 1 Marking chosen.

4. Use the **Preview** option to show the effect of the changes made to the Marking Format

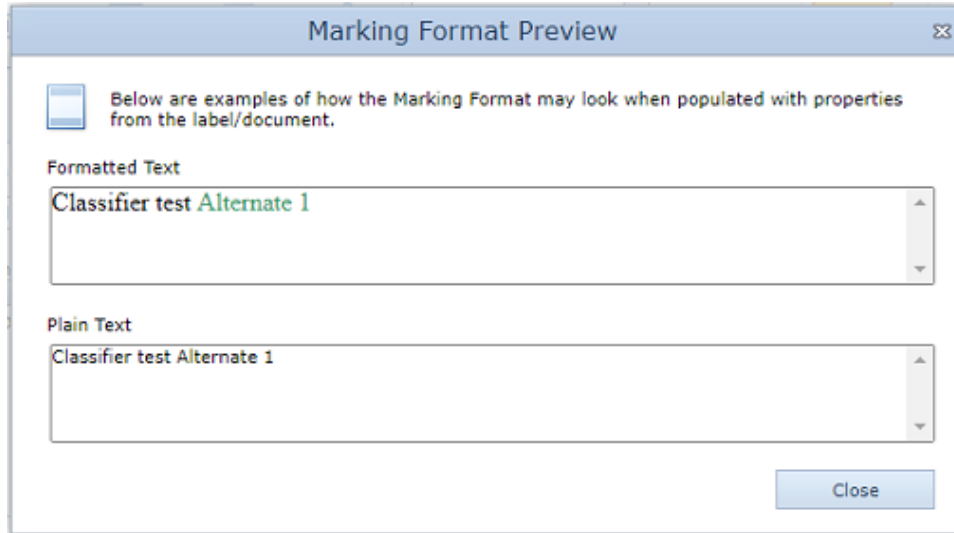


Figure: Alternate 1 Preview.

Date Format

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#)/ {marking} → Properties

Note: Date items are presented as local time.

You can control how Date type selectors are presented in the marking by using any presentation value under [Text Display](#):

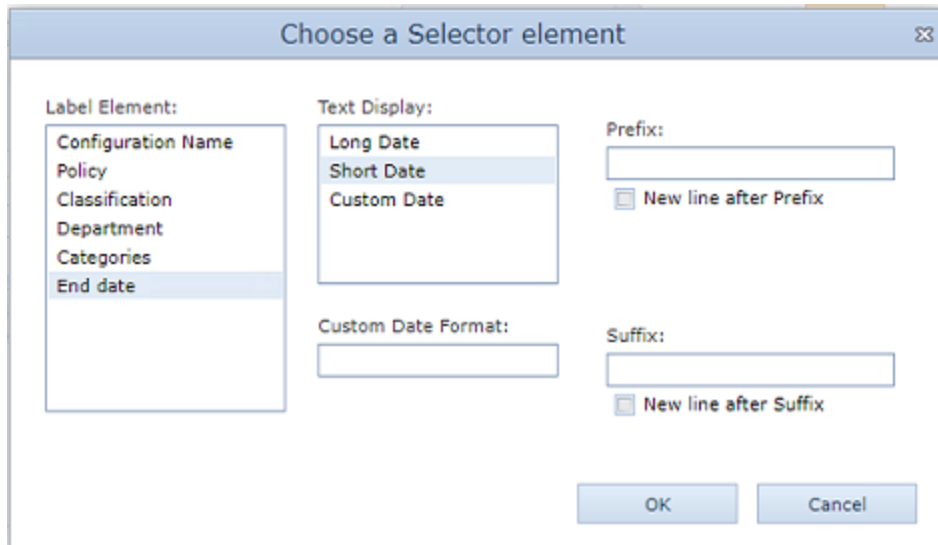


Figure: [Marking Format](#): Date Format options.

The values **Long / Short** date indicate that the **Long / Short** date formats defined for the system under **Control Panel / Regional Settings** are to be used. The default is **Long date**.

Selecting **Custom Date** will make the **Custom Date Format** field available allowing you to enter text formatting control as described in:

[http://msdn.microsoft.com/en-us/library/system.globalization.datetimeformatinfo\(v=VS.80\).aspx](http://msdn.microsoft.com/en-us/library/system.globalization.datetimeformatinfo(v=VS.80).aspx)

For example, you could specify **'dddd, dd MMMM yyyy'** to get **'Tuesday, 23 October 2012'**.

Note: It is recommended that you use simple **custom formats**, and check the effects via the Preview mechanism.

The selector token in the **Marking Format** is annotated accordingly (If **Long Date** is chosen it is not shown as it is the default).

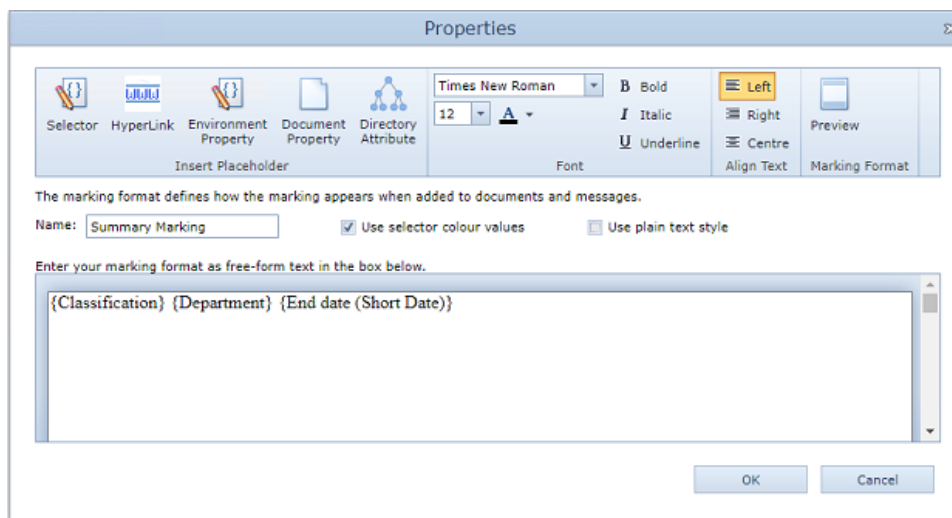


Figure: Marking Format: Date selector annotation.

Marking Selector Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

Marking Selector Options allows you to define prefix and suffix text which only appears in the marking if the selector has a value selected. This feature can be used to remove redundant <whitespace> in markings and to facilitate parsing of (externally defined) label values in [Label Locations](#).

Note: Prefix and Suffix **must** be defined for Text / [Date picker](#) / Date offset selectors included in a Marking format that will be used to parse a text label (e.g. Externally defined label, FLOT, LLOT, [Portion Marking](#) or Subject).

For Multiple selection selectors the Separator field is available allowing you to define text to separate individual selector values.

Example 1- Multiple Selection Separator With a Prefix

An organisation's label configuration comprises two selectors - **“Classification”** and **“Category”**. Category is an optional selector that might not be set by the user, and it allows multiple values to be selected.

The site wants to mark documents as “My company: Classification {classification value} | Categories [category value(s) separated by '/']”.

Much of this is easily achieved through the basic [Marking Format](#) mechanisms, but if no Category value was selected a marking of “My company - Classification {Classification value} | Categories [” could result. The site may prefer for this to appear just as “My company - Classification {Classification value}”.

The solution to this situation is to use Marking Options when configuring the Marking Format. By defining Selector Formatting for the Category element with a prefix of “ | Categories [”; a separator of “/” and a suffix of “]”, the fixed text is only included if a Category has values selected.

1. Select the **relevant element** in the Marking Format Editor window to trigger display of the Select label element dialog.
2. Enter the Prefix and Suffix values you require – e.g. “[Categories: “ and “]”

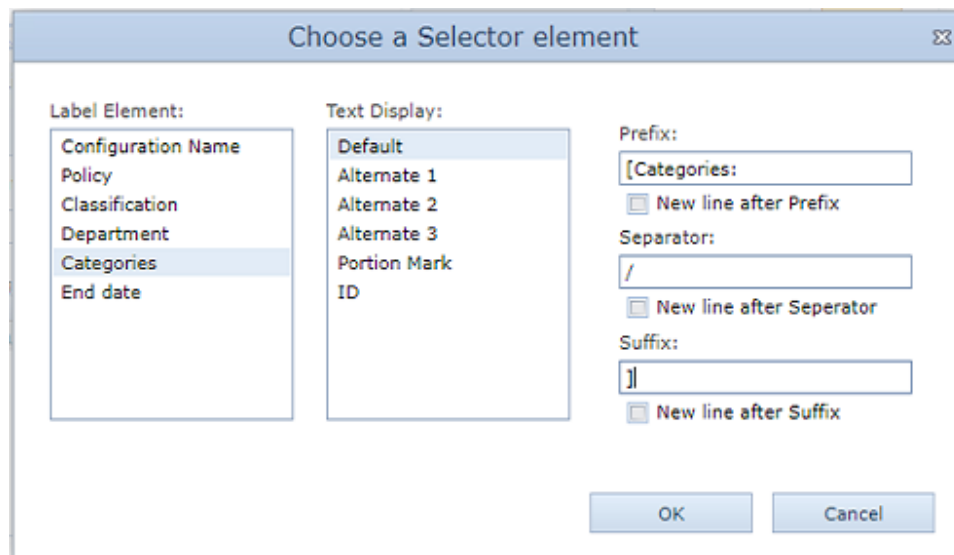


Figure: Marking Format - Marking options dialog.

1. Click **OK** and the parent edit dialog will be updated to reflect the change (e.g. My Company Classification: {Classification}{Categories (/[Categories:/[slash]/]}).
2. Click **Preview** to show the effect of the changes made to the Marking Format.
3. Click **OK**.
4. Depending on the number of Categories (1, 2 or 3) selected this would show:
 - My Company Classification: Public
 - My Company Classification: Public [Categories:One]
 - My Company Classification: Public [Categories:One/Three]

Example 2 - Multiple Line Display

You could check the **New line after Prefix** or **Suffix**. This would have the effect of placing items on separate lines as per the example below:

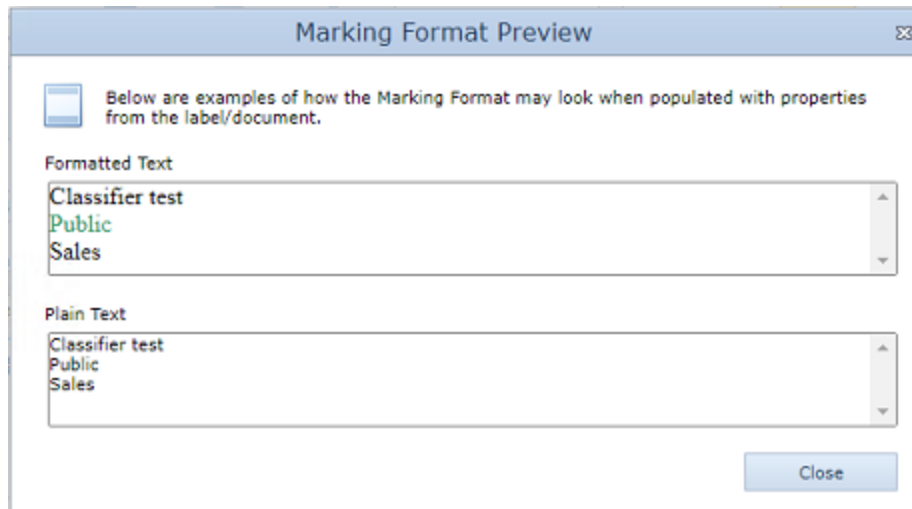


Figure: Label preview: multiple lines.

Note: Care should be taken when using the above feature to ensure that the desired effect occurs in all places where the marking format is used. For example: - **Visio** does not support multiple line header/footer. - **Outlook Summary Marking** does not handle multiple lines. - **Word Summary Marking** cannot handle more than two lines.

Inserting A Hyperlink

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} ⇒ Properties

Note: It is recommended that you only insert **Hyperlinks** in **Marking Formats** intended for use in Email FLOT and LLOT rules. There is nothing to stop you using a [Marking Format](#) containing a Hyperlink elsewhere (e.g. a Word Header), but invariably the link will not operate correctly.

To insert a Hyperlink into a format:

1. Select the **Marking Library** node.
2. Select the relevant **entry** and choose **Properties**.
3. Select an **insertion point**.
4. Choose the **Insert Placeholder / Hyperlink** action. This will present the following dialog allowing you to define the text displayed and the associated **Hyperlink**.

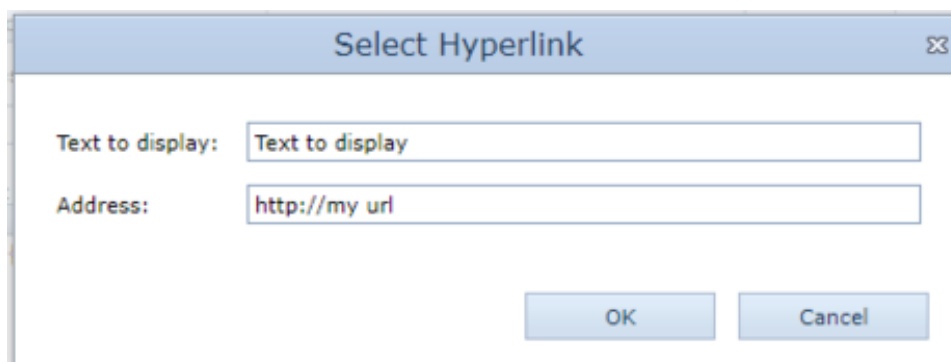


Figure: Configure Hyperlink.

5. Set the **Text to display** and the **Hyperlink Address** .
6. Once you are happy, click **OK**. A Hyperlink placeholder will appear at your selected insertion point as in the example below:

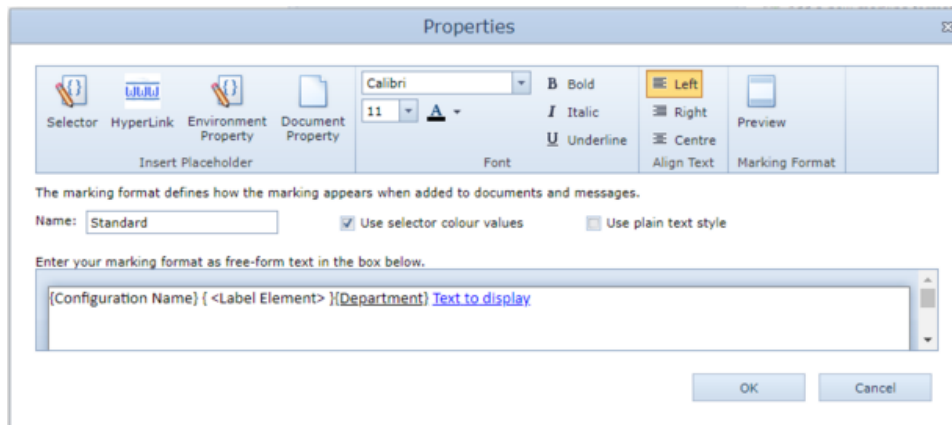


Figure: Hyperlink Placeholder.

Inserting An Environment Property

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#)/{marking} → Properties

Note: Some Environment values may not be available in all environments (e.g. OWA Classifier, Summary Marking - any item not available is left blank). It is important to check the actual Marking that appears in all circumstances where a [Marking Format](#) is used.

To insert an Environment Property into a format:

1. Select the [Marking Library](#) node
2. Select the relevant **entry** and choose **Properties**.
3. Select an **insertion point**.
4. Choose the **Insert Placeholder / Environment Property** action. This will present a choice of property Families (**DateTime/Environment/General**).

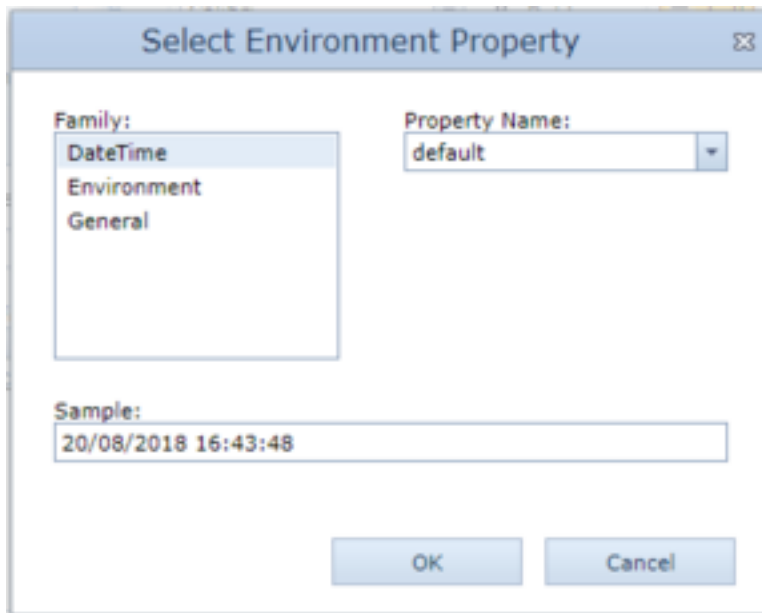


Figure: Insert Environment Property.

5. Select the required **Family** and the list below **Property Name** will be updated.
6. Select the required **Property Name** and check the example formatting in **Sample**.
7. Once you are happy, click **OK**. A placeholder for the element will appear at your selected insertion point.
For example:

{Configuration Name} {Classification} {\$Environment:COMPUTERNAME}

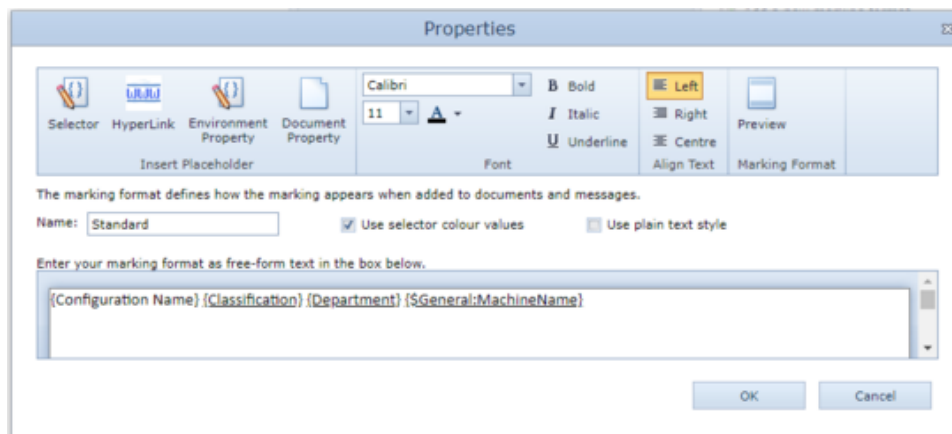


Figure: Marking Format - Environment.

Inserting A Document Property

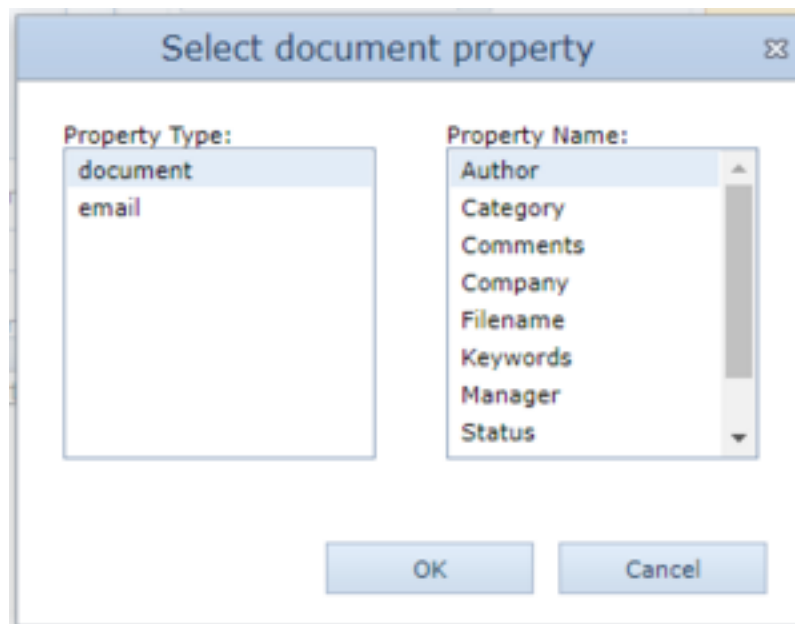
Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

Note: Not all the properties listed are supported by all applications. Properties supported by an application can be found via **File->Info->Properties (Advanced Properties)** or similar.

Note: Document properties may not be available in all environments. It is important to check the actual Marking that appears in all circumstances - especially if it is assigned as the [Custom Format for Summary Markings](#).

To insert an Environment Property into a format:

1. Select the **Marking Library** node
2. Select the relevant **entry** and choose **Properties**.
3. Select an **insertion point**.
4. Choose the **Insert Placeholder / Document Property** action. This will present a list of the available **Property Types** (document or email).



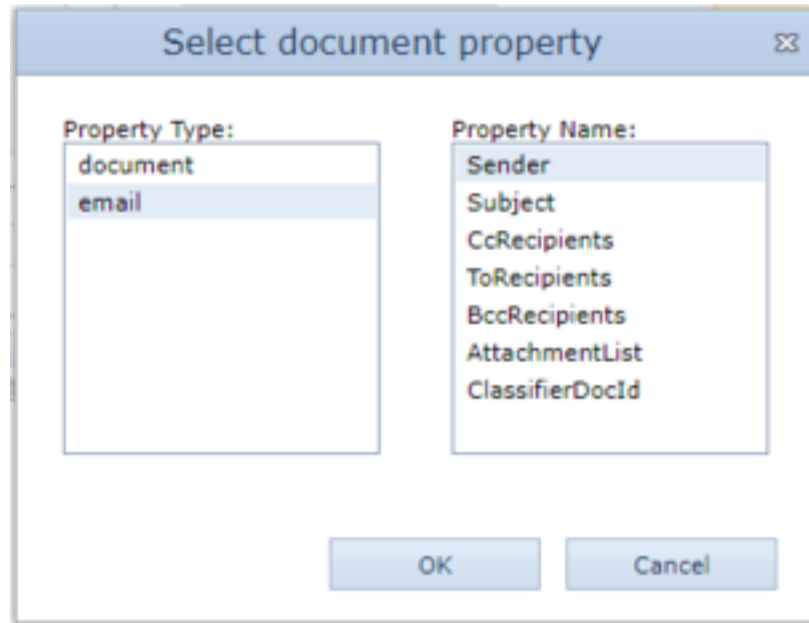


Figure: [Marking Format](#): Document Property Marking Format: Email property.

5. Select the **Property Type** you require (**document** or **email**). The list below **Property Name** will show the supported values.

Note: The supported properties are grouped for convenience, but Classifier just checks the current object for a property with that name. In particular, selecting Subject from the list of document properties will be meaningful if the marking format is applied to an email and vice versa.

6. Select the required **Property Name**.
7. Once you are happy with your choice, click **OK**. A placeholder for the property will appear at your selected insertion point. For example:

{Configuration Name} {Classification} {Author/document}

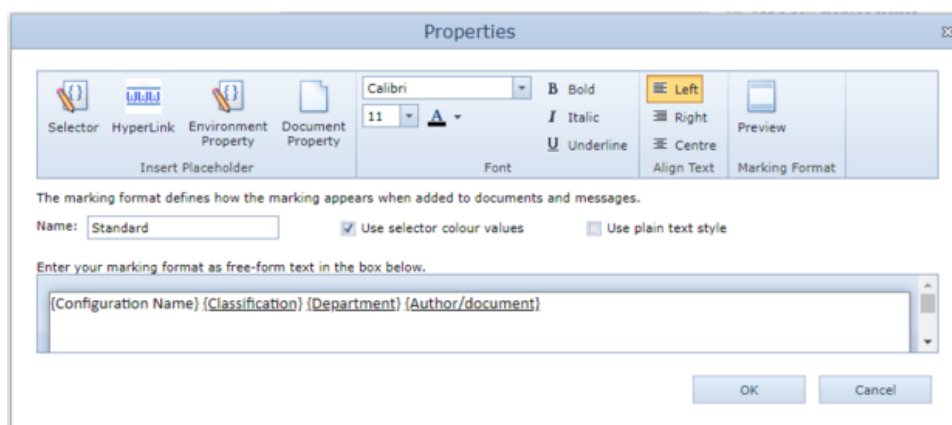


Figure: Marking Format - including author.

- Similarly adding an email property to include for example Cc recipients inserts a place holder into the **Marking Format**.

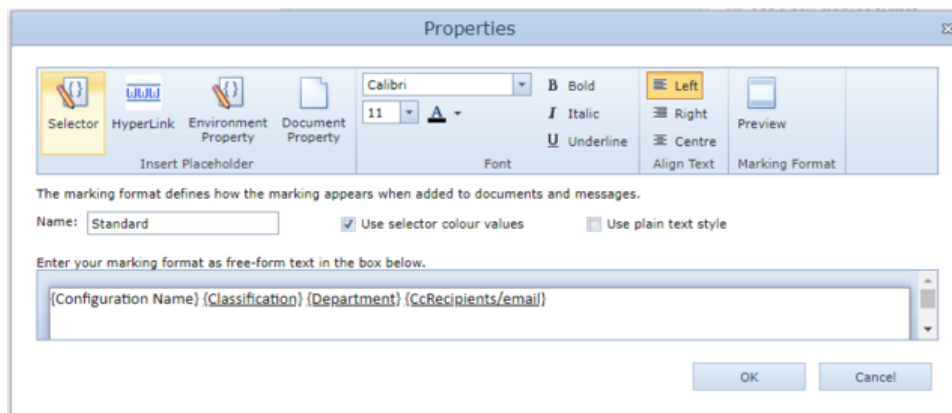


Figure: Marking Format CcRecipients.

Inserting A Directory Attribute

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

To insert a Directory Attribute into a format:

- Select the **Marking Library** node
- Select the relevant entry and choose **Properties**.
- Select an **insertion point**.
- Choose the **Insert Placeholder / Directory Attribute** action. This will present a choice of Family Types (**Computer** or **User**).

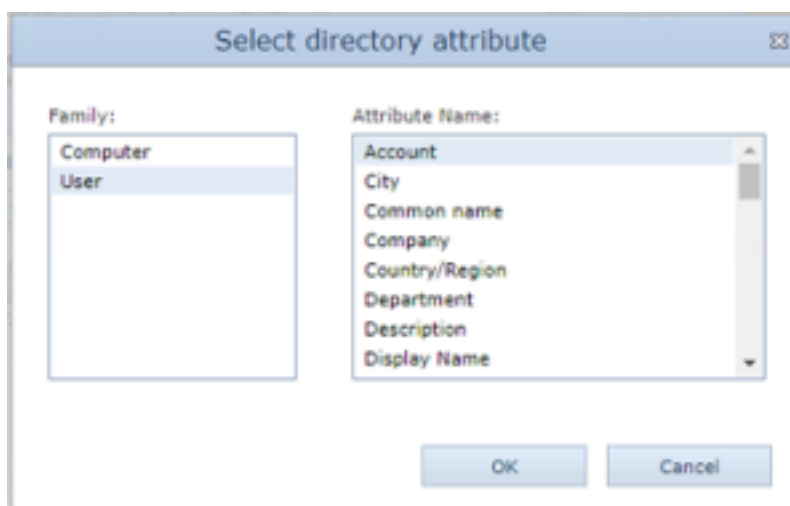


Figure: [Marking Format](#): Computer Attribute Marking Format: User Attribute.

5. Select the **Family Type** you require (**Computer** or **User**). The list below **Attribute Name** will show the supported values.
6. Select the required **Attribute Name**.
7. Once you are happy with your choice, click **OK**. A placeholder for the attribute will appear at your selected insertion point. For example:

{Configuration Name} {Classification} {User:Department}

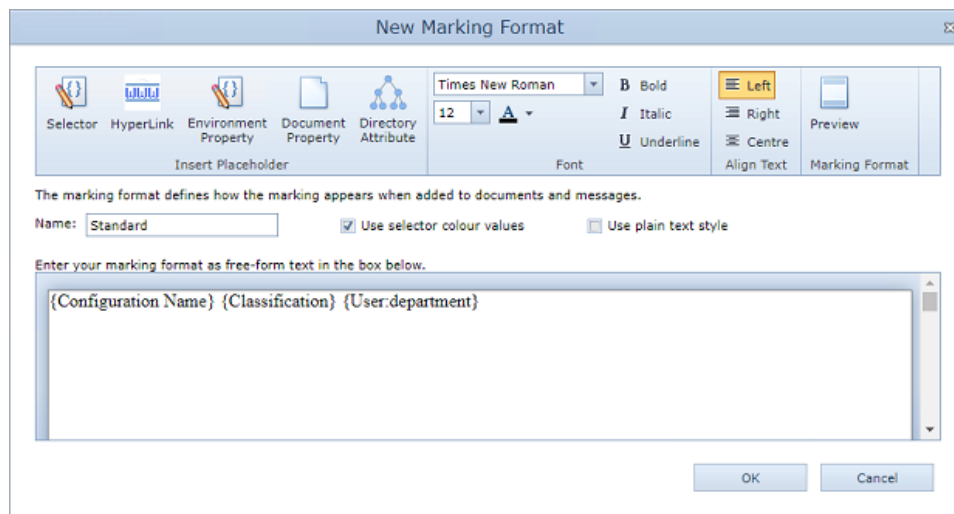


Figure: Marking Format: including user department attribute.

Font Options And Rich Text Formatting

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) {marking} → Properties

Using the [Marking Format](#) / Font options it is possible for formats to include Rich Text Formatting, Font, Colour, Size, Style (Bold, Italics and Underline).

Note: If you apply additional formatting to a header or footer it will be retained even if you subsequently select different label values. For example, select the header created when you select label values, and then apply double strike-through; change the label and the strike-through remains.

Note: A Marking Format that includes Rich Text features may be applied to a label location which does not support such features. In this case the plain text version of the Marking Format will be applied.

This can give effects as shown in the example FLOT below which has Bold + Italic + Underlined set.

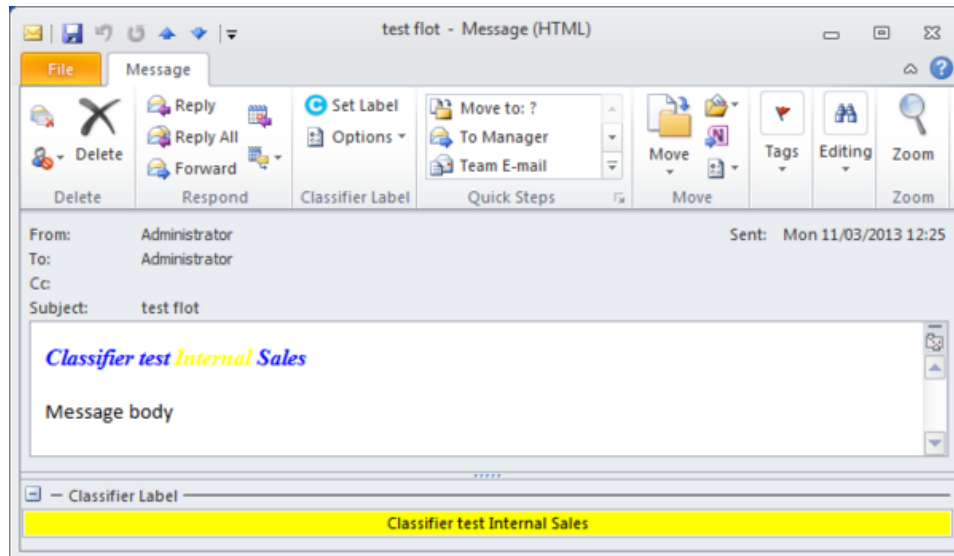


Figure: Rich formatted FLOT.

Align Text

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

You can align the text Marking applied to a location by choosing the relevant option (Left, Centre and Right) from the Align Text control. This will only be meaningful in some label locations (e.g. Not an X-Header).

Preview A Marking Format

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Properties

Whilst editing [Marking Format](#) you may Preview the effects of any changes made.

To preview a marking format:

1. Select the relevant **Marking Format** and choose **Properties**.
2. Make any required changes.
3. Click **Preview** which will present the format with any placeholder and qualifier annotations removed and replaced using representative values (the first Value for each Selector or the appropriate alternative value).
4. Two representations are shown indicating the effects with and without text formatting applied.

Note: Not all elements are available in all environments. It is important to check the actual Marking that appears in all circumstances, especially if it is assigned as the [Custom Format for Summary Markings](#) .

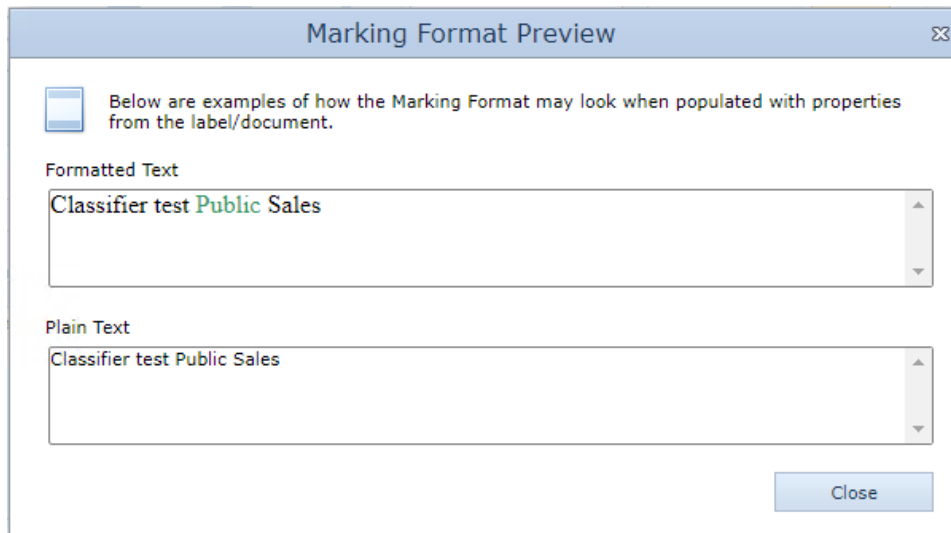


Figure: Marking Preview.

If Use plain text style is set ([Properties \(Marking Format\)](#)), the Formatted text display area is not shown.

Copy (Marking Format)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Copy

You can use an existing [Marking Format](#) as the basis for a new Marking Format.

1. Select the **Marking Library** node and select the **relevant Marking Format entry** .
2. Choose **Copy** . This adds a new entry to the list called **Source - Copy**.
3. Select the copy, choose **Properties** and rename it.

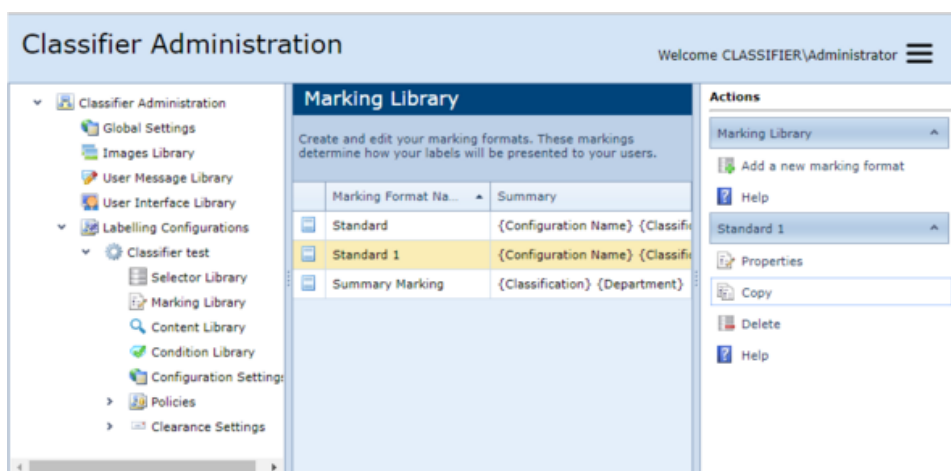


Figure: Marking Format - Copy.

4. Make the necessary changes to the new format and click **OK** to save.

Delete (Marking Format)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Marking Library](#) / {marking} → Delete

To delete any marking format:

1. Select the **Marking Library** node and select the relevant **Marking Format entry** .
2. Choose **Delete** .
3. Click **Yes / No** to complete or **cancel** the operation.
4. A warning dialog is presented if you attempt to delete a Marking Format that is in use in the configuration.

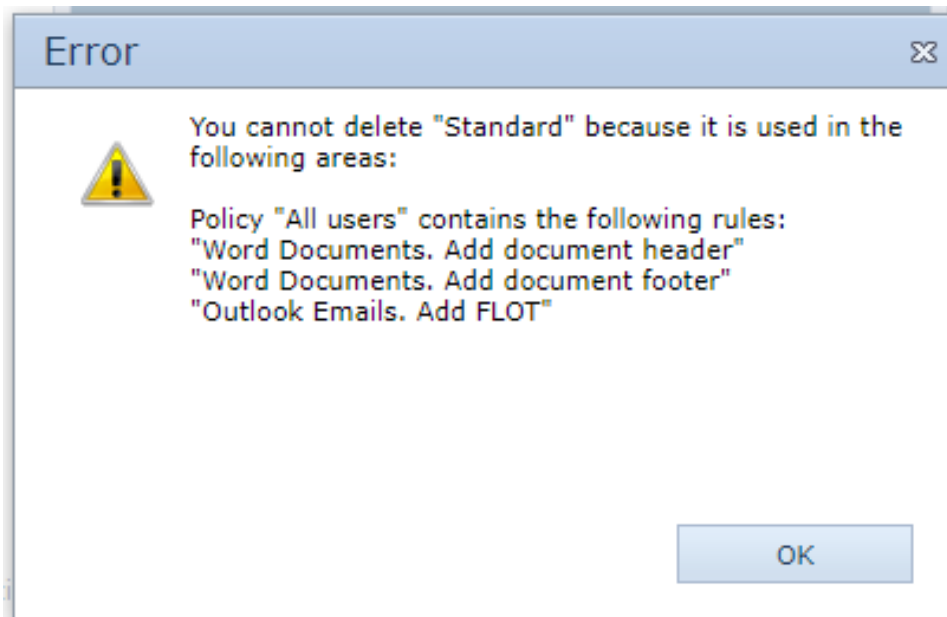


Figure: Delete Marking warning.

Content Library

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ Content Library

Note: Content Checking is supported by Email Classifier and Office Classifier (Word, Excel and PowerPoint).

Note: Content checking of RMS protected items never yields a match as the content is not accessible.

The Configuration can define that checks should be applied when sending an email message or saving / printing a document to ensure that the content (Subject/ Body/ attachments / document) does not contain certain 'words'. The attachment types processed during email content checking are listed in [Appendix - Content Checking File Types Supported](#) .

The operation of the search performed can be modified using a registry key setting described under [Matching algorithm control](#) .

The **Content Library** consists of one or more (Search) **Expressions** which can be associated with one or more site defined **Matchers** . Initially there are no **Expressions** or **Matchers** defined and selecting the Content Library shows:

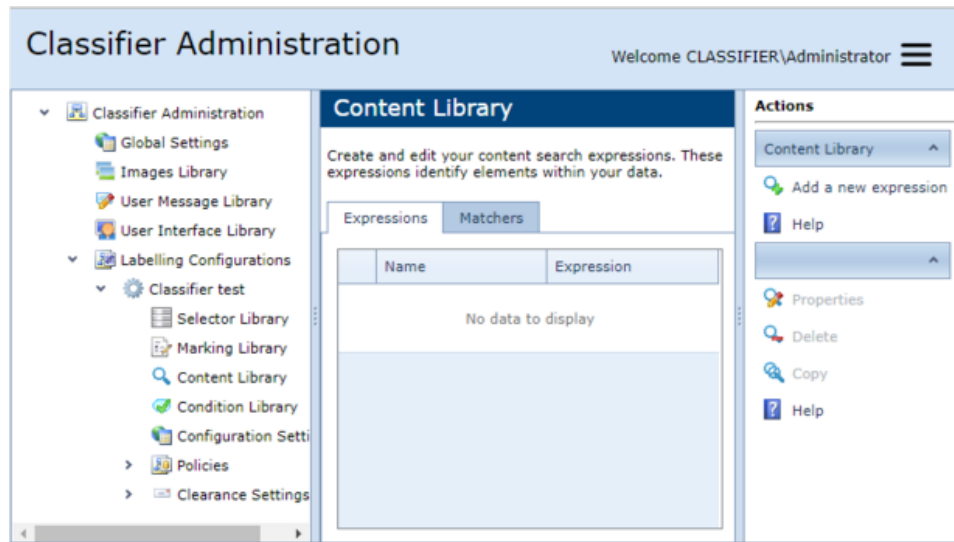


Figure: Content Library initial state.

Each **Expression** has a unique (Expression) Name , and an 'expression' defining the how content will be checked. See [Defining Expressions](#) for further details.

Note: Expressions can also be referenced from Conditions (see [Properties \(Condition\)](#)).

A **Matcher** defines an association between the content to be matched (as defined by the associated **Expressions**) and a set of selector values, such that the identified content may be considered "**permitted**" for the label set defined by the selector values, or alternatively that this content is never permitted regardless of the label value.

[Check content for this rules](#) ([Check rules](#)) can then be defined which specify the **Matcher(s)** relevant to the check, and the **action** to be taken if a **Matcher** is matched. The action defined by a Content Rule is only triggered if the associated **Matcher** fails, that is an Expression matches some content, and either the content is never allowed, or the current label is not in the permitted set of selector values. The Rule also allows you to control the level of detail shown to the user when the Rule action is triggered.

A description of the end user experience of Content checking can be found in [Content Checking User view](#) .

Each Content **Matcher** has a unique **Name** and **Description** and should have one or more Expressions associated, along with permitted Selector values (a portion of the label space) for which the matching content is allowed. If a message contains content matching an **Expression** in the **Matcher** , then the message label must be in the defined label set for the content check to pass.

Each **Content Checker** has a **Match Type** which is either **ANY** (the associated content will be considered as identified if **ANY** of the Expressions defined matches), or **ALL** (the associated content will be considered as identified only if **ALL** of the Expressions match).

The following actions are available depending upon whether **Expressions** or **Matchers** tab is selected (also via the Content Library context menu):

- [Add a new expression](#)
- [Add a new matcher](#)

The following actions are available once a Matcher / Expression has been defined.

When the **Expressions** tab is selected:

- [Add a new expression](#)
- [Properties \(Expression\)](#)
- [Delete \(Expression\)](#)
- [Copy \(Expression\)](#)

When the **Matcher** tab is selected:

- [Add a new matcher](#)
- [Properties \(Matcher\)](#)
- [Delete \(Matcher\)](#)

Defining Expressions

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Expressions] → [Add a new expression](#)

Each **Expression** defines a set of values which are to be compared against the contents of a message, and the way in which the comparison is to be performed.

The comparison operates by comparing '**words**', so if your expression is "**apple and pie**", applepie is one word and will not match.

An expression might be a simple (case insensitive) comparison, or more complex.

Regular Expressions:

- Need to be enclosed in "##" ... e.g. a regular expression to search for two numbers together would have to be entered as "##[0-9][0-9]", therefore, if your phrase to look for was '**banana**' and '**two numbers together**' the search phrase to enter would be: banana AND "##[0-9][0-9]"
- Must match a single whole word. For example, a search for "##app.*ie" would not find "**apple pie**".
- Characters that are not indexed as letters are not searchable even using regular expressions.
- The search index does not store information about line breaks. Searches that include beginning / end of line regular expression criteria (^ and \$) will not work.
- Particular care must be exercised including "**And**" or "**Or**" as text in an expression as these are '**operators**' (see **Reserved words** below) and must be enclosed in quotes if you want them treated as text. For example, an expression open and closed would match if the message contained both "**open**" and "**closed**" within it. An expression open "**and**" closed would only match if the string "**open and closed**" appeared in the document, a similar effect can be achieved by enclosing the whole expression string in quotes - "**open and closed**".
- **Noise words** : Such as "**if**" and "**the**" are ignored during comparisons.
- **Reserved words**: The following should not be used as "**text**" when defining expressions:

(comma), (period), ?, =, *, %, #, ~, &, ~~, ##, contains, and, or, +, -, [,], /, \ (esc)

Examples:

| Expression | Meaning |
|---|--|
| banana | Will match if "banana" appears somewhere in the content. |
| apple and pear | Will match if both "apple" and "pear" appear in the content. |
| apple and not pear | Will match if "apple" appears but "pear" does not appear in the content. |
| (apple and pear) or (banana and orange) | Will match if at least one of the combinations (apple and pear) or (banana + orange) appears in the content. |
| appl* | Wildcard expression that matches apple, or application. |
| appl? | Wildcard expression that will match on apple, but not apples. |
| "apple pie" | Will match if the content contains the phrase "apple pie". |
| date(jan 15 2012) | Matches dates in any of the date formats defined below. |
| date(jan 10 2012 to jun 30 2012) | Matches dates in the defined range (first half of 2012). |
| | <p>Date formats: The following are all recognised as the same date</p> <p>January 15, 2013</p> <p>15 Jan 13</p> <p>2013/01/15</p> <p>1/15/13</p> <p>1-15-13</p> <p>The fifteenth of January two thousand thirteen</p> |
| mail(*@abcxyz.com) | Matches email addresses including wild-card * or ? inside the (). |
| creditcard(*) | Matches credit cards in any of the formats below. Matches credit cards starting with n234. |
| creditcard(1234*) | <p>The following are recognised as credit card number formats:</p> <p>n234-5678-1234-5678</p> <p>n234567812345678</p> <p>n234 5678 1234 5678</p> <p>Numerical tests used by the credit card issuers for card validity are used to exclude sequences of numbers that are not credit card numbers. However, these tests are not perfect and so the credit card number recognition feature may pick up some numbers that are not really credit card</p> |

| Expression | Meaning |
|---|---|
| | numbers. The examples above are not valid credit card numbers and will not trigger the checks - valid credit card numbers must start (n) with 3,4,5 or 6. |
| === == | Matches a sequence of 3 digits, a space and 2 digits. |
| mail(*@hotmail.com) | Matches a hotmail email address. |
| "###[a-z]{2}[0-9]{4}[a-z]" | Regular expression to detect an index number of the form xxnnnx. |
| "###[a-ceghj-pr-tw-z]{1}[a-ceghj-npr-tw-z]{1}" "##[0-9]{2}" "##[0-9]{2}" "##[0-9]{2}" "##[a-d]{1}" | UK National Insurance with spaces UK National Insurance number with no spaces. |
| "###[a-ceghj-pr-tw-z]{1}[a-ceghj-npr-tw-z]{1}[0-9]{6}[a-d]{1}" | |
| "###([a-z]{2}[9]{3} [a-z]{3}[9]{2} [a-z]{4}[9]{1} [a-z]{5})[0-9]{6}([a-z]{1}[9]{1} [a-z]{2})[0-9]{3}" | Matches NON99604079T9900 NOONE355144BA900 NONE9701010RW900 but not ABC12343434F9900 NOONE355123ASDAS NOONE9121234UOUOO |

Add a New Expression

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Expressions] → Add a new expression

To add a new expression:

1. Select the **Content Library** and select the **Expressions** tab.
2. Choose **Add a new expression** . This will present the **Search Expression** dialog:

Figure: New Expression.

3. Supply the **Name** and **Expression** (see [Defining Expressions](#)).
4. Click **OK**. The summary list will be updated to show the new Expression.

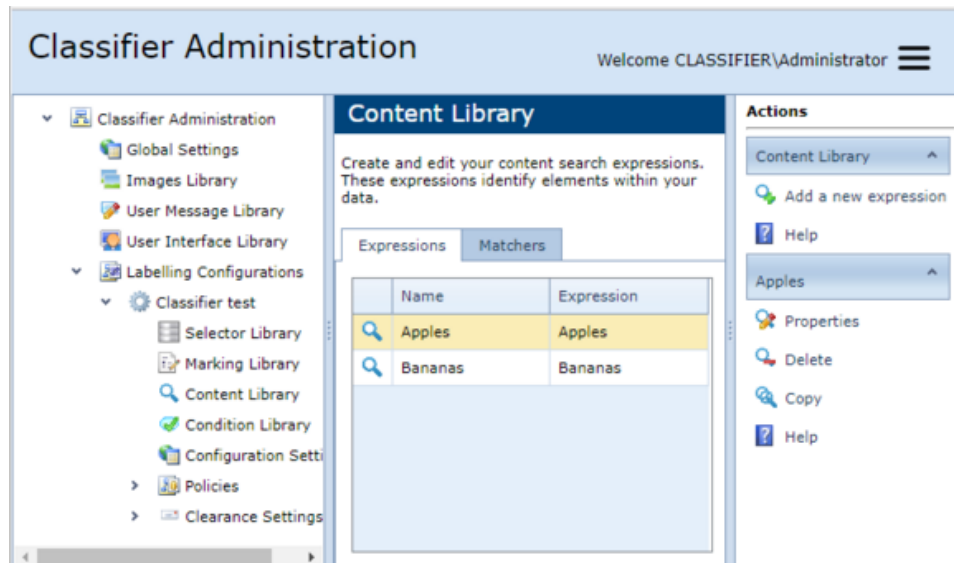


Figure: Expressions.

5. The expressions established can be used when defining Content [Matchers](#) ([Properties \(Matcher\)](#)) and when defining Conditions (see [Properties \(Condition\)](#)).

Properties (Expression)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Expressions] → Properties.

[[Add a new expression](#) will invoke this Properties (Expression) sequence.]

To view or modify an Expression:

1. Select the **Content Library** and select the **Expressions** tab.
2. Select the relevant Expression **entry** .
3. Choose **Properties** . This presents a dialog which shows the current state.

Figure: Expression Properties.

3. Change the **Name** or **Expression** as required. See [Defining Expressions](#) for further details on how to define the expression.

Delete (Expression)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Expressions] → Delete

Note: You cannot delete an **Expression** that would result in a **Matcher** with no associated expressions.

To delete an Expression from a Matcher:

1. Select the **Content Library** and select the **Expressions** tab.
2. Select the relevant **Expression** entry .
2. Choose **Delete** (Expression) .
3. Click **Yes / No** to complete or **cancel** the operation.

Copy (Expression)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Expressions] → Copy

You can use existing Expressions defined under one Matcher as the basis for a new Expression for use in the current or another Matcher using a Copy and Paste sequence.

To copy an expression:

1. Select the **Content Library** and select the **Expressions** tab. Select the relevant **Expression** .
2. Choose **Copy** . A new Expression entry is created (with a unique name which can be changed).

Matchers

You can select a name for the content matcher and match any or all expressions within the matcher.

Add a New Matcher

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Matcher]s → Add a new matcher

Note: Content Checking is supported by Email Classifier and Office Classifier (Word and Excel).

To add a new matcher:

1. Select the **Content Library** and select the **Matchers** tab.
2. Choose **Add a new matcher**. This will launch the following dialog:



Figure: Matcher Properties.

3. Supply a **Name** (this Name is used when defining Content Checking rules).
4. Supply a **Description** (is required) - this is for information purposes only.
5. Choose whether **Match any** or **Match all** expressions defined for this Matcher must match for the Content Checking rule to consider the content as matching (and trigger the defined action).
6. The **Name**, **Description** and **Match any / Match all** can be changed later via [Properties \(Matcher\)](#).
7. Click **Next**. This will present a dialog to allow you to choose the expressions relevant to this Matcher.

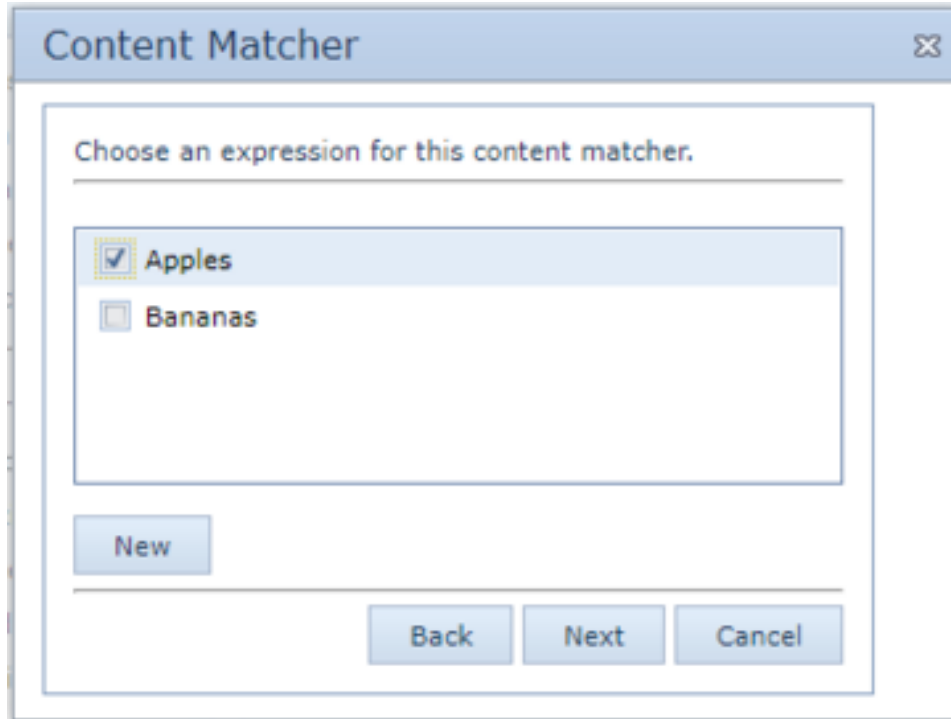


Figure: Choose Expressions.

8. You can define a **New Expression**, if required, or select one or more expressions from the list presented.
9. Define the **Expression** . Examples of Expressions can be found in [Defining Expressions](#) .
10. Click **Next** . This will present a dialog allowing you to define the Label set for which **matched** content is permitted.

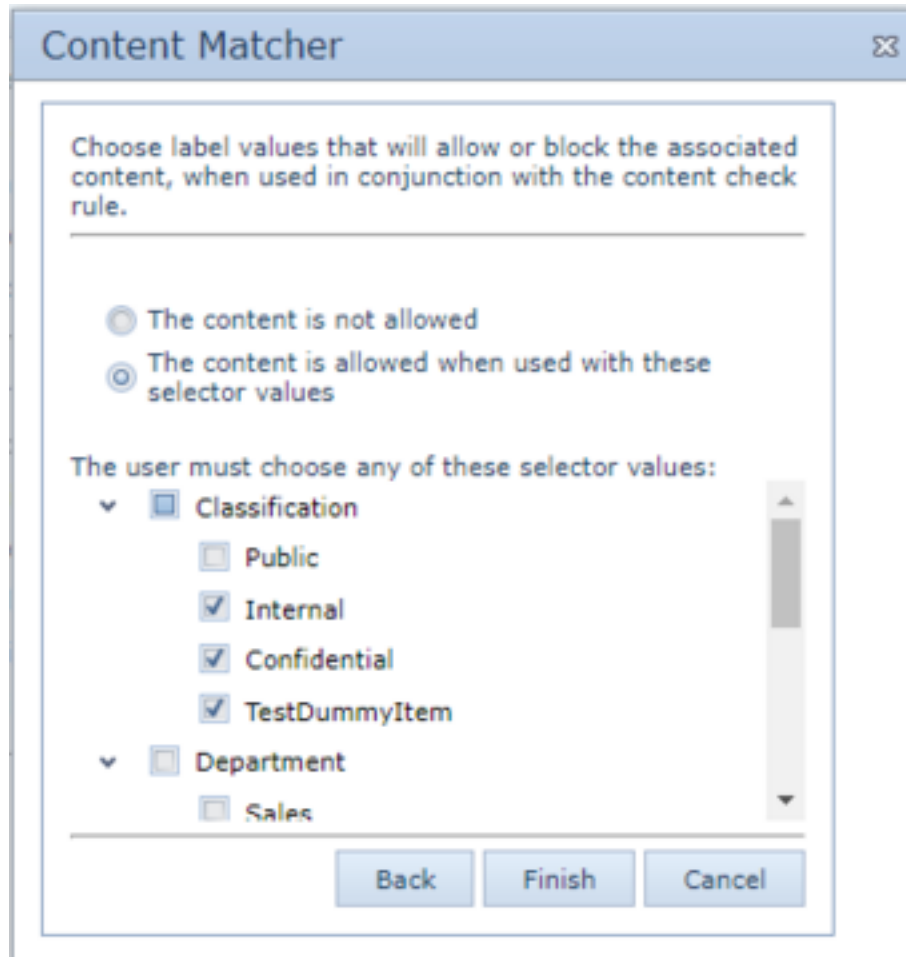


Figure: Matcher - Define Label Criteria.

11. **The content is not allowed** setting means that the defined content is not permitted regardless of the label value. Selecting this will grey out the label selection tree.
12. In the above example, the content is allowed as long as the label is **Internal** or **Confidential** AND **Engineering** or **Board** (i.e. anything with Public or Sales would fail the content check, as would a value with only one of [Classification](#) or Department set).
13. The Label Criteria can be modified using the [Properties \(Matcher\)](#) action.

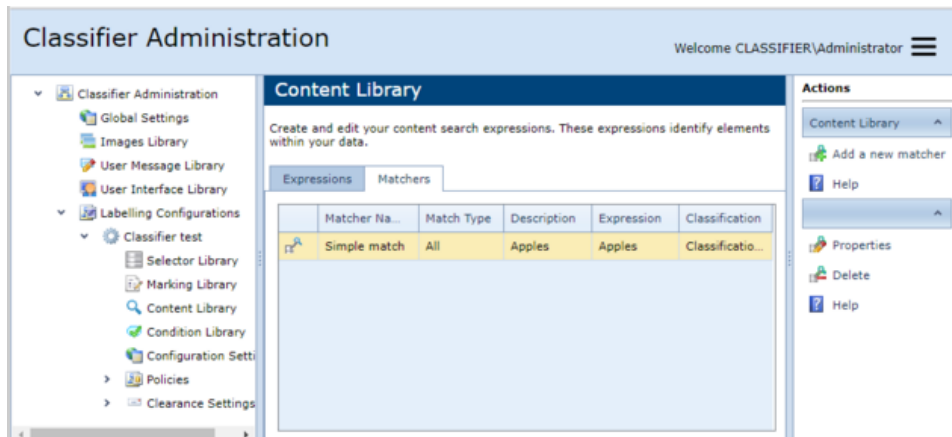


Figure: Matcher summary list.

- Click **Finish** and **Yes** on the change confirmation dialog and the newly created Matcher will appear in the summary.

Properties (Matcher)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Matchers] → Properties

To view and change the properties of a Matcher:

- Select the **Content Library** and select the [Matchers](#) tab.
- Select the relevant **Matcher** entry.
- Choose **Properties**.
- You can then view or modify the properties of a Matcher: **Name**, **Description**, **ANY / ALL**, **Expressions**, Label Criteria as described in [Add a new matcher](#).

Delete (Matcher)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#) / [Matchers] → Delete

To delete a **Matcher** from the **Content Library**:

- Select the **Content Library** and select the **Matchers** tab.
- Select the relevant **entry** in the list of **Matchers**.
- Choose **Delete**.
- Click **Yes** to complete or **No** to cancel the operation.

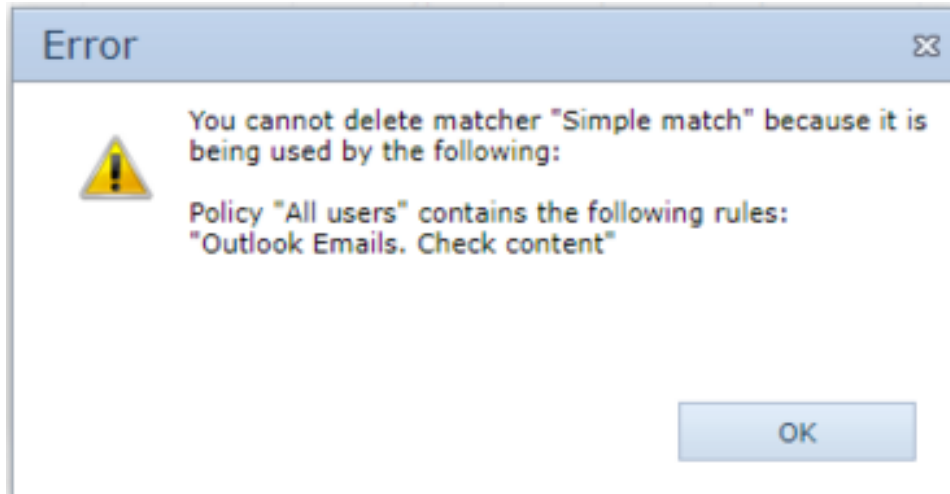


Figure: Matcher in use.

4. A warning dialog will be presented if you attempt to delete a **Matcher** that is in use in a **Rule**.

Content Checking User View

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Content Library](#)

When content checking is performed, Classifier treats each of the Message Subject, Message Body and each attachment as a separate item, and performs checks using the Expressions associated with Content Matchers selected for the rule. A progress bar is displayed as the content is being inspected. (The registry setting [DisplayContentCheckProgress](#) can be used to disable this progress bar).

If a Matcher matches in any of the items (Subject, Body or attachment), a Content Check exception is flagged and the current message label is checked against the Label criteria defined for the associated Group. If the current label is covered by the label criteria then the check succeeds and the user is unaware.

Further control over the matching algorithm is available as described in [Matching algorithm control](#).

- If the current label is NOT in the defined label criteria, then the Warn/Prevent action is activated.
- If **Warn** or **Prevent** is set (as opposed to Audit only) then the user will be prompted:

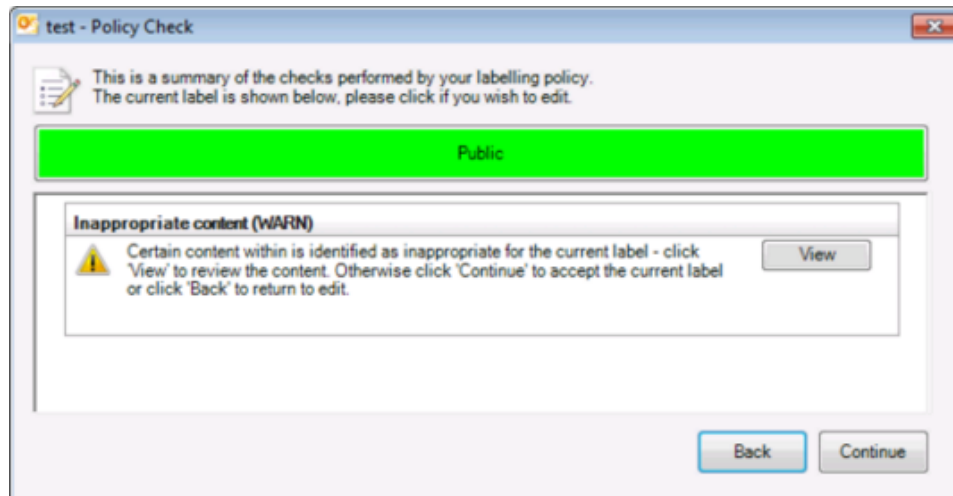


Figure: Content Check - Policy Check.

To check the policy content:

1. If the **Show highlighted content matches** option is checked in the rule, then the user also has the ability to scan the actual matches by clicking **View**.
2. Clicking **View** will show further information. Select each location and the item contents (including meta-data such as header / footer values) appears with matches highlighted.
3. **Next / Previous** allow you to move up and down the selected location (attachment / document / body).

Note: Highlighting of matches in PDF files is only possible if Adobe Reader / Adobe Acrobat in Edit > Preferences > Search > **Enable search highlights from external server** is **Enabled** .

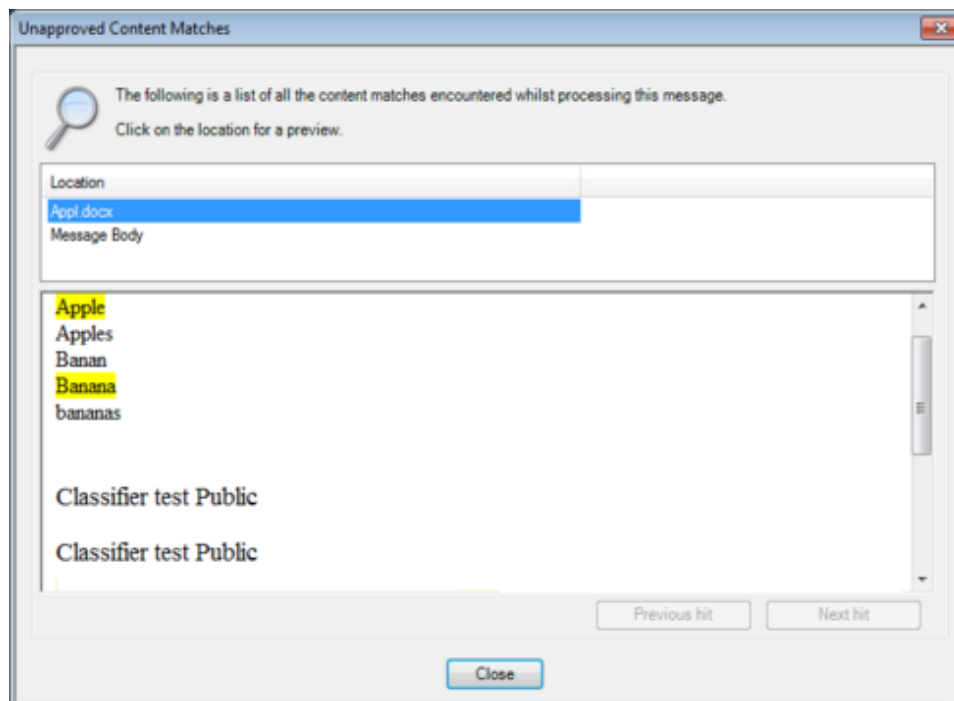


Figure: Content matches.

Matching Algorithm Control

By default the matcher checks various aspects of the message (e.g. Subject, Body and attachments), is case insensitive and includes document properties.

Two [General Settings](#) are provided that allow further control:

- [Content checking - case sensitive](#) .
- [Content checking - skip document properties](#)

Additional aspects of the algorithm can be controlled by setting an enumeration registry entry to be established in one of the following locations (which are searched in the order shown):

- HKEY_CURRENT_USER\SOFTWARE\Policies\Boldon James\Classifier
- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\Classifier
- HKEY_CURRENT_USER\SOFTWARE\Boldon James\Classifier
- HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\Classifier
- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Boldon James\Classifier (if running 32-bit Classifier applications on a 64-bit machine)

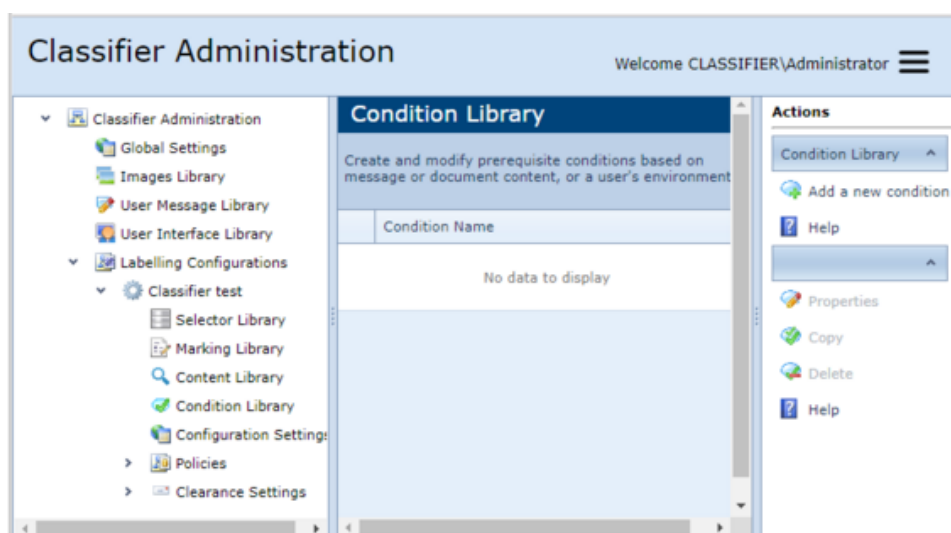
| | |
|--------------|--|
| Entry | \ContentCheckFieldFlags |
| | Only applicable if Classifier Content Checking is enabled. |
| Type | REG_DWORD |
| Data | Not configured - The default operation applies. |

| | |
|-------|--|
| Entry | \ContentCheckFieldFlags |
| | Only applicable if Classifier Content Checking is enabled. |
| | Any value defined will modify the search algorithm according to the bit-wise values described in the dtsearch FieldFlags support web page (e.g. search for "dtsearch support FieldFlags"). |
| | For example : |
| | Value = 3 (1 + 2) would ignore the filename (1) and ignore document properties (2). |
| | The setting will apply to all Content Check rules performed by a Classifier application. |

Condition Library

Admin: [Labelling Configurations](#) ⇒ {configuration}⇒ Conditions Library

The Configuration can define conditions that can be associated with [Add Rules](#) , [Apply Rules](#) and [Check Rules](#) so that the Rule is only triggered if the Condition(s) are met. For example a rule that applied a LLOT only if an external recipient was defined. Initially there are no Conditions defined. Prerequisite conditions are associated with a rule as part of [Rules Wizard operation](#) .



Conditions Library initial state.

The functions supported are:

- [Add a new condition](#)
- [Properties \(Condition\)](#)
- [Copy \(Condition\)](#)
- [Delete \(Condition\)](#)

Each Condition defined includes one or more compatible (Document or Message) Condition type definitions:

Condition Types applicable to Active Directory Attribute:

- Active Directory Attribute Values of Computer
- Active Directory Attribute Values of User
- Active Directory Group Member of User

Condition Types applicable to Documents and Messages:

- Date
- IP Address
- MAC address
- Time
- Host Product Locale
- OS Locale
- Product Type
- Day of Week

Document related Condition types :

- Document Content / Document Content Count (Microsoft Word, PowerPoint and Excel and Data Classification Service – Index Mode Only)
- Document Custom Property (All Office applications and Data Classification Service – Index mode Only)
- Document Event Fired (All Office applications)
- Document has different odd & even page headers and footers (Word and Excel)
- Document is marked as **'final'** (Microsoft Word, PowerPoint and Excel).
- Document Property (All Office applications and Data Classification Service – Index Mode Only)
- Document Protection Type (Word only).
- Document Template Name (Word only).

Message related Condition types:

- Dynamic Clearance User Properties
- Message Content / Message Content Count
- Message Class
- Message has attachment with an extension
- Message has attachment with a name
- Message has number of attachments
- Message has unclassified attachment
- Message originator domain
- Message originator email address
- Message Recipient Attribute values
- Message Recipient Count
- Message Recipient Domain
- Message Recipient Location (internal or external)

- Message Recipient Presence
- Message response type (Reply, Reply all or Forward)
- Message type (Message, meeting or task)

File Condition types relating to Classifier Discovery Service:

- File Attributes
- File Creation Date
- File Custom Data (only applies to Import Mode)
- File Extension
- File Last Accessed Date
- File Last Modified Date
- File Name
- File Owner
- File Size
- File Type

Each Condition type supports specific options as described in [Properties \(Condition\)](#) .

When defining a rule you can indicate whether the rule applies Condition free, or subject to one or more Conditions.

Scenarios:

1. A message containing recipients from both domains A and B should have X-header AB applied. This can be achieved with a single condition (Message Recipient Domain condition with two entries) and a single rule.
2. A message with a recipient from domain A or domain B should have an x-header A or B added. This will require two conditions one for each domain, and two rules. The fact that in this case there may be duplicate rules (at the same point in the rule tree) is handled by the fact that the rule highest up the tree takes precedence (See [Move rule up / down](#)).

Add a New Condition

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Condition Library](#) → Add a new condition

To add a new condition:

1. Select the **Condition Library** .
2. Choose **Add a new condition** and the following is presented:

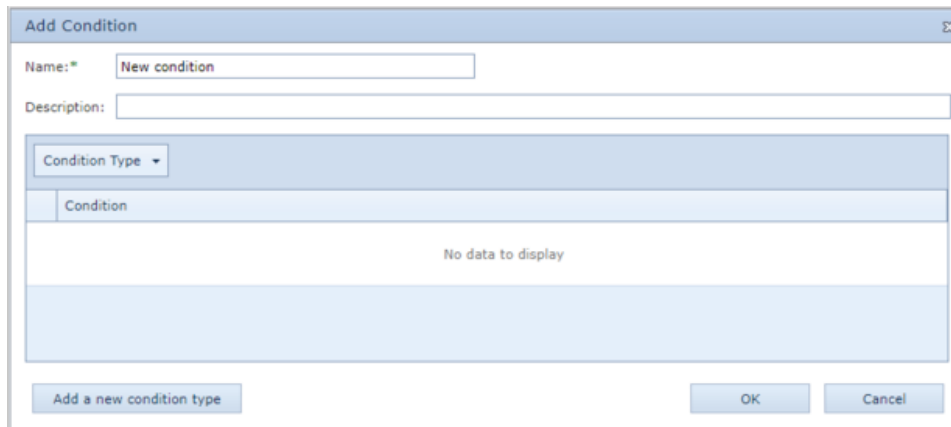
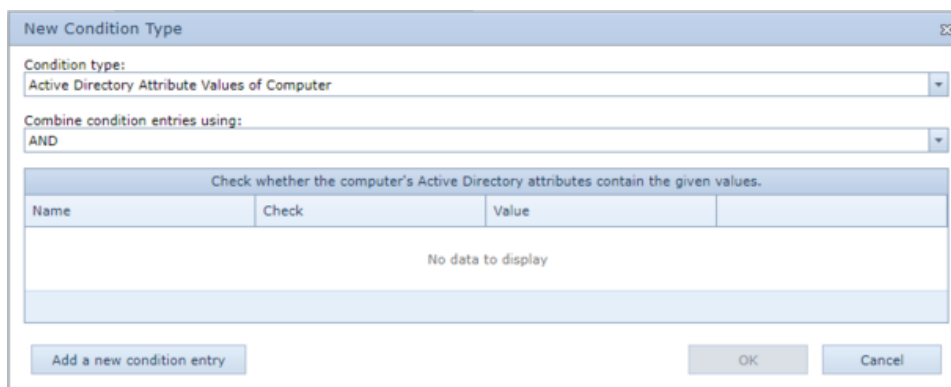


Figure: Add a new condition.

3. Specify a **Name** , and **Description** if required.
4. Add one or more conditions using the **Add a new condition type** button (which will present a dialog similar to that presented by [Properties \(Condition\)](#)).



New Condition Type.

5. Select the required **Condition Type** from the drop down menu.

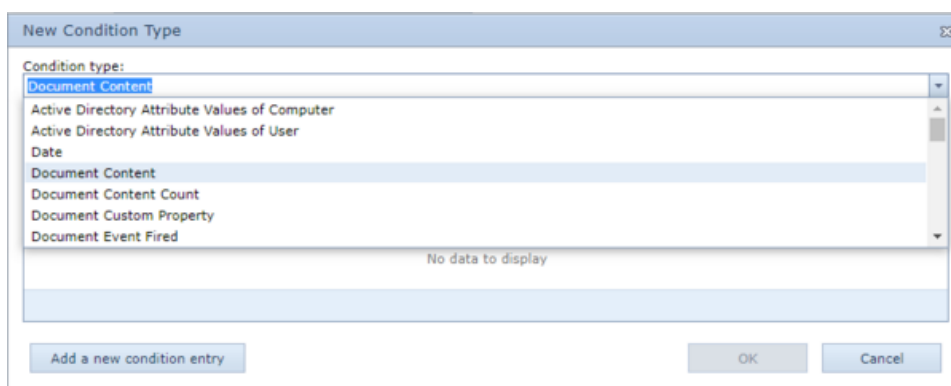


Figure: Choose Condition Type.



Figure: Add a new condition entry.

6. Click **Add a new condition entry** which will display a dialog allowing you to configure the selected condition type (each type has its own specific settings - the example below relates to Condition Type Active Directory Values of User).
7. You can define multiple Condition Entries for a Condition Type, and specify how the condition entries combine together. If you combine entries with the **AND** operator then all conditions must be true. Alternatively, if you combine entries with the **OR** operator then one or more conditions must be true.

Properties (Condition)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Condition Library](#) → Properties

To view or change the properties of a Condition:

1. Select the **Condition Library**.
2. Select the relevant **Condition**.
3. Choose **Properties**. This will present the **Edit Condition** dialog allowing you to configure any aspect of the selected Condition type entry:

Note: Essentially the same dialog and operation is presented when you [Add a new condition](#).

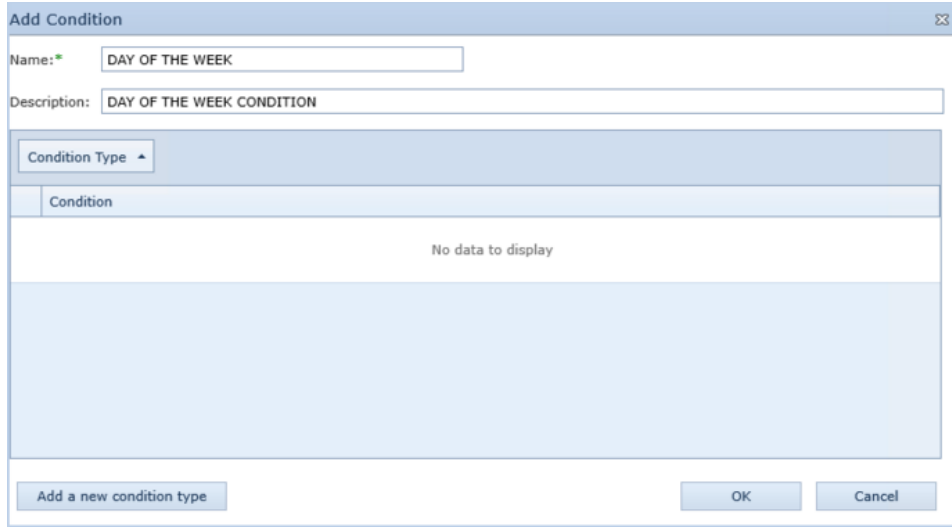


Figure: Edit Condition.

4. You can [Add a new condition](#) type , **Edit** or **Delete** an existing entry.
5. Expanding a **Condition** using the arrow icon in the left hand column will provide condition details.
6. The **Edit** option allows you to configure the selected condition type (each type has its own specific settings (the example below relates to Condition Type - Active Directory Values of User):

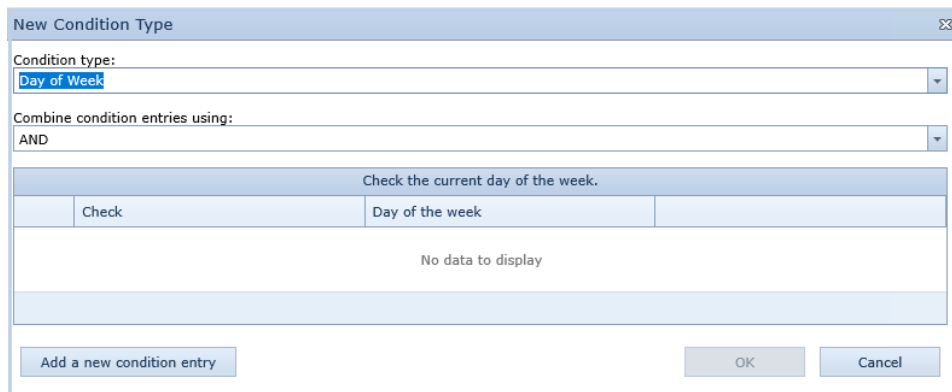


Figure: Edit Condition Entry.

7. Condition entries can be combined using either the **AND** operators or the **OR** operator. If you combine entries with the **AND** operator then all conditions must be true. Alternatively, if you combine entries with the **OR** operator then one or more conditions must be true. It is the user's responsibility to ensure that conditions are logically sound.
8. Condition entries can be combined using either the **AND** operators or the **OR** operator. If you combine entries with the **AND** operator then all conditions must be true. Alternatively, if you combine entries with the **OR** operator then one or more conditions must be true. It is the user's responsibility to ensure that conditions are logically sound.

9. You can **Add a new condition entry** , **Edit** or **Delete** an existing entry. The example below shows options for a **Active Directory Group Membership of User** condition entry.

Figure: Condition: New entry.

10. Each Condition type supports one or more Condition entries with specific options as per the table below.

Note: Expression matching in the options below is case insensitive.

| Condition Type | Options Supported |
|---|---|
| Active Directory Attribute Values of Computer | If Computer Active Directory attribute: Description, DN, Location, Name, Operating system, Operating system service pack and Operating system version - [Contains value] [Does not contain value] [has value] [has value matching regular expression] [has a value not matching regular expression]. See also Cache Active Directory attributes on start-up . |
| Active Directory Attribute Values of User | If User Active Directory attribute (see attribute list below this table) - [Contains value][Does not contain value] [has value] [has value matching regular expression] [has a value not matching regular expression]. See also Cache Active Directory attributes on start-up . |
| Active Directory Group Membership of User | [Specifically the logged on user or in the case of OWA the Originator] User is/ is not a member of the specified Active Directory group or an Active Directory group matching the supplied regular expression. |
| Date | Date [is] [is not] [is after] [is before] |
| Day of Week | Values: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday |
| Document Content Document Content Count (Email, Word, Excel and PowerPoint) and Data Classification Service – Index Mode) | Combinations that Do or Do Not match existing Expressions defined in the Content Library . For example: Expressions finds a match with (Expression) ApplesANDExpression does not find a match with (Expression) Bananas . |
| Document Custom Property | <ul style="list-style-type: none"> • Document (Custom) Property Name. • Check (appropriate value or existence check type). • Value if applicable. |

| Condition Type | Options Supported |
|---|---|
| Document Property (All Office applications) and Data Classification Service – Index Mode) | |
| Document Event Fired (All Office applications) | Event processed [is] [is not] with Event type Saving / Printing /Label selection |
| Document has Different Odd and even page header/footers (Word and Excel) | Document [does] [does not] have Different Odd & even page header/footers set. |
| Document is marked as final (Word and Excel) | Document [is] [is not] marked as final. |
| Document Protection Type (Word only) | Document [is] [is not] protected with protection type Comments / FillingInForms / NoChanges / TrackedChanges. |
| Document Template Name (Word only) | Document template name [equals] [does not equal] [contains] [does not contain] [matches regular expression] [does not match regular expression] |
| Dynamic Clearance User Properties | A named '(Offline) Address Book' property for a recipient - [has value] [does not have value] [contains] [does not contain] [matches regular expression] [does not match regular expression]. Note: Not all attributes in the Active Directory are available via an (Offline) Address Book. See Dynamic Clearance Conditions for further information. |
| IP Address | Computer's IP address [is] [is not] in Network (values IP address and Subnet mask) |
| Mac Address | Computer [has] [does not have Mac address] [matches regular expression] [does not match regular expression]. |
| Message Class | Message Class[equals] [does not equal] [starts with] [ends with] [contains] [does not contain] |
| Message Content Message Content Count | Combinations (AND or OR) that Do or Do Not match existing Expressions defined in the Content Library . For example: Expressions finds a match with (Expression) ApplesANDExpression does not find a match with (Expression) Bananas . |
| Message Has Attachment with Extension | Message [has] [does not] have attachment with an extension that equals Value. Note: Embedded images may be excluded using the Include embedded images when performing attachment checks setting. |
| Message Has Attachment with Name | Attachment name [equals] [starts with] [ends with] [contains] [matches regular expression] Does not have attachment name that [equals] [contains] [matches regular expression]. |

| Condition Type | Options Supported |
|--------------------------------------|---|
| | Note: Embedded images may be excluded using the Include embedded images when performing attachment checks setting. |
| Message Has Number of Attachments | Message Contains [more attachments] [less attachments] [Attachments present] [No attachments]. Note: Embedded images may be excluded using the Include embedded images when performing attachment checks setting. |
| Message Has Unclassified Attachments | Message [has] [does not] have Unclassified attachments. Note: Embedded images may be excluded using the Include embedded images when performing attachment checks setting. |
| Message Originator Domain | Originator domain [equals] [does not equal] [starts with] [ends with] [contains] [does not contain]. |
| Message Originator Email Address | Originator email address [equals] [does not equal]. |
| Message Recipient Attribute values | Check for recipient whose address book properties match the specified value |
| Message Recipient Count | Contains [more recipients than] [fewer recipients than] Recipient count (Distribution lists are not expanded when this check is performed). |
| Message Recipient Domain | [Contains recipients in domain] [Does not contain recipients in domain] - checks that the address contains the supplied string - case insensitive |
| Message Recipient Location | Message [contains recipients that are] [does not contain recipients that are] Internal / External |
| Message Recipient Presence | Message [contains recipient] [does not contain recipient] [There is one recipient and it is] [There is one recipient and it is not]. Recipient address (an exact match is performed - case insensitive) |
| Message Response Type | Message [is] [is not] of type Reply / ReplyToAll / Forward. |
| Message Type | Message Type [equals] [does not equal] Message / Meeting / Task. |
| Product Type | Running application is or is not one of the Classifier supported products (Outlook, Word, Excel, PowerPoint, Project or Visio). |
| Time | Check the time |

List of Active Directory attributes supported by 'Active Directory' Attribute Values of User.

Common Name, Country/Region, Company, Department, Description, Display Name, Printable display name, DN, Extension attribute 1 to 15, Fax number, Given name, Home telephone number, Telephone notes, Initials, City, email address, SMTP address, Mobile telephone number, User culture, Pager number, Office, Zip/Postal Code, Proxy address, Account, Surname, Street, Telephone number, Title and URL.

Data Classification Service Specific Conditions

| Condition Types | Options Supported |
|------------------------------------|---|
| File Attributes | [Contains] [Does not contain] |
| File Creation Date | [Is][Is not] [Is after] [Is before] |
| File Custom Data - only applies to | [Contains value] [Does not contain value] [Has value] [Does not |

| Condition Types | Options Supported |
|-----------------|---|
| Import Mode | have value] [Matches RegEx][Does not match RegEx] |
| File Extension | [Contains value] [Does not contain value] [Has value] [Does not have value] [Matches RegEx][Does not match RegEx] |
| File Name | [Contains value] [Does not contain value] [Has value] [Does not have value] [Matches RegEx][Does not match RegEx] |
| File Owner | [Is][Is not] [Contains] [Does not contain] [Matches Regex] [Does not match RegEx] |
| File Path | [Is][Is not] [Contains] [Does not contain] [Matches Regex] [Does not match RegEx] |
| File Type | [Is][Is not] |
| Last Accessed | [Is][Is not] [Is after] [Is before] |
| Last Modified | [Is][Is not] [Is after] [Is before] |

Copy (Condition)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Condition Library](#) → Copy

To Copy a Condition:

1. Select the **Condition Library** .
2. Select the relevant source **Condition** .
3. Choose **Copy** . A new Condition appears in the list with the name extended to provide uniqueness.
4. Select the **new copy** and choose **Properties** to change the name and underlying conditions.

Delete (Condition)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Condition Library](#) → Delete

To delete a Condition:

1. Select the **Condition Library** .
2. Select the relevant **Condition** .
3. Choose **Delete** . If the Condition is currently referenced by a **Rule** or **Suggested Classification**, the dialog will be presented showing the affected Rule(s) / [Suggested Classifications](#).

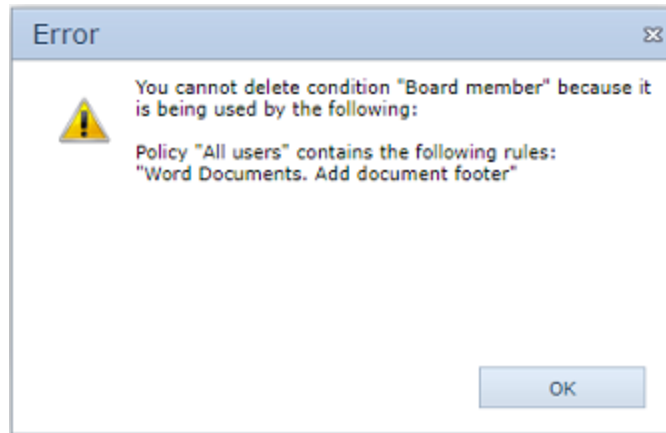


Figure: Condition in use.

4. Otherwise a confirmation dialog is presented. Click **OK** to complete the deletion.

Question Library

The Question Library is a repository that stores questions and answers that are used to create Decision Trees for use in various scenarios. From these questions and associated answers the Decision Tree guides the user to select which label to apply.

This Question Library that is located together with the other libraries outside of and available to the configured policies.

This section describes the following features of the Question Library:

- [Columns](#)
- [Actions](#)
- [Question Properties](#)
- [Enable the Decision Tree Functionality](#)
- [Decision Tree Editor](#)

This is illustrated here using our example:

Note: There will be language variations when the admin tool's **Allow multiple languages** option is **enabled**.

Note: This feature we will only support plain text.

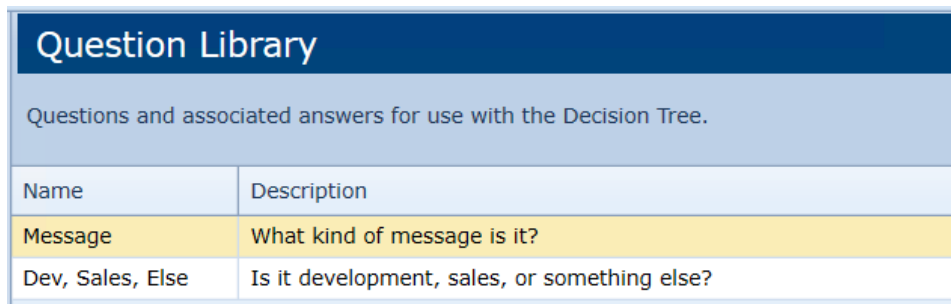
To view the question library:

- In the [Classifier Administration](#) interface select **Labelling Configuration**>(policy name)>**Question Library**.

Columns

The top-level summary page of the [Question Library](#) presents the following columns:

- **Name:** Enter a name to refer to this question within the admin tool.
- **Description:** Enter the question. The question is truncated to a single line.



| Question Library | |
|--|--|
| Questions and associated answers for use with the Decision Tree. | |
| Name | Description |
| Message | What kind of message is it? |
| Dev, Sales, Else | Is it development, sales, or something else? |

Figure: Sample Question Library summary view.

Actions

[Question Library](#)

The area where a user can create and manage Questions and associated Answers.

- There are options to **Add a New Question** or view **QuestionProperties**.

[Selected Question]

Properties

- The properties option presents a Question property dialog allowing a user to edit the selected question properties and associated answers.

Copy

- Creates a duplicate of the selected question.

Delete

- Attempts to delete a Question from the Question Library.
- If you confirm the deletion of the Question the administration service provides a warning if the Question is being used in a Decision Tree.

Question Properties

Note: The name is required and the name must be unique within the [Question Library](#).

Note: The size limit for text fields defaults to 1000 characters.

In the Question Library:

- [Languages](#) : Multiple languages are supported within the configuration. If there is nothing defined then the editor will show it as blank. If the Allow Multiple Languages option is disabled then the language option

will be hidden.

- **Answers:** There is no limit to the number of Questions. Answers can be moved up and down in the list. This order in which answers appear here is the order in which they are presented on the Decision Tree client dialog.
- **Selection Style :** Single or Multiple Select.

Question Properties

Note: The name is required and the name must be unique within the [Question Library](#).

Note: The size limit for text fields defaults to 1000 characters.

In the Question Library:

- [Languages](#) : Multiple languages are supported within the configuration. If there is nothing defined then the editor will show it as blank. If the Allow Multiple Languages option is disabled then the language option will be hidden.
- **Answers:** There is no limit to the number of Questions. Answers can be moved up and down in the list. This order in which answers appear here is the order in which they are presented on the Decision Tree client dialog.
- **Selection Style :** Single or Multiple Select.

Enable the Decision Tree Functionality

The **Decision Tree Functionality** can be **enabled** under the **Labelling Configuration Policies** area. When a user selects this option then it will add an extra tab to the associated policy editor.

Properties

Choose a name and description for your policy.

Policy Name: * All

Description: General User Policy

The client can keep a record of the more recently used labels for easy selection.

Maximum number of labels to show: 6

Choose how default classifications are generated

User Selectable Default Classification

Use Intelligent Default Label

Help the user choose a label.

Use Assisted Labelling

Use Decision Tree

Use Single Click with pre-defined labels

Control the display of selectors on the client.

Show selector captions on the ribbon bar

The values of some selector types may be displayed as buttons.

Where possible wrap buttons after: 0

User interface definition:

BJ Dogfood UI

Default Language:

Configuration Default Language

OK Cancel

Figure: Enabling the Decision Tree.

To enable the Decision Tree:

1. Go to **Labelling Configuration**>**Configuration Name**>**Policies**>(Select Policy) .
2. Select the required **Policy** node.

3. In the **Action Pane**, select **Properties** . A Properties window will appear.
4. Under **Help** the user chooses a label, select [Use Decision Tree](#) .
5. Click **OK** .

Decision Tree Editor

Note: Depending on a per-policy option, this new tab is displayed or hidden.

Note: The Administrator must define a list of questions in the '[Question Library](#).'

The top of the tree is called Decision Tree. This serves to provide a starting point for the Administrator to add questions. It also provides a Properties option to control the layout of the Decision Tree dialog on the client.

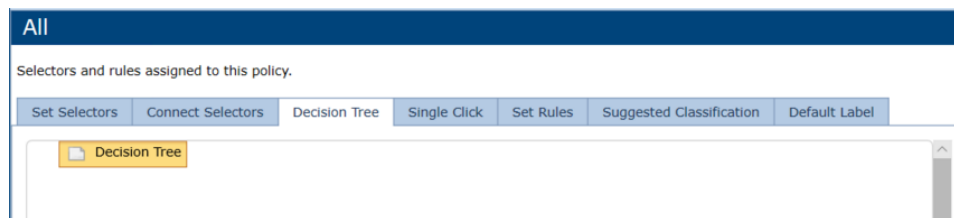


Figure: The Decision Tree tab in the policy.

Tree Node Options

The screenshot below, displays the actions that are available within the Decision Tree, shown with an example of the context menu

Note: The availability of menu items depends on the selected tree node.

Note: Only a single label node may be added per answer.

Only a single label node may be added per answer. The Label menu item will then be greyed out and the Properties menu item used to edit the label. When a node is selected then the relevant operations will be enabled for the selected item.

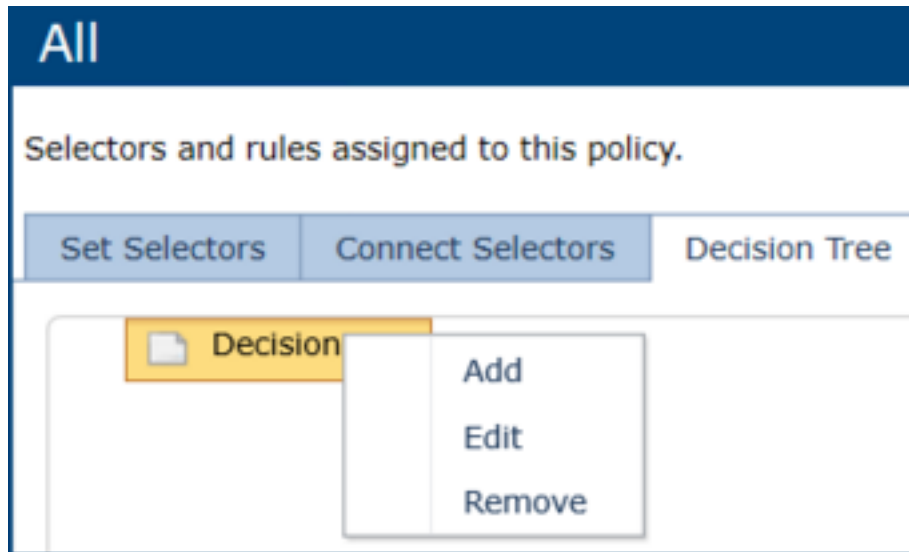


Figure: The Context menu.

Remove A Node

A user can remove a node from the Decision Tree.

To remove a node:

1. Within the [Policy](#), select the **Decision Tree** Tab and within the Decision Tree select the node to be removed. Right click and select **Remove** from the context menu.
2. When removing a node an **Are you sure you want to remove this item?** question will appear. Click **Yes** . All the child nodes of the selected node will also be deleted. Answer nodes cannot be deleted here.

Insert A Question Into The Decision Tree

A user can insert an available question from the [Question Library](#) into the Decision Tree.

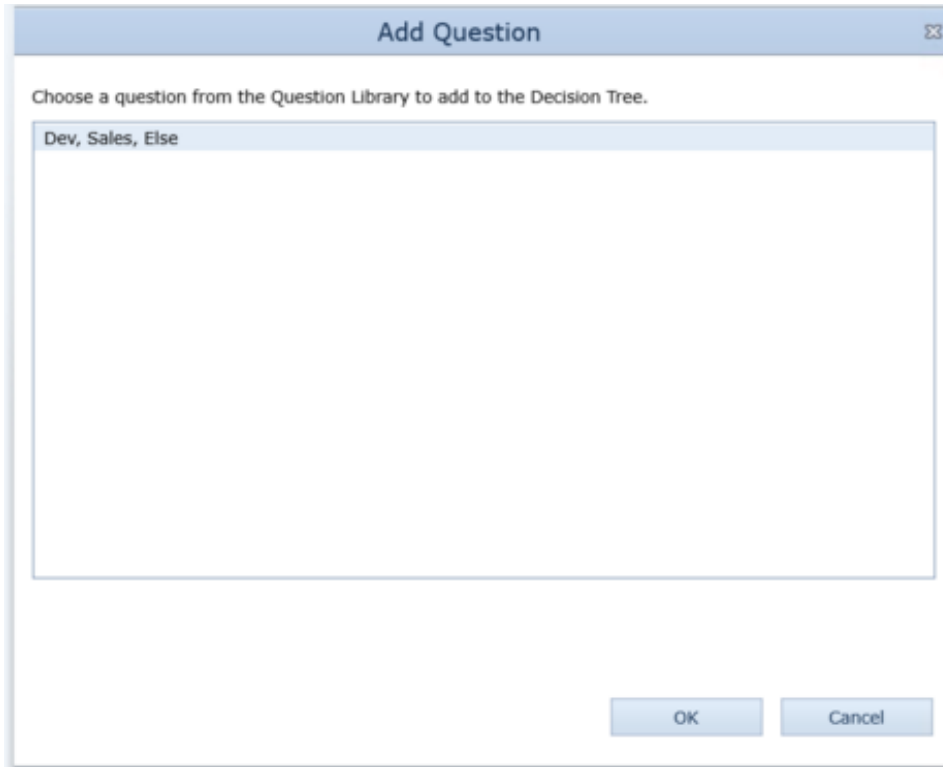


Figure: Add a question into the Decision Tree.

To insert a question into the Decision Tree:

1. Within the [Decision Tree Editor](#), select the **node** below which you want to add a new Question Then right-click and select **Add** . An **Add Question Window** will appear displaying available questions.
2. Select the required question and click on the **OK** button. The result will display the question and the answers underneath.

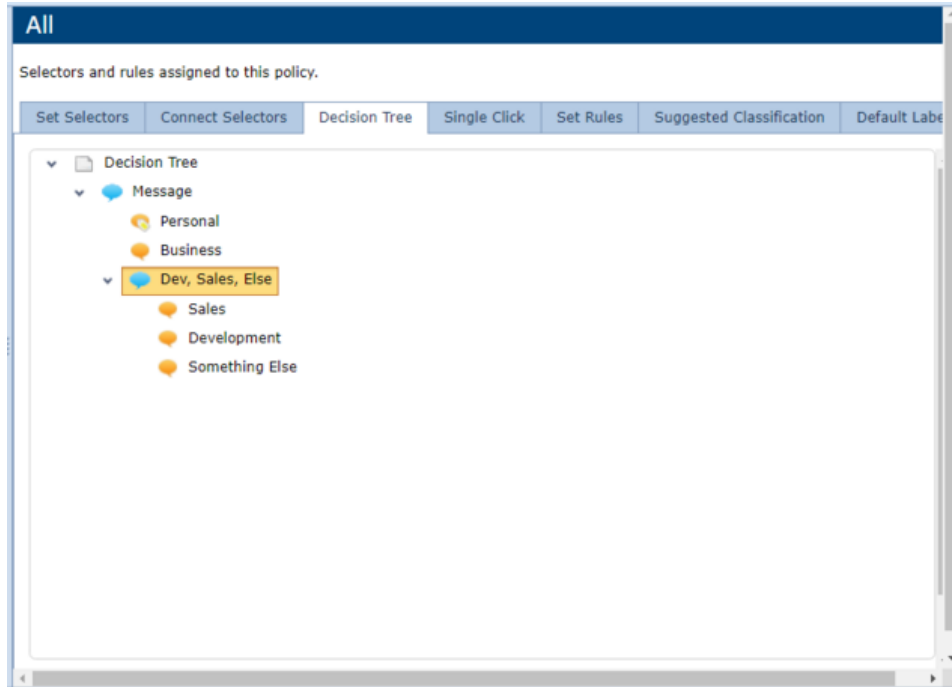


Figure: The added question and answers.

Edit Available Answers

A user can select an answer that will be available in the policy. By default all answers will be enabled when a question is added to the tree. The **Properties** dialog for a question will provide the ability to disable some of the answers.

Note: Display style will depend on whether the question has been defined in the [Question Library](#) as single or multi-select.

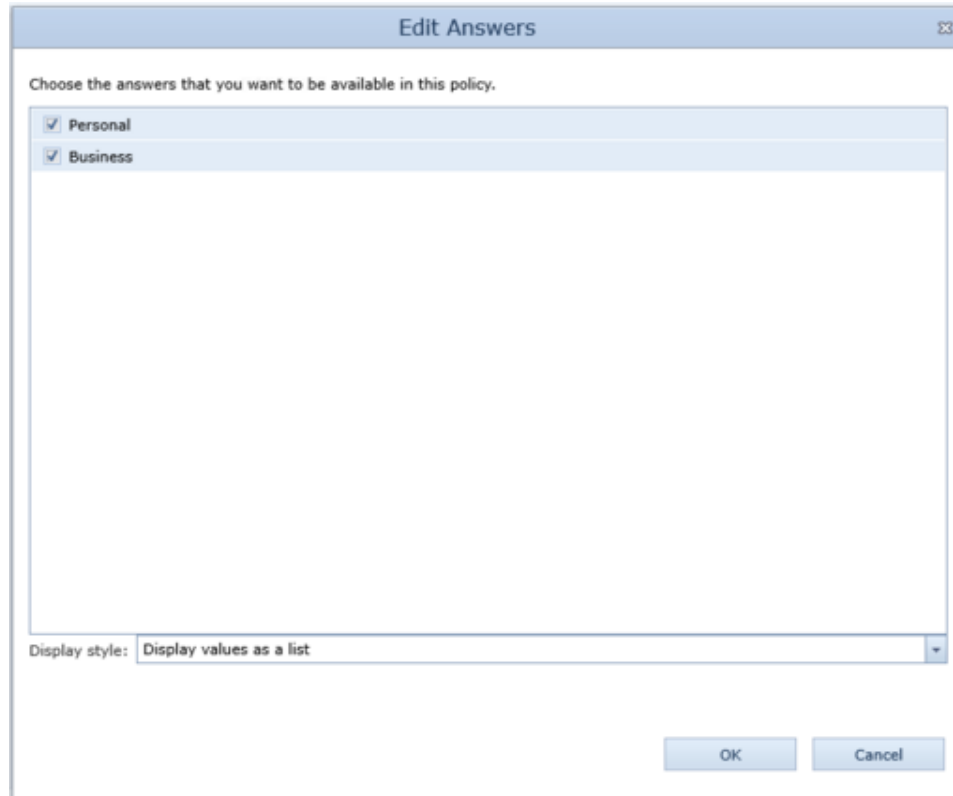


Figure: Question Properties.

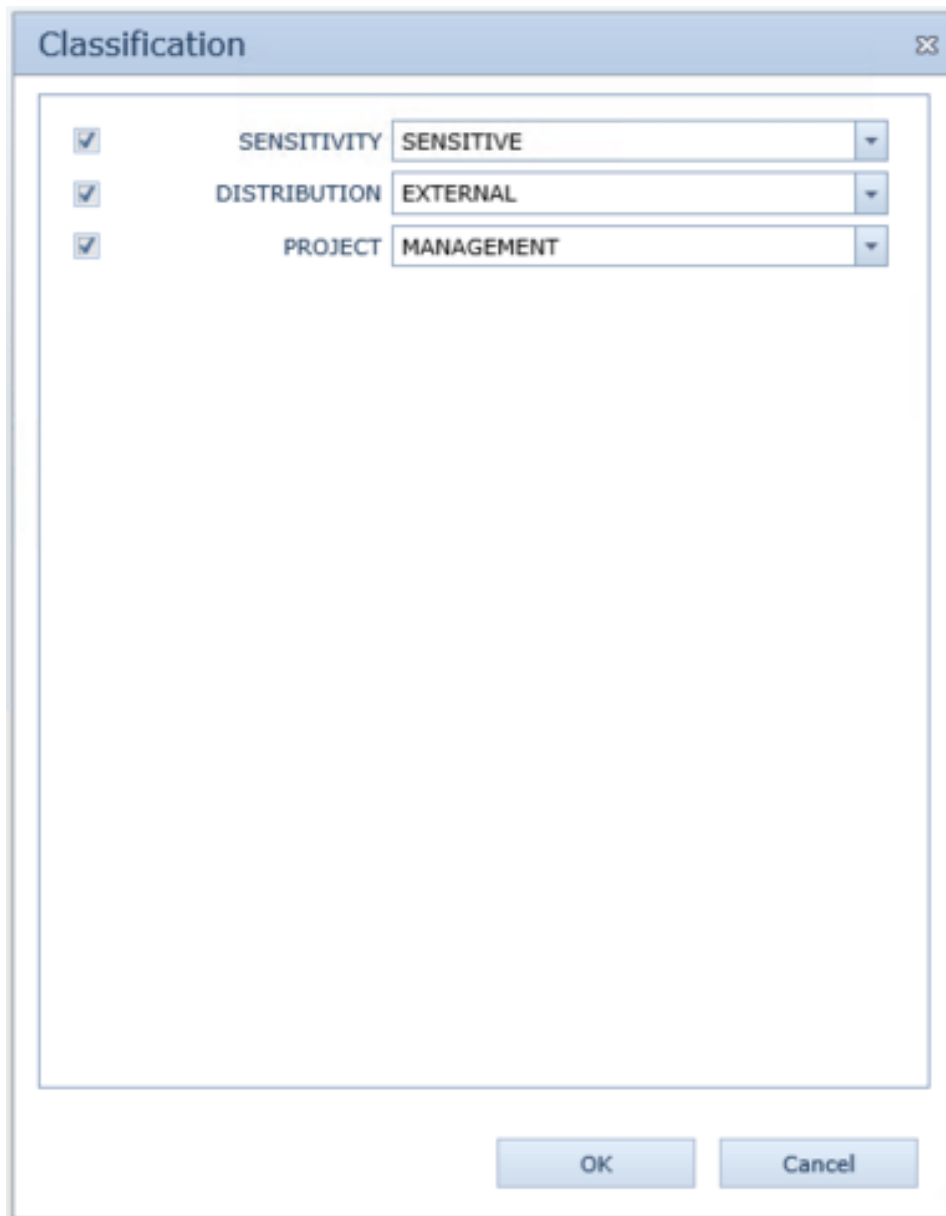
To edit a question in the Decision Tree:

1. Within the [Policy](#), right click on the question node and click **Edit** . An **Edit Question Window** will appear displaying available questions.
2. Select the **answers** that will be available in the **policy**.
3. In the dropdown list, select the **display style**. Select **Display values as a list** . Click **OK** .

Set A Label

A label can be set for an Answer Node is selected in the Decision Tree.

Note: You can only add label changes to multi-select answers that are processed from the first answer until the last.



The image shows a 'Classification' dialog box with a title bar and a close button. It contains three checked checkboxes on the left, each corresponding to a dropdown menu on the right. The first row is 'SENSITIVITY' with the value 'SENSITIVE'. The second row is 'DISTRIBUTION' with the value 'EXTERNAL'. The third row is 'PROJECT' with the value 'MANAGEMENT'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

| | | |
|-------------------------------------|--------------|------------|
| <input checked="" type="checkbox"/> | SENSITIVITY | SENSITIVE |
| <input checked="" type="checkbox"/> | DISTRIBUTION | EXTERNAL |
| <input checked="" type="checkbox"/> | PROJECT | MANAGEMENT |

Figure: Label Properties.

To set a label:

1. Within the **Decision Tree**, right-click on the **answernode** and click **Edit** . A Classification Window similar to the one above will be presented. The actual content of the Classification window will depend on your configuration. For our example configuration, choose required label elements as described below.
2. In the **Sensitivity** dropdown menu, select one of the sensitivity options; **Unmarked**, **Sensitive**, **Commercial-In-Confidence** .

3. In the **Distribution** dropdown menu, select **Internal** or **External** .
4. In the **Project** dropdown menu, select one of the options. Click **OK** .

Bottom Pane

For answer nodes with an associated Label, the bottom pane shows a description of the label changes to be applied. These can be label element items to add or Selectors to clear.

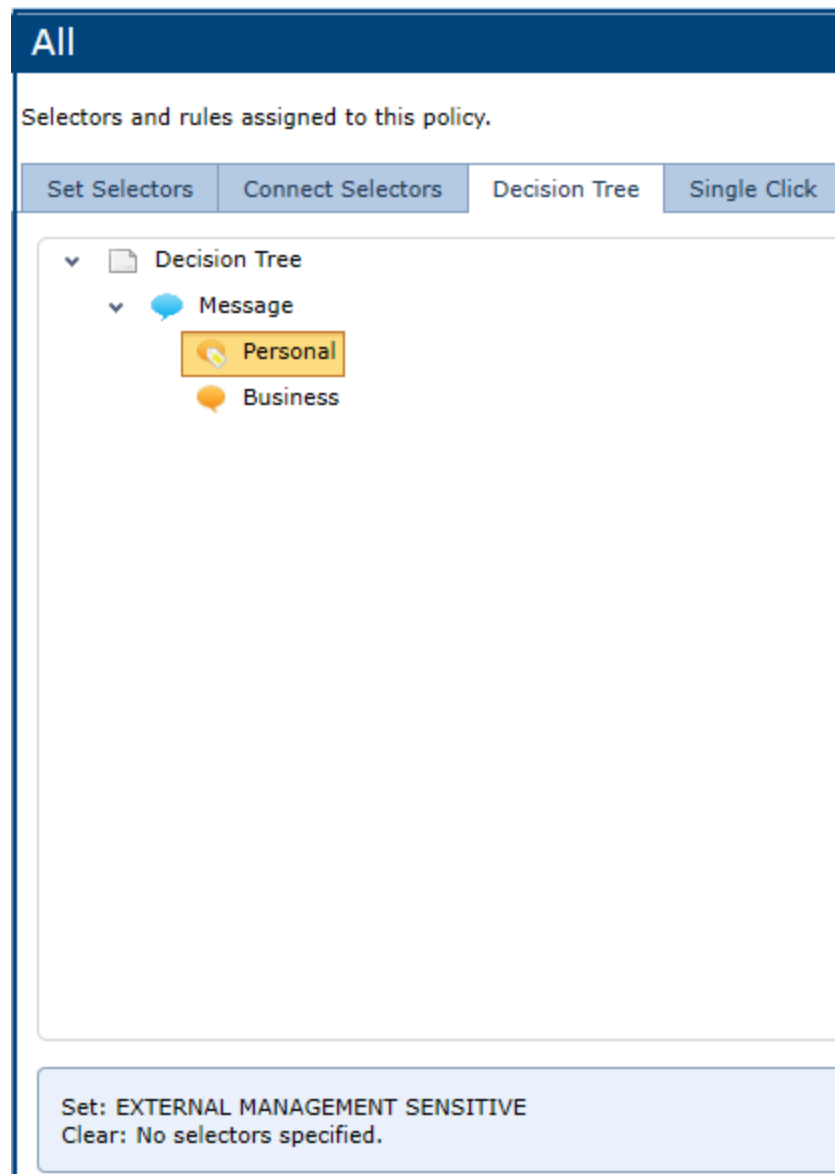


Figure: Displaying the label changes, Set and Clear.

Configuration Settings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ Configuration [Settings](#)

Opening Configuration Settings provides access to settings that are common across all policies in this Label Configuration. The settings apply to all policies – that is users operating under different policies will see no difference with regard to these settings.

The following settings are available:

- [Classifier Application Settings](#)
- [General Settings](#)
- [Label Locations](#)
- [Combined Label Locations](#)

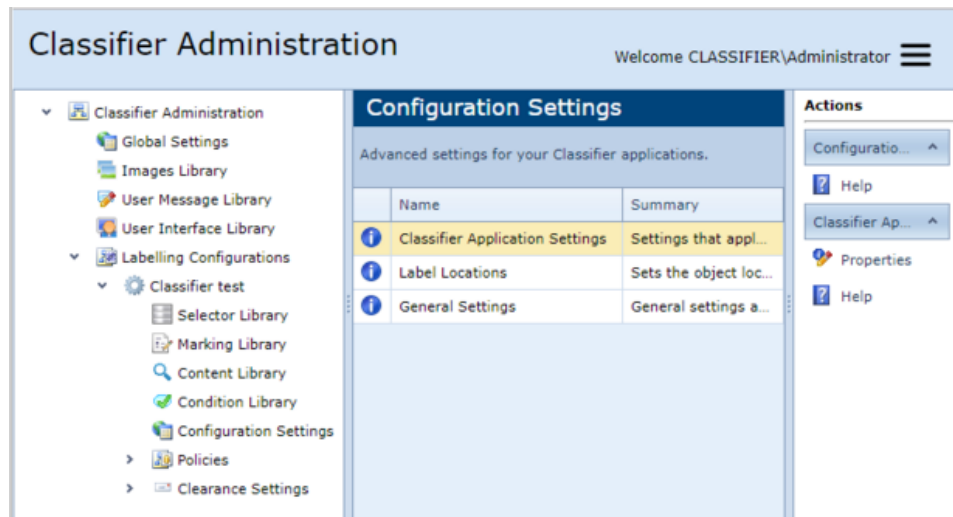


Figure: Configuration Settings.

Classifier Application Settings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Each application has its own settings which are viewed by selecting the appropriate tab (**PowerPoint Settings** in the example below).

The settings supported by each Classifier application are summarised in the table below with a separate sub-topic describing each setting.

Note: Options are omitted or 'greyed' if the application / feature is not licensed.

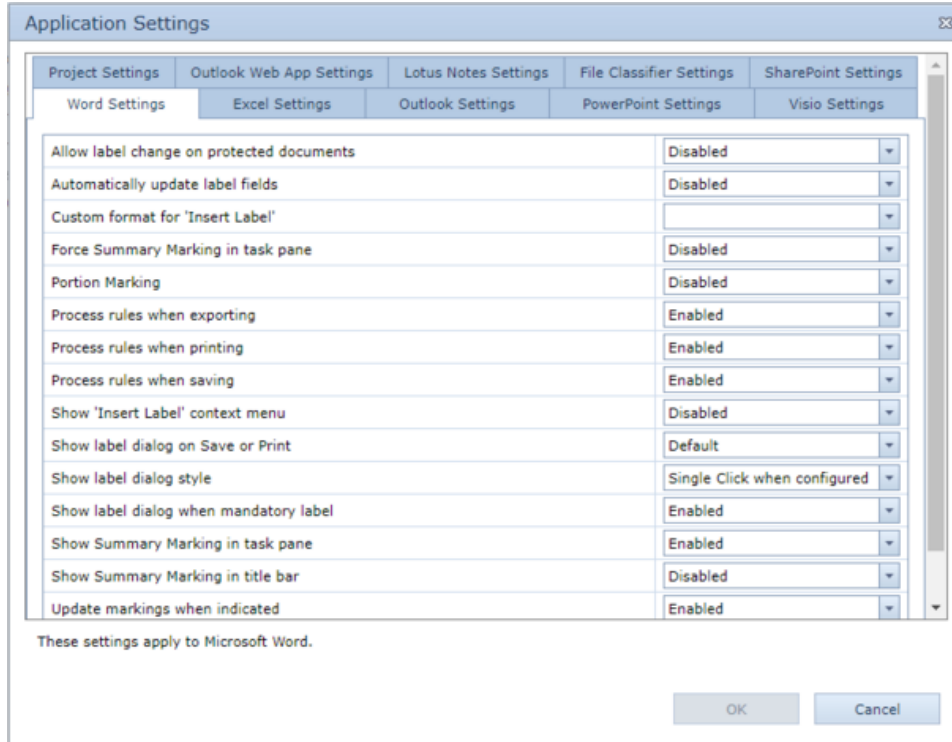


Figure: Classifier Application Settings.

Key to Table

One of: Outlook / OWA) / Notes / Mob / MailAdd-in / Word / Excel / PowerPoint / Project / Visio / CAD / SharePoint / File the applications Application supports the setting. **Note:** Classifier Mail Add-in may sometimes be referred to as 'OWA 2013/2016'.

- **(A):** The application automatically supports the feature, but it is not configurable.
- **(Blank):** The feature is not supported by the application.
- **Strike-through:** The setting is not supported by that application or that version of the application.

| Item | Outlook | OWA | Mail Add-in 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint & File |
|---|---------|-----|--------------------|-------|--------|------|-------|------------|---------------|-----|-------------------|
| Allow classification of meeting requests and appointments | Outlook | OWA | | | | | | | | | |
| Allow classification of tasks | Outlook | OWA | | | | | | | | | |
| Allow Folder View Labelling | Outlook | OWA | | | | | | | | | |
| Allow label change on protected documents | | | | | | Word | | | | | |

| Item | Outlook | OWA | Mail Add-in 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint & File |
|---|---------|-----|--------------------|-------|--------|------|-------|------------|---------------|-----|-------------------|
| Allow manual upgrade when sending messages | Outlook | | | | | | | | | | |
| Allow use of OWA Basic/Light Mode | | OWA | | | | | | | | | |
| Allow visual markings on a meeting request response | Outlook | | | | | | | | | | |
| Always use Distribution List clearances | Outlook | OWA | | | | | | | | | |
| Apply Headers/Footers when label is changed | | | | | | | Excel | | | | |
| Apply Headers/Footers when workbook is saved | | | | | | | Excel | | | | |
| Automatically elevate email label | Outlook | | | | | | | | | | |
| Automatically update Label fields | | | | | | Word | | | | | |
| Custom format for 'Insert label' | | | | | | Word | | | | | |
| Custom format for 'Label' column | Outlook | | | | | | | | | | |
| Display selector values in context menu | | | | | | | | | | | File |
| Enable Back Button on Save as | | | | | | | | | Visio | | |
| Ensure attachment markings are consistent | Outlook | OWA | Mail Add-in | Notes | | | | | | | |
| Ensure label dominates all portion markings | Outlook | | | | | | | | | | |
| Folder View column name | Outlook | OWA | | | | | | | | | |
| Folder View column populate on start-up | Outlook | | | | | | | | | | |

| Item | Outlook | OWA | Mail Add- in 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint & File |
|---|---------|-----|---------------------------|-------|--------|------|-------|------------|--------------------|-----|----------------------|
| Force Summary Marking in task pane | | | | | | Word | Excel | PowerPoint | Project Visio | | |
| Include embedded images when performing attachment checks | Outlook | | | | | | | | | | |
| Maximum file size for icon overlay (in KB) | | | | | | | | | | | File |
| McAfee Host DLP marking | Outlook | | | | | | | | | | |
| McAfee Host DLP scan | Outlook | | | | | | | | | | |
| Portion Marking | Outlook | | | | | Word | Excel | PowerPoint | | | |
| Process rules when exporting | | | | | | Word | Excel | PowerPoint | Project | | |
| Process rules when printing | | | | | | Word | Excel | PowerPoint | Project | | |
| Process rules when saving | | | | | | Word | Excel | PowerPoint | Project + Visio | | |
| Search for Outlook Item Properties that match email label locations | Outlook | | | | | | | | | | |
| Set property to refresh markings | | | | | | | | | | | SharePoint + File |
| Show Classifier 'C' on icon overlay | | | | | | | | | | | File |
| Show Classifier on ribbon when reading | Outlook | | | | | | | | | | |
| Show 'Insert Label' context menu | | | | | | Word | | | | | |
| Show label dialog on Save or Print | | | | | | Word | Excel | PowerPoint | Project + Visio | | |
| Show label dialog on send | Outlook | | | Notes | | | | | | | |
| Show label dialog style | Outlook | | | Notes | | Word | Excel | PowerPoint | Project + Visio | | |
| Show label dialog | Outlook | | | Notes | | Word | Excel | PowerPoint | Project | | |

| Item | Outlook | OWA | Mail Add-in 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint & File |
|---|---------|-----|--------------------|-----------|--------|------|-------|------------|---------------------------|-----|-------------------|
| when mandatory label | | | | | | | | | + Visio | | |
| Show Summary Marking in task pane | Outlook | | | | | Word | Excel | PowerPoint | Project + Visio | | |
| Show Summary Marking in title bar | | | | | | Word | Excel | PowerPoint | Project + Visio 2010 2013 | | |
| Suppress Classifier alerts when running macros | | | | | | Word | Excel | PowerPoint | | | |
| Text displayed when an item without a label cannot be checked into SharePoint | | | | | | | | | | | SharePoint |
| Text displayed when OWA Basic/Light Mode is disabled | | OWA | | | | | | | | | |
| Update markings when indicated | | | | | | Word | Excel | PowerPoint | Project + Visio | | |
| Use default label when replying to unmarked emails | Outlook | OWA | Mail Add-in | Notes (A) | | | | | | | |
| Use Alternate Data Stream (ADS) marking | | | | | | | | | | | File |
| Use From field for Originator Clearance | Outlook | OWA | | | | | | | | | |
| Warn if file contents cannot be accessed | Outlook | OWA | Mail Add-in | Notes | | | | | | | |
| Watermarks use marking format font | | | | | | Word | | | | | |

Allow Classification of Meeting Requests and Appointments

Note: This setting is only applicable to Microsoft Outlook.

Note: OWA Classifier and Classifier Mail Add-in support classification of meeting requests and appointments, but the support is not configurable.

Note: Visual markings (Subject, FLOT/LLLOT and Attachment lists) are not supported on appointments.

This setting defines whether the Classifier label selection features will be presented when the user is drafting a meeting request or appointment.

- **Enabled (Default):** The Classifier Label selection features will be presented in the Ribbon / Ribbon bar and meeting requests will be labelled in the same manner as other messages.
- **Disabled :** The Classifier Label selection features does not appear in the Ribbon / Ribbon bar and these items will not be labelled.

Allow Classification of Tasks

Admin : [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook.

Note: Folder view labelling of tasks is not supported.

Note: OWA Classifier supports classification of tasks subject to the standard OWA limitations that you cannot create, accept or edit assigned tasks. Only local tasks can be created and edited within OWA.

This setting defines whether the Classifier label selection features will be presented when the user is drafting a task.

- **Enabled:** The Classifier Label selection features will be presented in the Ribbon / Ribbon bar and tasks will be labelled in the same manner as other messages.
- **Disabled (Default):** The Classifier Label selection features will not appear in the Ribbon / Ribbon bar and tasks will not be labelled.

Note: The label summary bar may not be shown when choosing to assign a task to someone.

Allow Folder View Labelling

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Email Classifier and OWA Classifier.

This setting defines if users will be able to label unlabelled items in Outlook folders, and/or modify labels on items in Outlook folders.

- **Disabled (Default):** The selector is added to the tree below the chosen node. In this example, Department has been added below the Root.ault). User's will not be allowed to set or modify label values on items in Outlook folders.
- **Enabled:** User's will be allowed to set or modify label values on items in Outlook folders using the mechanisms described below.

If the feature is Enabled, the user has access to two additional actions:

Note : OWA Classifier only supports the Set [Label](#) mechanism.

- A **Label selected message(s)** button when viewing a folder summary in Outlook
- A **Set Label...** button when viewing an open message.

A summary of user operation can be found in [Folder View Labelling Operation](#) .

It is possible that an attempt to label a document using the Folder View mechanism may fail (e.g. permissions). The text displayed in this circumstance is configurable using the [Text displayed when Folder View labelling fails](#).

Allow Label Change on Protected Documents

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Word (Office Classifier).

This setting defines if users will be able to change the label and markings on protected word documents (File > Info > Protect document > Restrict editing) where **Editing restrictions** is set to **No changes (Read only)** or **Comments**. This setting is applicable when either **Add a Header / Footer / Watermark** and **Add this image to header / footer / top / bottom / Watermark** rules are used.

Note: If **Editing restrictions** is set to **Filling in forms**, then regardless of this setting the label value can be changed, but any Headers / Footers / Watermarks will not be changed.

Note: Setting **Editing Restrictions** to **Tracked changes** has no impact on Classifier operation - the label and markings can be updated.

- **Disabled (Default):** Users can change label values on protected word documents, **but** the effect on markings is unpredictable.
- **Enabled:** Users will be allowed to modify label and marking values in Headers, Footers and Watermarks on supported protected word documents.

For supported Editing restrictions types this is accomplished by Classifier registering Header/Footer/Watermark label information as "**Exceptions**" within the "**Restrict Editing**" mechanism. If the setting is **Enabled**, Header/Footer / Watermark information will be displayed enclosed with square brackets (e.g. [Classifier test Public]).

Note: If a document has never had a Classifier label applied (even an empty label) then Office Classifier cannot add a marking to that (protected) document unless the whole Header / Footer / Watermark area have been manually marked as Exceptions within the Restrict Editing mechanism.

Allow Manual Upgrade When Sending Messages

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook.

Note: This setting has no effect if [Automatically elevate email label](#) is **Enabled**.

If this setting is **Enabled**, and a high-water mark check rule is triggered because labels of attachments are higher than the current message label, and it is possible to derive a label for the message that will dominate all attachment labels, then the policy check dialog will present an **Upgrade message** button.

If the setting is **Disabled**, or a high-water mark label cannot be derived, then only a **Remove** (attachment) button will be presented.

Allow Use of OWA Basic/Light Mode

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to OWA Classifier.

This setting allows a site to disable OWA Basic/Light Mode if it has only installed the OWA Classifier Premium Mode.

- **Enabled (Default):** OWA Basic/Light Mode is available.
- **Disabled :** OWA Classifier will intercept any requests to operate in OWA Basic/Light Mode. The user will be notified using the message configured under [Text displayed when OWA Basic/Light Mode is disabled](#).

Allow Visual Markings on a Meeting Request Response

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook.

Note: This setting is only used if [Allow classification of meeting requests and appointments](#) is Enabled.

This setting supports the following options which control in which circumstances Classifier will apply Visual Marking rules (Subject/FLOT/LLOT)to Meeting Request responses.

- **Disabled:** Visual marking rules will never be applied to a meeting request response.
- **On Edit Response:** Visual marking rules will be applied if the user chooses **Edit the response before sending** .
- **On Send Response Now:** Visual marking rules will be applied if the user chooses **Send the response now** .
- **All:** Visual marking rules will always be applied.

Always Use Distribution List Clearances

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook and OWA.

A clearance may be **assigned to an Active Directory Distribution Group** - that is a Distribution Group that has an associated email address.

If there is no clearance assigned to a Distribution Group (DG) Email Classifier will attempt to expand the DG and use the DG member's clearances to perform clearance checks.

If this setting is **Disabled** then DGs are always expanded. If the relevant setting is **Enabled** , then DG clearance will be used if available. If DG clearance is not available then the DG will be expanded to perform clearance checks.

Apply Headers/Footers When Label is Changed

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Excel.

Applying headers and/or footers in Excel via Classifier rules can have a performance impact. This is because each time the header/footer is changed for each Worksheet, Excel communicates with the default printer which becomes more noticeable as the number of sheets increases. This setting can be used (in conjunction with [Apply Headers/Footers when workbook is saved](#)) to reduce the impact.

- **Enabled:** Every time the Label is changed, all Headers and Footers are updated.
- **Disabled (Default):** The Headers / Footers are not updated when the Label is changed. This can lead to inconsistent markings on the Workbook when viewed in Print Preview or Page Layout view.

Note: Headers and Footers are always updated when the workbook / sheet is printed.

Apply Headers/Footers When Workbook is Saved

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ Configuration [Settings](#) / Classifier ApplicationSettings

Note: This setting is only applicable to Microsoft Excel.

Applying headers and/or footers in Excel via Classifier rules can have a performance impact. This is because each time the header/footer is changed for each Worksheet, Excel communicates with the default printer which becomes more noticeable as the number of sheets increases. This setting can be used (in conjunction with [Apply Headers/Footers when Label is changed](#)) to reduce the impact.

- **Enabled (Default):** Every time the document is saved, all Headers and Footers are updated.
- **Disabled :** The Headers / Footers are not updated when the workbook is saved. This can lead to inconsistent markings on the Workbook when viewed in Print Preview or Page Layout view.

Note: Headers and Footers are always updated when the workbook / sheet is printed.

Automatically Elevate Email Label

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook.

This setting can be **Enabled** to direct Classifier to try (when attaching a document) to automatically raise the label on an email to encompass that document's label. If that automatic action cannot complete (e.g. there is a clash of single selection list values), AND a Perform high-water mark check is configured, then a further check is applied when the message is sent and the user involved in resolution of any residual issues according to the Warn/Prevent setting in the rule.

If this setting is **Enabled** and a high-water mark check initially fails then the software will do the following:

- For **Hierarchic Selectors** ([Single selection list](#)) it will set the selector value to the highest value from the message and the set of attachments and Pass the check.
- For **Informational Selectors** (those with Include this **Selector in Clearance Checks** unset - [Single selection list](#) and [Multiple selection list](#)) it will retain the message setting for the selector regardless of any attachment values and Pass the check.

- For **all other Selectors** if a single value is available for the selector that will dominate the message and attachment values for that selector, then the message label will be set to that value and the check is Passed. If no such value is available, the check fails and the user will be notified of the issue.

So a message labelled as "**Confidential**" with an attachment of "**Confidential Sales**" would have its label automatically changed to "**Confidential Sales**", but a message labelled as "**Confidential Engineering**" with an attachment of "**Confidential Sales**" triggers the dialog described in [Attachment Handling](#) .

If this setting is **Enabled** , then the setting [Allow manual upgrade when sending messages](#) has no effect.

Automatically Update Label Fields

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Word.

This setting supports two values:

- **Disabled (Default):** Fields populated using the [Insert Marking as Field Code \(Word only\)](#)] action will not be updated automatically when the classification is changed.
- **Enabled :** Classifier will automatically search for fields containing Classifier markings whenever the [Classification](#) is changed.

Note: Certain content (e.g. copied from a web page) can contain lots of **fields** resulting in a significant overhead when Classifier searches for field values to update. This setting allows the user to control when the field update is performed.

Custom Format For 'Insert Label'

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) /Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word**.

The name of the Marking Format to be used if incorporating a Classifier label into a Word document using the [Insert Label](#) context menu action. If this value is not set then the value associated with [Custom Format for Summary Markings](#) is used.

Custom Format For 'Label' Column

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook**.

The name of the Marking Format to be used if presenting a Classifier label in a column in an Outlook folder summary as described in [Folder View - column name](#) .


If this value is not set then the value associated with [Custom Format for Summary Markings](#) will be used.

Display Selector Values In Context Menu

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **File Classifier**.

This setting provides additional control over the context menu display as described in the **File Classifier Guide > Displaying selector values in the context menu (not using single click)** .

- **Enabled** : File Classifier context menu will present relevant selector values and the current classification.
- **Disabled (Default):** File Classifier just presents the  action in the context menu.

Enable Back Button on Save As

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Visio**.

- **Enabled (Default):** The **Back** button is available if a check dialog is shown during **Save As** operation.
- **Disabled:** The **Back** button is not available if a check dialog is shown during **Save As** operation. This setting should always be **Disabled for Visio 2013/2016** as there is no means of cancelling a **Save As** operation at the point at which Classifier is invoked. Leaving the setting to **Enabled for Visio 2013/2016** may mean that rule actions are not performed at all.

Ensure Attachment Markings are Consistent

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only relevant if you have **installed** and used **Power Classifier** or **File Classifier**.

Note: This setting is only applicable to **Email, OWA** and **Notes Classifier**.

This setting affects the checks made when a message is sent.

- **Enabled** : Office Classifier supported attachments (Microsoft Word, Excel, PowerPoint, Project and Visio) are checked for the custom property set by File or Power Classifier to indicate that they have updated the label value, and the visible markings may be inconsistent with the label value. If the custom property is set, then the user is prompted and submission halted, allowing the user to take corrective action. The text displayed to the user is configured through the [Text to display if attachment markings are inconsistent](#).
- **Disabled** : The above check is not performed.

Ensure Label Dominates All Portion Markings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook**.

This setting indicates if Classifier should include **Portion Markings** in the body of an email message when performing [Label Dominance](#) checks.

It only has effect if [Portion Marking](#) is **Enabled** for **Outlook**.

Note: The message **Subject** and the message **Body** are scanned for **portion markings**. Thus a marking (e.g. [RES] for Restricted) present in the Subject of a reply or forward message will be treated the same as [RES] inserted as a [Portion Marking](#) within the message body.

Folder View Column Name

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook**.

This setting (previously known as Column name for Folder View) allows you to define the heading for a column you can then add into folder views. The column will show any Classifier label associated with a message using the [Custom format for Summary Markings](#).

1. Define the required **name** (e.g. **Classifier**) as the **Folder View column name**.
2. Deploy the configuration change. You can then add the named column into the Inbox folder as follows:
3. Start **Outlook**.
4. Select the **Inbox** folder.
5. Send a Classifier labelled message to that folder.
6. **Open** and **close** the received message.
7. Select **View / Addcolumns** (or Position the cursor over the headings for the Inbox and choose **Field Chooser** from the context menu). This presents the dialog below. Select **User-defined fields in Inbox** from the drop down.

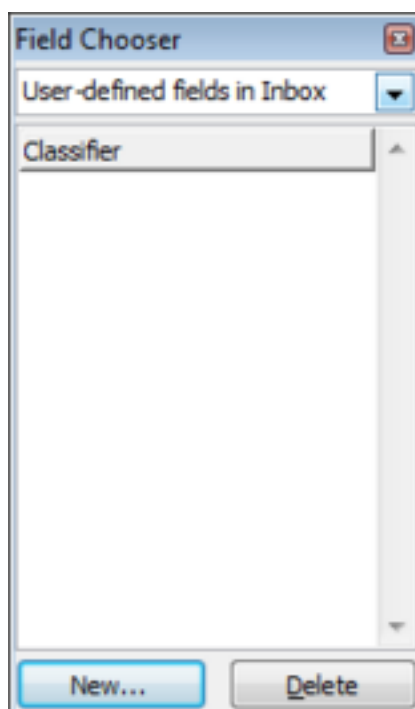


Figure: Field Chooser.

Note: The 'Column' name you assign does appear in the above list if you have chosen a value that already appears in one of the other lists available under Field Chooser (e.g. [Label](#) appears under All Appointment fields). You can check this by using the Manual definition of column name mechanism described below.

8. Select the required field and drag this into the required position in the folder column headings.
9. You can then replicate that **Folder View** to all other folders using the **View / Change / Apply Current View to Other Mail Folders** action. Consider selecting the parent nodes and using the **Apply view to sub-folders** setting.

Manual definition of column name:

You can manually make your column name available in any folder as follows:

1. Select the **folder** , **Invoke Field Chooser** and choose **User-defined fields** in folder .
2. Click **New...** and enter your configured Column name (e.g. Classifier Label).
3. If you enter a name that is already in use in one the other lists you will be notified:

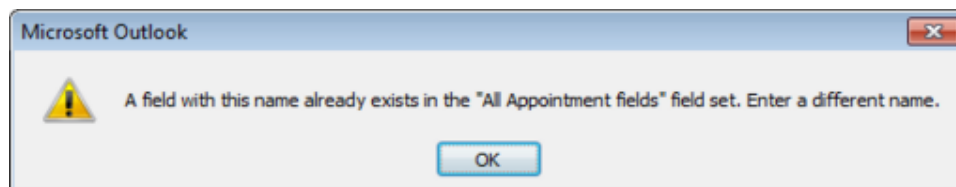


Figure: Field Chooser warning.

4. Select the new item and drag and drop it into the required place in the folder columns headings.

Folder View Column Populate On Start-Up

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook**.

This setting may be useful in avoiding problems (e.g. This function cannot be performed because the message has been changed) when performing operations such as **follow up** or **apply a category** on messages with the [Folder View column name](#) option is **enabled**.

Such problems are most likely to arise when running in on-line mode (rather than cache mode) for messages delivered to the Inbox when Classifier is not running (e.g. overnight).

- **Enabled:** On start-up, Classifier will search all the received main folders (usually the Inbox) in each Mailbox, plus any subordinate folders, to ensure that the Classifier Folder View column property is populated.
- **Disabled(Default):** No **fix-up** action is performed at start-up and Classifier will perform any required fix-up when the item is accessed.

Force Summary Marking in Task Pane

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word, Excel, PowerPoint** and **Project**.

The setting determines whether users are allowed to close the task pane that displays the Summary Marking.

- **Enabled** - Users cannot close the **Summary Marking** task pane.
- **Disabled** - Users can close the **Summary Marking** task pane. There may be no means of re-instatement if they do close the pane unless the [Show Summary Marking](#) action is **Enabled**.

Include Embedded Images When Performing Attachment Checks

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook**.

The setting determines how embedded images are handled by [Check for the high-water mark](#), [Check clearance for attachments](#) and [Check for unlabelled attachments](#) rules.

- **Enabled (Default):** Embedded images will be processed as described in [Attachment handling](#).

Note: If the message is in **RTF** format, attachment checks cannot be performed on embedded attachments.

- **Disabled:** Embedded images are excluded from [Check for the high-water mark](#), Check Content, Check clearance for attachments and [Check for unlabelled attachments](#) rules.

Maximum File Size For Icon Overlay (In KB)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: his setting is only applicable to **File Classifier**.

If icon overlays are in use, each overlay (typically 6) has to load the file to determine the correct icon to display. For large files this can lead to visible delays to explorer.

This setting allows you to limit the icon overlay operation to files below a specified size.

By default the value is not set indicating that no limit is applied.

McAfee Host DLP Marking

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook.

This setting is only relevant if the associated setting [McAfee Host DLP scan](#) is **Enabled**, in which case it determines the text string (as derived from the selected Marking Format) to be passed to McAfee. The text string derived from the [Marking Format](#) can of course include the selected label values.

McAfee Host DLP Scan

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook.

This setting relates to how Email Classifier interacts with McAfee Host DLP software (HDLP). Classifier checks whether DLP is available at start up - if DLP is unavailable the setting is ignored.

- **Enabled:** Directs Classifier to call an API provided by DLP for use in Outlook environments to pass text string as part of Classifier and ePO integration. The text string passed is determined by the Marking Format configured by [McAfee Host. DLP marking](#). The text string derived from the [Marking Format](#) can of course include the selected label values (classification). [DLP marking](#). The text string derived from the [Marking Format](#) can of course include the selected label values (classification). The DLP API is invoked just before the message is sent. It is a matter for McAfee configuration as to effect of the 'text string'.

ePO Configuration

It is assumed that ePO has been configured to trust Classifier as follows, otherwise both components will process the message in an uncoordinated manner.

To republish the ePO policy:

1. Navigate to the **policy** catalogue and open the current **client configuration**.
2. Select **Settings/ Operational Modes and Modules** and then verify that **Outlook Add-ins / Activate 3rd Party Add-in Integration** is **Enabled** .
3. Go to **Settings / Email Protection** and under the **Outlook 3rd party integration** section select **Boldon James** from the **Vendor Name list**.
4. Re-publish the ePO policy.

- **Disabled (Default):** McAfee HDLP API is not invoked.

Portion Marking

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook, Word, Excel and PowerPoint**.

A **portion mark** is usually an abbreviated marking derived from a label value (e.g. [P] for Public).

This **Portion Marking** application setting (one each for Outlook, Word, Excel and PowerPoint), controls whether users can insert a Portion Marking into the content of an Outlook message, Word document, Excel Spreadsheet or PowerPoint presentation.

This **Portion Marking** action is only available if the relevant application **Portion Marking** setting is **Enabled** , AND Configuration [Settings](#) / [General Settings](#) / [Custom Format for Portion Marking](#) has a valid [Marking Format](#) configured.

Note: Outlook must be configured to use Word as the email editor. Outlook. Not supported in a Plain Text message body.

Note: A Portion Marking may only be inserted into an empty cell in an Excel spreadsheet.

Note: (Outlook) Portion Marks (Choose Portion Mark) are always inserted at the current insertion point within the message body (even if the visible cursor is in the Subject field).

If **Portion Marking** is available, then the user can insert a [Portion Mark](#) at the current position in the message / document using either the Portion Mark action in the ribbon bar, or the **Insert Portion Marking** action in the context menu for Word and Excel (the context menu action is not available in Outlook or PowerPoint).

To insert a Portion Mark:

1. Position the **insertion point** in the **message / document**.
2. Choose the **Portion Mark** to be applied, either via the **Portion Mark** action on the **ribbon bar** (see [Portion Mark](#) for a fuller description of the user options) or **Insert Portion Marking** action from the **Word** or **Excel** context menu.
3. The standard label selection dialog appears:

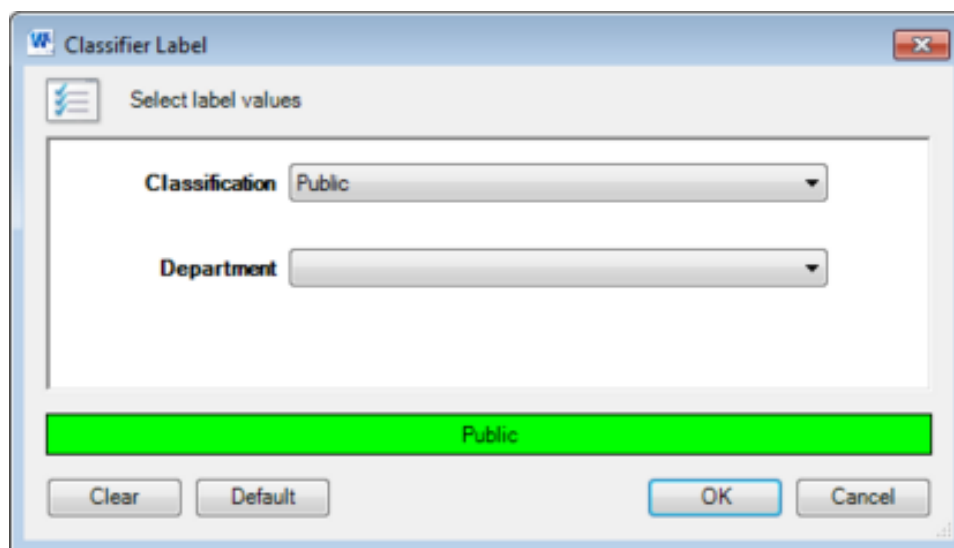


Figure: Portion Marking: Label Selection.

4. Choose the required label value and click **OK** . (If the user has defined Favourite Label values, they will be available through the [Favourites](#) drop down).
5. The label value will appear at the current insertion point formatted according to the configured [Custom Format for Portion Marking](#) .

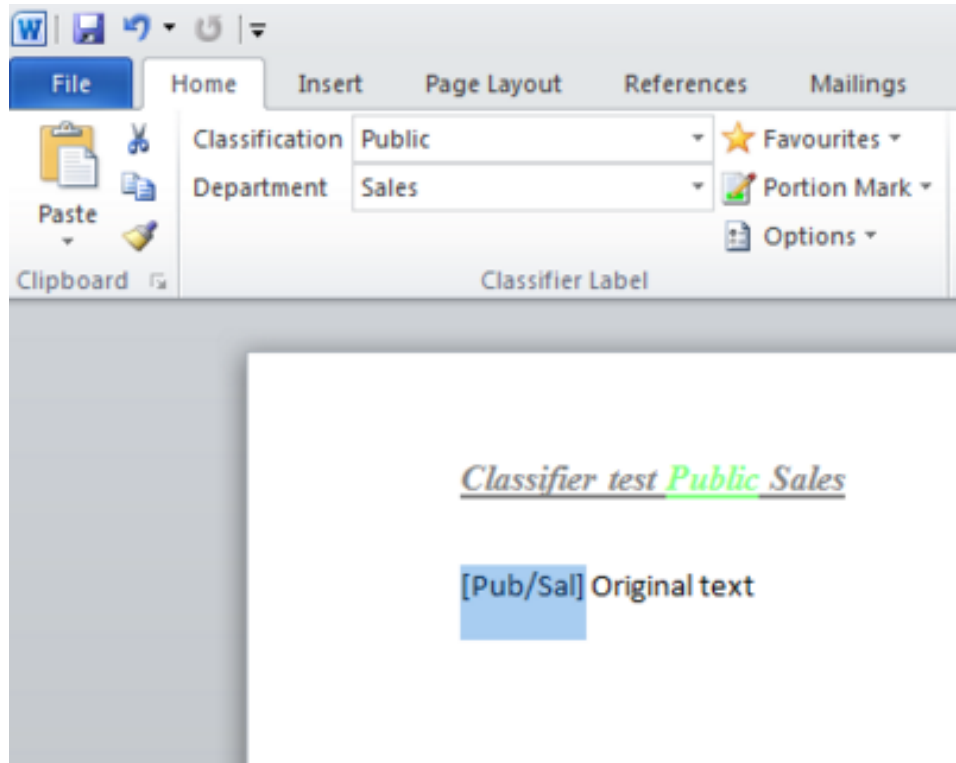


Figure: Portion Mark inserted: Office.

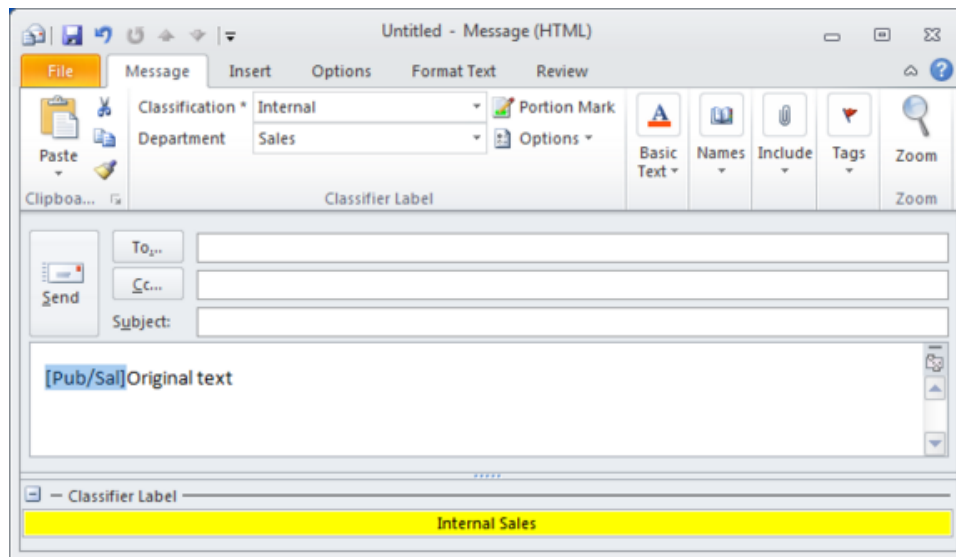


Figure: Portion Mark inserted: Outlook.

6. To remove a **Portion Mark**, just select the **Portion Mark text** (including any delimiters) and click **Delete**.

[Label Dominance](#) and Automatic Label Upgrade

When a Portion Mark is inserted, Office Classifier, where possible, automatically upgrades the current label value to ensure that it dominates the Portion Mark being inserted as described in [Label Dominance](#) .

Office Classifier only performs such label dominance checks at the time the Portion Mark is inserted. It does not perform any more checking of the label against Portion Marks (e.g. on Label change or document Save).

Office Classifier will make no change during dominance checking where the current label value contains a value for a non-hierarchic element that is different to the value for that element in the Portion Mark. For example: Label = Internal / Sales and Portion Mark = Internal / Support, then label would remain as Internal / Sales with no user involvement.

Note: [Single Selection list](#) and [Multiple selection list](#) Selectors only take part in automatic upgrade of Portion marks if they have **Include this selector in clearance and attachment checks** enabled.

Note: Email Classifier will correctly identify Portion Markings ONLY if the associated Marking Format has delimiters around the entire marking format (e.g. `[{Classification (Portion Mark)}]`). See [Properties \(Marking Format\)](#) for details on how to do this.

When a Portion Marking is inserted, Email Classifier, where possible, automatically upgrades the current label value to ensure that it dominates the Portion Mark being inserted as described in [Label Dominance](#) .

Email Classifier usually only performs such label dominance checks at the time the Portion Marking is inserted. It does not perform any more checking of the label against Portion Marking (e.g. on Message Send).

However, if the additional setting [Ensure label dominates all portion markings](#) is **Enabled** then a dominance check will be performed if the user changes the label of the message. If Email Classifier detects an attempted downgrade the following will be displayed and the label downgrade cancelled:

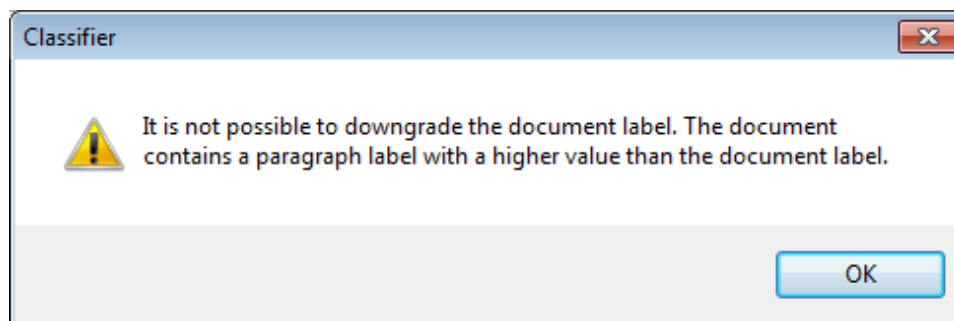


Figure: Portion Marking downgrade warning.

Note: Any lowering of a Hierarchic selector constitutes downgrade, as will removal of a non-hierarchic selector. Any other change of value of a non-hierarchic selector will not constitute a downgrade.

Process Rules When Exporting

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word, Excel, PowerPoint and Project**.

You can enforce rules (**Enabled - default**) such as [Check these mandatory selectors](#) ([Check rules](#)) when an **Export** operation is performed. Any checks that fail will interrupt the flow and involve the user in the choice of action according to the Warn / Prevent setting defined in the rule.

Note: If a policy check dialog appears for **PowerPoint** or **Project**, the user must **Fix** the issue or **Continue**, they cannot go **Back**.

Process Rules When Printing

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word, Excel, PowerPoint and Project**.

You can enforce rules (**Enabled**) such as [Check these mandatory selectors](#) ([Check rules](#)) when a Print operation is performed. Any checks that fail will interrupt the flow and involve the user in the choice of action according to the **Warn / Prevent** setting defined in the rule.

Note: If a policy check dialog appears for **PowerPoint** or **Project**, the user must **Fix** the issue or **Continue**, they cannot go **Back**.

Process Rules When Saving

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word, Excel and PowerPoint, Project and Visio**.

This setting allows you to enforce rules (**Enabled**) such as [Check these mandatory selectors](#) ([Check rules](#)) when a Save operation is performed. Any checks that fail will interrupt the flow and involve the user in the choice of action according to the **Warn / Prevent** setting defined in the rule.

Note: If a policy check dialog appears for **Visio**, the user must **Fix** the issue or **Continue**, they cannot go **Back**.

Search For Outlook Item Properties That Match Email Label Locations

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Outlook**.

- **Disabled (Default):** Standard processing of [Label Locations](#) applies.
- **Enabled :** When processing Label Locations, if a defined x-header item cannot be found, then Classifier will check to see whether there is an Outlook Item Property with the same name as the x-header that can be used instead.

Set Property To Refresh Markings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **SharePoint Classifier** and **File Classifier**.



The effects of this setting are described in the **SharePoint Classifier** and **File Classifier** Guides.

Show Classifier 'C' On Icon Overlay

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to File Classifier.

This setting provides additional control over the appearance of Icon Overlays.

- **Enabled (Default):** File Classifier icon overlays will include the Classifier symbol .
- **Disabled :** File Classifier icon overlays will NOT include the Classifier symbol .

Show Classifier On Ribbon When Reading

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Outlook.

This setting provides control over whether the Classifier entry is shown in the ribbon bar when reading a message.

- **Enabled (Default):** The Classifier ribbon entry is displayed.
- **Disabled :** The Classifier ribbon entry is **not** displayed.

Show 'Insert Label' Context Menu

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word**.

This setting supports two settings:

- **Disabled (Default):** The **Insert Label context** menu is **not** available in Word [see [Insert Marking as Field Code \(Word only\)](#)].
- **Enabled :** The **Insert Label context** menu is available in Word.

Show Label Dialog On Save Or Print

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word, Excel, PowerPoint Project** and **Visio**.

Further control over the style of the label dialog presented is provided by [Show label dialog style](#) .

Note: Regardless of the value of this setting, Classifier will always process the configured rules (e.g. Check these mandatory selectors) which in some circumstances may result in a further label dialog being shown.

This setting supports three values:

- **Default:** The user experience saving or printing a document is controlled by any rules defined (e.g. [Check these mandatory selectors](#) and [Check for use of default label](#)) and the setting [Process rules when saving](#) .
- **Always:** The Label selection dialog will be presented if the user saves or prints a document. The user can modify the label, or continue the operation.
- **If message label matches default label:** If the current label matches the default label when the user saves or prints a document, then the Label selection dialog will be presented. The user can modify the label, or continue the operation.

Show Label Dialog On Send

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook** and **Lotus Notes**.

Further control over the style of the label dialog presented is provided by [Show label dialog style](#) .

Note: Regardless of the value of this setting, Classifier will always process the configured rules (e.g. Check these mandatory selectors) which in some circumstances may result in a further label dialog being shown.

This setting supports three values:

- **Default:** The user experience sending a message is controlled by any rules defined (e.g. [Check these mandatory selectors](#) and [Check for use of default label](#)).
- **Always:** The Label selection dialog will be presented if the user sends a message. The user can modify the label, or continue the operation.
- **If message label matches default label :** If the current label matches the default label when the user sends a message, then the Label selection dialog will be presented. The user can modify the label, or continue the operation.

Show Label Dialog Style

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is applicable to **Microsoft Outlook, Word, Excel, PowerPoint, Project, Visio** and **Notes**.

In various circumstances Classifier will automatically display a label selection dialog (e.g. Mandatory selector required). By default, if **Use Single Click with pre-defined labels** is configured, then a Single Click format is presented, otherwise the Full label selection dialog appears.

This per-application setting provides control over the style of dialog presented when **Use Single Click with pre-defined labels** is configured **AND** one or more of the following is triggered:

- [Show label dialog on Save or Print](#)
- [Show label dialog on Send](#)
- [Show label dialog when mandatory label](#)

This setting supports two values:

- **Single Click when configured (Default):** A Single Click label selection dialog is presented if **Use Single Click with pre-defined labels** is configured, otherwise the Full label selection dialog appears.
- **Full Classification Dialog :** The Full label selection dialog is presented even though **Use Single Click with pre-defined labels** is configured.

Show Label Dialog When Mandatory Label

Admin : [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is applicable to **Email Classifier, Notes Classifier** and **Office Classifier (Microsoft Word, Excel, PowerPoint, Project and Visio)**.

This setting modifies the end user experience when Mandatory Selector rules are triggered on **Send, Save** or **Print** (see also [Process Rules When Printing](#) and [Process Rules When Saving](#)).

If this setting is **Enabled** when a Mandatory Selector check fails (there is no value for the Mandatory Selector), **AND** Warn/Prevent in the rule is set to **Prevent** , then the label dialog shown below is presented rather than the general Rule exception dialog, allowing the user to set the label directly.

Further control over the style of the label dialog presented is provided by [Show label dialog style](#) .

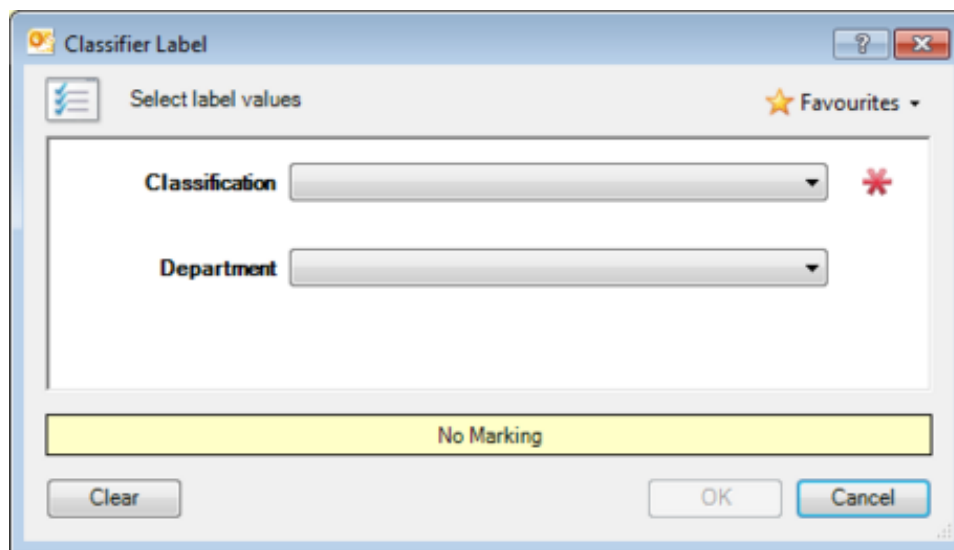


Figure: Mandatory Label required dialog.

The text that appears at the top of the dialog may be modified by the [Text displayed when mandatory label is absent](#) setting.

If this setting is **Disabled** when a Mandatory Selector check fails (there is no label), **OR** Warn/Prevent is set to **Warn** , then the general Rule exception dialog is displayed with the **Remove/Back/Continue** options.

The text in the body of this dialog is controlled by the relevant application Rule.

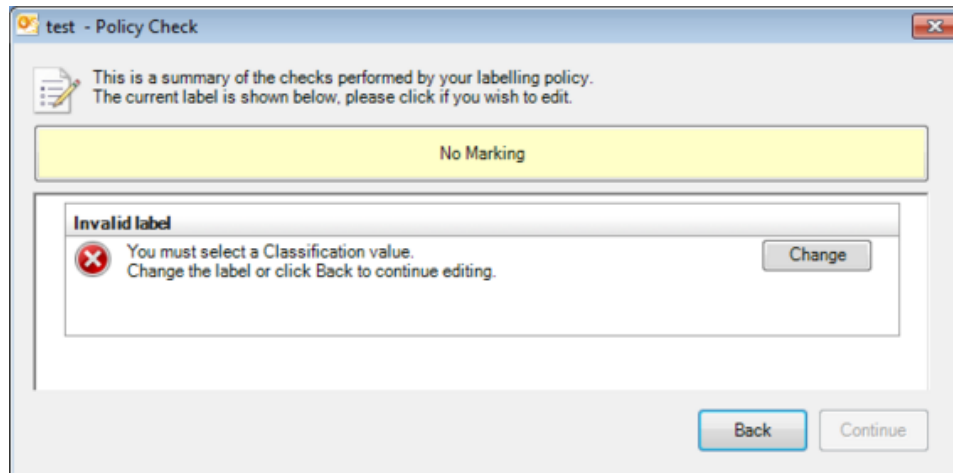


Figure: Mandatory Label Check.

Show Summary Marking In Task Pane

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is applicable to Microsoft Outlook, Word, Excel, PowerPoint and Project.

This setting controls whether the Summary Marking value appears in an information bar at the bottom of an open document window. The default value is **Enabled**.

If there is currently no label value selected then the [Text to display if no marking is available](#) will be displayed as the Summary Marking value.

Depending on the environment, the user can expand and contract this information bar, and may be able to close the bar with no means of re-instatement. The [Show Summary Marking](#) action may be **Enabled** to provide a Classifier menu action to re-instate the Summary Marking display if the information bar is closed.

The [Force Summary Marking in task pane](#) may be **Enabled** to prevent the user from closing the information bar.

Show Summary Marking In Title Bar

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is applicable to Microsoft Word, Excel, PowerPoint, Project and Visio, **but** has no effect in Visio or PowerPoint 2010 (and later) which do not support alteration of the window title.

- **Enabled:** If the setting is Enabled. The Summary Marking value is inserted into the Window title bar. It is appended to the document name.
- **Disabled (Default):** The default is Disabled. The title bar will not be changed by Classifier.

Suppress Classifier Alerts When Running Macros

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Word, Excel and PowerPoint.

The following must be **Enabled** for each required office application:

File > Options > Trust Center > Microsoft <Word/Excel/PowerPoint> Trust Center > Trust Center Settings > Macro Settings > Developer Macro Settings > Trust access to the VBA project object model.

- **Disabled (Default):** Any Classifier alerts triggered whilst running macros will be displayed and require action.
- **Enabled :** Classifier alerts triggered whilst running macros will not be displayed.

Text Displayed When An Item Without A Label Cannot Be Checked Into SharePoint

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **SharePoint Classifier**.

The effects of this setting are described in the [SharePoint Classifier Guide](#).

Text Displayed When OWA Basic/Light Mode Is Disabled

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **OWA Classifier**.

This setting allows you to configure the User defined message to be displayed to a user if an attempt to use [Allow use of OWA Basic/Light Mode](#) is inhibited by OWA Classifier.

Update Markings When Indicated

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Word, Excel, PowerPoint, Project and Visio**.

Note: The setting is only relevant if you are using Power Classifier or File Classifier.

This setting provides an additional level of control if **File or Power Classifier** is used to label **Office Classifier** documents.

Under default operation if **File Classifier** or **Power Classifier** labels a document it will set a custom property on Office Classifier documents to indicate that the Label may not match the document markings. Office Classifier applications detect this custom property the next time the document is opened and update all markings.

It is possible (particularly if using **Power Classifier** to label many files) that the label values applied cause unexpected effects on the markings. This setting allows you to suspend (on a per application basis) the automatic updating of markings, providing more time to resolve marking issues.

Although Power Classifier for files can set the setting on a document. It is basically a document custom property. It is still left to Email and Office Classifier whether it implements it.

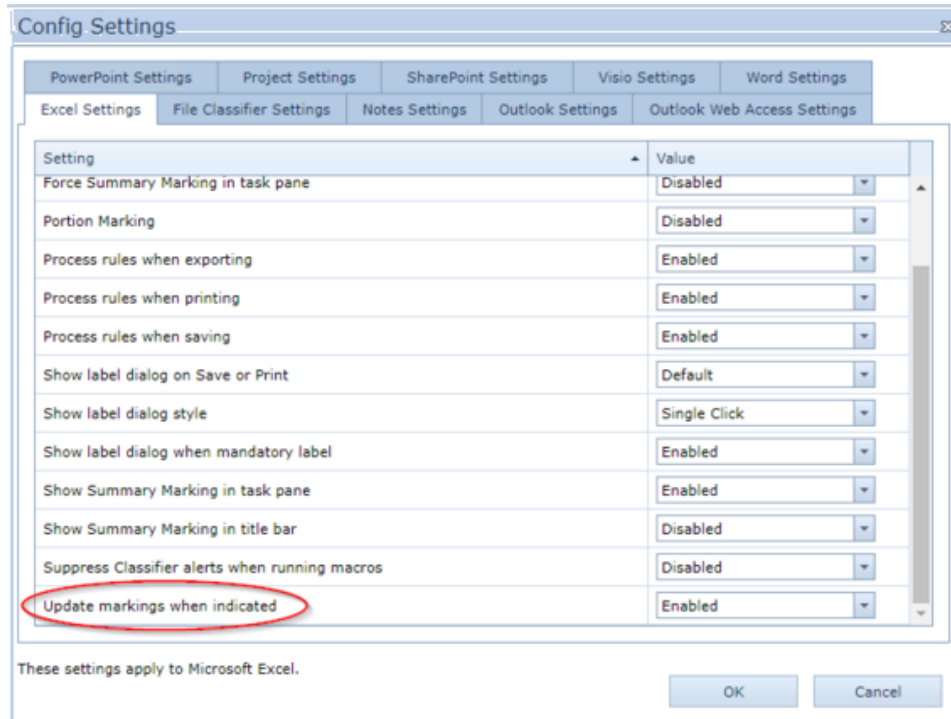


Figure: Update markings when indicated enabled.

- **Enabled (Default):** When a document is opened, the office application will react to the custom property set by File or Power Classifier and refresh the document markings when the document is opened, clearing the custom property.
- **Disabled :** The Office application ignores the custom property when a document is opened. However, actions such as Save and Print may still trigger an update of markings.

Note: Newer versions of File Classifier and Power Classifier provide control over the setting of the refresh custom property as described in the relevant product guide.

Use Alternate Data Stream (ADS) Marking

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to File Classifier.

This setting provides additional control over whether File Classifier writes label information to the Alternate Data Stream for file types that are not supported (i.e. NOT configured in DocLabeller2 - e.g. TXT files).

- **Enabled (Default)** - File Classifier will store the label in the Alternate Data Stream.
- **Disabled** - File Classifier will NOT write the label to the Alternate Data Stream for files that are NOT configured in DocLabeller2.

Note: For Visio files, the General setting [Use Alternate Data Stream \(ADS\) for Visio files](#) takes precedence.

Use Default Label When Replying To Unmarked Emails

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Email, OWA, Mail Add-in and Notes Classifier.

Note: Classifier Mail Add-in and Notes Classifier always apply the default label.

This setting allows you to control what happens if the original received message has no label. This option has no effect if a default label has not been defined. **Enabled** or **Disabled** will create a "Reply" with no label.

To check this setting go to **Labelling Configurations > Configuration Settings > Classifier Application Settings > Outlook Settings** tab > Use default label when replying to unmarked emails.

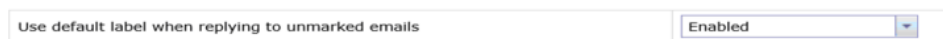


Figure: The default setting is Enabled for Use default label when replying to unmarked emails.

- **Enabled (Default):** The reply message adopts the default label value (if configured) as the initial label value for the reply message.
- **Disabled:** The reply message starts using a blank label value.

Use From Field For Originator Clearance

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to Microsoft Outlook and OWA Classifier.

This setting is only relevant if you are using **Perform Clearance Checking on Originator** rules under Email or OWA Classifier. In environments where a user has the ability to submit mail from more than one mailbox, this setting can be used to ensure that Email Classifier uses the **From** value for Originator Clearance checks rather than the default (primary mailbox).

- **Enabled:** Email / OWA Classifier will use the From value to perform Originator Clearance Checks.
- **Disabled:** Email / OWA Classifier will always use the Primary mailbox identity to perform Originator Clearance Checks.

Warn If File Contents Cannot Be Accessed

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting is only applicable to **Microsoft Outlook, OWA and Notes Classifier**.

This setting influences the operation of [Check for the high-water mark](#). If the setting is **Enabled**, then the user will be 'warned' of any failure to access a file during those checks. Such failures can arise for example if encrypted ZIP files are attached, or the document is in a format inaccessible to Classifier (e.g. an old PDF format). Further details can be found under [Attachment Handling](#).

Watermarks Use Marking Format Font

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / Classifier [Application Settings](#)

Note: This setting only applicable to **Microsoft Word**.

This setting supports controls the effect of adding a Watermark as the result of an Add a Watermark rule firing:

- **Disabled (Default):** Classifier will set the Watermark font to Calibri.
- **Enabled:** Classifier will set the Watermark font to the first font used in the applicable designated marking format.

General Settings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / General [Settings](#)

These settings are common to multiple applications, although a feature may only be applicable to a subset of applications.

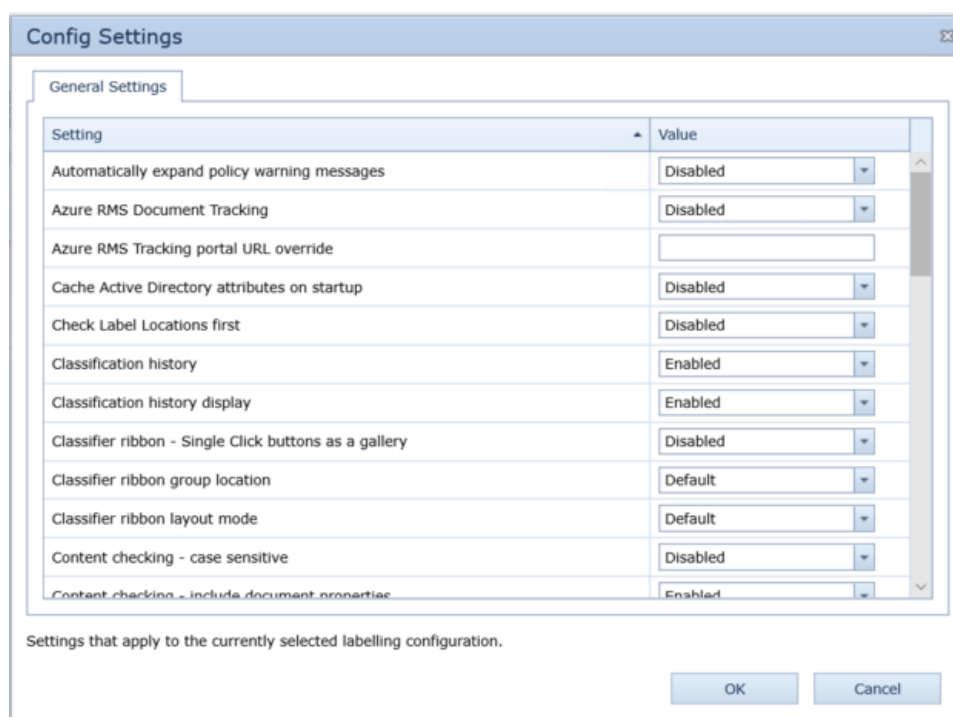


Figure: Configuration Settings: General Settings.

The settings and their applicability are summarised in the table below:

Note: Classifier Mail Add-in may sometimes be referred to as OWA 2013/2016.

Key to Table

One of: Outlook / OWA) / Notes / Mob / MailAdd-in / Word / Excel / PowerPoint / Project / Visio / CAD / SharePoint / File the applications Application supports the setting.

(A): The feature is automatic (not configurable).

(Blank): The feature is not supported by the application.

| Item | Outlook | OWA | Mail Add-in | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint File Cl API Box |
|--|---------|-----|-------------|-------|--------|------|-------|------------|----------------|-----|----------------------------|
| Automatically expand policy warning messages | Outlook | OWA | | Notes | Mobile | Word | Excel | PowerPoint | Project+ Visio | CAD | SharePoint+ File |
| Azure RMS Document Tracking Facility | | | | | | Word | Excel | PowerPoint | | | |
| Azure RMS Tracking portal URL override | | | | | | Word | Excel | PowerPoint | | | |
| Cache Active Directory attributes on startup | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | |
| Check Label Locations first | Outlook | OWA | MailAdd-in | Notes | Mobile | Word | Excel | PowerPoint | Project+ Visio | CAD | SharePoint +File + Box |
| Classification History | | | | | | Word | Excel | PowerPoint | | | |
| Classification History Display (2010 or later) | | | | | | Word | Excel | PowerPoint | | | |
| Classifier Ribbon Single Click Buttons as a Gallery | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | |
| Classifier ribbon group location | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | SharePoint +File |
| Content checking - case sensitive(3.9) | Outlook | | | | | Word | Excel | PowerPoint | | | |
| Content checking - include document properties (3.9) | Outlook | | | | | Word | Excel | | | | |
| Custom format for 'Classifier Auditing' | Outlook | O | | Notes | Mobile | Word | Excel | PowerPoint | Project+ Visio | CAD | SharePoint +File + Box |
| Custom format for 'Label Summary' custom document property | | | MailAdd-in | | | Word | Excel | PowerPoint | Project+ Visio | CAD | |
| Custom format for Portion marking | Outlook | | | | | Word | Excel | PowerPoint | | | |
| Custom format for Summary Markings | Outlook | OWA | | Notes | Mobile | Word | Excel | PowerPoint | Project+ Visio | CAD | SharePoint +File |
| Disable OK on Label dialog if mandatory values are missing | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | |
| Display of Favourites button | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | |

| Item | Outlook | OWA | Mail Add-in | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint File Cl API Box |
|---|---------|-----|---------------|-------|--------|------|-------|------------|----------------|-----|----------------------------|
| Display of Label Dialog launch button | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | CAD | |
| Indicate mandatory selector check failures | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | |
| Label integrity check failure error message | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | File |
| Masking of Selectors against Clearance | Outlook | OWA | | | | Word | Excel | PowerPoint | Project+ Visio | CAD | |
| Minimise space between selector value buttons on ribbon | Outlook | | | | | Word | Excel | PowerPoint | | | |
| Remove Classifier Options from the Ribbon Bar | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | File |
| Select value for Masked Selector | Outlook | OWA | | | | Word | Excel | PowerPoint | Project+ Visio | CAD | |
| Show 'Help' button on ribbon bar | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | SharePoint +File |
| Show labeller 'Clear' button | Outlook | OWA | MailAdd-in(A) | Notes | | Word | Excel | PowerPoint | Project+ Visio | | SharePoint +File |
| Show labeller 'Default' button | Outlook | OWA | MailAdd-in(A) | Notes | | Word | Excel | PowerPoint | Project+ Visio | | SharePoint +File |
| Single Click best match | Outlook | OWA | MailAdd-in | Notes | | Word | Excel | PowerPoint | Project+ Visio | CAD | SharePoint +File |
| Summary bar size changes are preserved | | | | | | Word | Excel | PowerPoint | Project+ Visio | | |
| Summary Marking as black text on a white background | Outlook | | | | | Word | Excel | PowerPoint | Project+ Visio | | |
| Text displayed when a distribution list fails to expand | Outlook | OWA | | | | | | | | | |
| Text displayed when attachment check failed to complete | Outlook | OWA | | Notes | | | | | | | |
| Text displayed when Folder View labelling fails | Outlook | OWA | | | | | | | | | |


| Item | Outlook | OWA | Mail Add-in | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint File Cl API Box |
|---|---------|-----|-------------|-------|--------|------|-------|------------|---------------|-----|----------------------------|
| Text displayed when mandatory label is absent | Outlook | OWA | | Notes | Mobile | Word | Excel | PowerPoint | Project+Visio | CAD | SharePoint+File |
| Text displayed when originator check failed to complete | Outlook | OWA | | | | | | | | | |
| Text displayed when prompting for a reason for ignoring policy warnings | Outlook | OWA | | Notes | Mobile | Word | Excel | PowerPoint | Project+Visio | CAD | SharePoint+File |
| Text displayed when recipient check failed to complete | Outlook | OWA | | Notes | Mobile | | | | | | |
| Text displayed when RMS protection failed to complete | Outlook | | | | | Word | Excel | PowerPoint | | | |
| Text displayed when S/MIME application failed to complete | Outlook | OWA | | | | | | | | | |
| Text to display for notifying of policy checks performed | Outlook | OWA | | Notes | Mobile | Word | Excel | PowerPoint | Project+Visio | CAD | SharePoint+File |
| Text to display for resolution of policy issues | Outlook | OWA | | Notes | Mobile | Word | Excel | PowerPoint | Project+Visio | CAD | SharePoint+File |
| Text to display if attachment markings are inconsistent | Outlook | OWA | | Notes | | | | | | | |
| Text to display if no marking is available | Outlook | OWA | MailAdd-in | Notes | Mobile | Word | Excel | PowerPoint | Project+Visio | CAD | SharePoint+File |
| URL for your labelling help site | Outlook | OWA | | Notes | | Word | Excel | PowerPoint | Project+Visio | CAD | SharePoint+File |
| Use Alternate Data Stream (ADS) for Visio files | | | | | | | | | | | File + API |
| User defined RMS protection | | | | | | Word | Excel | PowerPoint | | | |

Automatically Expand Policy Warning Messages


Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to Classifier Mail Add-in.

- **Disabled (Default):** The text displayed in policy check dialogs will not be automatically expanded when the dialog is first displayed, and will include the button shown below, allowing the user to view any additional text.

Click for more information 

- **Enabled:** If enabled, Classifier automatically expands the text the first time the [Policy](#) Check Dialog is displayed, and includes the following button:

Click for less information 

Azure RMS Document Tracking

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Only applicable to Word, Excel and PowerPoint.

This setting is only effective if **RMS Client 2.1** has been installed.

The setting can be used to provide the user with the means to invoke RMS Tracking from the Classifier Options menu.

- **Disabled (Default):** The **Track Document** action does not appear in the **Classifier Options** menu.
- **Enabled:** A **Track Document** action appears in the **Classifier Options** menu.

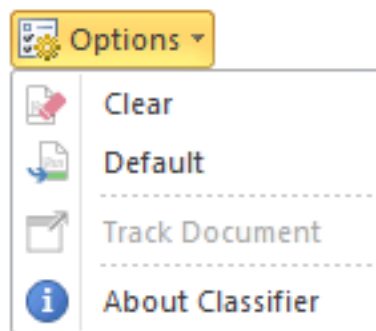


Figure: RMS Track document.

The action is greyed until the document has been saved and has had RMS protection applied.

Selecting the **Track Document** action invokes the RMS tracking sequence - interacting with the relevant portal.

The default portal address can be overridden using the [Azure RMS Tracking portal URL override](#) setting.

Azure RMS Tracking Portal URL Override

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Only applicable to Word, Excel and PowerPoint.

Note: This setting is only relevant if [Azure RMS Document Tracking](#) is **Enabled**.

It allows you to override the default RMS portal address by the supplied URL.

Cache Active Directory Attributes on Start-up

Admin: [Labelling Configurations](#) {configuration} [Configuration Settings](#) / [General Settings](#)

Conditions and Marking Formats may be defined that refer to Active Directory attributes. By default Classifier will cache such attributes when they are first referenced. This setting allows you to direct Classifier to cache the attributes when the application starts.

- **Disabled (Default):** Classifier will only cache Active Directory attributes when first referenced.
- **Enabled:** Classifier will cache Active Directory attributes when the application starts.

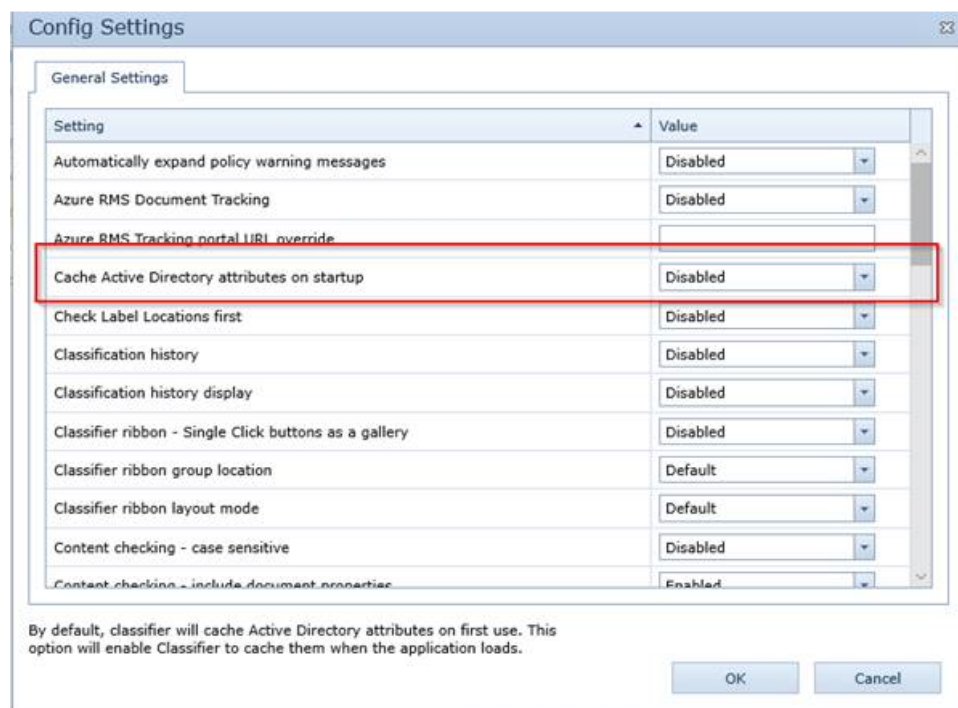


Figure: The setting for the Cache Active Directory attributes on startup.

Check Label Location First

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is usually only relevant in certain specialised environments. It is not applicable to **Classifier Mail Add-in**.

- **Disabled (Default):** Classifier will check for an internal Classifier label before checking [Label Locations](#).
- **Enabled :** Classifier will check Label Locations for a label value before checking for an internal Classifier label.

Classification History

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only applicable to **Word, Excel and PowerPoint**.

- **Disabled (Default):** Classifier will not maintain classification history information.
- **Enabled :** Classifier will store classification change history within the document for supported file types each time the document is saved.

[Classification History Display](#) controls whether the **user** can **see** and **Clear** the **history information** but **only for Office 2010 or later**.

Classification History Display

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

- **Disabled (Default):** The user will not be able to view any stored [Classification History](#).
- **Enabled:** The user will be able to view any stored Classification History

If this setting is **Enabled**, the **Classification History** is available via a **separate File > Classifier > Classification History** option on the **backstage view** which will present the following dialog.

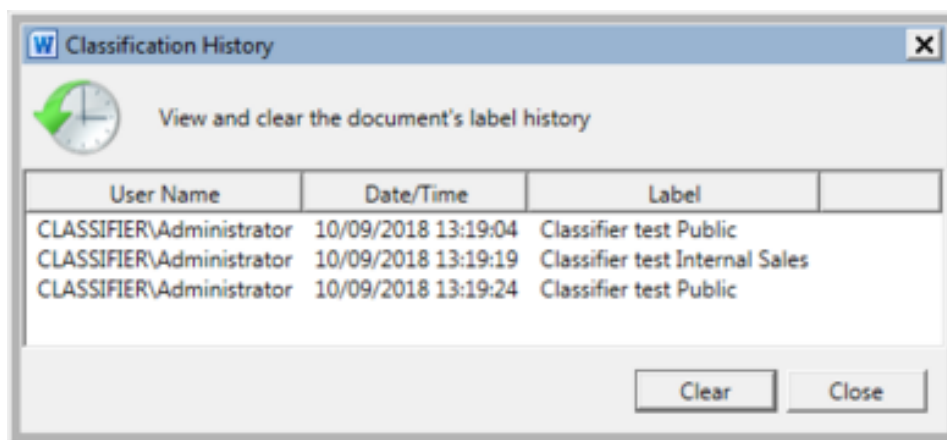


Figure: Classification History Display.

The user may **Clear** all the history.

The text presented to the user may be configured using the [User Interface Definition](#) mechanisms (see [Classification History \(UID\)](#) for further details).

Classification Ribbon Single Click as a Gallery

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

The option setting on the CAS under **General Settings-> Classifier Ribbon button as a gallery** allows **Single Click UI display** to provide smaller real estate for **Classifier Client icons on the Office Ribbon**.

Note: By default this setting is turned off so it needs to be switched to **ENABLED**.

Note: This setting is not applicable to **OWA Classifier, Classifier Mail Add-in, Notes Classifier or Mobile Classifier**.

This setting defines how Classifier inserts the Classifier label ribbon group. It supports two values and by default it is Disabled :

- **Disabled:** With the option disabled for Classifier Ribbon button as a gallery , then the normal display of Classifier icons is displayed on the Office Ribbon bar as shown below in the three different modes.
- **Enabled:** With the option enabled for Classifier Ribbon button as a gallery , then the smaller real estate display of Classifier icons is applied to the Office Ribbon.

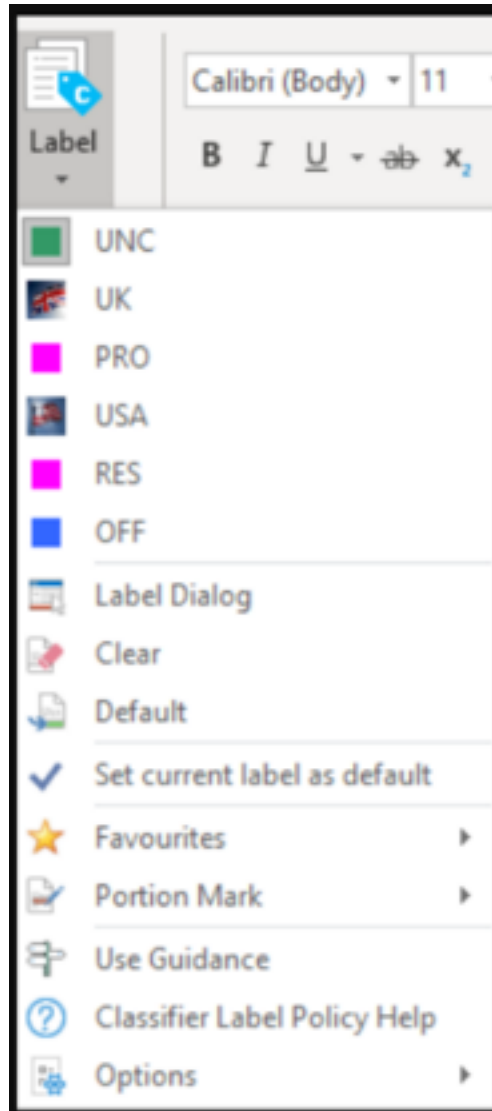


Figure: Standard mode with gallery DISABLED.

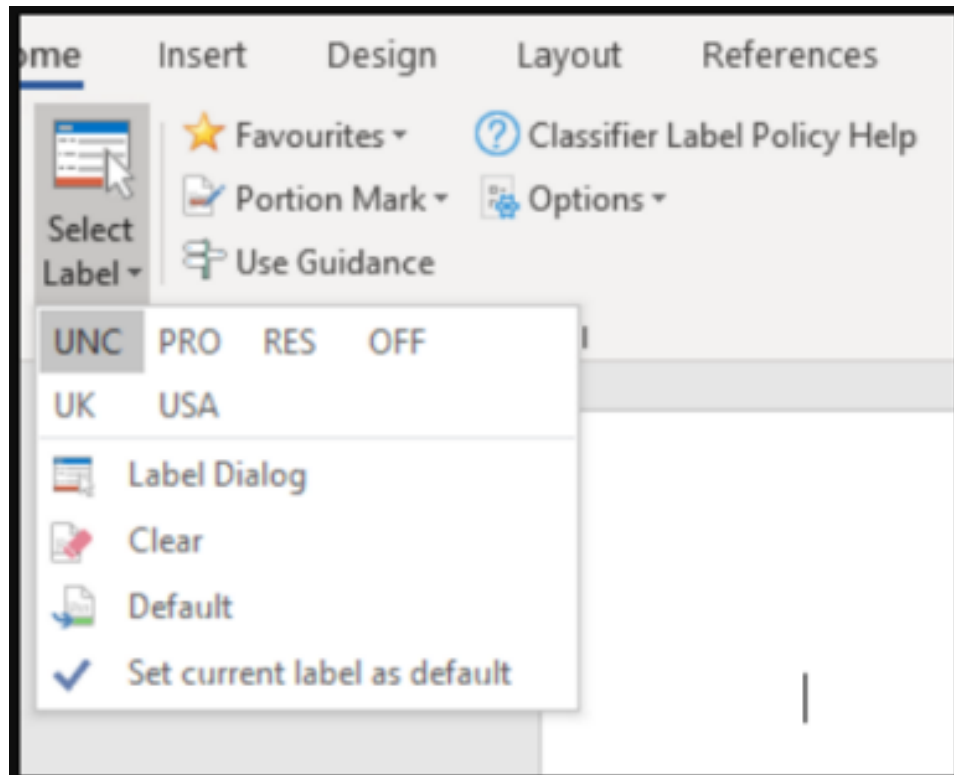


Figure: Standard mode with gallery ENABLED.

Classifier Ribbon Group Location

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / General Settings](#)

Note: This setting is not applicable to **OWA Classifier**, **Classifier Mail Add-in**, **Notes Classifier** or **Mobile Classifier**.

This setting defines how Classifier inserts the Classifier label ribbon group. It supports four values:

- **Default:** Classifier will insert the Classifier ribbon bar group after the Clipboard group in most application situations, but after the Respond group in an Outlook Read message window.
- **First:** Classifier will attempt to determine the first group in the ribbon bar and insert the Classifier group before this (first) group.
- **Last:** Classifier will insert the Classifier ribbon bar group at the end of the current groups in the ribbon bar.
- **Custom Tab:** Classifier will present the Classifier Label selection group as a Custom Tab as per the example below.

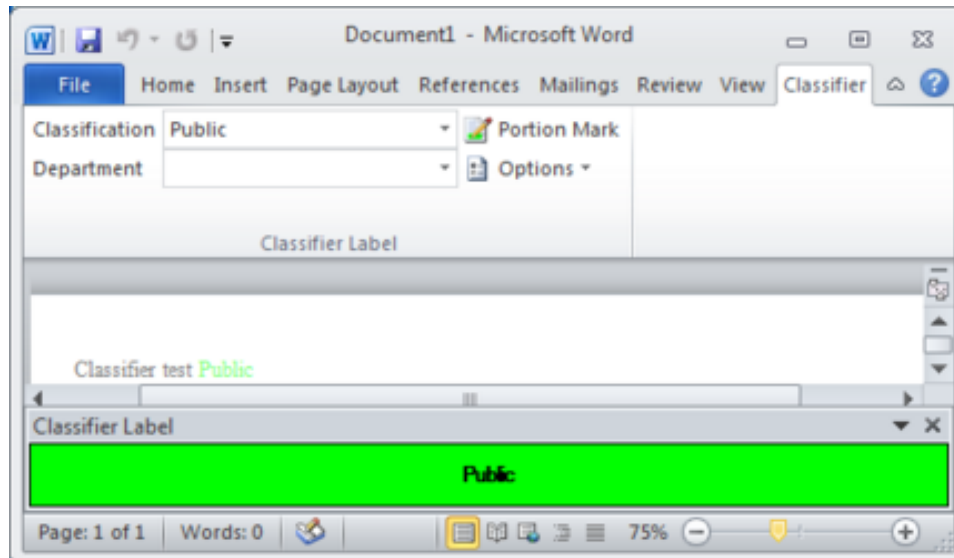


Figure: Classifier Labeller Custom Tab.

Note: Other software and or site/user configuration of the ribbon bar may have an effect on where the Classifier ribbon group actually appears.

Classifier Ribbon Layout Mode

The Classifier ribbon layout options can be found under **Labelling Configuration>Configuration Settings>General Settings>Properties** .

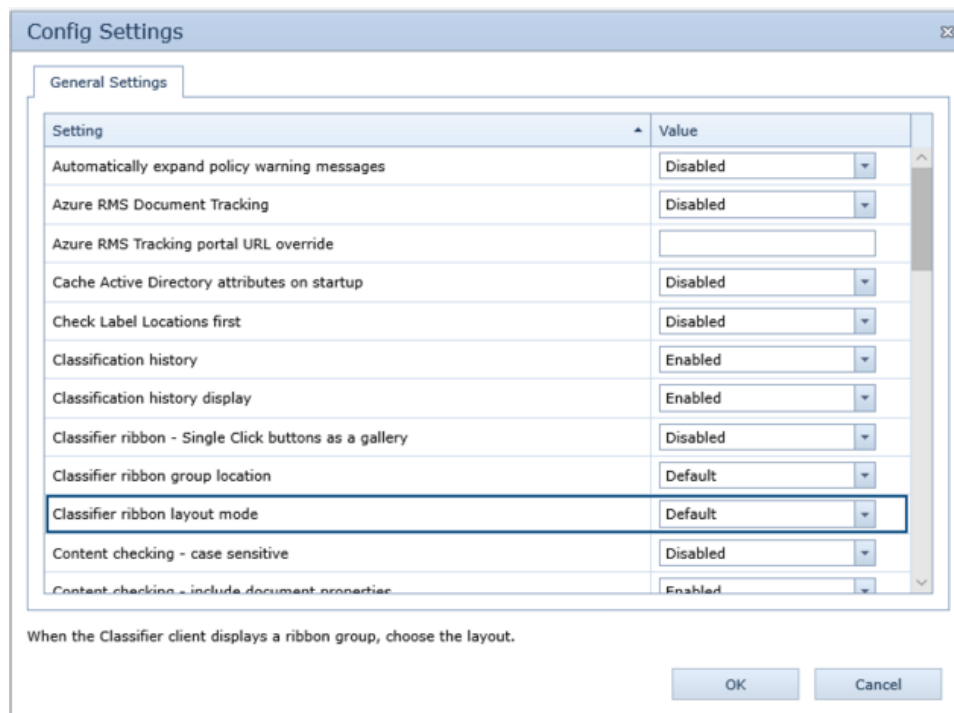


Figure: Classifier ribbon layout mode setting.

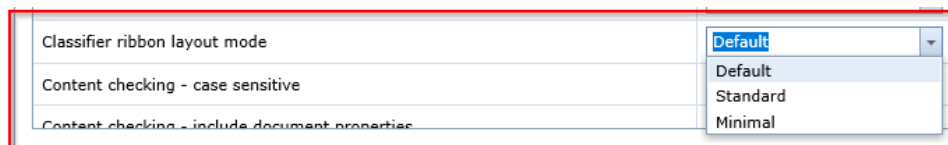


Figure: Classifier ribbon layout mode value options.

The Classifier ribbon layout options:

- **Default mode** : As it exists today.
- **Standard mode** : This mode will move the label options into a single drop down split button and the other menu and options are rationalised into more meaningful groups. The label split button will contain a gallery of single click elements as well as options which relate directly to the label.
- **Minimal mode**: This mode will show just one button on the ribbon. This split button contains all the Classifier functionality in one place.

Content Checking - Case Sensitive

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only applicable to Microsoft Outlook, Word, Excel and PowerPoint.

- **Disabled (Default)**: The matching performed is case insensitive (e.g. apples and APPLES are the same).
- **Enabled**: Case sensitive matching is performed.

Content Checking - Include Document Properties

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only applicable to Microsoft Outlook, Word and Excel.

- **Disabled**: Document properties are skipped when performing content checks.
- **Enabled (Default)**: Document properties are also checked when performing content checks.

Custom Format For 'Classifier Auditing'

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in**.

Note: The auditing format used should be appropriate and set up from day one so Reporting can make use of earlier events even if it wasn't installed when the events were generated.

Note: To improve the parsing of individual selector values, the marking prefix and suffix of selector elements in the marking format, should not be a space character.

The name of the Marking Format to be used for incorporating a Classifier label into a classifier log entry.

If this value is not set then the value associated with [Custom Format for Summary Markings](#) will be used.

Custom Format For 'Label Summary' Custom Document Property

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only applicable to **Office Classifier**.

The name of the **Marking Format** to be used for storing a Classifier label into the Classifier '**private**' document property **bjDocumentSecurity Label**([Document Properties \(Office Classifier\)](#)).

If this value is not set then the value associated with [Custom Format for Summary Markings](#) will be used.

Custom Format For Portion Marking

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This feature only applies to **Word, Excel, PowerPoint** and **Outlook**.

This is the name of the **Marking Format** to be used when inserting a user selected [Portion Mark](#) in an **Office Classifier document (Word / Excel / PowerPoint)**, or an **Outlook email (Email Classifier)**.

This [Marking Format](#) should include delimiters around the value to ease user identification in the content and to allow the **Email Classifier** to find markings in some situations.

You may wish to configure the alternative '**Portion Marking**' Selector values for use in this Marking Format as described in [Properties \(Selector Values\)](#) / Portion.


Further details of [Portion Marking](#) can be found in [Portion Marking](#) .

Note: This setting must be configured before the Portion Mark action will appear in the application ribbon bar.

Note: Any Environment properties included in a Marking Format may not appear if that Marking Format is assigned as the Custom Format for Portion Markings.

Custom Format For Summary Markings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: (Summary Marking (Default)) If this setting is blank, Classifier generates a simple text **Summary Marking** using space separated selector value names, with a background colour corresponding to the first selector value in the current Classification (label) that has a colour associated. If no colour is found, Classifier will use an in-built default (FFFFC8 )

This is the name of the [Marking Format](#) to be used in the following situations:

- When presenting the **Summary Marking** in the **Information Bar** in a document or message window. The display of the **Summary Marking** is controlled by the [Show Summary Marking in Task Pane](#) for **Email Classifier** or **Office Classifier** and [Show Summary Marking in Title Bar](#) (**Word / Excel / PowerPoint**) settings.

Note: Under OWA Classifier, Classifier Mail Add-in, Notes Classifier and Mobile Classifier the summary marking is always presented (there is no configuration setting).

- Label summary at the bottom of [Label Selection Dialog](#).
- The 'label' button at the top of the policy check dialog.
- When adding a label to the title of office documents.
- When presenting a list of [Favourites](#).
- When presenting a list of [Portion Mark](#) values.
- When presenting a list of [Recently used labels and Portion Marks](#).

If this setting is blank Classifier generates a simple text Summary Marking from the selector values in the label.

Note: Given the usage listed above, you may find it useful to keep the Summary Marking format as simple as possible (e.g. omit the Label Configuration name).

Note: Any Environment properties, or Document properties included in a Marking Format may not appear if that Marking Format is assigned as the Custom Format for Summary Markings.

Disable OK On Label Dialog If Mandatory Values Are Missing

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / General Settings](#)

Note: Only applicable to **Microsoft Outlook, Word, Excel, PowerPoint, Project and Visio**.

The label selection dialog presented in various circumstances includes an **OK** button.

By default the **OK** button is enabled even if there are mandatory selectors missing and the rule is configured as **Prevent**. This may lead to user confusion.

This setting can be used to ensure that if a rule is configured as **Prevent** the **OK** button is disabled until the user has selected a valid classification (rules configured as **Warn** will continue to enable the **OK** button).

- **Disabled (Default):** The **OK** button is available to the user even if the rule is configured as **Prevent**.
- **Enabled :** The **OK** button is disabled if the rule is configured as **Prevent** until the user selects a valid classification.

Display of Favourites Button

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / General Settings](#)

Note: The feature is **not** applicable to **OWA Classifier, Classifier Mail Add-in**, nor under **Notes 8**, nor **Mobile Classifier**.

This setting controls the visibility of the [Favourites](#) feature in the Label ribbon bar.

- **Disabled (Default):** The **Favourites** button does not appear.
- **Enabled:** The **Favourites** button appears and the features are available to the user.

Display of Label Dialog Launch Button


Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / General Settings](#)

Note: The setting is **not** applicable to **OWA Classifier, Classifier Mail Add-in, Notes Classifier** or **Mobile Classifier**.

In the following circumstances, users may require access to a full Label selection dialog:

- Use **Single Click with pre-defined labels** and that it is **Enabled** for the policy.
- Not all selectors are accessible via the ribbon (e.g. [Text entry](#) etc.).

If either of the above applies, then either a Label dialog button or a dialog launcher glyph is presented according to this setting.

- **Disabled (Default):** A **Classifier Label** button does **not** appear - the dialog launcher glyph, a  will appear instead.

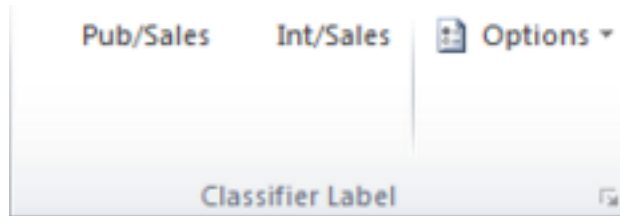


Figure: Classifier Label Glyph.

- **Enabled:** A **Classifier Label dialog** button appears rather than the glyph.



Figure: Classifier Label button shown.

The single click label dialog changes to present a **Label Dialog** button.

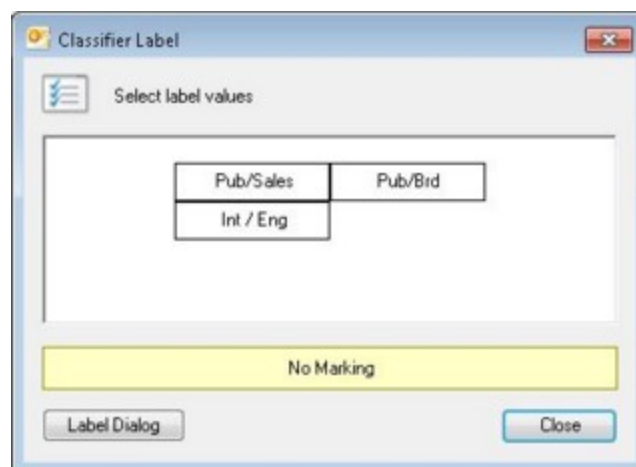


Figure: Single Click:Label Dialog button.

Client Configuration Registry Settings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: The setting is not applicable to OWA Classifier, Classifier Mail Add-in, Notes Classifier, Mobile Classifier or SharePoint Classifier.

This setting provides control over whether the * appears alongside missing mandatory selectors in the label dialog.

- **Disabled:** The * will not appear alongside missing mandatory selectors in the label dialog.
- **Enabled (Default):** The * will appear alongside missing mandatory selectors in the label dialog.

Label Integrity Check Failure Error Message

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This item is only significant in very specific circumstances configured under Classifier Support guidance.

Masking Of Selectors Against Clearance

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to Classifier Mail Add-in, Notes Classifier or Mobile Classifier.

- **Disabled :** The selector values available for selection by the user will comprise all the Selector values available in the policy.
- **Enabled:** The selector values available to the user comprise only those values marked available in the policy for which the user is cleared (but see also the second bullet below).

Initial value for a Masked Selector

If [Select value for Masked Selector](#) is **Disabled** :

- If a default is defined and not masked, then select the default.
- If there is no default defined, then the selector value is blank.

If [Select value for Masked Selector](#) is **Enabled** :

- If a default value is defined and not masked, then select the defined default.
- If there is no default defined, or the default is masked, then select the first available value.
- If the user opens a labelled draft message, or an labelled document containing a selector value for which they are not cleared, then the Label UI includes that existing value in the available list.

Minimise Space Between Selector Value Buttons On Ribbon

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

This setting provides additional control over the placement of buttons on the ribbon.

Note: Checkboxes in the ribbon still appear in columns.

- **Disabled (Default):** Selector value buttons are placed at intervals determined by the longest item in a column.
- **Enabled :** Selector value buttons are placed next to each other on ribbon bar row so as to minimise space between them.

Remove Classifier Options from the Ribbon Bar

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting has no effect under versions of Microsoft Office prior to 2010.

Note: Only applicable to **Email and Office Classifier**.

- **Enabled:** The [Label Options](#) menu no longer appears in the [Ribbon](#) Bar. The various actions can be found as follows: **Clear**, [Default](#) and **Help** are available if the user invokes the [Label Selection dialog](#).

Note: In some circumstances the label dialog is not available (e.g. there are three or less ribbon bar selectors) and the user will not have access to the **Clear** and **Default** actions.

Note: You can force Help to be displayed using the [Show 'Help' button on ribbon bar](#).

[About Classifier](#) can be found in the **Office Backstage View** (Select the **File** tab and click **Classifier**).

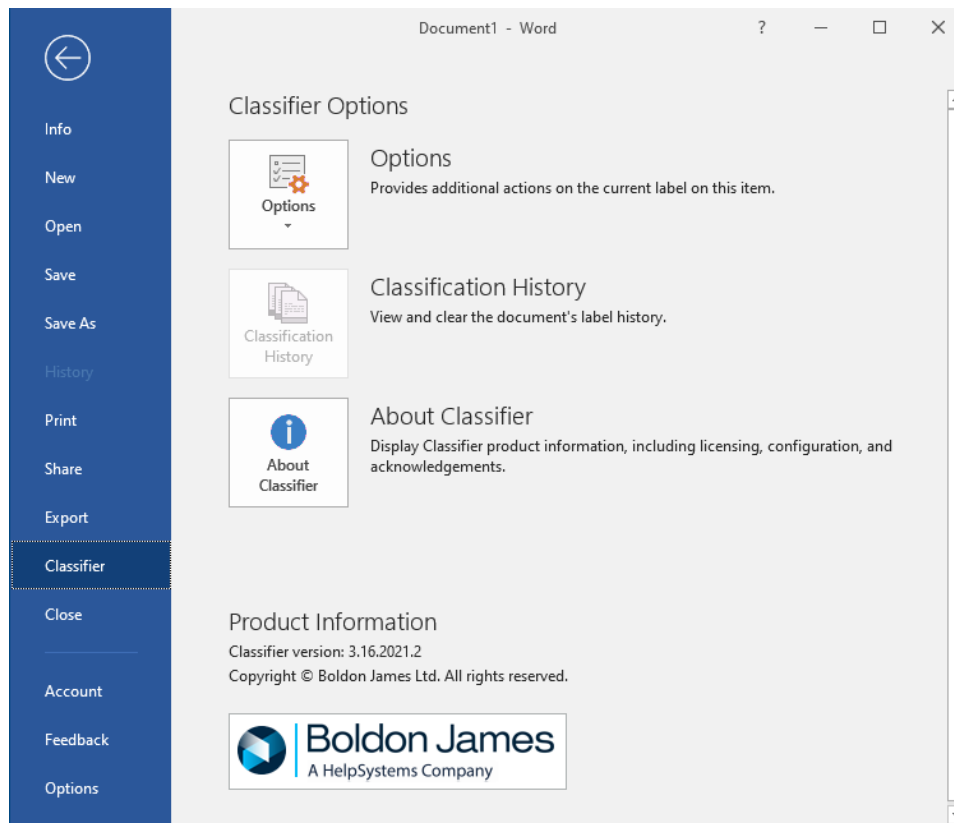


Figure: BackStage View.

- **Disabled** : Classifier [Label Options](#) appear in their usual location on the **Ribbon Bar**.

Select Value For Masked Selector

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only relevant if Masking of Selectors against Clearance is Enabled.

Note: Only applicable to **Email, OWA** and **Office Classifier**.

This setting can affect the initial value displayed for a selector when [Masking of Selectors against Clearance](#) is Enabled . It is configured by selecting Enabled or Disabled (default) from the drop down menu available in the right hand cell.

- **Disabled (Default):** See description of [Masking of Selectors against Clearance](#) for the effects.
- **Enabled:** See description of [Masking of Selectors against Clearance](#) for the effects.

Show 'Help' Button On Ribbon Bar

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **OWA Classifier, Classifier Mail Add-in, Notes Classifier** or **Mobile Classifier**.

This setting defines how access to any site defined Help is presented to the user:

- **Enabled** : A **Help** button appears as a separate button above **Options** within the Classifier Ribbon Bar.
- **Disabled (Default):** A **Help** action appears under the **Options** menu in the Classifier Ribbon Bar.

Show Labeller 'Clear' Button

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in** or **Mobile Classifier**.

This setting defines whether the Classifier [Clear](#) action appears under Classifier Label Options (outlook only) and / or on the Label selection dialog.

- **Enabled (Default):** The [Clear](#) label action is available.
- **Disabled** : The [Clear](#) label action does not appear under Classifier [Label Options](#).

Show Labeller 'Default' Button

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in** or **Mobile Classifier**.

This setting defines whether the Classifier [Default](#) action appears under Classifier [Label Options](#) (outlook only) and / or on the Label selection dialog.

- **Enabled (Default):** The [Default](#) action is available.
- **Disabled:** The [Default](#) action does not appear under Classifier Label Options.

Single Click Best Match

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only relevant if the current policy has [Use Single Click with pre-defined labels](#) enabled.

Note: Not applicable to **Classifier Mail Add-in** or **Mobile Classifier**.

- **Disabled (Default):** The action is that a Single Click button is only highlighted if its associated label value exactly matches the currently selected label value.
- **Enabled:** The button with the best match (if any) to the current label value will be highlighted. This best match is determined using the algorithm described below.

The objectives of the best match algorithm are that if a button is highlighted then all values assigned to that button must appear in the current label, **AND** the only values that appear in the current label that are not assigned to the button should be informational only. If there is more than one exact / best match then only one button will be highlighted.

The Best match **algorithm** operates as follows:

If the current label exactly matches the label configured for a button, then that button is highlighted.

If there is no exact match, then look for a button that:

- Matches all clearance relevant selector values in the current label (Note that 'no value selected' is significant in this situation

AND

- For information only selectors [ones that do not have **Include this selector in clearance and attachment checks** checked, see below Edit values (Selectors)].
 - Either the button has no value assigned for the selector

OR

- The selector value assigned to the button exactly matches the value selected in the label

Example:

Consider a configuration containing three selectors: **Classification**, **Department** and **Project** where the Project is informational only, and the single click buttons below are defined:

| | | |
|----------------------------|------------------|-----------|
| Public | Public / Sales | -/Sales/- |
| Public / Sales / Project X | Internal / Board | |

| Label Value | Single Click Button Highlighted |
|----------------------------|---------------------------------|
| Public | Public |
| Public / Project Y | Public |
| External / Engineering | No match |
| Public / Sales / Project Y | Public / Sales |
| Internal / Engineering | No match |
| Public / Board | No match |
| - / Sales / Y | - / Sales / - |

Note: In the last case no value selected for Classification is significant.

Summary Bar Size Changes Are Preserved

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Only applicable to Office documents.

- **Disabled:** Each new instance of a Classifier application will show the Summary bar, and the user may alter the size of the Summary bar for that instance only.
- **Enabled (Default):** The user may alter the size of the Summary bar (or Close), and the setting is remembered.

Summary Marking As Black Text On A White Background

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to OWA Classifier, Classifier Mail Add-in, Notes Classifier or Mobile Classifier.

This setting operates in conjunction with the [Custom format for Summary Markings](#) and is set by selecting **Enabled** or **Disabled** (default) from the drop down menu available in the right hand cell.

- **Disabled (Default):** The Marking format and Selector value colour settings are used when presenting a Summary Marking.
- **Enabled :** All Marking format and Selector value colour settings is ignored, and the Summary Marking presented will appear as Black text on a White background.

Text Displayed When A Distribution List Fails To Expand

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only relevant to Email and OWA Classifier.

Unusual conditions may arise where Classifier is unable to expand a Distribution Group when performing [Check clearance for attachments, recipients or originator](#) rules.

Classifier will prompt the user proffering a Policy check the dialog with a **Back** choice, and depending upon the **Warn / Fail** setting a **Continue** choice.

The dialog includes text summarising the condition. By default this will be:

Failed to expand the distribution list. Please contact your administrator.

This default text may be replaced by site defined text via this setting. The setting is configured via the drop down list in the right hand column.

- **Disables**; Selecting the blank entry Disables the setting (the default text is presented).
- **Enables**: Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed When Attachment Check Failed To Complete

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only relevant to **Email, OWA** and **Notes Classifier**.

Classifier may be unable to complete configured [Check for the high-water mark](#) rules ([Check rules](#)). Classifier will then prompt the user proffering the Policy check dialog with a **Back** choice, and depending upon the '**Warn**' / '**Fail**' setting a **Continue** choice.

The dialog includes text summarising the condition - by default this will be:

If the Rule is set to **Prevent** :

1. The following attachments have a higher label than that of this message.
2. Click **Remove** to delete these attachments or **Back** to return to the message.

If the Rule is set to **Warning** :

1. The following attachments have a higher label than that of this message.
 2. This default text may be replaced by site defined text via this setting.
 3. The setting is configured via the drop down list in the right hand column.
- **Disables**: Selecting the blank entry Disables the setting (the default text is presented).
 - **Enables**: Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed When Folder View Labelling Fails

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Only applicable to **Email** and **OWA Classifier**.

This setting is only relevant if the **Outlook** or **OWA** setting [Allow Folder View labelling](#) is **Enabled** .

The setting defines the text to be displayed to the user if an attempt to set or modify a label on an item in a folder fails (e.g. because the user does not have the necessary permissions to the item).

Text Displayed When Mandatory Label Is Absent

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in**.

This setting is only applicable if [Show label dialog when mandatory label](#) is **Enabled** , and a selector is designated as mandatory by an applicable check [Mandatory Selectors](#) rule is configured **AND** the Warn/Prevent in the rule is set to **Prevent** .

This setting defines the text that appears at the top of the body of the dialog shown below.

The dialog appears if the user attempts to send a message with one or more selectors designated as mandatory in an applicable rule blank.

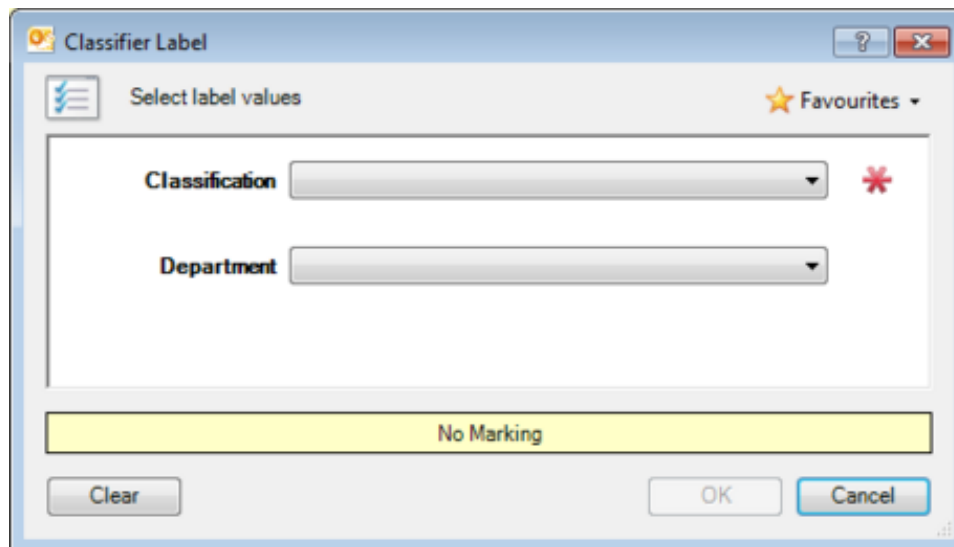


Figure: Mandatory Label required dialog.

The setting is configured via the drop down list in the right hand column.

- **Disables:** Selecting the blank entry Disables the setting (the default text is presented).
- **Enables:** Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed When Originator Check Failed To Complete

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / General Settings](#)

Note: This setting is only applicable to Email and OWA Classifier.

Classifier may be unable to complete configured [Check clearance for originator](#) rules. Classifier will then prompt the user proffering Policy check dialog with a Back choice, and depending upon the **Warn / Fail** setting a **Continue** choice.

The dialog includes text summarising the condition - by default this will be:

- **An error occurred while determining whether you are cleared to send a message with the selected label. Please contact your administrator**

This default text may be replaced by site defined text via this setting.

The setting is configured via the drop down list in the right hand column.

- **Disables:** Selecting the blank entry Disables the setting (the default text is presented).
- **Enables:** Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed When Prompting For A Reason For Ignoring Policy Warnings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in**.

This setting allows you to configure the text displayed (by associating a User Message) when a user is prompted to enter a reason for ignoring policy warnings.

Text Displayed When Recipient Check Failed To Complete

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only applicable to **Email, OWA, Notes** and **Mobile Classifier**.

Classifier may be unable to complete configured [Check clearance for recipients](#) rules (Check rules). Classifier will then prompt the user proffering [Policy](#) check dialog with a **Back** choice, and depending upon the **Warn / Fail** setting a **Continue** choice.

The dialog includes text summarising the condition - by default this will be:

- **An error occurred while clearance checking the recipients. Please contact your administrator.**

This default text may be replaced by site defined text via this setting.

The setting is configured via the drop down list in the right hand column.

- **Disables:** Selecting the blank entry Disables the setting (the default text is presented).
- **Enables:** Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed When RMS Protection Failed To Complete

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only relevant to **Email Classifier** and **Office Classifier** (but excluding Project and Visio).

Classifier may be unable to complete configured Apply this RMS policy rules ([Apply rules](#)). Classifier will then prompt the user proffering Policy check dialog with a **Back** choice.

The dialog includes text summarising the condition - by default this will be:

- **Failed to apply RMS protection**

This default text may be replaced by site defined text via this setting.

The setting is configured via the drop down list in the right hand column.

- **Disables:** Selecting the blank entry Disables the setting (the default text is presented).
- **Enables:** Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed When S/MIME Application Failed To Complete

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only relevant to Email and OWA Classifier.

Classifier may be unable to complete configured Apply S/MIME security rules ([Apply rules](#)). Classifier will then prompt the user proffering Policy check dialog with a **Back** choice.

The dialog includes text summarising the condition, by default this will be:

- **Failed to apply S/MIME. Ensure Email Security is configured correctly in Outlook**

This default text may be replaced by site defined text via this setting.

The setting is configured via the drop down list in the right hand column.

- **Disables:** Selecting the blank entry Disables the setting (the default text is presented).
- **Enables:** Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text To Display For Notifying Of Policy Checks Performed

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in**.

Classifier includes a default text string that appears in the user dialog presented if a Policy check ([Check rules](#)) is configured and fails (e.g. One or more recipients of a message is not cleared for the current label). An example of the dialog is shown below.

The text in the body of the dialog is controlled by the relevant application Rule.

The text that appears at the top of the dialog may be replaced via this setting (applicable to all Classifier applications).

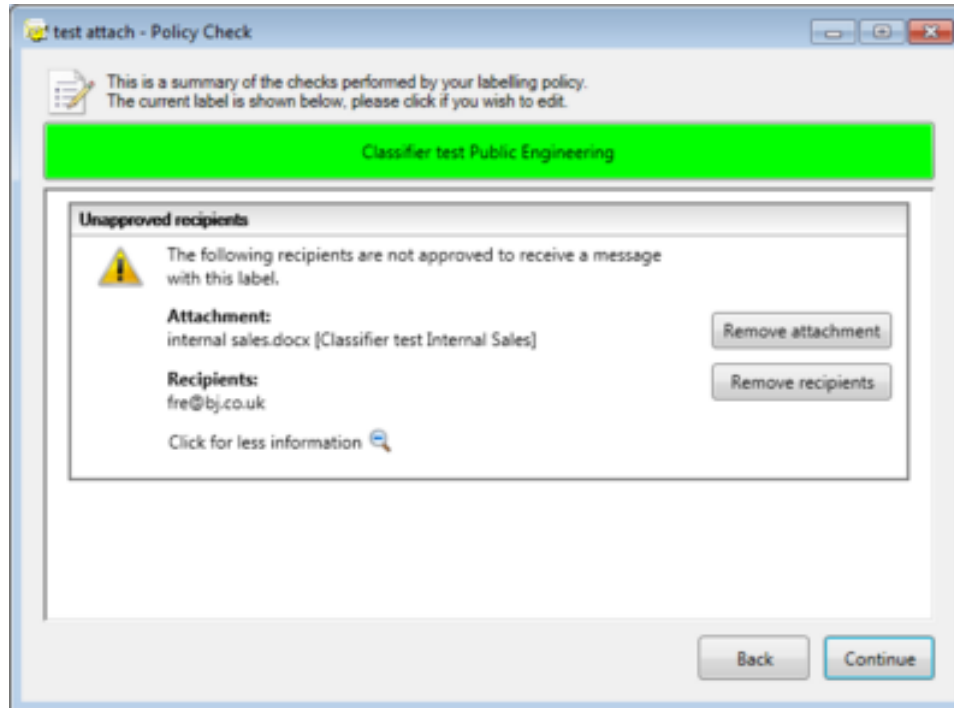


Figure: Example Policy Check dialog.

The setting is configured via the drop down list in the right hand column.

- **Disables:** Selecting the blank entry Disables the setting (the default text is presented).
- **Enables:** Selecting a User Message from the list presented Enables the setting and will replace the default text with the text defined by the User Message.

Text to Display For Resolution Of Policy Issues

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / General Settings](#)

Note: Not applicable to **Classifier Mail Add-in**.

This setting can be used to modify the end user experience when Policy Check issues are resolved via the Policy check dialog.

The default operation if this setting is disabled (blank) is summarised as follows:

- The software performs any configured policy checks.
- If any check fails a dialog is presented including **Remove / Back /** and possibly **Continue** .
- If the Remove action is available and the user chooses **Remove** , and the operation resolves all issues, the underlying operation (e.g. Send / Save) does not require any further user involvement.

This setting defined the **User Message** shown in the dialog presented after successful resolution (e.g. Remove) of Policy Check issues. The setting is configured via the drop down list in the right hand column. Selecting the blank entry Disables the setting. **Selecting a User Message** from the list presented **Enables** the setting.

The example dialog below shows the **User Message Title** appearing as a heading (Resolved policy issues (SETTINGS)), and the message **Text** underneath (Policy resolution has completed).

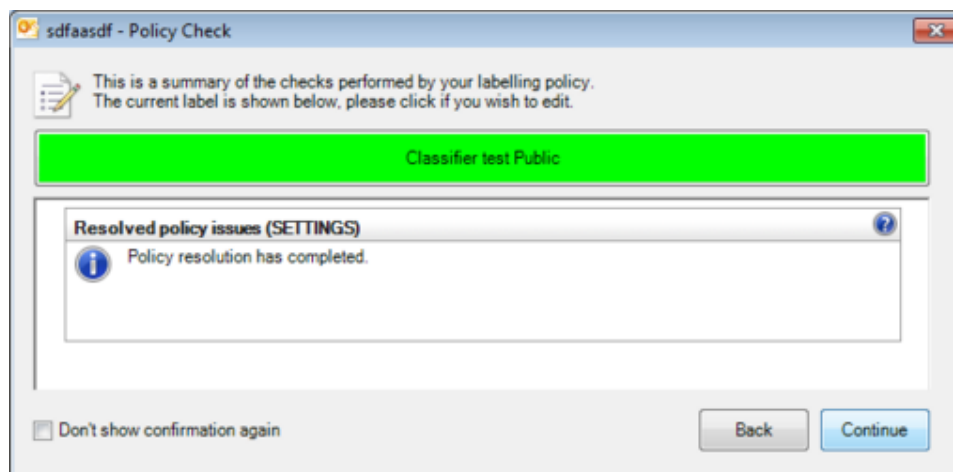


Figure: Policy issue resolution confirmation.

Text To Display If Attachment Markings Are Inconsistent

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: This setting is only applicable to **Email**, **OWA** and **Notes Classifier**, and only if you have enabled the relevant [Ensure attachment markings are consistent](#) setting.

This setting allows you to configure the text presented to the user if an attachment is detected with an inconsistent marking. The check performed is as described in [Ensure attachment markings are consistent](#).

Text To Display If No Marking Is Available

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to Classifier Mail Add-in.

The text defined here (applicable to all Classifier applications) will appear if there is no current label value in:

- The information bar at the bottom of a document window or an email message window if the [Show Summary Marking in task pane](#) setting is **Enabled**.
- The Window title for Word, Excel, and PowerPoint (not 2010/2013) subject to [Show Summary Marking in Title Bar](#) the setting is **Enabled**.

If there is no label defined (and this is valid in the policy), then any Markings using Message Formats (e.g. FLOT) will just include blank space for each element referenced in the Format.

Note: This may be referred to as the "No Label text" and may be displayed if the document is 'unlabelled' or if the document contains Classifier label information, but with no values selected (empty label).

URL For Your Labelling Help Site

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

Note: Not applicable to **Classifier Mail Add-in** or **Mobile Classifier**.

You may use this setting (applicable to all Classifier applications) to define a link to a location that will display label related help information to the user.

The link supplied must be a correctly formed absolute URL. Examples:

- <http://www.xyz.com> is a well formed absolute URL, www.xyz.com is not. It needs a scheme protocol specifier (<http://> in this case) to be a well formed absolute URL.
- <file://products/MS/MSDN%20CD-KEYs.txt> is a well formed absolute URL, <file://products/MS/MSDN CD-KEYs.txt> is not. It needs proper encoding of special characters (such as the space) to be a well formed absolute URL.

Please also note that at present Classifier only supports [http://](#), [https://](#) and [file://](#) schemes for the URLs used in Classifier.

The user can access to this site via the [Link to site defined help](#) action.

Note: Whilst OWA Classifier supports the Help links defined in a Classifier Configuration , the nature of OWA access may mean that a defined link is not accessible due to external access controls (e.g. additional authentication requirements).

Use Alternate Data Stream (ADS) For Visio Files

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

The Visio file plug-in used by Classifier applications requires the Visio application to be installed and runs an instance of Visio when it is invoked. This is generally not sensible in **File Classifier / Classifier API / Power Classifier for Files** contexts, and so by default these applications do not process Visio files.

This setting can be used to direct File Classifier and Classifier API to maintain labels for Visio files in the Alternate Data Stream.

- **Disabled (Default):** The Alternate Data Stream (ADS) will not be used to hold a label value for Visio files.
- **Enabled:** The Alternate Data Stream (ADS) will be used to hold a label value for Visio files.

Note: This setting takes precedence over the File Classifier Application [Use Alternate Data Stream \(ADS\) marking](#) setting. Power Classifier for Files does not use this setting, but version 3.10 supports an equivalent parameter instead. Any label set using this ADS option will **NOT** be detected by the Classifier enabled Visio and vice-versa.

User Defined RMS Protection

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [General Settings](#)

This setting is used to control whether the user is presented with an **Apply Ad Hoc** protection option (or just the **Apply Template** option) when a [Check for RMS protection](#) rule fires.

- **Disabled (Default):** Only the Apply Template option is presented.
- **Enabled :** Both the Apply Template and Apply Ad Hoc protection options are presented.

Label Locations

Admin : [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings / Label Locations](#)

Label Locations ([Marking](#) locations) allows you to tell Classifier the (document and email/webmail) properties that may contain label values that have not been established by Classifier (e.g. messages arriving from another organisation), and to assign relative precedence to the different label locations. If Classifier recognises its own Classifier Label property it always uses this as the label value for the document or email.

Note : You do not have to configure any Label Locations, Classifier will just treat objects that have not been labelled by Classifier as 'unlabelled'.

Email and Document locations are managed by selecting **Configuration Settings > Label Locations** and clicking **Properties**:

The screenshot shows a dialog box titled "Label Locations" with a close button in the top right corner. It is divided into two main sections: "Email" and "Documents".

The "Email" section contains the following text: "Supply the label location and format for labels in emails from other organisations. Classifier will search for these labels in list order starting at the top." Below this is a table with three columns: "Location Type", "Parameter", and "Marking Format". The table is currently empty, displaying "No data to display". To the right of the table are "Up" and "Down" buttons. Below the table are "Add", "Edit", and "Remove" buttons.

The "Documents" section contains the following text: "Supply the label location and format for labels in documents from other organisations. Classifier will search for these labels in list order starting at the top." Below this is a table with three columns: "Location Type", "Property Setting", and "Marking Format". The table is currently empty, displaying "No data to display". To the right of the table are "Up" and "Down" buttons. Below the table are "Add", "Edit", and "Remove" buttons.

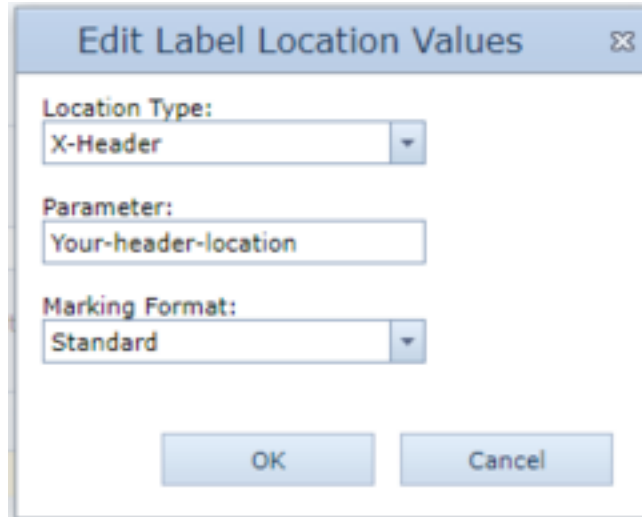
At the bottom of the dialog box are "OK" and "Cancel" buttons.

Figure: Label Locations.

You can **Add** , **Edit** and **Remove** Label Locations by selecting the appropriate **Add** , **Edit** or **Remove** button.

Clicking **Add** will insert a new row containing default settings which you can then **Edit** , which will present a dialog allowing you to change the configured settings.

For email locations the dialog is:

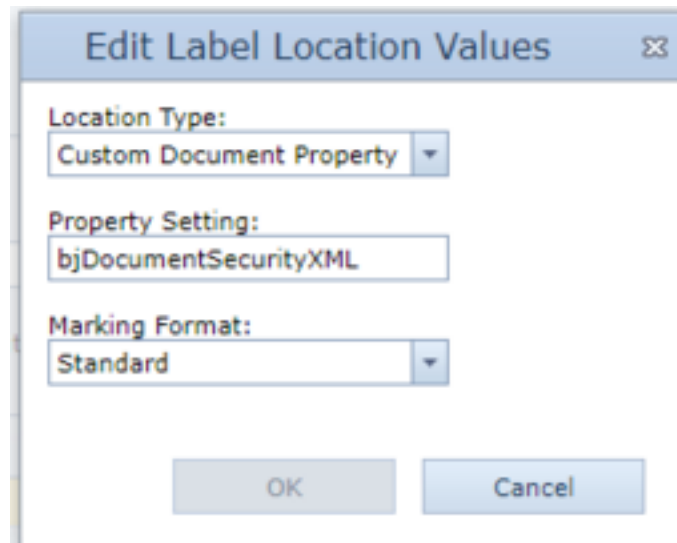


The dialog box titled "Edit Label Location Values" has a close button in the top right corner. It contains three fields: "Location Type:" with a dropdown menu set to "X-Header", "Parameter:" with a text box containing "Your-header-location", and "Marking Format:" with a dropdown menu set to "Standard". At the bottom are "OK" and "Cancel" buttons.

Figure: E-mail Label Location settings.

The Parameter field is only relevant to X-Header locations and is the name of the X-Header to be checked.

For document locations the dialog is:



The dialog box titled "Edit Label Location Values" has a close button in the top right corner. It contains three fields: "Location Type:" with a dropdown menu set to "Custom Document Property", "Property Setting:" with a text box containing "bjDocumentSecurityXML", and "Marking Format:" with a dropdown menu set to "Standard". At the bottom are "OK" and "Cancel" buttons.

Figure: Document Label Location settings.

Property Setting contains either the user supplied **Custom Document Property** name, or the **Document Property** selected from the drop down list (Author, Subject, Title, etc).

You must indicate the [Marking Format](#) to be used to try to parse the location.

Further details of the set of locations supported are described in:

- [Supported mail label locations](#)
- [Supported document label locations](#)

Further information on the parsing method can be found in [Recognising and Parsing Label Markings](#).

Supported Document Label Locations

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [Label Locations](#)

The following locations may be added and ordered:

- **Custom Document Property** : You may define multiple Custom Document Property entries each with its own property name supplied in the Parameter field. If a custom document property with that name is found its value will be assessed to see whether a Label can be determined. **Note that this feature is not supported by Visio.**
- **Document Property**: You may define multiple Document Property entries each with its own property name supplied in the Parameter field (e.g. keywords). If a document property with that name is found its value will be assessed to see whether a Label can be determined. A set of properties is available, but not all properties are propagated (e.g. Comments is not saved in PDF files).

Locations are searched in the order defined (use Up / Down to control the order) and the first configured location found to contain a recognisable value is used to form the document label value.

A Marking Format must be supplied to be used to interpret any value found.

Note: Not all locations presented are supported by all applications. Check the product Release Note for further information (e.g. AUTOCAD Classifier).

Supported Mail Label Locations

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [Label Locations](#)

Note: Classifier Mail Add-in 2013 only supports markings in Subject.

The following locations may be added and ordered:

- **First Line Of Text** : Classifier will assess the First line of text (FLOT) in the message body to see whether it contains a Label value. The Parameter field is not applicable.
- **Last Line Of Text** : Classifier will assess the Last line of text (LLOT) in the message body to see whether it contains a Label value. The Parameter field is not applicable.
- **Subject** : Classifier will assess the Subject (prefix and suffix) of the message to see whether it contains a Label value. The Parameter field is not applicable.
- **X-Header**: You may define multiple X-Header entries each having its own property name (supplied as the Parameter value - i.e. your header location). If an SMTP header with that name is found its value will be assessed to see whether a Label can be determined.

Locations are searched in the order defined (use Up / Down to control the order) and the first configured location found to contain a recognisable value is used to form the email/webmail message label value.

A Marking Format must be supplied to be used to interpret any value found.

Recognising And Parsing Label Markings

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Configuration Settings](#) / [Label Locations](#)

Note: Parsing of Markings in Label Locations can be problematic if some elements are optional, or if the marking contains string selector values (date or text selectors). Setting [Marking Selector options](#) may resolve matters.

Marking Recognition

Classifier needs to recognise and parse Markings in the following circumstances:

- When a message or document is opened and there is no Classifier Label property (e.g. Classifier will check any Label Locations defined to see whether there is a Marking present which can be used to derive a Label Value.
- When replying / forwarding messages Classifier may need to:
 - Recognise and remove any **FLOT** or **LLOT** on the original email and replace it with markings matching the current label.
 - Recognise and remove any **Subject Prefix** or **Suffix** on the original email and replace it by a marking that matches the current label.

To facilitate marking recognition, Marking formats used for parsing must include clear unique delimiters as part of the [Marking Format](#) definition (e.g. [marking]). In addition, string based selectors ([Text entry](#), [Date picker](#) and Date offset) need to have Prefix and Suffix defined (see [Marking Selector options](#)).

Marking Parsing

Classifier takes a string that it believes contains a Marking (determined using Marking Recognition above) and uses the designated Label Location Marking Format (working left to right) to determine a set of Label values (from the available Selectors) that produces that Marking.

The parsing essentially breaks the Marking into chunks that are either text or a label element, and for label elements tries to determine the Selector value. The process allows for label elements included in the marking format that have no value, and it also allows for the use of Alternate Selector label values.

If the Marking contains an alternative value then the appropriate primary Selector value is adopted by the object label. This mechanism can be used to provide a 'mapping' between external and internal values. For example:

Consider an organisation XYZ that internally has a [Classification](#) value of "**Confidential**", but receives messages from a collaborative organisation (ABC) that may store "Sensitive" in a X-Header (e.g. X-ABC-Classification). It wishes to map Sensitive to Confidential internally. So:

- Define the Classification value **Confidential** to have an alternate value of **Sensitive** .
- Define a Marking Format "**ABC Sensitivity**" that just contains the Classification label element but with the **Alternate value** selected.
- Define an X-Header Label Location **X-ABC-Classification** and associate the **ABC Sensitivity** Marking Format.

Combined Label Locations

Admin: [Labelling Configurations](#) /{configuration} [Configuration Settings](#) /Combined [Label](#) Locations

The Label Locations feature allows you to tell Classifier the (document and email and web-mail) properties that may contain label values that have not been established by Classifier (e.g. messages arriving from another organisation). If Classifier can derive a label from a label location it will assume that label for the document and message. Once Classifier has derived a label from a label location via the Label Locations feature, it doesn't process any remaining Label Locations.

In some circumstances, label values from external sources may be contained in multiple properties. Combined Label Locations allows values found in multiple locations into a derived label.

Multiple '**combined label locations**' can be created. Each '**combined label location**' can be assigned a Name and Description to describe its purpose. Within each '**combined label location**' you define the locations as per the '**Label Locations**' feature.

For non-Classifier labelled content, Classifier will start with the first '**Combined Label Location**' and try and create a label using the configured locations. If a label can't be derived, Classifier will then move onto the next '**Combined Label Location**', and so on. If a label can't be derived from any '**Combined Label Location**', Classifier will process the standard Label Locations to see if it can derive a label.

Policies

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ Policies

The Label Configuration settings are made available to end-users through Classifier Policies. Each Policy defines:

- Its **Name** and **Description**.
- The [Policy Label UI](#) presented (Selectors and Values available and how they appear to users of that Policy), and presentation control through [User Interface Definition](#).
- The [Maximum number of labels to show](#) (Recently used), [Use Assisted Labelling](#) and [Use Single Click with pre-defined labels](#) features are available.
- The Policy Rules governing the application of Markings to Object Locations and the invocation of **other** actions (e.g. applying RMS and S/MIME security).

One Classifier Policy can be used as the basis for a new policy through a **Copy** function.

Once you have defined a Policy it is published (as part of the configuration) to File store or to AD and deployed to users using locally defined or group policy mechanisms. One Classifier Policy may be associated with multiple Group Policies.

There must always be at least one Policy defined. If your requirements are straightforward one Policy may be sufficient with all users having the same capabilities. Additional Policies may be required if for example, you want to limit the ability of some users to apply certain label Selectors / Values.

Access to all Policy Administration is through the Policies node under the Label Configuration. Selecting this node shows a list of the current policies below the Policies node, and in the Policies summary display to the right.

Policy administration actions appear under the following headings:

- [Actions](#) that operate on the Policy Object described in [Policy Management](#) .
- Actions that configure the Policy UI settings (Selectors and Selector Values) described in [Policy Label UI](#) .
- Actions to define condition based [Suggested Classifications](#) .
- Actions to define [Default Label \(Policies\)](#) that can then be referenced for use in SharePoint Classifier and Intelligent Default features.
- Actions that configure the Policy Rules described in Policy [Rules Management](#) .
- Details of all the rules supported is provided in [Rules supported](#) . Rules fall into three general types as described in the subordinate topics - [Add rules](#) , [Apply rules](#) and [Check rules](#) .

Policy Management

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#)

This section describes the actions that can be performed when the Policies list window is visible.

The actions supported are:

- [Add a new policy](#)
- [Properties \(Policy\)](#)
- [Settings](#)
- [Copy \(Policy\)](#)
- [Delete \(Policy\)](#)
- [Label Preview](#)

The effects of a policy can be tested using [Publish Test Configuration](#) in conjunction with [Test Mode Administration](#) .

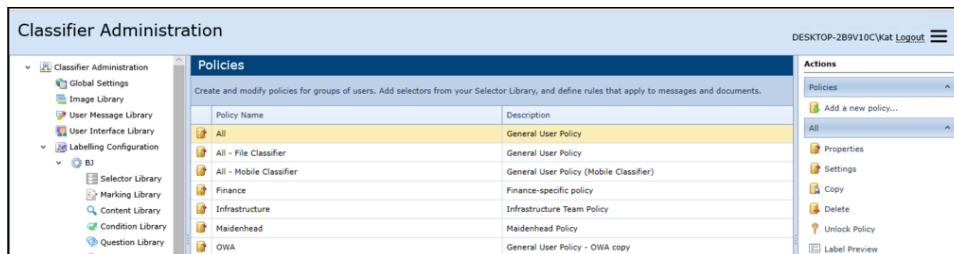


Figure: Policy Management.

Selecting a **specific policy** will present various tabs in the central frame. Enabling an option (e.g. [Use Assisted Labelling](#)) may add an extra tab (e.g. **Connect Selectors**) to the central frame.

The contents of the central frame change depending upon the tab selected. The example below shows the display with **Set Selectors** tab selected.

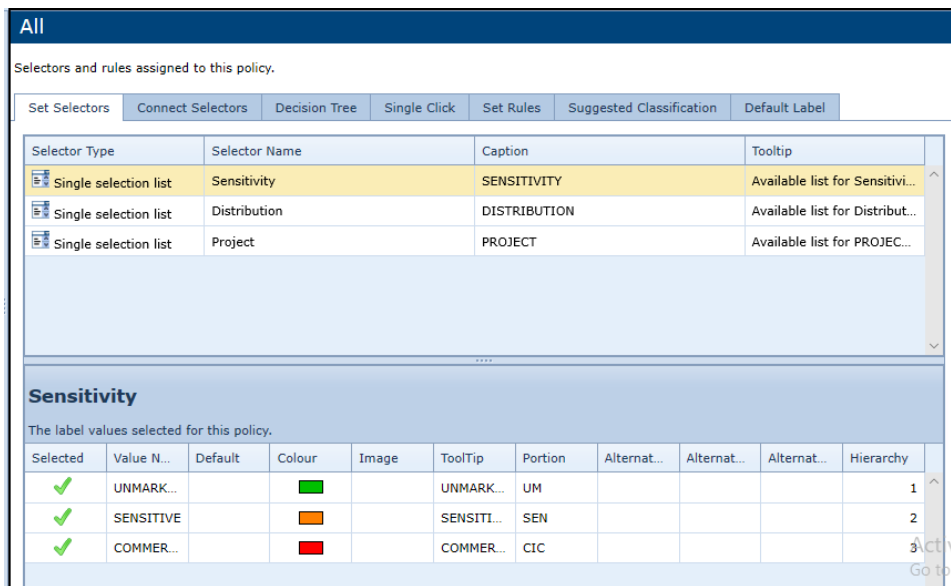


Figure: Set Selectors display.

The detailed settings in a Policy are available when an individual policy is selected in the policy tree, along with the relevant tab and are described in:

- [Policy Label UI](#)
- [Suggested Classifications](#)
- [Default Label \(Policies\)](#)
- [Rules Management](#)

Add a New Policy

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → Add a new policy

The Add a New [Policy](#) section describes how to add a new policy.

Add Policy

Choose a name and description for your policy.

Policy Name:

Description:

The client can keep a record of the more recently used labels for easy selection.

Maximum number of labels to show:

Choose how default classifications are generated

User Selectable Default Classification

Use Intelligent Default Label

Help the user choose a label.

Use Assisted Labelling

Use Decision Tree

Use Single Click with pre-defined labels

Control the display of selectors on the client.

Show selector captions on the ribbon bar

The values of some selector types may be displayed as buttons.

Where possible wrap buttons after:

User interface definition:

Default Language:

Figure: Adding a new policy.

To add a new policy:

1. Under **Labelling Configuration**>(Company Name)>**Policies** , select **Policies** .
2. From the **Actions** area, select **Add a new policy** . This will present a **Add Policy** dialog window.

3. See the [Properties \(Policy\)](#) for a description of the various fields or click on the links below.
 - [Policy Name and Description](#)
 - [Maximum Number of Labels to Show](#)
 - [User Assisted Labelling](#)
 - [Use Decision Tree](#)
 - [User Selectable Default Classification](#)
 - [Use Intelligent Default Label](#)
 - [Use Single Click With Predefined Labels](#)
 - [Show Selector Captions on the Ribbon Bar](#)
 - [Where Possible Wrap Buttons After](#)
 - [User Interface Definition](#)
 - [Default Language](#)
4. Select **OK** and the newly created Policy will appear in the Policies summary list. Once you have created a Policy it appears under the Polices node in the left hand pane.
5. Selecting a Policy will change the adjacent pane to provide access to the underlying configuration. The pane shows a summary of the Rules or Selector information, although when a new policy as added the display will be empty (No Selectors and no Rules defined).
6. Configuration of the Selectors is described in [Policy Label UI](#) and Rules configuration is described in [Rules Management](#).

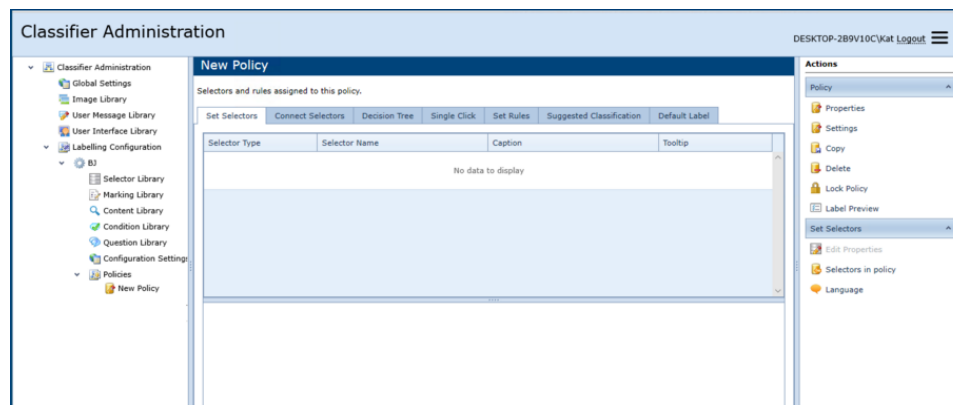


Figure: New Policy Settings.

Properties (Policy)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Properties

Note: The **Maximum number of labels** is dependent on the [Display of Favourites button](#) being **Enabled**.

This action presents the same dialog as [Add a New Policy](#).

Note: The individual properties [Policy Name and Description](#), [User Interface Definition](#), Maximum Number of Labels and [Use Single Click with Predefined Labels](#) can be changed at any time.

Note: The [Use Assisted Labelling](#) setting can never be unset on a policy once it has been set.

Properties

Choose a name and description for your policy.

Policy Name:

Description:

The client can keep a record of the more recently used labels for easy selection.

Maximum number of labels to show:

Choose how default classifications are generated

- User Selectable Default Classification
- Use Intelligent Default Label

Help the user choose a label.

- Use Assisted Labelling
- Use Decision Tree
- Use Single Click with pre-defined labels

Control the display of selectors on the client.

- Show selector captions on the ribbon bar

The values of some selector types may be displayed as buttons.

- Where possible wrap buttons after:

User interface definition:

Default Language:

OK Cancel

Figure: Policy Properties.

To view the new policy:

1. In the Classifier Administrator go to **Classifier Administration>Labelling Configuration>(Company Name)>Policies>(Relevant Policy Name)>Properties** . Properties lists the current (available) settings.
2. Modify the following settings (as required):
 - [Policy Name and Description](#)
 - [Maximum Number of Labels to Show](#)
 - [Use Decision Tree](#)
 - [User Assisted Labelling](#)
 - [User Selectable Default Classification](#)
 - [Use Intelligent Default Label](#)
 - [Use Single Click With Predefined Labels](#)
 - [Show Selector Captions on the Ribbon Bar](#)
 - [Where Possible Wrap Buttons After](#)
 - [User Interface Definition](#)
 - [Default Language](#)

If you set [Use Single Click with pre-defined labels](#) , an extra Tab appears in the central frame that gives access to the Single Click configuration features (example below). Similarly if you set [Use Assisted labelling](#) , an extra tab ([Connect Selectors](#)) is added.

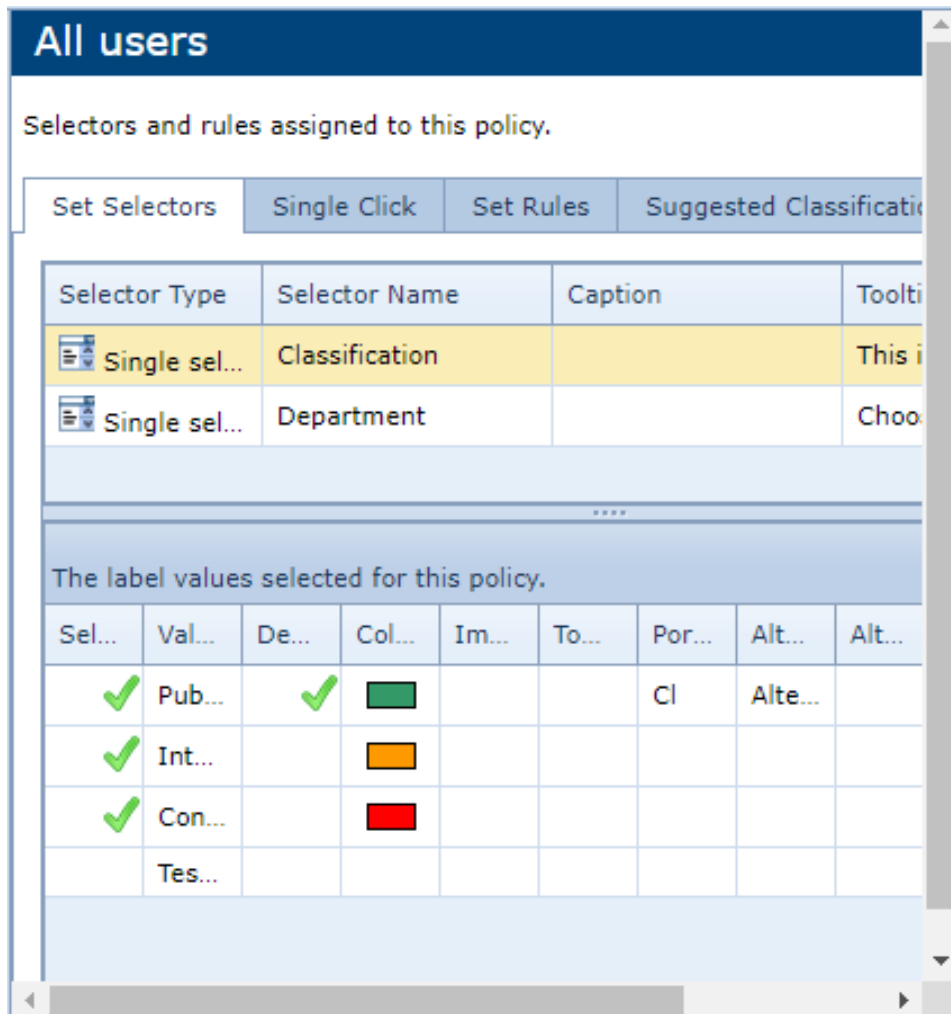


Figure: Policy with Single Click.

Policy Name And Description

Note: The Policy name must be unique in the Configuration.

Note: Policy names must only contain characters that are permitted in file paths except *, ?, : and . .

- **Policy Name(Only for the Administrator)** - The policies are not visible to end-users.
- **Description (Optional) (Only for the Administrator)** - The description is not visible to end-users.

Maximum Number Of Labels To Show

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Properties

The **Maximum number of labels to show** controls the Recently used Labels feature, see also [Display of Favourites button](#)).

Note: The feature is unavailable unless the [Display of Favourites button](#) is also Enabled, as this is how Recently used labels are accessed.

This setting (on the [Policy](#) properties dialog) determines the number of label values remembered for each of **Recently used Labels** and **Recently used Portion Marks**.

- If the Maximum number of labels to show is zero , then the Recently used Labels and Portion Marks features are effectively Disabled . The user is never presented with the **Recent** lists.
- If the **Maximum number of labels to show is > zero** , then the Classifier maintains a list of the most recently used labels and a list of the most recently used Portion Marks. The entry at the top of a list is the most Recently Used Labels or [Portion Mark](#). The lists are maintained in the **Current User** section of the **Registry**.

Note: Even if a recently used Portion Mark list is maintained, it is available to the user if [Portion Marking](#) is Enabled in the application (see [Portion Marking](#)).

See [Recently Used Labels and Portion Marks](#) for a description of when and how these lists appear to the user.

Use Decision Tree

An configurable option has been added to the existing Policy Properties to allow Decision Tree functionality to be enabled if required. The new setting is described in [Enable Decision Tree Functionality](#) . Selecting this option will add an extra tab to the associated policy editor and make it available to the client.

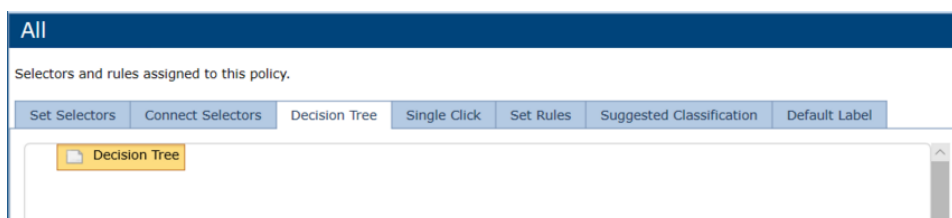


Figure: The Decision Tree Tab.

Use Assisted Labelling

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Properties

Note: The **Use Assisted Labelling** setting can never be unset on a policy once it has been set.

Note: The user interface for Assisted Labelling operates differently between Office and OWA environments.

If the setting on the Policy properties dialog is **unset** , label selection is standard. The user sees individual drop-down lists for each selector.

If the setting is **set** then label selection operates as described in [Assisted Labelling Operation](#) .

Once you set **Use Assisted Labelling** for a policy you cannot unset it. The following warning is presented.



Figure: Use Assisted Labelling warning.

To acknowledge the warning:

1. Click **OK**.
2. Select **Cancel** (on the Policy properties dialog) and take a copy or click **OK** to proceed.
3. Once you have set **Use Assisted Labelling**, an additional tab [Connect Selectors](#) appears when that policy is selected, so that **Assisted Labelling** selectors can be configured.

User Selectable Default Classification

If you wish users to be able to choose their own default label rather than using the policy defined default, then the **User Selectable Default Classification** can be **Enabled**.

If **Enabled**, a **Set current label as default** option appears in the Favourites menu assuming the [Display of Favourites button](#) is also **Enabled**.

Use Intelligent Default Label

To provide flexibility over the default label functionality, the Use Intelligent [Default Label](#) feature can be **Enabled**.

If **Enabled**, the default label that is applicable to a new document or email is determined by combining any existing configured Default Label with entries in the [Default Label \(Policies\)](#) section that have matching conditions attached to them.

Note: If the '[User Selectable Default Classification](#)' feature is enabled and a user has defined their own default label, then the **User Selectable Default** will be used rather than any derived **Intelligent Default**.

Using the **Intelligent Default** feature negates the need to duplicate policies where the only difference between policies is the default label.

When deriving an Intelligent Default, a Classifier product will take the configured default label as the starting point for the Intelligent Default. It will then determine which Default Labels have a matching condition attached to them. These will be processed in turn, starting with the lowest priority, and the values for each applied to the Intelligent Default label.

Note: As the matching Default Labels are processed, any existing values that are currently in the Intelligent Default will be replaced even if the existing value dominates the value from the matching Default Label.

By defining appropriate conditions on labels in the Default Label section, you can configure different default labels as required for your organisation. For example, you may wish to have a different default label when a user in a ' Finance ' group creates a new Excel workbook as opposed to when a user in a ' Marketing ' group creates a new PowerPoint presentation.

Use Single Click With Predefined Labels

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Properties

The Use Single Click With Predefined Labels section will show you how to create a predefined label.

Note: This setting (on the Policy properties dialog) must be **Enabled** on a policy for the Single Click configuration tab to be shown.

Note: Single Click and **Assisted Labelling** can be used together, but you will not be able to configure Single Click until you have added at least one selector under the [Connect Selectors](#) Tab.

Note: Changing a policy name that has been deployed invalidates any instances of that name set through Group Policy configuration. Changing the description will have no side effects.

If you set [Use Single Click with pre-defined labels](#) , an extra Tab appears in the central frame that gives access to the Single Click configuration features (example below). Similarly if you set [Use Assisted labelling](#) , an extra tab ([Connect Selectors](#)) is added.

The standard label selection interface presents the available [Selector](#) values as 1 to 3 lists.

You can choose to pre-configure up to 12 label values that then appear as individual buttons in the Ribbon Bar. The user still has the ability to select individual selector values via the Classifier Label dialog box launcher arrow.

This topic describes configuration of the feature, additional information on the user experience can be found in [Single Click operation](#) .

The initial state (**with Single Click Enabled on the policy but un-configured**) appears as:

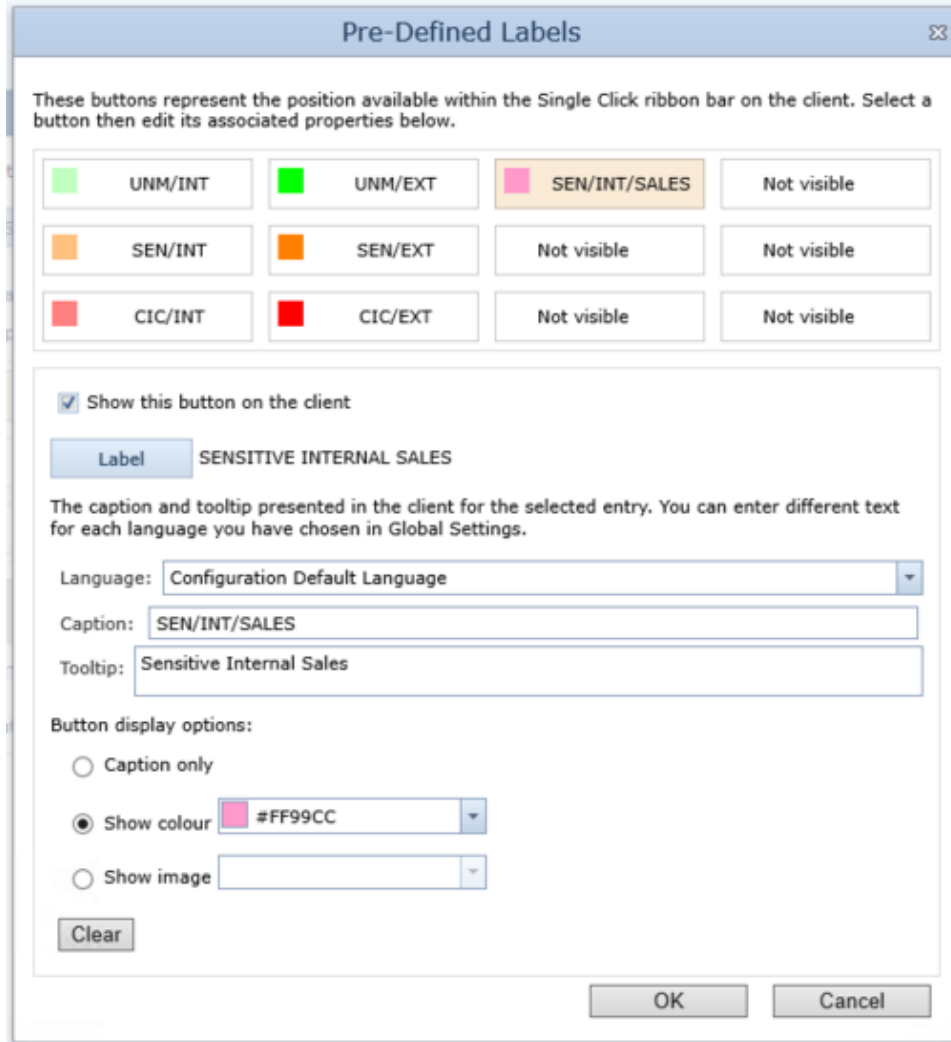


Figure: Single Click buttons that a user can configure.

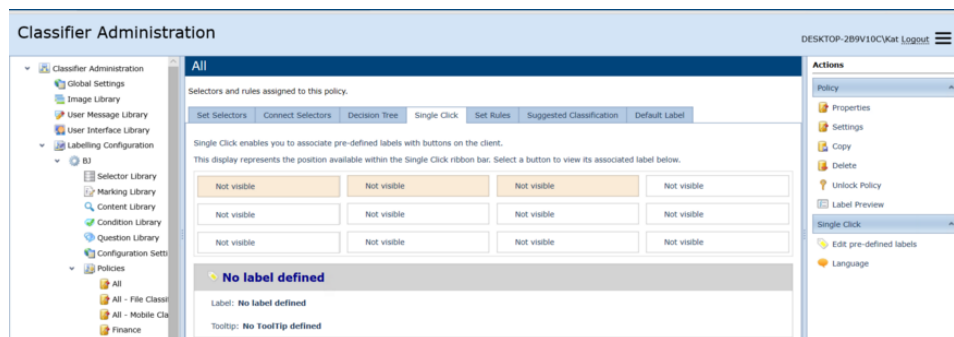


Figure: Single Click initial state.

To use single click with predefined labels:

1. In the **Classifier Administrator** go to **Classifier Administration>Labelling Configuration>(Configuration Name)>Policies>(Relevant Policy Name>Properties .**
2. In the **Properties** window, select the **Use Single Click** with **Predefined Labels** checkbox.

Note: The matrix of single click buttons displayed is affected by a windows re-size operation, so short Captions are advisable.

3. To configure the buttons for **Single Click**, select the relevant **Policy** and select the **Single Click** tab.
4. In the single click section, select **Edit pre-defined labels .** which will display the dialog which allows you to configure each button.
5. In the grid, select a button whose properties will be configured or edited.

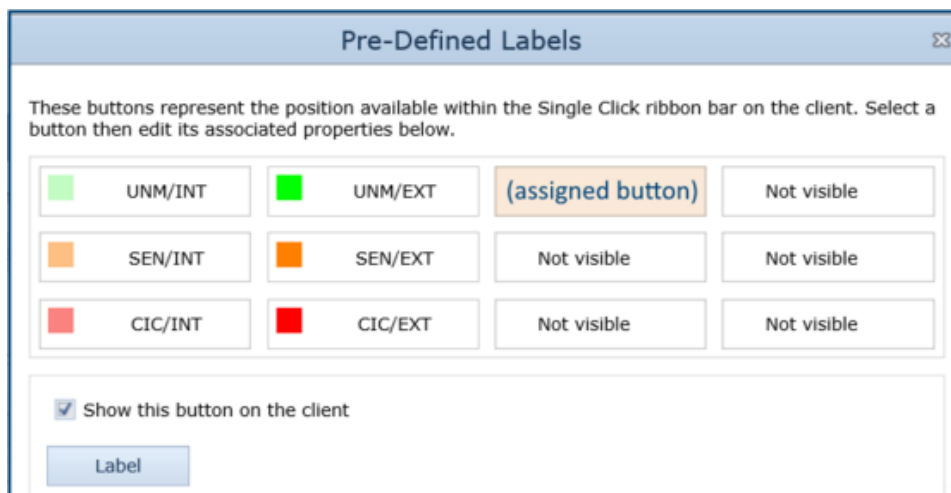


Figure: The assigned button that will be displayed on the client.

Note: You can configure any of the buttons. Configured buttons do not have to be adjacent and use [Publish Test Configuration](#) to view the user effects.

6. If you wish the button to be visible select the **Show this button on the client** checkbox. This will make the other settings become available. If you uncheck **Show this button on the client** , any settings for the button will be remembered, but the button is not shown to the user.
7. To choose the label value to be assigned to this button, click on the **Label** button. This will present a dialog allowing you to choose the label value.
8. Select the label value that will appear on the label.

The screenshot shows a dialog box titled "Boldon James Classification". It features three rows of controls: "SENSITIVITY" with buttons for "UNMARKED", "SENSITIVE", and "COMMERCIAL-IN-CONFIDENCE"; "DISTRIBUTION" with buttons for "INTERNAL" and "EXTERNAL"; and "PROJECT" with a dropdown menu currently showing "SALES". At the bottom of the dialog, there is a prominent orange bar with the text "SENSITIVE INTERNAL SALES". Below this bar are three buttons: "Clear", "OK", and "Cancel".

Figure: Setting the predefined labels.

- **Sensitivity** : UNMARKED, SENSITIVE, COMMERCIAL-IN-CONFIDENCE.
 - **Distribution** : INTERNAL, EXTERNAL.
 - **Project** : In the drop down menu, select the project.
9. Click **OK** . To clear all the values for the button, click **Clear** . This will clear all values for the selected button except for **Show this button on the client** .
 10. In the drop down box, select the language. In [Global Settings](#) you can enter the text for each language you have chosen.
 11. Enter the caption text that will appear on the button. For example, SEN/INT/SALES.
 12. Enter the text for the tooltip on the button.
 13. Set the required button display options:

- **Caption only:** If this option is selected, only the configured caption is displayed.
 - **Show colour:** If this option is selected, it will display a colour block. By default the colour is taken from the Selector value configuration setting. To select a specific colour, in the drop down menu, select the preferred colour block. A solid colour block (16*16) will appear in front of the caption.
 - **Show image:** If this option is selected, the selected image appears in front of the caption. An image may be selected in the drop down menu provided which will display all the configured images that have been placed in the [Image Library](#) . The image will be scaled to fit within the 16*16 space.
14. If you select **Clear** , it will clear all the values for the selected button except for **Show this button on the client**.
 15. Click **OK**.

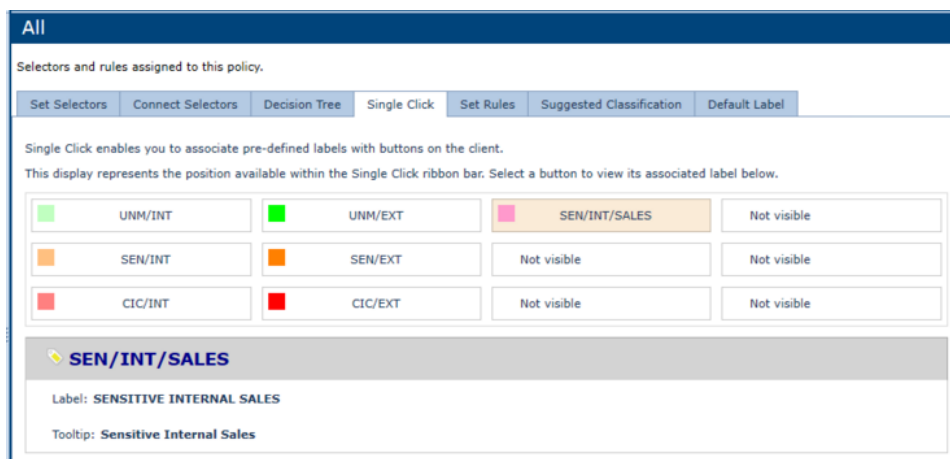


Figure: The result of adding a Single Click predefined label. The buttons colour and detail is displayed.

Show Selector Captions On The Ribbon Bar

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Properties

Note: This setting is not applicable to **Notes**, **Mail Add-in** nor **Mobile Classifier**.

This setting controls the visibility of the Selector captions in the ribbon bar:

- **Enabled (Default):** Captions will appear.
- **Disabled :** Captions will not appear.

In the examples below **Display selector options as buttons** ([Single selection list options](#)) is **Enabled** for the first selector:

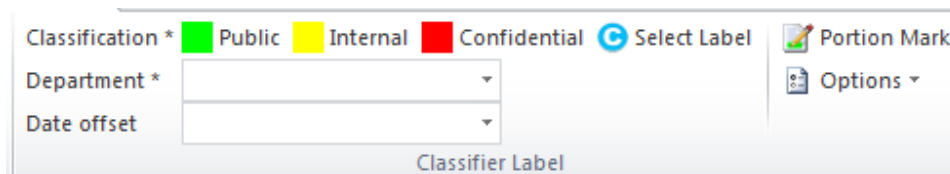


Figure: Classifier [Ribbon](#) Bar: With captions.

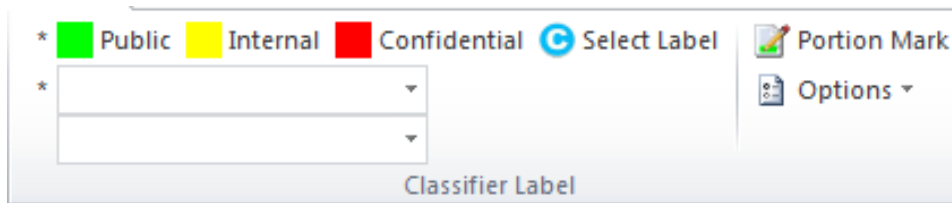


Figure: Classifier Ribbon Bar: No captions.

Where Possible Wrap Buttons After

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Properties

The Where Possible Wrap Buttons After allows you to control how [Single selection list](#) selectors are presented if the [Display selector values as buttons](#) ([Single selection list options](#)) is **Enabled** .

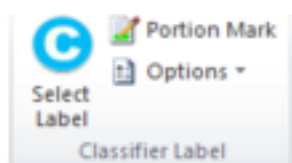
This value is only relevant if you have **Enabled** the **Display selector values as buttons** for one or more Single selection list selectors or for a multi-selection list selector as described in [Single selection list options](#) / [Multiple selection list options](#) .

The Classifier ribbon bar can accommodate a maximum of **three** rows of selector information. This setting can be used to control how Classifier wraps these buttons within the Classifier Ribbon Bar.

If this value is not set (default), then Classifier will display the defined buttons for a selector on a single row.

Each selector shown in the Ribbon Bar will start on a new row regardless of whether **Display selector values as buttons** is **Enabled** or **Disabled** .

If there are more than three rows in total to appear in the Ribbon Bar (after wrapping), Classifier reverts to the default (single row per selector) and the Classifier label button is shown providing access to the [Label](#) selection dialog.



Standard Ribbon Bar re-sizing actions apply, so it is a site responsibility to check that the settings configured are appropriate for the number of selectors and values to be displayed.

Examples of the effects of this can be found under [Ribbon Bar examples](#) , [Label Selection dialog](#) , [Assisted Labelling Operation](#) and [Tabs](#) .

User Interface Definition

The **User Interface Definition** allows you to choose the user interface definition you wish to use from those configured in the [User Interface Library](#) . The **Default UI definition** is always available.

Default Language

You can select the default language for the user interface. This allows you to choose the **Policy Default Language** to be used by the [algorithm for finding the language to display](#) to find the correct (language related) value to present to a user. See [Properties \(Classifier Administration\)](#).

Note: Only visible if **Allow multiple languages** is enabled.

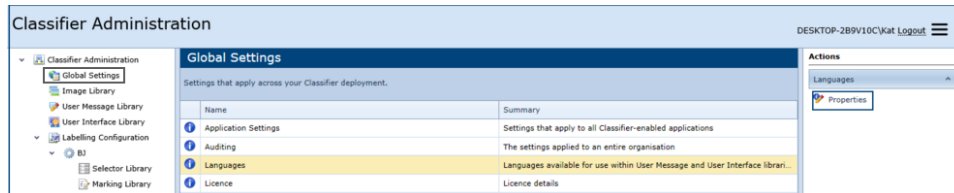


Figure: Global Settings is where you can add languages to the user interface.

To add multiple languages:

1. In the Classifier Administration, select **Global Settings**.
2. Either click on [Languages](#) within the [Global Settings](#) Table or **Properties**. A dialog box will appear.



Figure: Adding languages within Global Settings. There is also an option to add different versions of languages.

3. To add a language click on the **Add button**. To remove a language, click on the **Delete** button. These languages will appear in the following drop down menu.

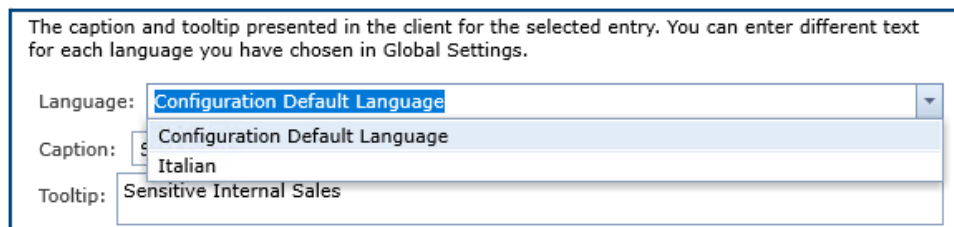


Figure: The list where the different languages are contained.

Settings

The [Policy User Interface Settings](#) and the Suggested Classification Settings.

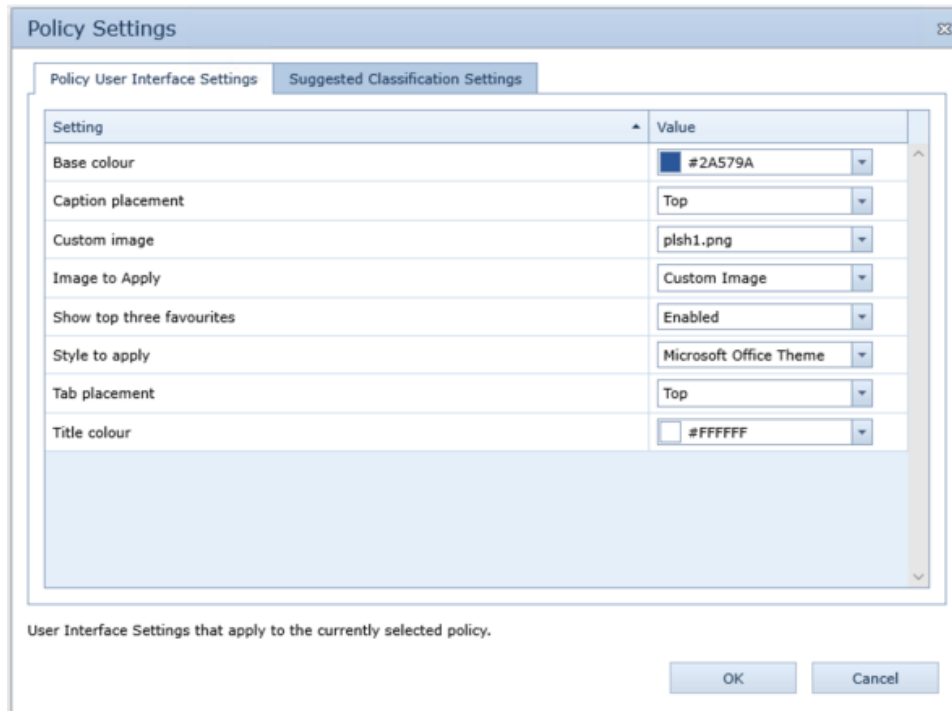


Figure: Policy User Interface Settings.

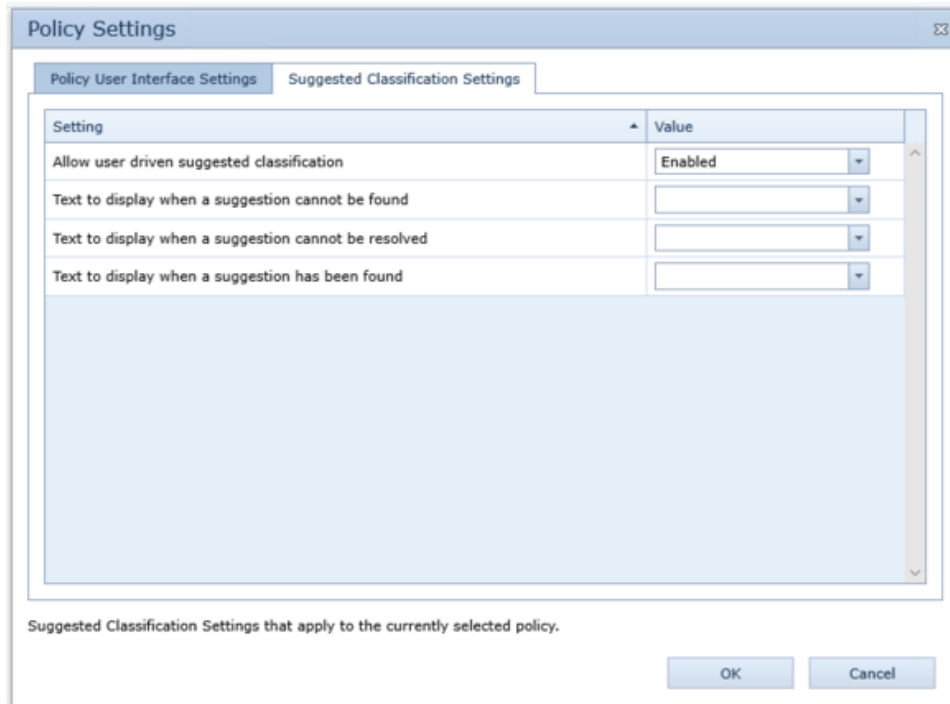


Figure: Suggested Classification Settings.

Policy User Interface Settings

The various setting options for the Policy User Interface. To see this area in the Classifier Administrator go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings**.

Note: The [Style to Apply](#) and [Image To Apply](#) options apply to the [Label](#) dialog, [Policy Check](#) dialog, [Challenge](#) dialog, [Organise Favourites](#) dialog and [Decision Tree](#) dialog.

Note: The [Caption Placement](#) and [Tab Placement](#) only apply to the main [Label](#) dialog.

- [Base Colour](#)
- [Caption Placement](#)
- [Custom Image](#)
- [Image to Apply](#)
- [Show Top Three Favourites](#)
- [Style to Apply](#)
- [Tab Placement](#)
- [Title Colour](#)

Base Colour

The custom colour for the header section of the user interface when using the Custom Theme.

Note: The Base colour and Title colour only applies in the Custom Theme.

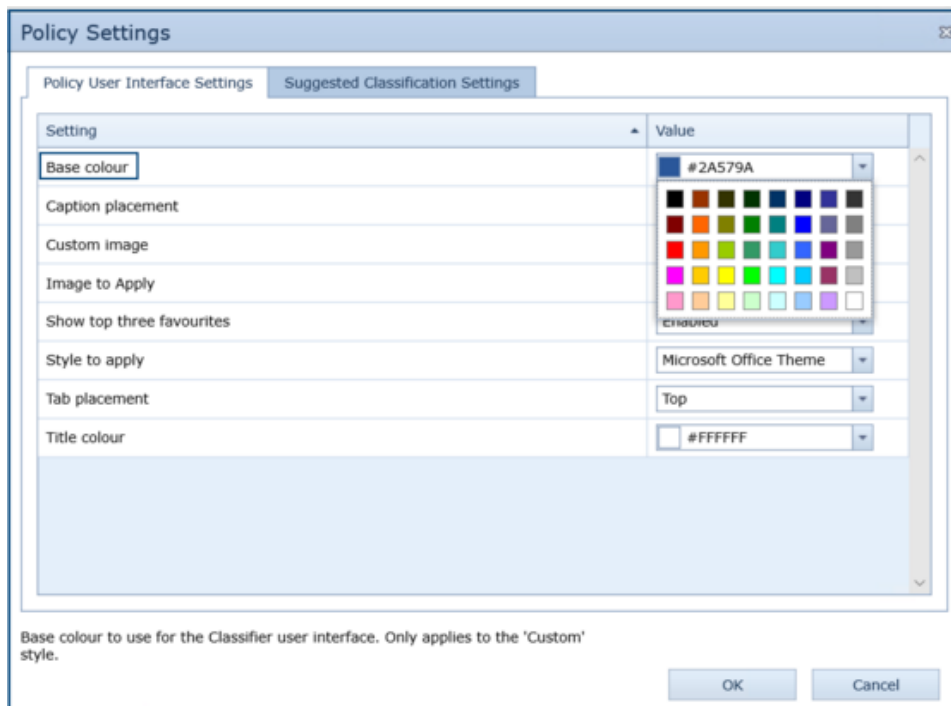


Figure: Selecting the Base Colour in the Classifier Administrator [PolicySettings](#) .

To select the base colour:

1. Open the Classifier Administrator and go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings>Policy User Interface Settings>Base Colour**.
2. In the [Policy User Interface Settings](#), **Base Colour** drop-down menu select a colour. Click **OK** .
3. Run the label dialog from within an office application to see the selected base colour.



Figure: The Base Colour on the header item in Microsoft Word.

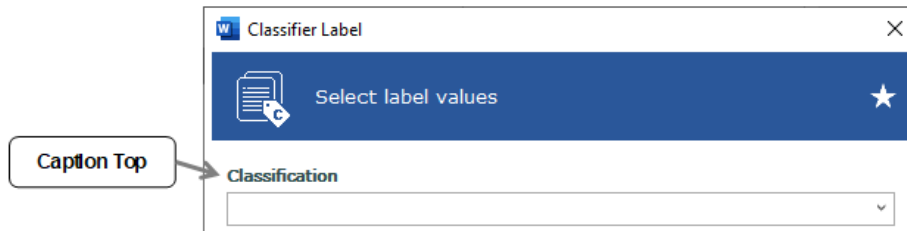
Caption Placement

Places a caption of the selector on the left (default) or at the top.

Custom Mode with captions set to the left.



Microsoft Office Theme with custom image and captions at the top.



To select the placement of a caption:

1. Open the Classifier Administrator and go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings>Policy User Interface Settings>Caption Placement**.
2. In the Policy User Interface Settings, Captions Placement drop-down menu select either:
 - **Top:** Place caption at the top.
 - **Left:** Place caption to the left.
3. Click **OK**.
4. Check the **Office Application** to see the applied caption placement.

Custom Image

A user can select an image from the [Image Library](#) to display on the UI.

Note: This does not apply when using the **Classifier Theme**.



Figure: Image Library and adding a new image.

To select a custom image:

1. Open the **Classifier Administrator** and go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings>Policy User Interface Settings>Custom Image**.
2. The **Custom Image** replaces the **default image**. Select this **image** from the **Image Library**.
3. Go to the **Image Library** and click on [Add a new image](#). A dialog box will appear.
4. Click **Browse** to look for a new image, add a description (optional) and click **OK**.
5. Go back to **Policies>All>Settings>Policy User Interface Settings>Custom Image** and select the image that was added.

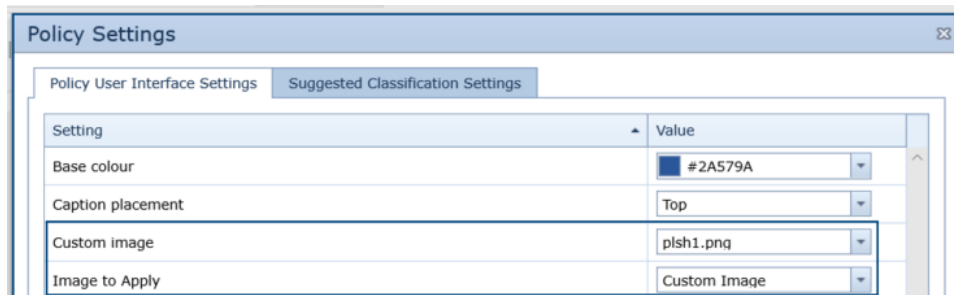


Figure: Custom image and Image to apply.

6. Check that [Image to Apply](#) is set to **Custom Image**.
7. Click **OK** The custom image is rendered to a small size.
8. Open up an **Office Application** to see the image.



Figure: Label Dialog with custom image.

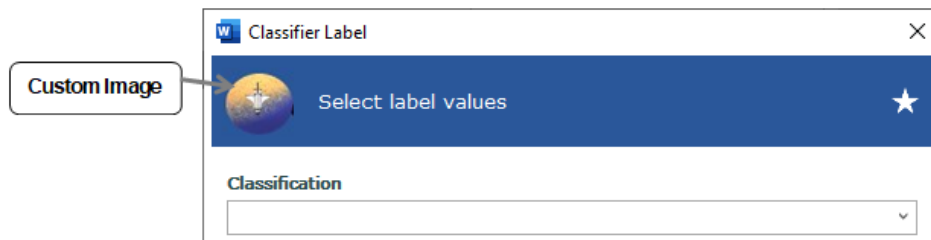
Image to Apply

This controls what image is displayed in the dialog. There are 3 different types of selections, [DefaultImage](#), [Custom](#) or **No Image**.

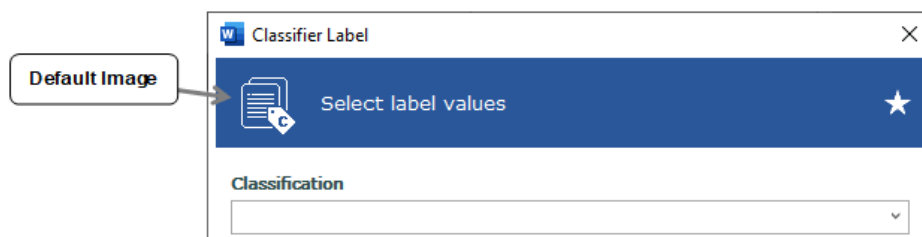


Figure: Adding a Custom Image to the [Image Library](#).

Label dialog shown with the custom image



Label dialog shown with the default Image.



Label dialog shown with the no image



To select an image:

1. Open the **Classifier Administrator** and go to **Labelling Configuration**>(Configuration Name)>**Policies**>(Policy Name)>**Settings**>**Policy User Interface Settings**>**Image To Apply**.
2. Select one of the following:
 - **Default Image (Default)** : The default Classifier Image.
 - **No Image**: Only the dialog description text is displayed.
 - **Custom Image** : Replaces the default image with a custom image which is selected from the **Image Library** .
3. Click **OK**.
4. Open up an **Office Application** to see the image.

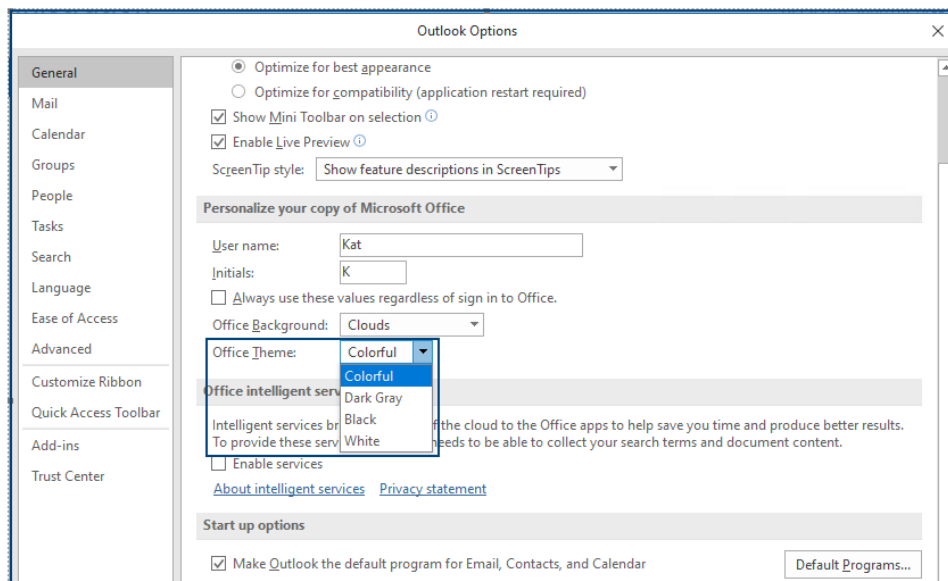


Figure: There are also options that can be set in outlook to make the theme Colorful, Dark Grey, Black or White.

Show Top Three Favourites

This option allows the user to add their top three favourites as selectable buttons on the ribbon.

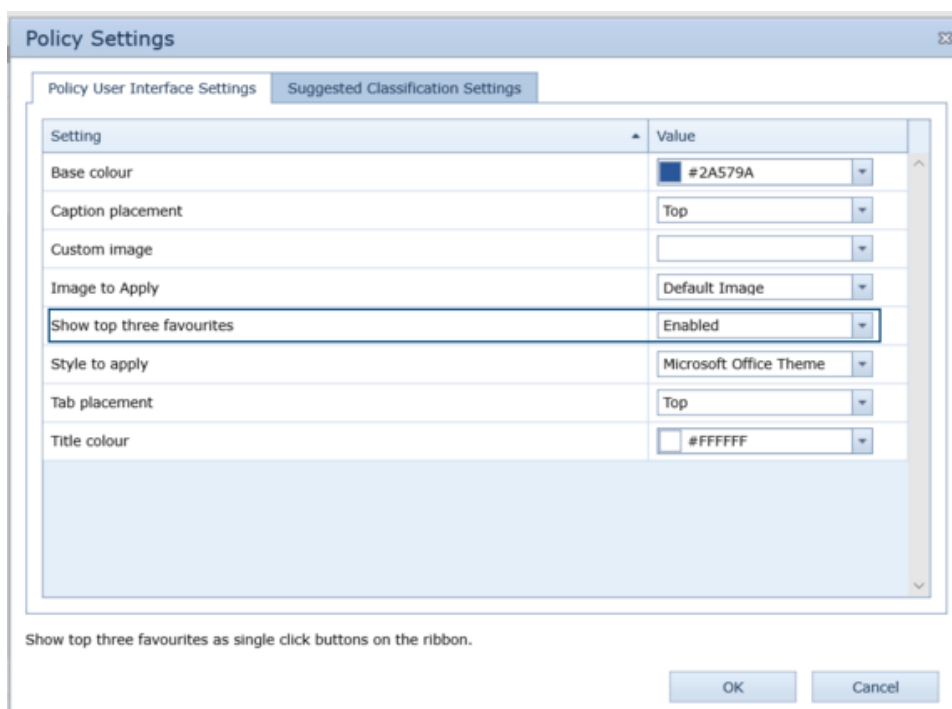


Figure: Enabling the Show top three favourites in the Classifier Administrator Policy Settings.

To add a current label to your favourites list:

1. Open the **Classifier Administrator** and go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings>Policy User Interface Settings>Show Top Three Favourites**.
2. Go to **Show top three favourites** and select **Enabled** . Click **OK** .
3. Start an Office Application like Microsoft Word and to add one or more labels as favourite. Use the **Organise Favourites** feature to put your favourites in order. The top three favourites from your favourites list is displayed as buttons on the ribbon.

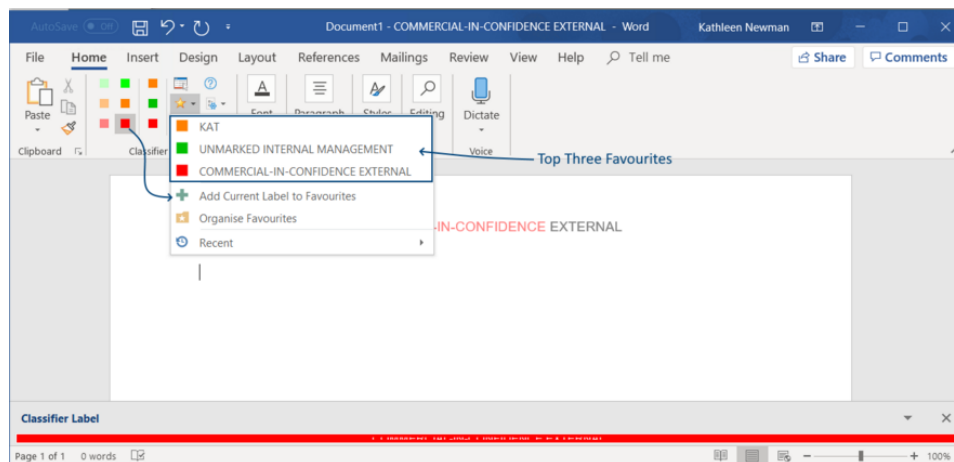


Figure: This screenshot shows how you add a current label to your favourites and a list of the top three favourites.

Style To Apply

The Style to Apply setting allows a user to select a theme for an Office Application. A user can select from a Microsoft Office Theme, a Classifier Theme or a Custom Theme.

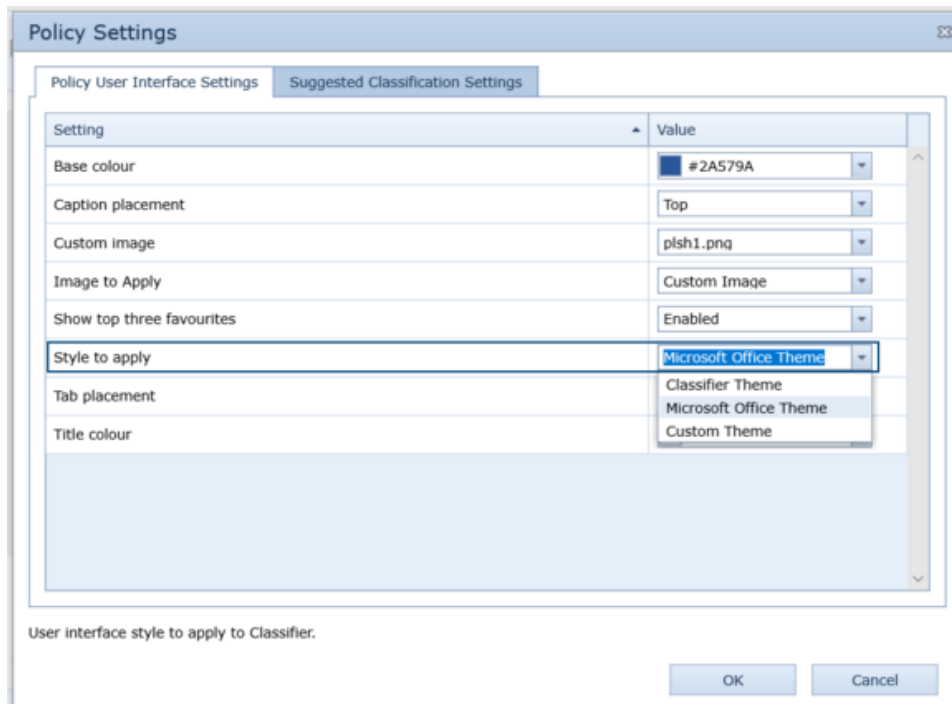


Figure: Style to apply selections.

To apply the style:

1. Open the **Classifier Administrator** and go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings>Policy User Interface Settings>Style to Apply**.
2. In the style to apply dropdown menu, select one of the following:
 - **Original Classifier UI (Default):** Original Classifier user interface.
 - **Microsoft Office Theme:** This will show a new style user interface with the colour scheme based on the active Office Theme from active Office application. This only applies when using Microsoft Office Applications.
 - **Custom Theme:** The user decides what colour to use for the header and description text.
3. Click **OK**.
4. Open up an **Office application** to check to see if the style was applied successfully.

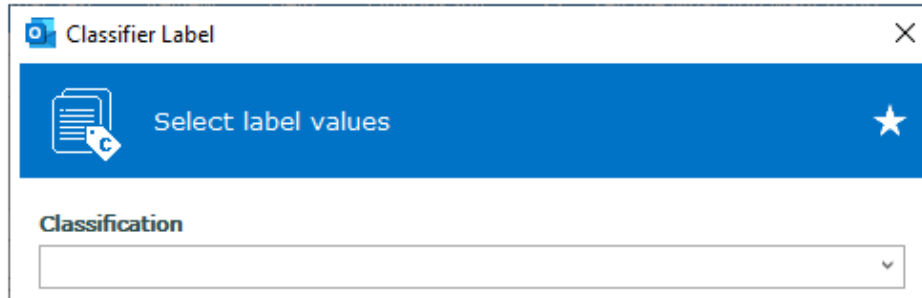


Figure: The Microsoft Office Theme in Microsoft Outlook.

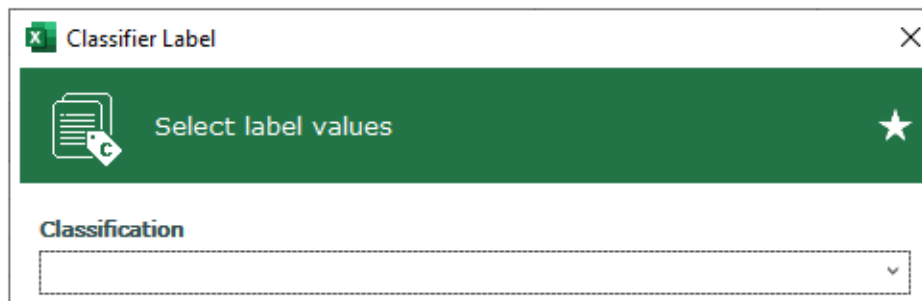


Figure: The Microsoft Office Theme in Microsoft Excel.

Tab Placement

A user can select to place a tab on the top or on the left. It is the top or left location of the tabs on tab pages.

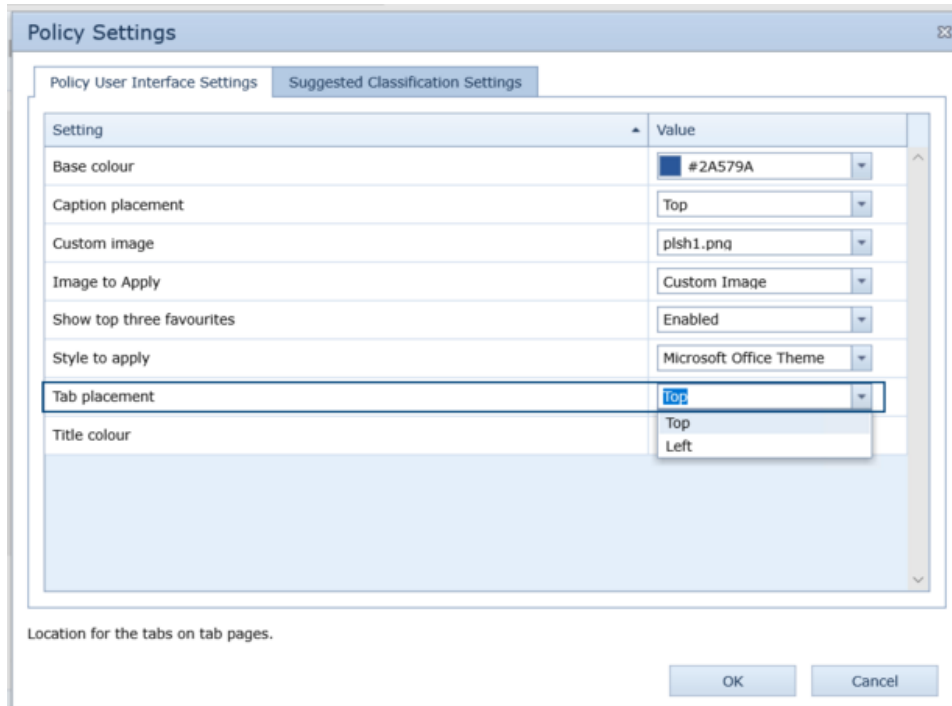


Figure: Tab Placement options in the Classifier Administrator Policy User Interface Settings.

To select a tab placement:

1. Open the **Classifier Administrator** and go to **Labelling Configuration**>(Configuration Name)>**Policies**>(Policy Name)>**Settings**>**Policy User Interface Settings**>**Tab Placement**.
2. In the style to apply drop-down menu, select one of the following:
 - **Top (Default)**: Places the tabs on the top.
 - **Left** : Places the tabs on the left side.
3. Click **OK**.

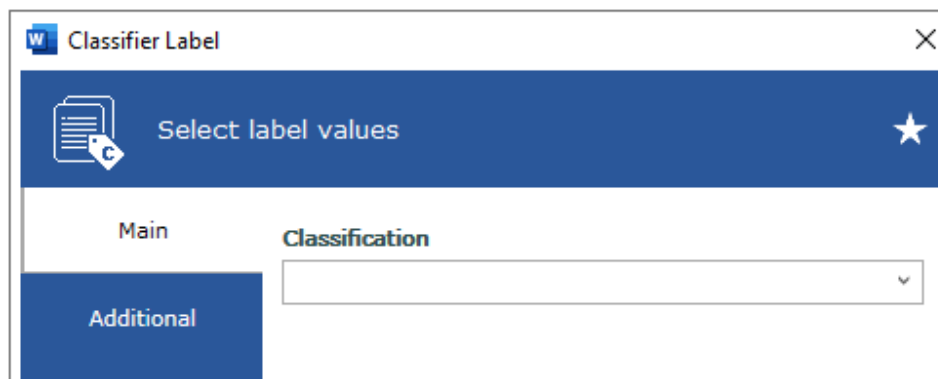


Figure: The tabs placed on the left (default).



Figure: The tabs placed on the top.

Title Colour

The custom colour for the description text in the header section of the user interface when using the **Custom Theme**. A user can select a text colour for the title.

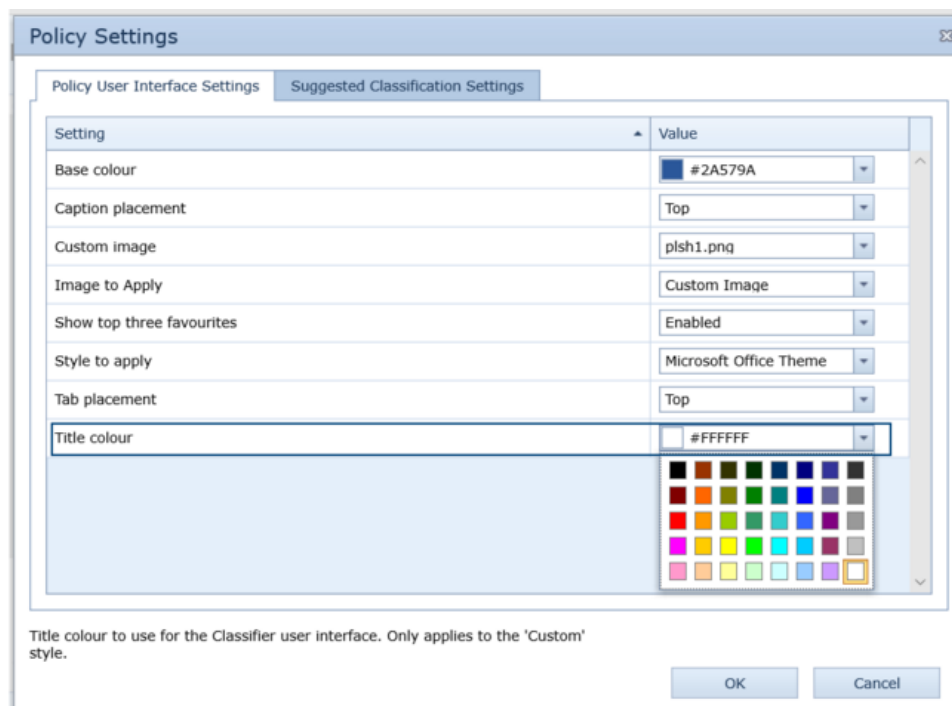


Figure: Setting the title colour for the title in the [Classifier Administration Policy User Interface Settings](#).

To set the title colour:

1. Open the **Classifier Administrator** and go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Settings>Policy User Interface Settings>Title Colour**.
2. In the [Policy User Interface Settings](#), Title Colour drop-down menu select a colour. Click **OK**.
3. Check an Office Application or **Microsoft Word** to see the applied **Title Colour**.



Figure: Setting the Title Colour in the Classifier Administration Policy User Interface Settings.

Copy (Policy)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Copy

You can use an existing Classifier Policy as the basis for a new policy. All the existing settings will be carried forward. This can save valuable time when developing new policies.

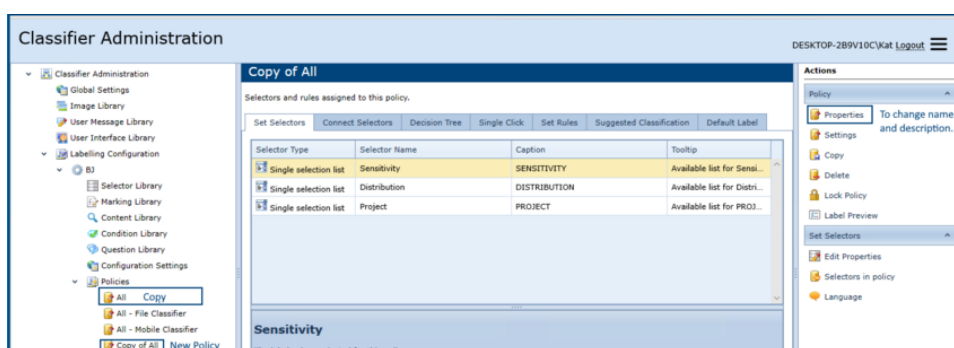


Figure: Copying an existing Classifier Policy as the basis for a new policy.

To copy an existing Classifier Policy as the basis for a new policy:

1. Go to **Labelling Configurations>Policies>(Existing Policy)>Copy** .
2. Select the **Policies** node and in the **Policies Tree**, select the relevant policy .
3. In the main column, select **Copy** to create a new entry in the list of policies named **Copy of <source>**.
4. In the Actions column, select **Properties**. A Properties dialog window will appear.

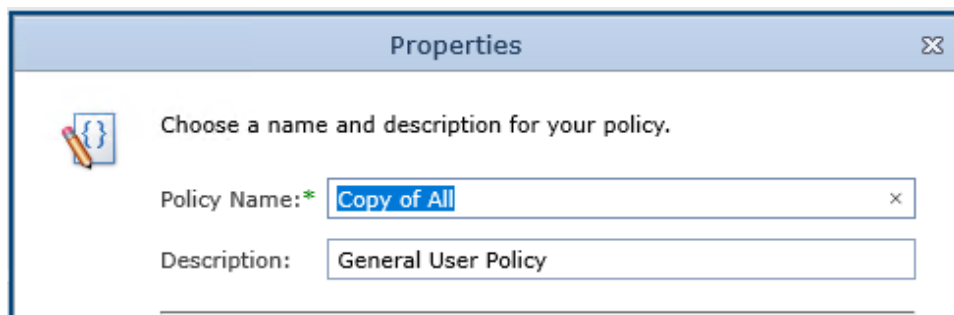


Figure: Changing the name of the policy and description.

5. Modify the **Name** or **Description** as required.
6. Click **OK** to complete the action.

Delete (Policy)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Delete policy

This section describes how to delete an existing policy.

Note: Prior to deletion you should consider the effects on any users currently using that policy.

Note: The usual course of action is to ensure that all users are mapped (e.g. through Group Policy configuration) to a different policy before deletion.

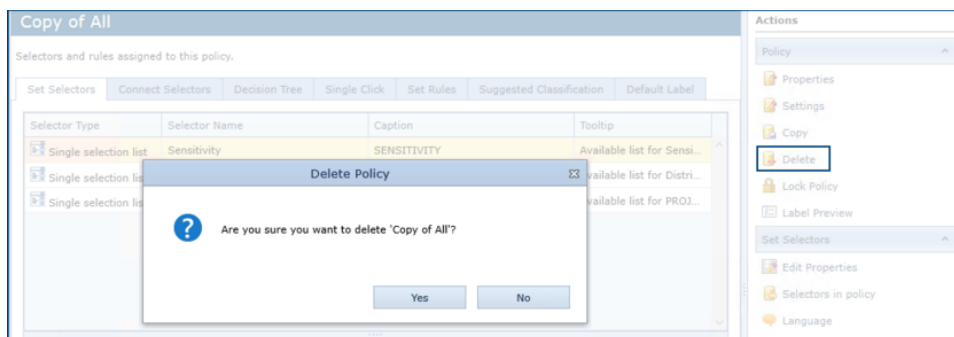


Figure: Deleting a policy.

To delete a policy:

1. Go to **Labelling Configurations>Policies>(Policy)>Delete** .
2. In the main column, select the **Policies** node and in the **Policies** tree, select the relevant **policy** .
3. In the **Actions** column, select **Delete**.
4. On the Delete Policy confirmation, it will ask the question, "**Are you sure you want to delete "(name of policy),"**" c lick on the**Yes** button. If you do not want to delete the policy, click on the **No** button.

Lock / Unlock Policy

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → Lock/Unlock policy

The **Lock Policy** action can be used to indicate to other Classifier administrators that the Configuration cannot be published at the moment (e.g. because policy changes are incomplete).

If the policy is locked, the **Unlock Policy** action is displayed and the [Publish Configuration](#) action is inhibited (greyed). There are similar **Lock Unlock Configuration** actions.

Note however, that **Unlock Configuration** will **NOT** affect any policy locks, they will remain in effect.



Figure: The Lock and Unlock selections in the [Actions](#) column.

To lock/unlock a policy:

1. Go to **Labelling Configurations>Policies>(Policy)>Lock Policy/Unlock Policy** .
2. To unlock a policy, select **Unlock** . To lock a policy select **Lock** .

Label Preview

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) → {policy} → [Label Preview](#)

This action will display the label interface for a policy as it appears in a Classifier application. If you wish to see other effects of the policy (e.g. how FLOT will appear) you will have to use the [Publish Test Configuration](#) action.

Note: [Favourites](#) does not appear in this dialog.

Note: Mandatory selectors will not be flagged as they are defined through application specific rules and the Label Preview context is application independent.

To display the label interface:

1. Go to **Labelling Configurations>Policy>Policies>Label Preview** .
2. Select the **Policies** node.
3. in the **Policies** tree, select the relevant **policy**.
4. Select **Label Preview** .
5. The Label selection dialog relevant to the selected policy is presented.
6. If the **policy** has Assisted Labelling enabled, you will see the **Assisted Labelling label** selection interface relevant to that policy as per the examples in [Assisted Labelling examples](#) (excluding favourites / mandatory).

The screenshot shows a dialog box titled "Boldon James Classification". It features three rows of controls: "SENSITIVITY" with buttons for "UNMARKED", "SENSITIVE" (highlighted in orange), and "COMMERCIAL-IN-CONFIDENCE"; "DISTRIBUTION" with buttons for "INTERNAL" (highlighted in orange) and "EXTERNAL"; and "PROJECT" with a dropdown menu showing "FINANCE". At the bottom of the dialog, there is a large orange bar containing the text "SENSITIVE INTERNAL FINANCE". Below this bar are "Clear" and "Cancel" buttons.

Figure: Label Values Preview dialog.

Suggested Classification Settings

Configures the ability for a user to run a suggested classification on demand. Further information on the Suggested [Classification](#) feature can be found [Suggested Classifications](#).

Note: Suggested classifications are usually triggered by an appropriate 'Check for a suggested classification' rule, but enabling 'User-Driven Suggested Classification' allows the user to **trigger the Suggested Classification manually** by selecting a button from the **Office Ribbon Bar** or from within the **Classifier Labeller User Interface**.

Note: In order for the feature to be available in a client that supports user-driven suggested classification, the setting to 'Allow user driven suggested classification' needs to be **enabled** and **appropriate messages selected for all 3 of the possible outcomes**.

Note: If a suggested classification check is performed manually by the user, the result of the check will be displayed in the standard Classifier [Policy](#) Check dialog with the appropriate configured message.

Note: A 'Check for a Suggested Classification' rule is not required for User-Driven Suggested Classification to function since this manual method of performing a check for suggested classification works against the suggested classification configuration. Any configured 'check for a suggested classification' rules will function as they normally would regardless of whether this feature is enabled or not.

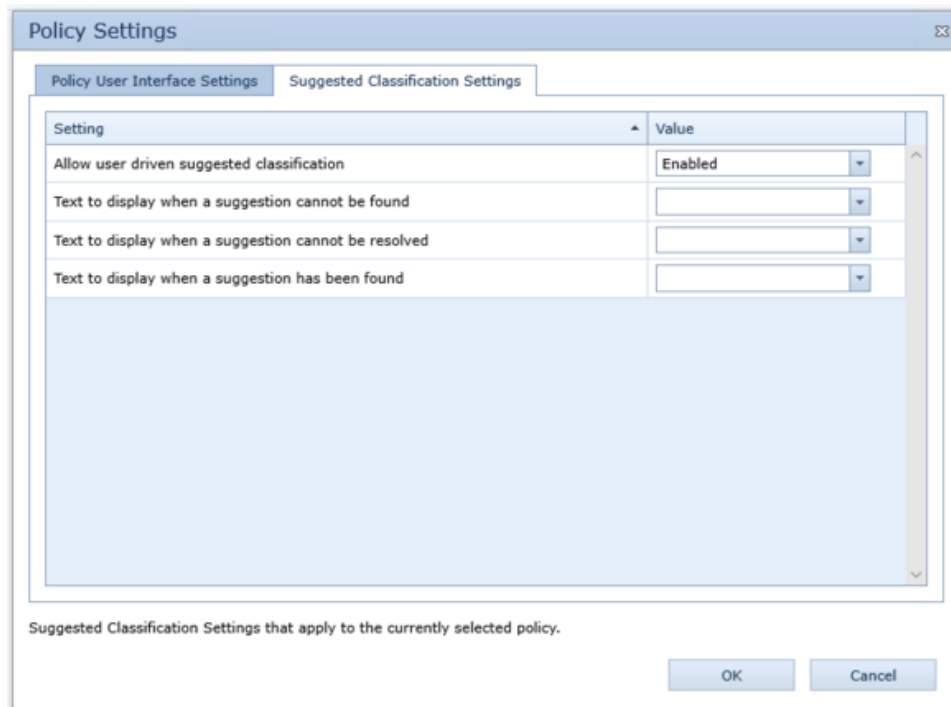


Figure: User-Driven Suggested Classification Settings.

To set the Suggested Classification Settings:

1. Go to **Labelling Configuration>Policy Management>Settings>Suggested Classification Settings**.
2. The following classifications are:
 - **Allow user-driven suggested classification?**
 - **Enable** - Allow user to trigger a suggested classification check.
 - **Disable** - Disallow user to trigger a suggested classification check.
 - **Text to display when a suggestion cannot be found**
 - The message to show when a user-driven suggested classification could not be found.
 - **Text to display when a suggestion cannot be resolved**
 - The message to show when a user-driven suggested classification could not be resolved. This typically happens when multiple clashing suggestions are applicable.
 - **Text to display when a suggestion has been found**
 - The message to show when a user driven suggested classification has been found.
3. When all the required settings have been selected, click **OK**.

Policy Label UI

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#)

The Label Configuration defines the set of Selectors and Values available for policies. The following functions are available if the Set Selectors tab is selected to define and manage selectors in a policy:

- View or change the properties of a [Selector](#) in a policy using the [Edit Selector](#) action. The properties are grouped by tab into **General**, which includes the ability to replace the **Caption** or **Tooltip** defined in the Selector library for this policy, and (Selector) Values (Values can also be accessed directly using [Selector Properties / Options](#) action).
- Make a Selector available or unavailable in the policy using [Selectors in policy](#), and configure whether they appear on the [Ribbon](#) or the general Label Selection dialog; and whether the Label Selection dialog is configured to present the selectors across a number of [Tabs](#).
- Control the [Selector Values](#) available in the policy and the default value using the [Selector Properties / options](#) action.
- Assisted Labelling may be configured using [Connect Selectors - Assisted Labelling](#).
- If [Use Single Click with pre-defined labels](#) is Enabled, manage the associated interface through the Single Click tab.
- [Language \(Policy\)](#) - [Only available if **Allow multiple languages** is enabled, see [Properties \(Classifier Administration\)](#)] allows you to switch the view to show the settings associated with a particular Language.

When a new [Policy](#) is created it will have no Selectors assigned (unless it was established using the **Copy Policy** action).

Selector Properties (Policy)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector}->Edit Properties

When a Selector is added to a Policy, the default is to assume that the settings defined in the [Selector Library](#) are adopted. Some aspects can be modified at the Policy level; others cannot as per the table below:

Library vs Policy Settings

| Attribute | Selector Library Setting | Policy Setting | Notes/ Defaultt |
|---|--------------------------|----------------|--|
| Type | Y | | Use Library setting. |
| Selector Name | Y | | Use Library setting. |
| Colour | Y | | Use Library setting. |
| Portion and Alternative encoding values | Y | | Use Library setting. |
| Caption | Y | Y | Use Library setting. (Selector Properties / General). |
| ToolTip | Y | Y | Use Library setting. |

| Attribute | Selector Library Setting | Policy Setting | Notes/ Defaultt |
|--|--------------------------|----------------|--|
| | | | (Selector Properties / General). |
| Value included | Y | Y | Single selection / Multiple selection / Date offset lists only. Initially all values are included. (Selector Properties / Options). |
| Default value | | Y | Initially no default is defined. (Selector Properties / Options). |
| Use names from | | Y | Single selection / Multiple selection / Date offset lists only. The default is to use the selector Name. (Selector Properties / Options). |
| Show selector captions on the ribbon bar | | Y | Default - Yes |
| Display selector values as buttons | | Y | Single selection lists, Multiple selection lists and Date offset only. The default is to use the selector Name. (Selector Properties / Options). |
| Where possible wrap buttons at | | Y | |
| Enable auto-complete | | Y | Text entry only. (Selector Properties / Options). |

The Policy settings listed in the table above may be modified for a particular Selector by selecting the relevant Selector and then selecting the **Edit Properties** action. A dialog is presented which provides two Tabs (**General** and **Options**). Access to the settings is merely a matter of selecting the appropriate Tab, as in the examples below.

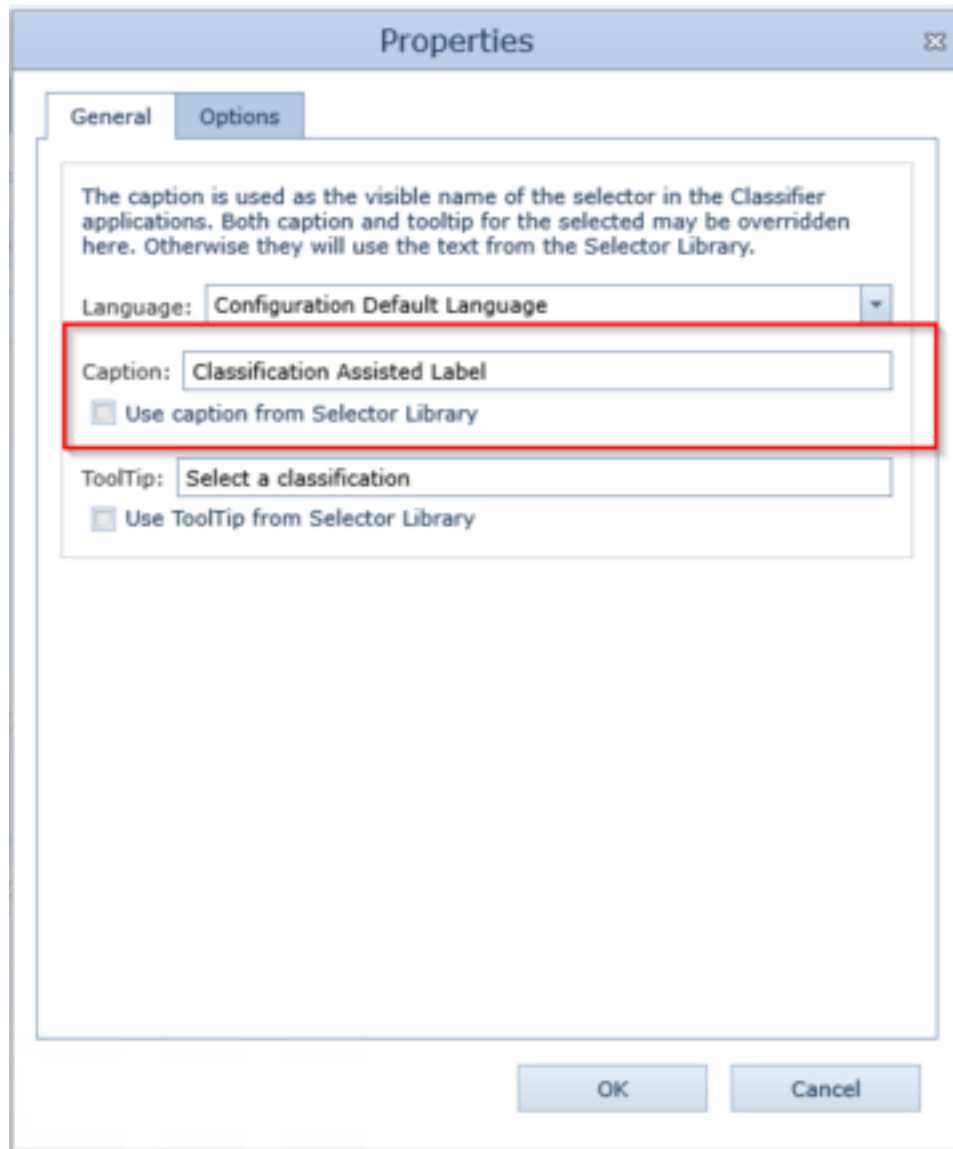


Figure: Selector Properties.

The two tabs are described in:

- [Selector properties / General](#)
- [Selector Properties / Options](#)

Selector Properties / General

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector}->Edit Properties/[General]

The General tab allows you to set the general properties of a [Selector](#) in this [Policy](#) as described below.

By default the Caption and Tooltip defined for this Selector in the [Selector Library](#) will be used. To define policy specific settings:

To set the general properties of a selector in this policy:

1. Select the **Policies** node and select the relevant policy in the **Policies** tree.
2. Select the **Set Selectors** Tab , and select the **selector** in the selector summary list for the relevant policy.
3. Choose (Selected Items) **Properties** and select the **General** tab.

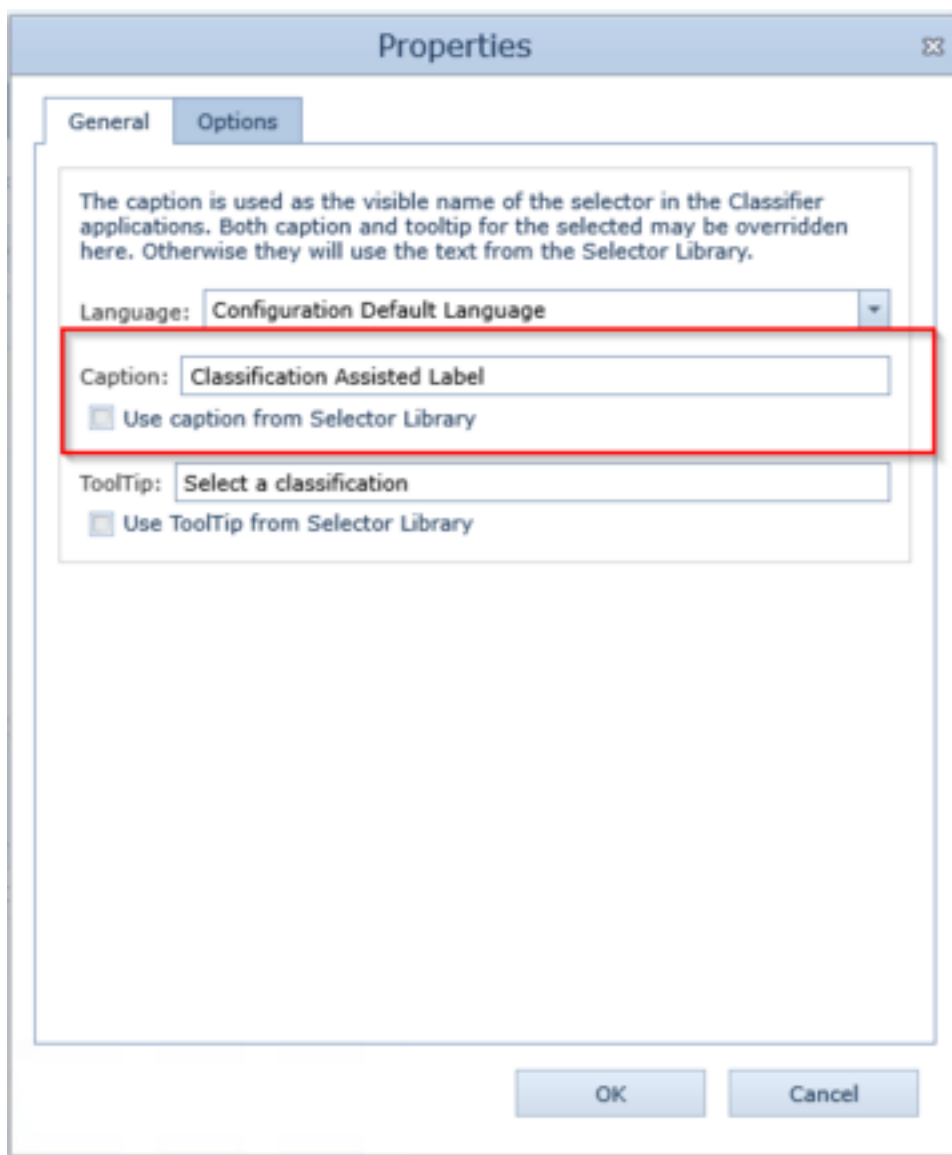


Figure: Selector Properties.

- **Language** : [Only visible if Allow multiple languages is enabled - see [Properties \(Classifier Administration\)](#)]. You only need to define Language specific values if the **algorithm** defined in [Languages](#) would not yield a suitable value from another configured Language. Choose the **Language** and then:
4. Check or un-check the **Use caption from Set Selectors** and/or **Use ToolTip from Set Selectors**.
 5. If un-checking enter your **replacement Caption / replacement Tooltip** into the text box provided.
 6. Click **OK** to complete the changes.

Selector Properties / Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} -> Edit Properties

Depending upon the selector type a different set of options is presented:

To view or change the various setting for a selector in a policy:

1. Select the **Policies node** and select the relevant policy in the **Policies** tree.
2. Select the **Set Selectors** Tab, and select the relevant **selector** in the selector summary list for the relevant policy.
3. Choose [Edit selector options](#). This will present a dialog relevant to the selector type:
 - [Single selection list options](#)
 - [Multiple selection list options](#)
 - [Text entry options](#)
 - [Date picker options](#)
 - [Date offset list options](#)
 - [Selector](#) Value Filtering
3. Apply any changes.
4. Click **OK** to complete the changes which are reflected in the Selector values area.

For All Selector Types

If a default value is defined, it is used as the initial value when a new document or email message is created unless there is pre-existing label that overrides it (e.g. document template label or an email message created **in Reply to**).

A **Value** selected to be the default is indicated in the **Default** column in the **Selector** summary in the parent window.

Note: Display of a default value is also affected by the setting [Masking of Selectors against Clearance](#) and [Select value for masked selector](#).

Single Selection List Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} -> Edit Properties

This dialog allows you to define for [Single selection list](#) selectors:

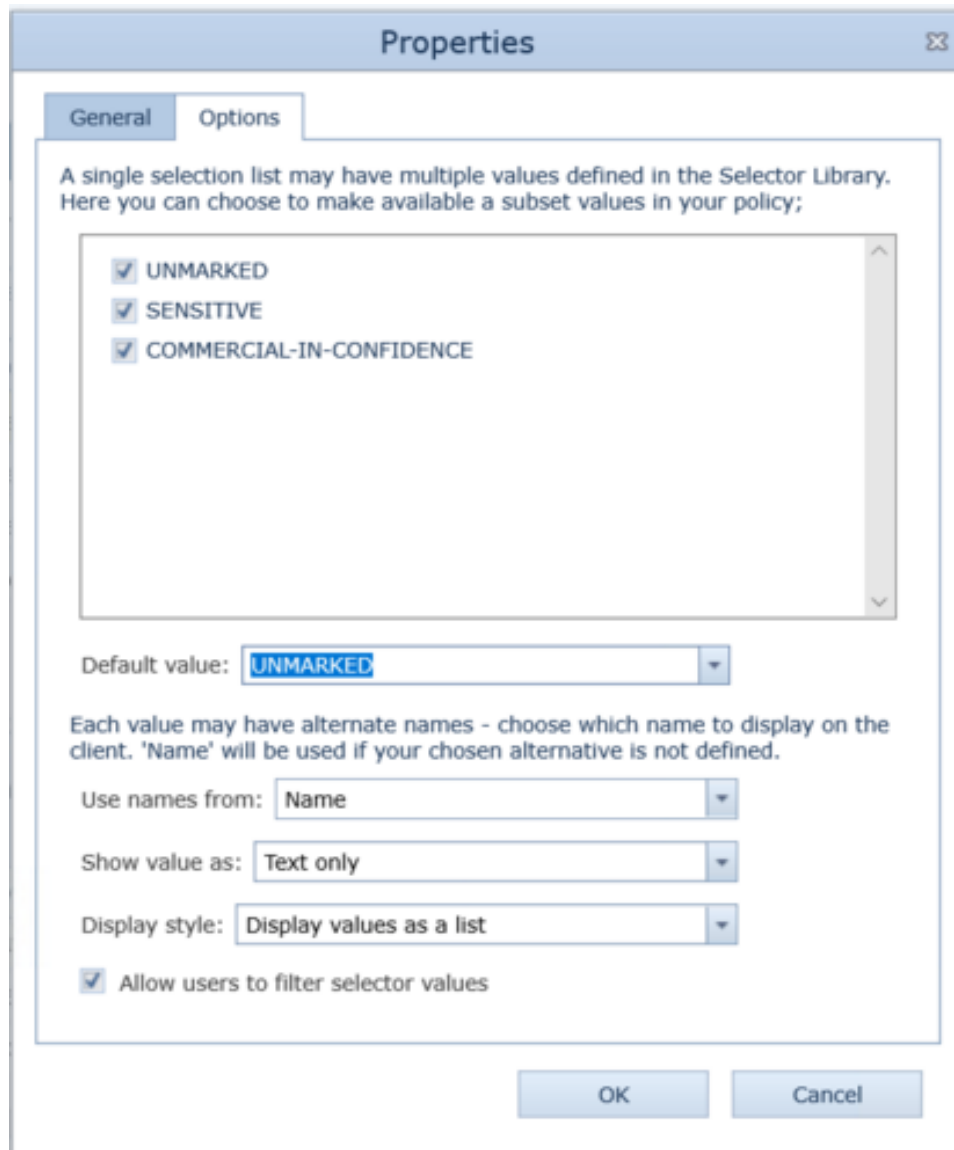


Figure: Single selection list options.

- **Available values** : Allows you to specify which of the values defined for the selector are actually available in the current policy by checking / unchecking the appropriate boxes. The initial state (when the selector is added into the policy) is that all values are available.
- **Default value** : Allows you to specify a default value for the selector by selecting the appropriate value from the list.
- **Use names from** : Allows you to specify which of the '**Names**' configured for a selector (**Name**, **Portion**, **Alternate Name**, **Alternate 2** and **Alternate 3**) is presented to the user for this policy. By default the Names configured are used. Classifier applications will then present the relevant value from the selected **Use**

names from property. If there is no value configured for that property, then Classifier will use the selector Name .

- **Show value as** : Allows you to specify how the selector will be presented if [Use Single Click with pre-defined labels](#) is **Disabled** . Three options are supported:
 - **Text only**: Only the caption will be presented.
 - **Colour and text**: The caption and background colour will be presented.
 - **Image and text** : The Image and caption will be presented.
- **Display Style**: Display values as buttons allows you to control how the selector values appear in the [Ribbon](#) [if a Single selection list selector is configured to appear in the Ribbon ([Selectors in policy](#))]. The [Properties \(Policy\)](#) level setting Where possible wrap buttons after provides additional control.
- **Display Values as a list** : Allows you to control how the selector values appear in the ribbon [If a multiple selection list selector is configured to appear in the ribbon ([Selectors in policy](#))]. The [Properties \(Policy\)](#) level setting Where possible wrap buttons after provides additional control.
- **Non-Assisted Labelling Policies** : For non-Assisted labelling policies, the **Display values as buttons** setting is found by selecting `<Policy> \ Set Selectors \ <Selector>` and then choosing [Edit selector options](#) .
- **Assisted Labelling Policies** : For Assisted labelling policies **Display selector values as buttons** should be set/unset for each instance of a single selection list selector in the [Selector](#) Sequence tree (e.g. Select `<Policy> \ Connect Selectors \ <Selector instance within the tree>` and choose **Edit selector options**). Setting the option via the **Set selectors** tab has no effect for Assisted labelling policies.

Note: If [Use Single Click with pre-defined labels](#) is **Enabled**, then **Use Single click with pre-defined labels** takes precedence (the **Display selector values as buttons** setting is ignored).

- **Disabled (Default)** : The selector will appear in the Ribbon as a drop down list of values.
- **Enabled** : The selector values appear as buttons in the Ribbon. Examples of the effects of this can be found under [Ribbon Bar examples](#) , [Label Selection dialog](#) and [Assisted Labelling Operation](#) . The Ribbon wrapping setting can be used to control the presentation of the buttons within the Ribbon.

Multiple Selection List Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} -> Edit Properties

This dialog allows you to define for [Multiple selection list](#) selectors:

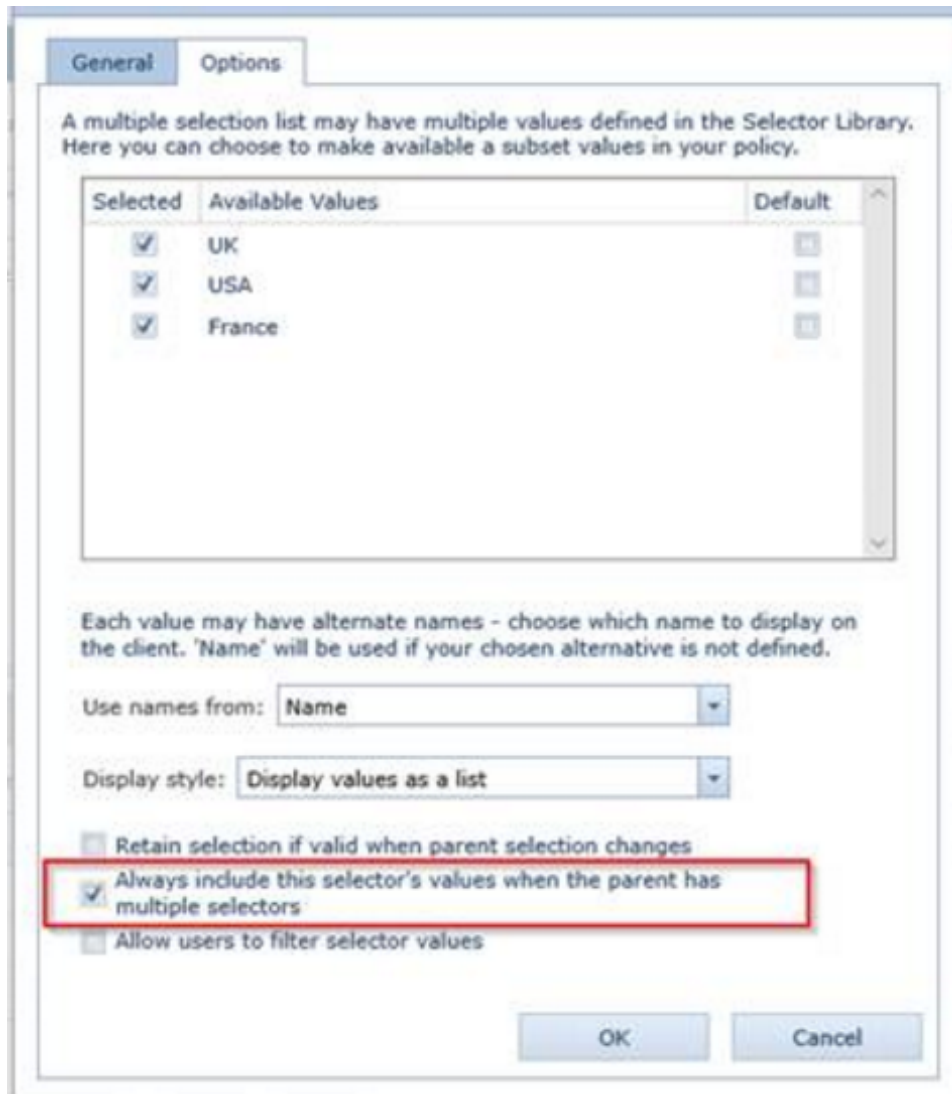


Figure: Multiple selection list options.

- **Selected** : This column allows you to specify which of the values defined for the selector are actually available in the current policy by checking /unchecking the appropriate boxes. The initial state (when the selector is added into the policy) is that all values are available.
- **Default**: Column allows you to specify zero, one or more default values for the selector by checking / unchecking the appropriate boxes.
- **Use names from** : Allows you to specify which of the 'Names' configured for a selector (Name, Portion, Alternate Name, Alternate 2 and Alternate 3) is presented to the user for this policy. By default the Names configured are used. Classifier applications will then present the relevant value from the selected **Use names from** property. If there is no value configured for that property, then Classifier will use the Selector **Name** .
- **Show value as**: Allows you to specify how the selector will be presented. Two options are supported:

- **Text only:** Only the caption will be presented
- **Colour and text:** The caption and background colour will be presented
- **Display Style:** [Display selector values as buttons](#) allows you to control how the selector values appear in the Ribbon [if a Multiple- selection list selector is configured to appear in the Ribbon ([Selectors in policy](#))].
- **Display Values as a list:** Allows you to control how the selector values appear in the ribbon [If a multiple selection list selector is configured to appear in the ribbon ([Selectors in policy](#))]. The [Properties \(Policy\)](#) level setting [Where possible wrap buttons after](#) provides additional control.
- **Non-Assisted Labelling policies:** For non-Assisted labelling policies, the **Display selector values as buttons** setting is found by selecting **<Policy> \ Set Selectors \ <Selector>** and then choosing [Edit selector options](#) .
- **Assisted Labelling Policies :** For Assisted labelling policies **Display selector values as buttons** should be set/unset for each instance of a single selection list selector in the Selector Sequence tree (e.g. Select **<Policy> \ Connect Selectors \ <Selector instance within the tree>** and choose **Edit selector options**). Setting the option via the **Set selectors** tab has no effect for Assisted labelling policies.

Note : If [Use Single Click with pre-defined labels](#) is **Enabled** , then **Use Single click with pre-defined labels** takes precedence (the **Display selector values as buttons** setting is ignored).

- **Disabled (Default):** Selector values displayed in the Ribbon will appear as check boxes.
- **Enabled :** The selector values appear as buttons in the Ribbon. The Ribbon wrapping setting can be used to control the presentation of the buttons within the Ribbon.

Date Picker Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} -> Edit Properties

This dialog allows you to define for [Date picker](#) selectors.

The screenshot shows a 'Properties' dialog box with two tabs: 'General' and 'Options'. The 'Options' tab is active. The dialog contains the following text and controls:

A default date can be set for the policy. This may either be based on a time period or a specific date, within the constraints defined in the Selector Library.

No default

Default using a time period

1 [spin box] Days [dropdown] Future [dropdown]

Default to a specific date

28/08/2018 [dropdown]

OK Cancel

Figure: Date picker options.

- **No default** : There is no default value defined
- **Default using a time period** : Allows you to define a default value relative to the current date
- **Default to a specific date** : Allows you to set a specific date as the default.

Text Entry Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} -> Edit Properties

This dialog allows you to define for [Text entry](#) selectors:

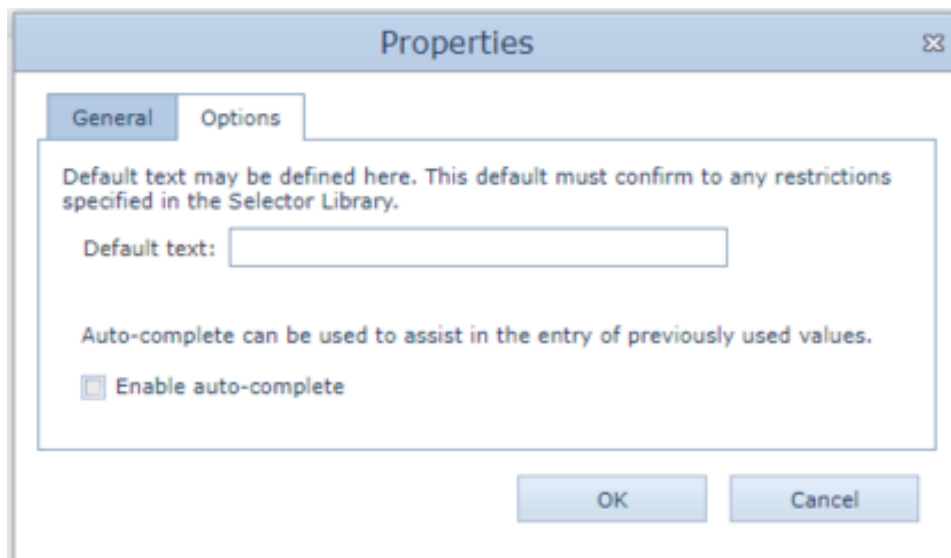


Figure: Text entry options.

- **Default text** : Allows you to specify a default value.
- **Enable auto-complete** : Can be Enabled so that Classifier will present previously used values that match what the user types to assist completion of the value.

Date Offset List Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} -> Edit Properties

This dialog allows you to define for **Date Offset** selectors:

- **Available Values**: Allows you to specify which of the values defined for the selector are actually available in the current policy by checking /unchecking the appropriate boxes. The initial state (when the selector is added into the policy) is that all values are available.
- **Default Date Period**: Allows you to specify a default value for the selector by selecting the appropriate value from the list.
- **Use Names From**: Allows you to specify which of the 'Names' configured for a selector (Name, Portion, Alternate Name, Alternate 2 and Alternate 3) is presented to the user for this policy. By default the Names

configured are used. Classifier applications will then present the relevant value from the selected **Use names from property**. If there is no value configured for that property, then Classifier will use the Selector Name .

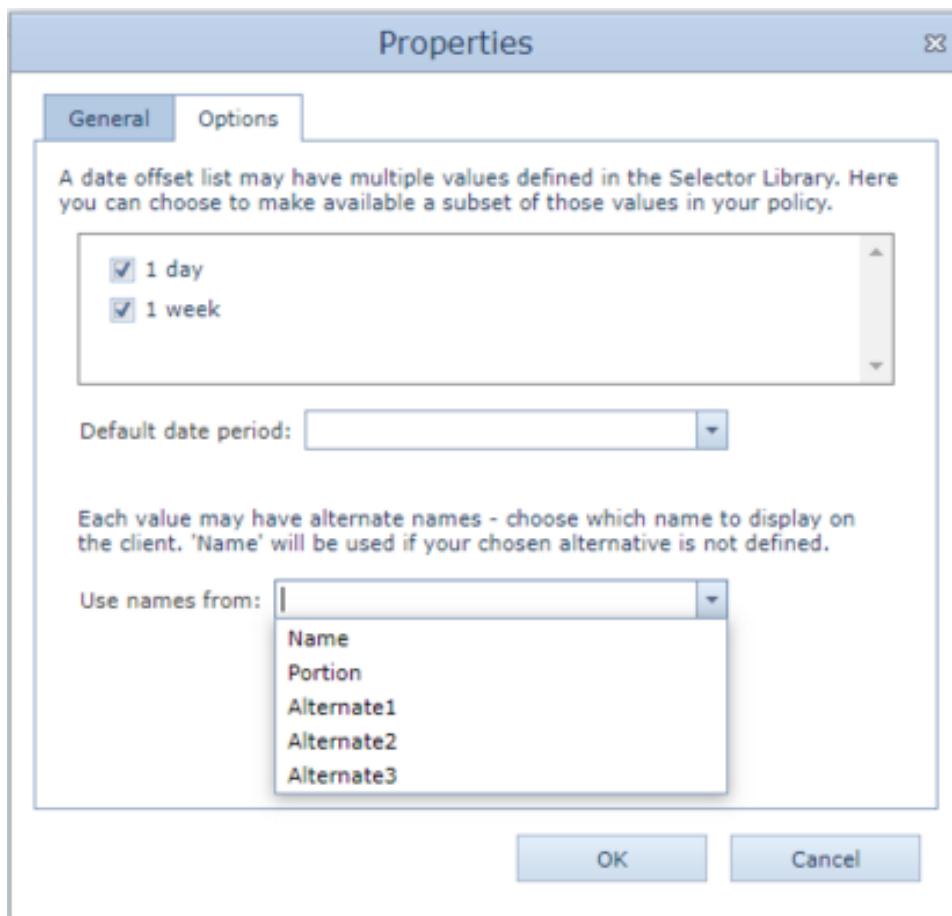


Figure: [Date offset list options](#).

Selector Value Filtering

This feature allows users to filter selector values. It provides an additional filter control that allows users to type in text that is used to filter the selector values in the list. This setting is available on Set Selectors for non-assisted labelling policies and assisted labelling policies.

Note: This option needs to be set to on to allow users to filter selector values.

Note: Only applies to single selection list selector or a multi selection list selectors when the display style is set to display values as a list.



Figure: The Allow Users to filter selector values option which allows users to filter selector values.

To filter a selector value:

1. Go to **Labelling Configuration**>(Configuration Name)>Policies>(Policy Name)>Set Selectors Tab .
2. Select a set single selection or multi selection selector from the list.
3. Select **Edit Properties** .
4. Select the **Options** tab.
5. Select the checkbox, "**Allow users to filter selector values**".
6. To save click on the **OK** button. To cancel the action, click on the **Cancel** button.

Selectors In Policy

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector}->Selectors in policy

When configuring a policy, you need to control the selectors that are relevant to the policy. This action allows you to Add or Remove selectors to/from a policy, and configure whether they appear on the [Ribbon](#) or the general Label Selection dialog; and whether the Label Selection dialog is configured to present the selectors across a number of [Tabs](#) .

Other selectors defined in the selector library that relate to (for example) externally defined label elements may still be recognised and displayed. See [Retained](#) for more detail.

To manage the Selectors in the policy:

1. Select the **Policies** node and select the relevant **policy** in the **Policiestree**. Select the **Set Selectors** tab.
2. Choose **Selectors in policy** which will display a list of Selectors that are currently included in / excluded from the policy.

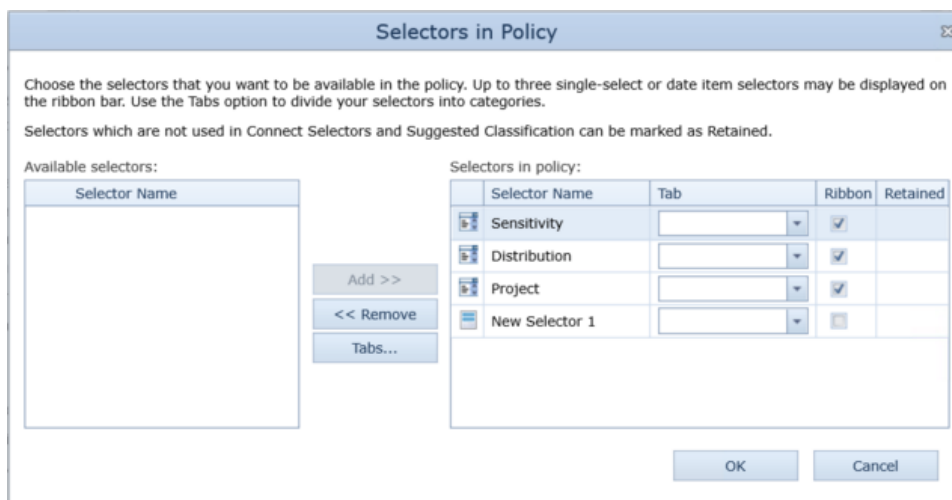


Figure: Selectors in [Policy](#) with Available selectors, Selectors in Policy ([Selector Name](#), [Tab](#), [Ribbon](#) and [Retained](#)).

3. Select the required **Selector** .
4. Click **Add / Remove** as appropriate. The Selector will be transferred to the other list.

Note: You cannot Remove a Selector from a policy if the policy has rules configured that refer to that Selector. In that circumstance the following dialog appears:

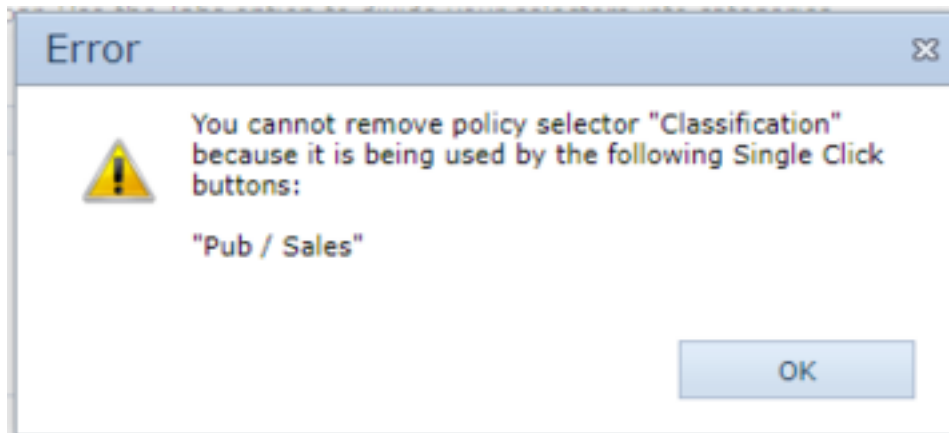


Figure: Remove Selector failure.

5. The policy summary list will be updated to show the updated list of Selectors in the policy.
6. You can use the **Ribbon** and /or **Tabs** options to control how label selection appears to the user.

Ribbon

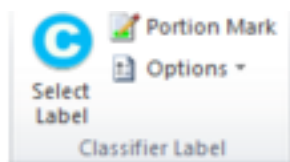
Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/{Set Selectors}/{selector}->Selectors in policy->Ribbon

Note: This feature is not applicable to [Text entry](#) or [Date picker](#) selector types which cannot be presented in the Classifier Ribbon Bar.

You can control which single selection, multiple selection or Date offset selectors configured in a policy appear in the Ribbon Bar using the **Ribbon** setting on the Selectors in Policy dialog - subject to a maximum of three such selectors.

All selectors will be available through the general Label Selection dialog which can be invoked through the

Classifier Label button or dialog box launcher  if [Single Click operation](#) is active.



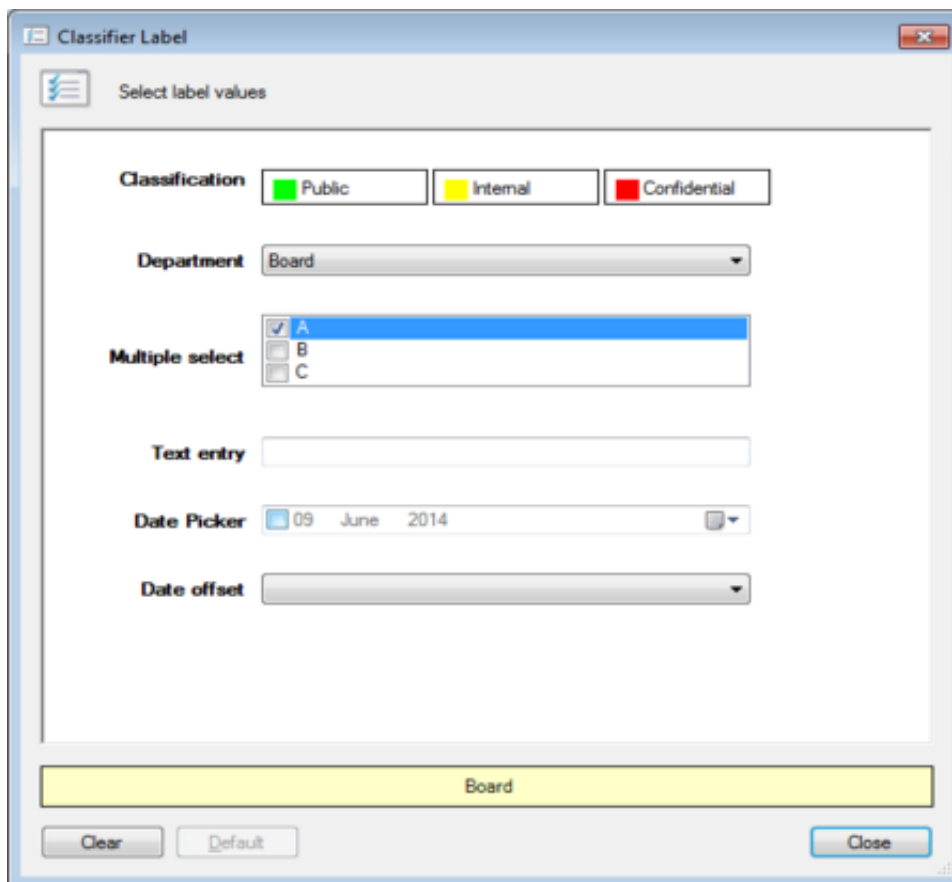
Checking the **Ribbon** box for a selector means that it will appear in the Ribbon Bar as well as the general label selection dialog.

Tabs

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/{Set Selectors}/{selector}->[Selectors in policy](#)

By default the general Label selection dialog shows all selectors configured for the current policy as in the following example where the selectors appear in the order defined in the [Selector Library](#) (Set selector order).

The example below shows the first (Single selection list) selector with **Display selector values as buttons** option **Enabled** ([Single selection list options](#)), the second (Single selection list) selector has the option **Disabled** and that selector appears as a drop down selection list.



The screenshot shows a window titled "Classifier Label" with a "Select label values" header. The window contains several selectors:

- Classification:** Three buttons labeled "Public" (green), "Internal" (yellow), and "Confidential" (red).
- Department:** A dropdown menu currently showing "Board".
- Multiple select:** A list box with three items: "A" (checked), "B", and "C".
- Text entry:** An empty text input field.
- Date Picker:** A date selection field showing "09 June 2014".
- Date offset:** A dropdown menu.

At the bottom of the window, there is a yellow bar displaying "Board". Below this bar are three buttons: "Clear", "Default", and "Close".

Figure: Select Label: All selectors.

You may wish to **group** the selectors to reflect their usage. This can be achieved using the Tabs facility. You can define one or more **Tabs**, and configure the **Name of the Tab**, and then which selectors appear on each **Tab**.

Note: If you allocate one selector to a Tab, you must allocate all selectors to one of the Tabs; failure to do this will result in a warning.

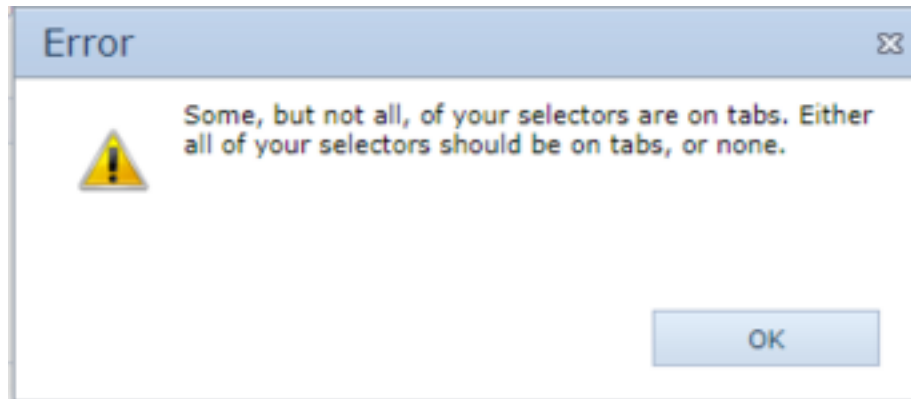


Figure: Some selectors not allocated to a Tab.

Consider the Tabs you require and establish them as follows:

1. Select the **policy**.
2. Choose **Selectors in policy** and click **Tabs** to display the Tabs configuration dialog:

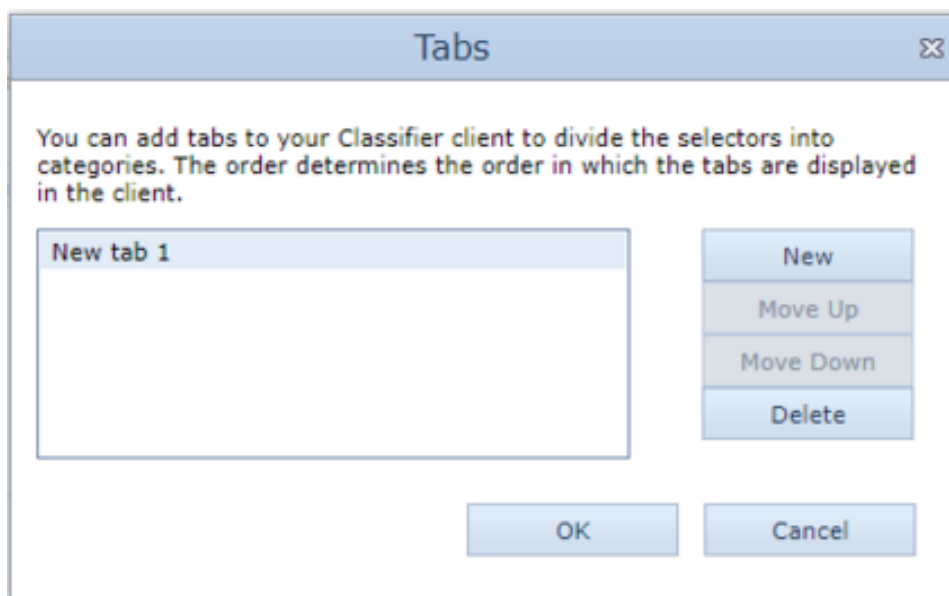


Figure: Tabs configuration.

3. Set the **name** for the **Tab** (double click to get an edit dialog, and use **New** to add any additional Tabs you require. The example shows three Tabs established:

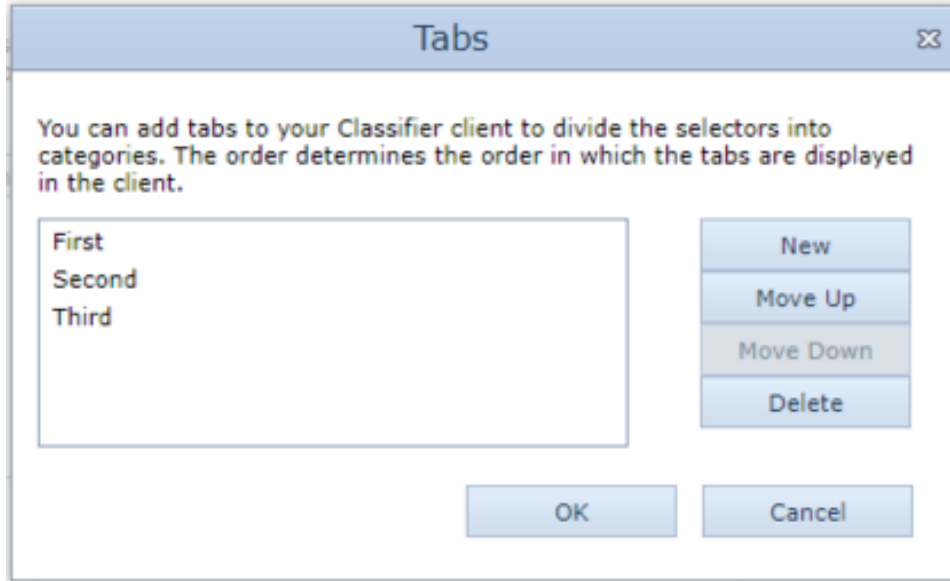


Figure: Three tabs.

4. Click **OK**. You can now allocate the selectors to the available tabs by choosing the **Tab** for each selector via the Tab drop down in the Selectors in policy dialog:

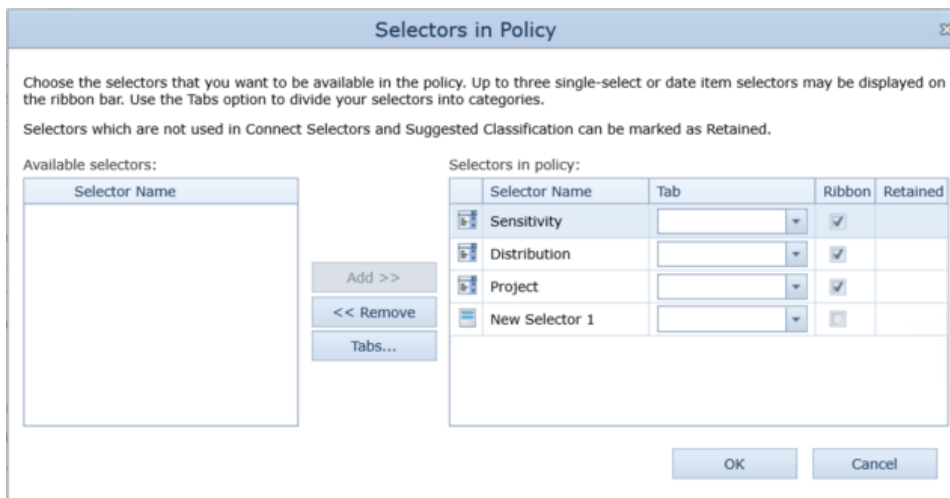


Figure: Configure Tab.

5. The policy summary view is modified to show the **Tab** / selectors relationship:

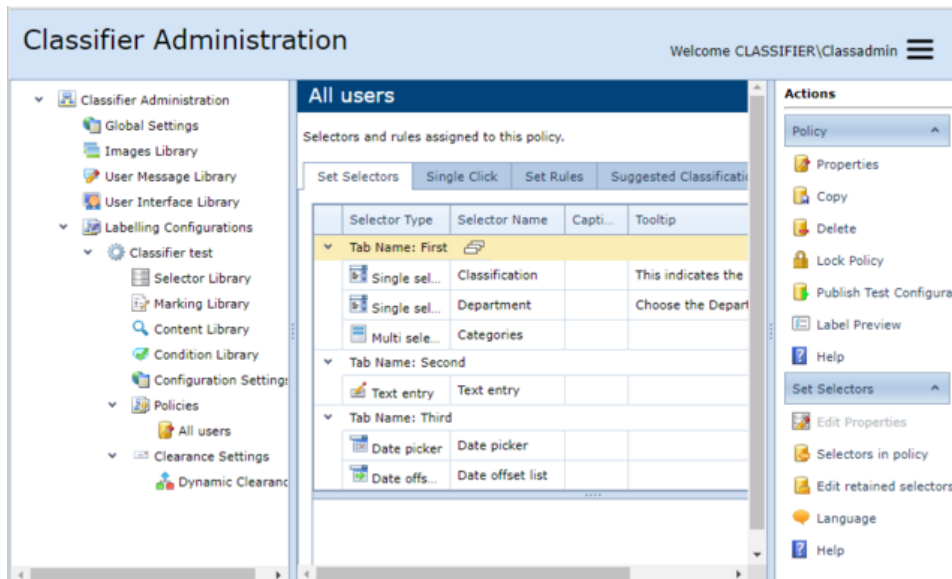


Figure: Policy summary: tabs configured.

6. Once you have configured the **selector / tab mappings** you can check the results using [Label Preview](#) :

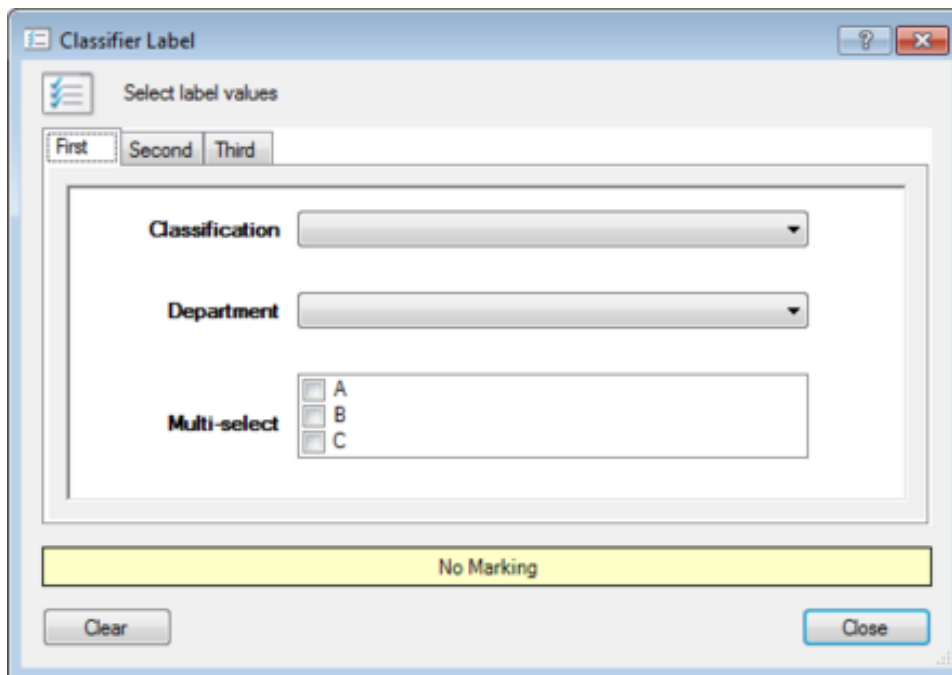


Figure: Tab selection interface.

7. The user can navigate between the tabs.

8. The order that selectors appear in the tab is the same as the selector order defined using [Set selector order](#) . Thus, the first and third selectors could appear on the First tab with the second selector appearing on the second tab, but the First selector would always appear at the top of the First Tab.
9. Set the order of the tabs using **Move Up / Down** .
10. You can **Delete** Tabs if they do not have any selector in the policy assigned to them.

Assisted Labelling and Tabs

- You can use tabs with a policy that has [Use Assisted Labelling](#) set. Using Assisted Labelling in conjunction with Tabs just means the operation involves showing / hiding tabs according to whether they currently contain selectors of interest.
- Selecting a value for one selector can follow the usual Assisted Labelling mechanisms to provide additional selectors and values on the same or a different Tab.
- In the example below the First tab contains a **Nature** (of information) selector which is flagged as **Mandatory** , but has no default defined. Once the user has chosen a value for this selector, a **Second** Tab appears which can depend on the value chosen in the First Tab.

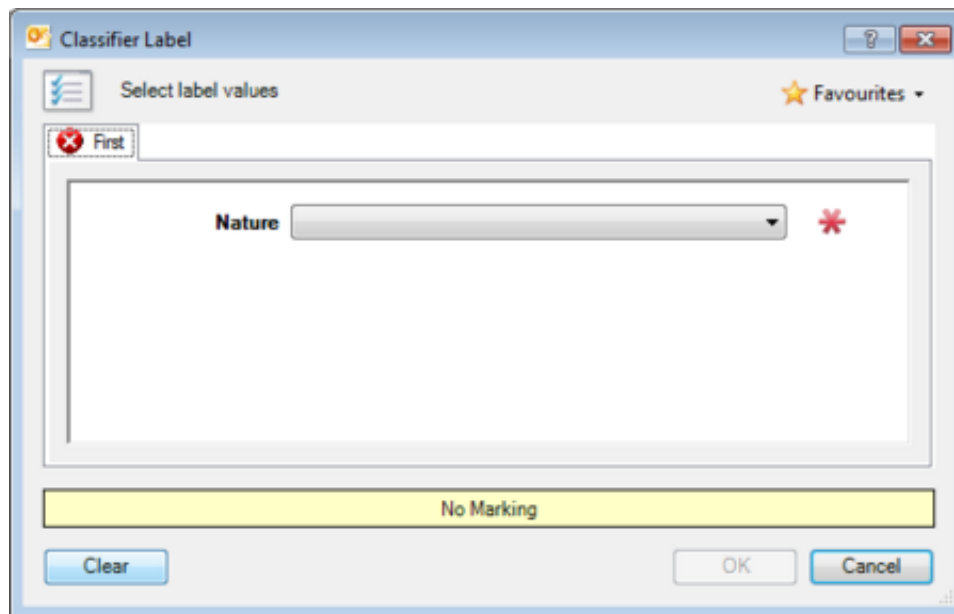


Figure: Nature mandatory.

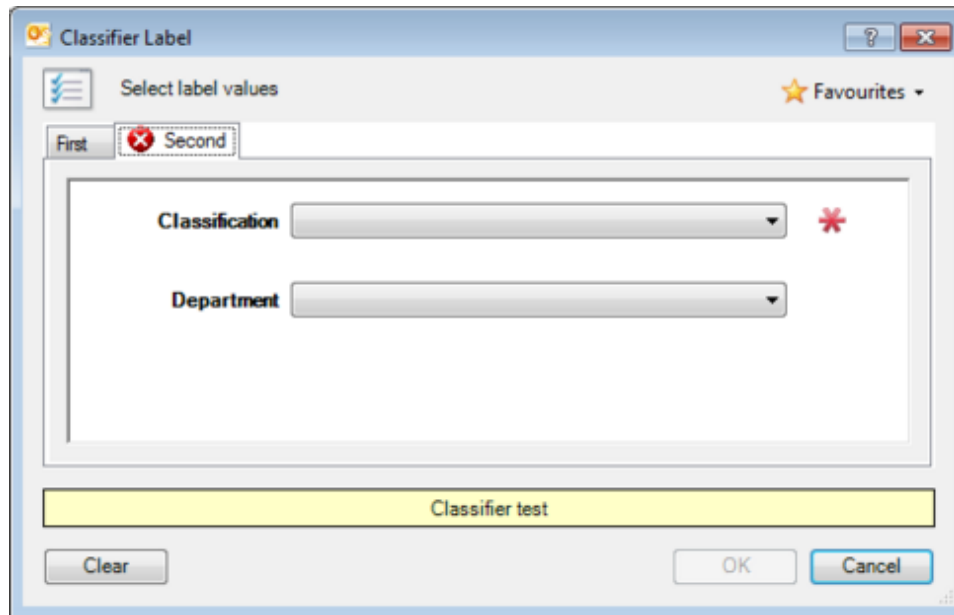


Figure: Second Tab added.

- The **Second** Tab indicates that it also contains a mandatory selector.
- No automatic switch of focus occurs even if another tab appears.

Retained

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Set Selectors]/{selector} → [Selectors in policy](#) → Retained

You may configure Selectors that are not available in all policies. Any Selector that is not available in a policy is a potential **Retained** Selector for that policy.

If an email message or document is received containing a Selector value that is recognised in the selector library, the value is presented if the selector is included in a Marking Format, even if it is not related to an Active selector. If you use an existing label containing such a (non-active) selector value as the basis for a new object (e.g. Reply to a received email message) the label value will be dropped from the new label.

There may be circumstances where the label value received has been established under a different policy (different group of users) and this value is to be retained as the value in the **reply to** or **forward** circumstance. Classifier caters for This requirement can be catered for in Classifier by adding a selector into a policy and then designating it as **Retained**, which will ensure that the source label value is propagated to the new object.

Another scenario is if a selector is no longer to be included in an active capacity, but the selector settings are to be retained in rules in the policy.

Your Marking Formats may include such Retained Selectors so that Summary Markings would still show any defined value. By default non-Active selectors are **NOT** propagated to new Documents or email messages. You can modify this behaviour as follows:

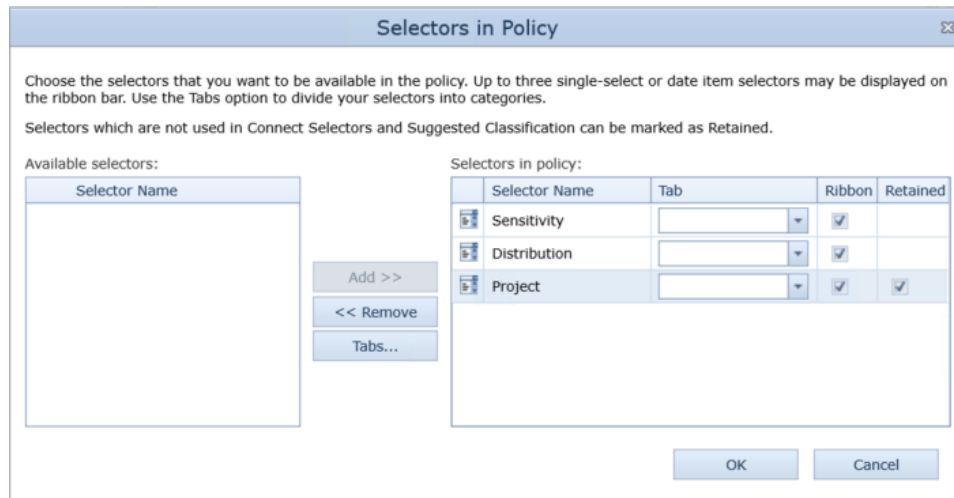


Figure: Retained selectors in policy.

To mark a selector as Retained:

1. Ensure the relevant Selectors are defined in the [Selector Library](#).
2. Include the **Selectors** in appropriate **Marking Formats**.
3. Select the **Policies** node and select the relevant **policy** in the Policies tree.
4. Select the **Set Selectors** Tab.
4. Choose **Selectors in Policy**. This will present a dialog showing the **Selectors** that are in the **Policy**.
5. Any selector that is not in use in the policy can be marked as being a '**Retained**' selector by selecting the appropriate **checkbox**.
6. Click **OK** to commit the changes.

Language (Policy)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/{Set Selectors} -> Language

By default the Set Selectors list presents the selector Captions and Tooltips defined for the Configuration default language.

You can select an alternative language from the Language drop down to see which items you have / have not configured for that language as per the example below which shows the Caption and tooltip set to blank because a non-default language has been selected and these values have not yet been populated.

Figure: Policy display (Non-default language).

Connect Selectors - Assisted Labelling

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors]

Assisted Labelling allows you to guide user selection of label values by limiting the choices of selectors and / or selector values depending upon the value chosen for a preceding selector.

A policy is either an Assisted Labelling Policy or not as determined by whether the [Use Assisted Labelling](#) option is checked on the policy Properties. If the option is checked then the Connect Selectors Tab appears if the policy is selected; initially showing the root of the Selector sequence tree.

Note: Once a policy has been set as an Assisted Labelling policy it cannot be reverted to a standard (Non-Assisted) Labelling policy.

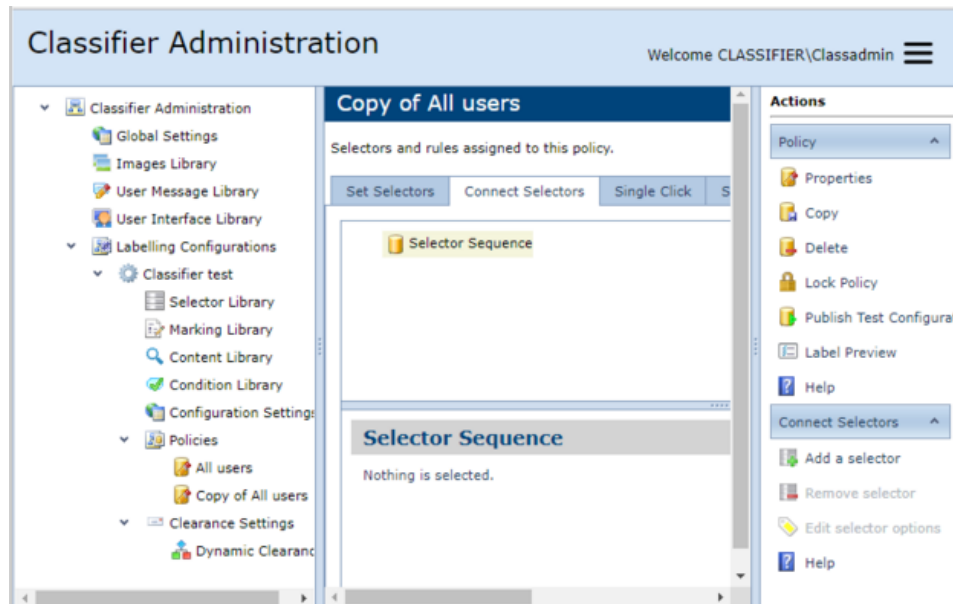


Figure: Connect Selectors.

All the standard policy management features apply, including defining the selectors and values that are available in the policy (e.g. [Selectors in policy](#) and [Edit Selector](#)). The only difference is that the Connect Selectors Tab allows you to construct a dependency tree.

Note: Until you start to populate the Selector Sequence Tree, the effects of using the policy may be indeterminate in terms of any label selection presented, default values and rule operation.

You start to build the Selector Sequence tree by adding one Selector at the root. This selector is the user's first choice. You can limit the selector values available using Edit selector Options. The tree shows Selectors and Selector values.

There are some fundamental constraints:

- The Selector Order defined in the Configuration is strictly enforced. Therefore if one branch of the tree adds the third selector defined below a value for the first selector (essentially omitting the second selector), the second selector cannot then be added further down.
- You cannot add a selector below a [Multiple selection list](#) value.
- Mandatory selector rules that demand a value for a selector that is not visible under certain circumstances - should be avoided, because the associated rule will always fail.
- The default values defined in the policy selectors are ignored in the Assisted Label connected selectors. Only default values configured in the connected selector are visible in the client.

The actions available for managing the Selector Sequence tree are:

- [Add a selector](#)
- [Remove selector](#)
- [Edit selector options](#) : Includes the ability to set the default value for this branch of the tree.

The Assisted Labelling Examples topic describes some different uses of Assisted Labelling; the associated configuration of the Selector Sequence tree and gives examples of the user experience.

Add a Selector

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors] -> Add a selector

To add a [Selector](#) into the Assisted Labelling Selector Sequence tree:

1. Select the **Policies** node and select the relevant **policy** in the Policies tree. Select the **ConnectSelectors** Tab.
2. Choose a **node** in the existing tree where you want to add a Selector. This could be below the **Root** , an existing **Selector** or an existing **Selector Value** .

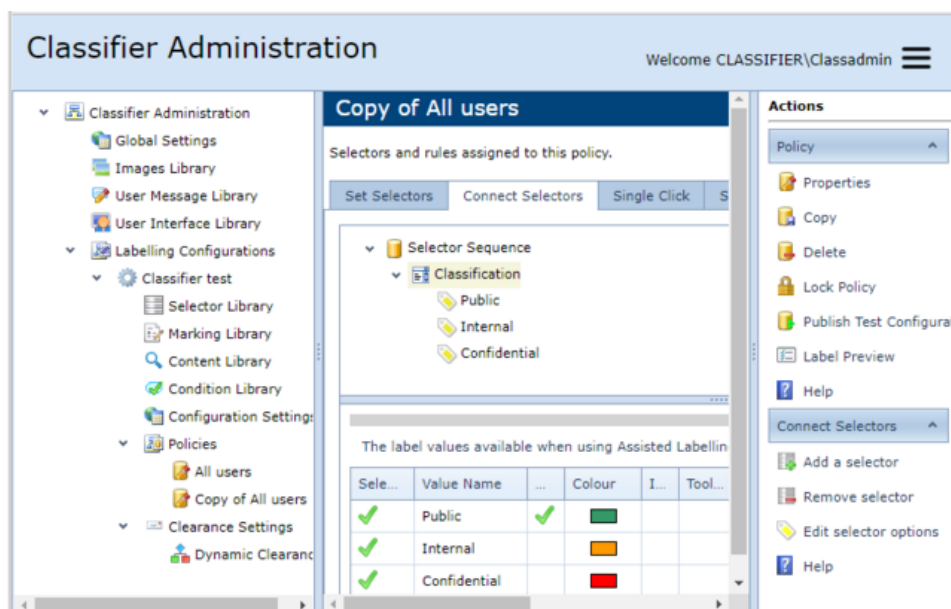


Figure: Add Selector Locations.

3. Choose **Add a selector** which will display a list of available selectors.

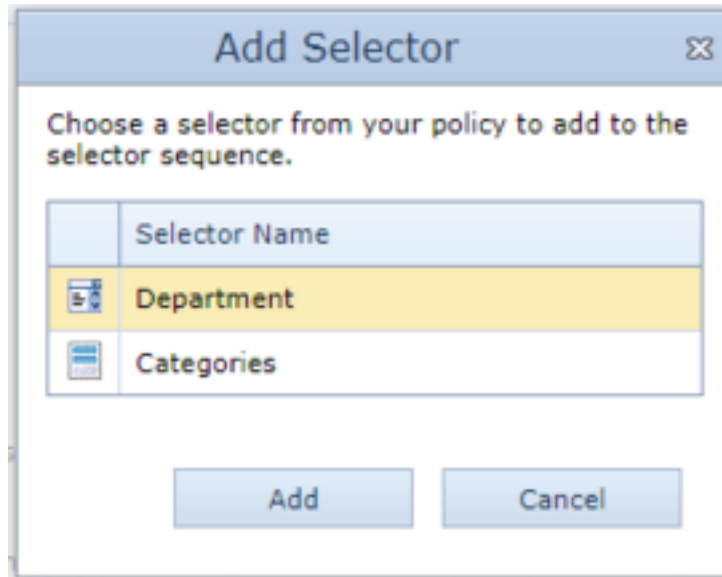


Figure: Add a selector.

4. Select the appropriate selector and click **Add** .
5. The selector is added to the tree below the chosen node. In this example, Department has been added below the **Root**.

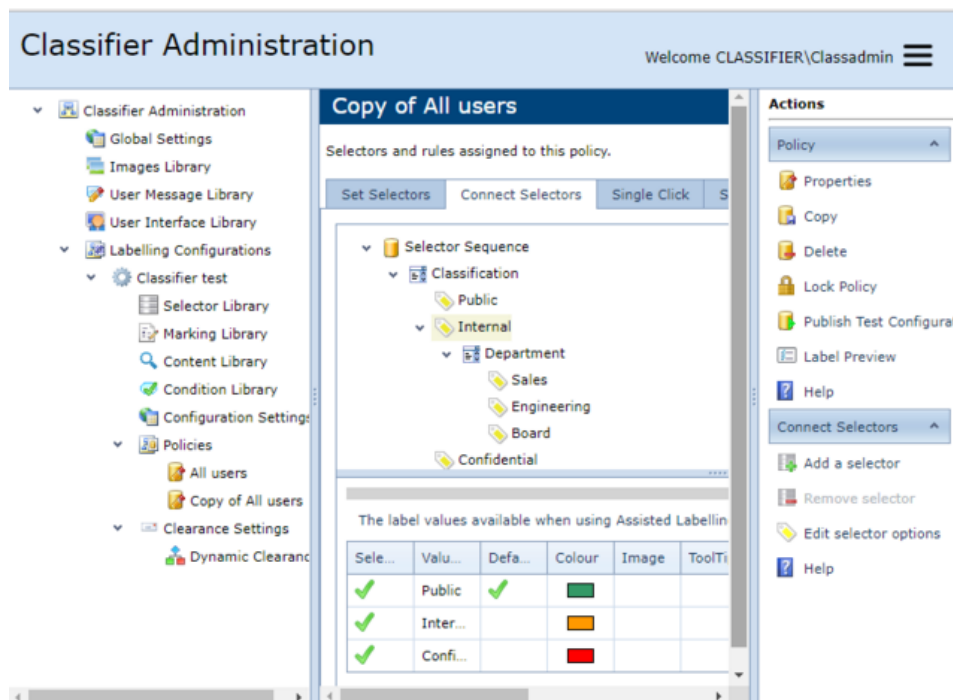


Figure: Department added below Internal.

Once the selector has been added, you may wish to configure the values available using [Edit selector options](#) . Initially all values for a selector (in the policy) are assumed to be available.

Note: The default values defined in the policy selectors are ignored in the Assisted Label connected selectors. Only default values configured in the connected selector are visible in the client.

Remove Selector

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors] -> Remove selector

To Remove a Selector from the Assisted Labelling Selector Sequence tree:

1. Select the **Policies** node and select the relevant policy in the **Policies** tree. Select the **Connect Selectors** Tab.
2. Select the **Selector** that is to be removed.
3. Choose **Remove** selector . A warning may be presented:

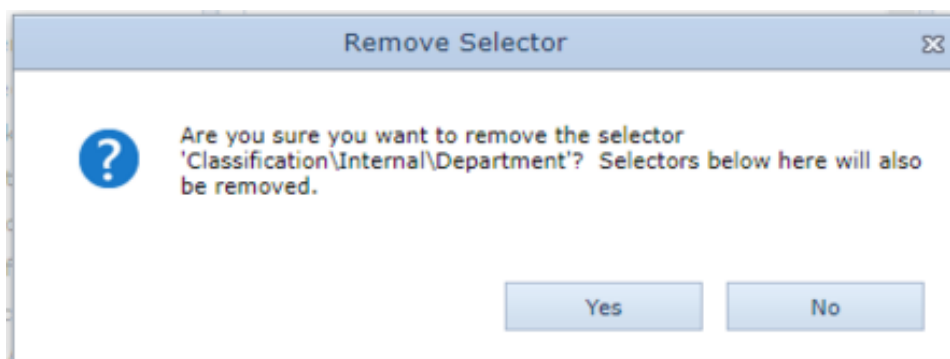


Figure: Remove Selector warning.

4. Click **Yes** and the chosen **Selector** will be removed from the tree.

Edit Selector Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors] ⇒ {Selector}->Edit selector options

Once a selector has been added into the **Assisted Labelling Selector Sequence** tree, you may wish to configure the **selector values** that will be available to the user in that branch of the tree. You can also define the **default value** to be applied for this selector in that **branch of the Selector Sequence** tree. Also see the [Selector Library](#) .

Note: The default values defined in the policy selectors are ignored in the Assisted Label connected selectors. Only default values configured in the connected selector are visible in the client.

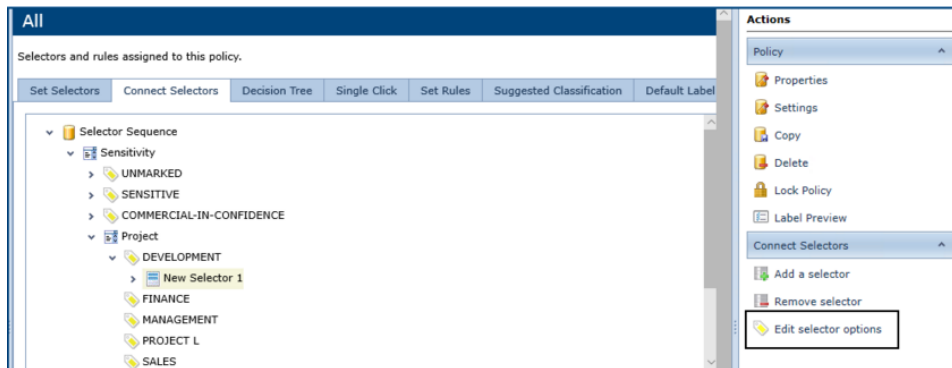


Figure: The Edit selector options tag.

To edit the selector options:

1. Go to **Labelling Configurations**>{configuration}>**Policies**>{policy}/[Connect Selectors]>{Selector}>Edit selector options.
2. Select the **Policies** node and in the **Policies** tree, select the relevant **policy** .
3. Select the **Connect Selectors** tab.
4. Select either the **Selector** or **one value of the Selector** whose values are to be edited.
5. Select either **Single Select** or **Multi Select** .
6. Choose **Edit selector options** . This will present the properties associated with the relevant selector.

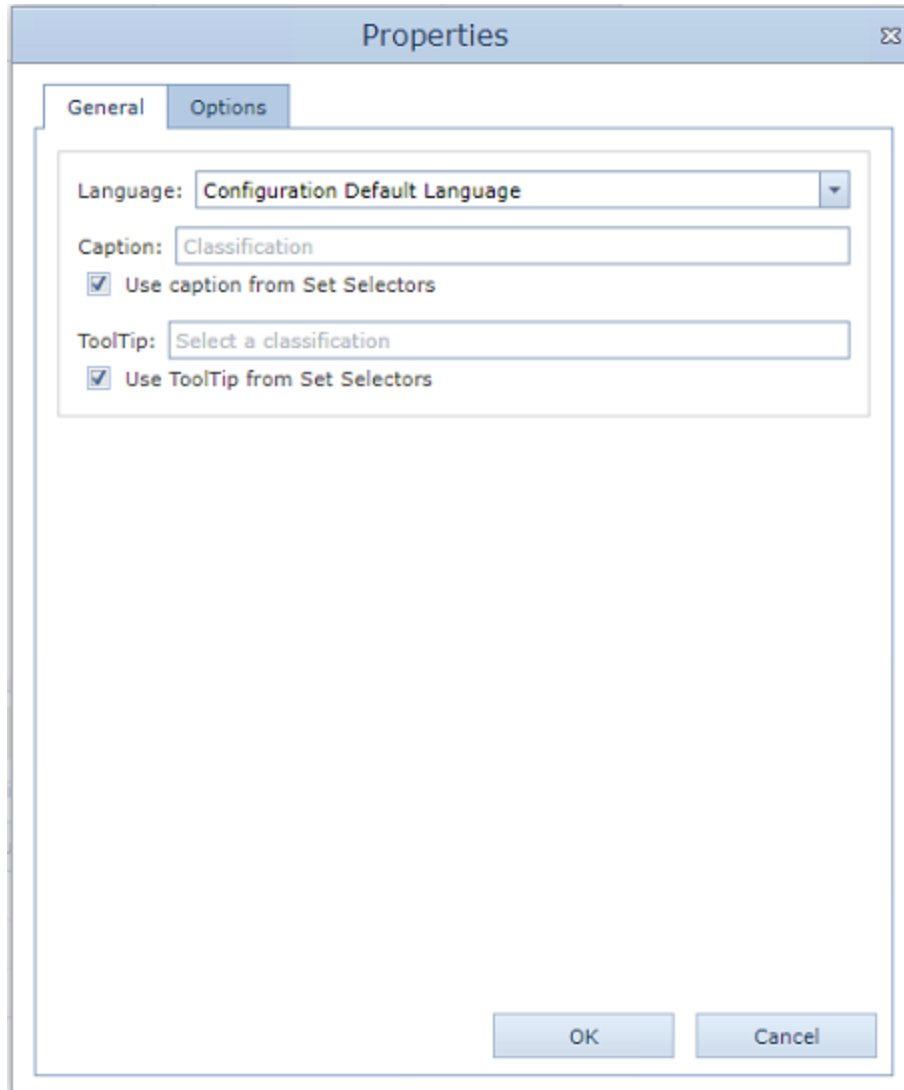


Figure: Edit selector options (single select).

7. On the **General** tab, you can override the **Caption** and **Tool-tip** values configured for the Selector in the policy; if an override is not provided then values will come from the [Selector Properties / General](#) page.

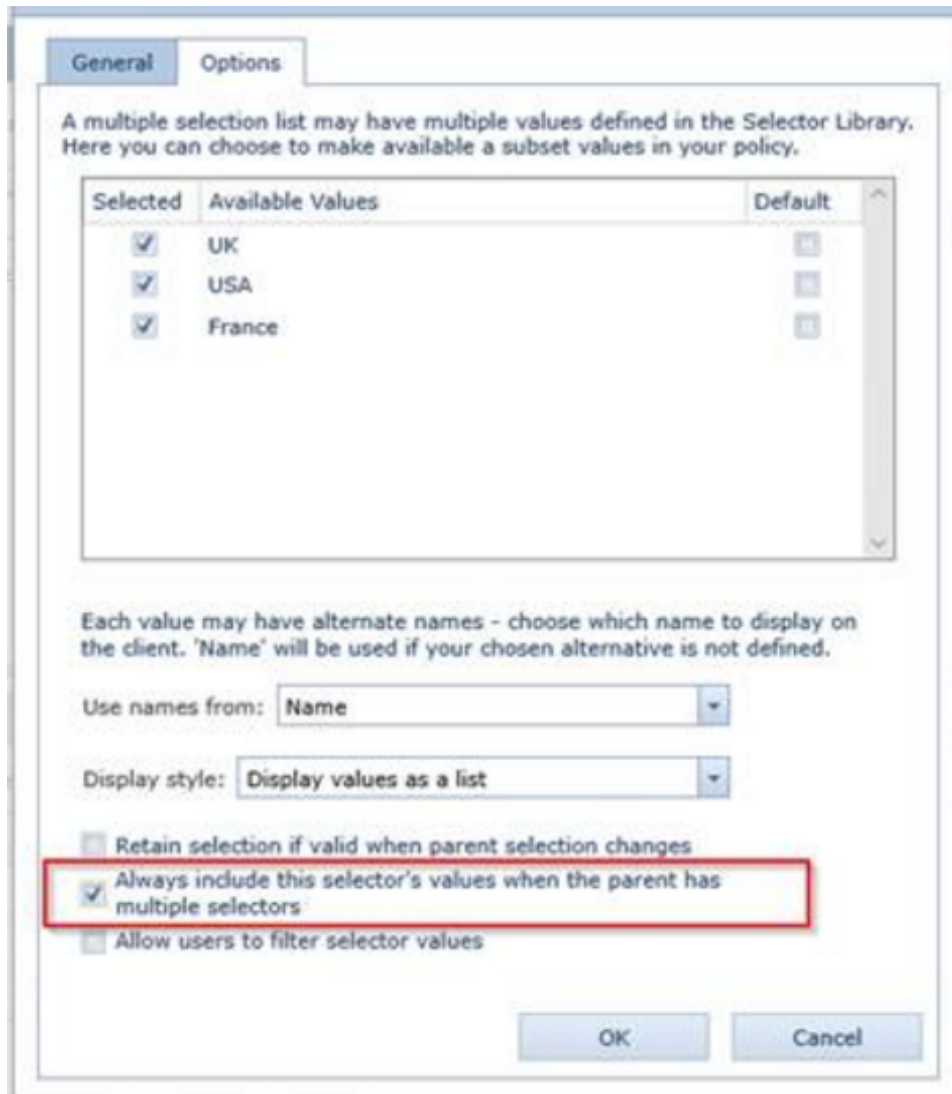


Figure: Edit selector options (multi select).

8. Select the **Options** tab, The options will vary with the type of selector.
9. Adjust the set of **available values** by **checking/un-checking** the appropriate boxes.
10. **Set / unset** the **Default value** as required. This default applies only to this branch of the tree.
11. Set the **Use names from** value to an attribute of the **Selector**. The default is to use the **Name** attribute.
12. Select the **Display style** (**Display values as buttons / Display values as a list**). For Assisted labelling policies Display values as buttons should be **set/unset** for each instance of a single selection list selector in the **Selector Sequence** tree (e.g. Select <Policy> \ Connect Selectors\ <Selector instance in the tree> and choose **Edit selector options**). Setting the option via the **Set selectors** tab has no effect for Assisted labelling policies. Display values as buttons allows you to control how the selector values appear in the [Ribbon bar](#) [if a [Single selection list](#) selector is configured to appear in the Ribbon bar ([Selectors in policy](#))]. The [Properties \(Policy\)](#) level setting [Where possible wrap buttons after](#) provides additional control. Also see [Multiple selection list](#).

Single select and Multi select selectors can select how values are displayed, **Text, Colours** and **Text, Images** and **Text, Check Boxes** or **Buttons**. Control how the selector values appear in the ribbon bar [If a multiple selection list selector is configured to appear in the ribbon bar ([Selectors in policy](#))]. The Properties (Policy) level setting [Where possible wrap buttons after](#) provides additional control

- **Checked:** The selector values will appear as buttons and the Properties (Policy) level setting [Where possible wrap buttons after](#) provides additional control.
- **Unchecked:** The selector values will appear as check boxes.

12. Checkboxes:

- **Retain Selection if valid when parent selection changes (Set/unset)** on each selector node in the Connect Selectors tree. This setting has the following effect, by default (**Disabled**), if the user changes the choice of a parent selector value, any choice of subordinate value(s) must be made afresh. If the setting is **Enabled** then changing the choice of a parent value will Retain any currently selected subordinate values that are available under the new parent choice. Consider the scenario described in [Example 1 - Categories with many Annotations](#) : The user could select **Cat 3 + A1/A2** . Subsequently selecting **Cat 1** would by default (**Disabled**) drop **A1/A2** , but **enabling Retain Selection** on the **Annotation** node below **Cat 1** would remember **A1** .
- **Always include this selector's values when the parent has multiple selections** is only applicable to Multiple selection selectors. Consider two multiple selection lists **Make** (a list of manufacturers) and **Models** (a list of the models available for each manufacturer) established as assisted labelling tree (Models below Make). The user selects Make A + models A1, A2 and A4, and Make C with Models C5 and C8. Enabling the setting on each Model branch will ensure that the label constructed will include all selected Makes and Models (Makes A + C / Models A1 + A2 + A4 + C5 + C8).
- Allow users to filter selector values . Users can filter selector values.

Assisted Labelling Examples

Admin: LabellingConfigurations ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors]

This topic provides examples illustrating how Assisted Labelling might be used to simplify and / or direct users' choice of labels. This is not an exhaustive list; the basic mechanisms can be used to provide a variety of effects.

Each example is presented in a separate sub-topic.

The examples are:

- [Example 1: Categories with many Annotations](#)
- [Example 2: An additional user choice if Category 2 is selected](#)
- [Example 3: Separation of Personal and Corporate information](#)

Example 1 - Categories With Many Annotations

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors]

Note: This example assumes only two selectors are present. However, the general mechanism can be extended down to a third level. This may also involve more than three different selectors, subject to the presence of no more than three selectors in any one branch. Thus not only are the selector values configurable, based on a value

selected at the parent selector level, but entirely different child selectors may be configured as available for selection, depending on the choice at the parent selector level.

Consider an organisation that needs to label information with two selectors called **Category** and **Annotation** .

There are several Category values, yet many Annotation values, but only certain combinations are valid.

If Assisted Labelling is not configured, the user would be presented with a long list of Annotation values and have no guidance as to whether they had selected a valid combination, potentially leading to frustration and labelling errors.

You can improve the user experience and reduce the incidence of mislabelling by implementing Assisted Labelling along the following lines:

1. Define all the Category values (e.g. Cat 1, Cat 2,)
2. Define all the Annotation values (e.g. A1, A2, A3,)
3. Define the matrix of valid combinations:

| Category | Annotation |
|----------|--|
| Cat 1 | A1 |
| | A3 |
| Cat 2 | [Blank - indicating this category has no associated Annotations] |
| Cat 3 | A1 |
| | A2 |
| | A4 |
| ... | ... |

4. Configure the two Selectors (**Category** and **Annotation**) and configure the full set of values for each.
5. Create a **Policy** and add both **Selectors** into the policy.
6. [In preparation for Example 2 , add a third selector **Visual Markings** with values **Yes** and **No** , and add this into the Policy].
7. Check that the **Policy** works and that the selectors and values are all available.
8. Set **Use assisted labelling** on the **policy**.
9. Select the **Policy** , and select the **Connect Selectors** tab.
10. Select the **Root** node and choose [Add a selector](#) .
11. Select **Category** and click **Add** .
12. Expand the tree to show the **Category** values.
13. Select **Cat 1** , choose **Add a selector** .
14. Select **Annotation** and click **Add** . Repeat the process for **Cat 3**, etc.

Note: Cat 2 is omitted from the preceding step as the table at the start indicates it has no associated Annotation value.

- Under **Cat 1** select **Annotation** and choose [Edit selector options](#) . Ensure that only the appropriate **Annotations (A1 and A3)** are selected (**uncheck all others**). Set a default if appropriate.
- Repeat the process for the other **Category** values (**Cat 3 etc**).
- The example below shows how the tree would look for the **Cat 1 /2/3**:

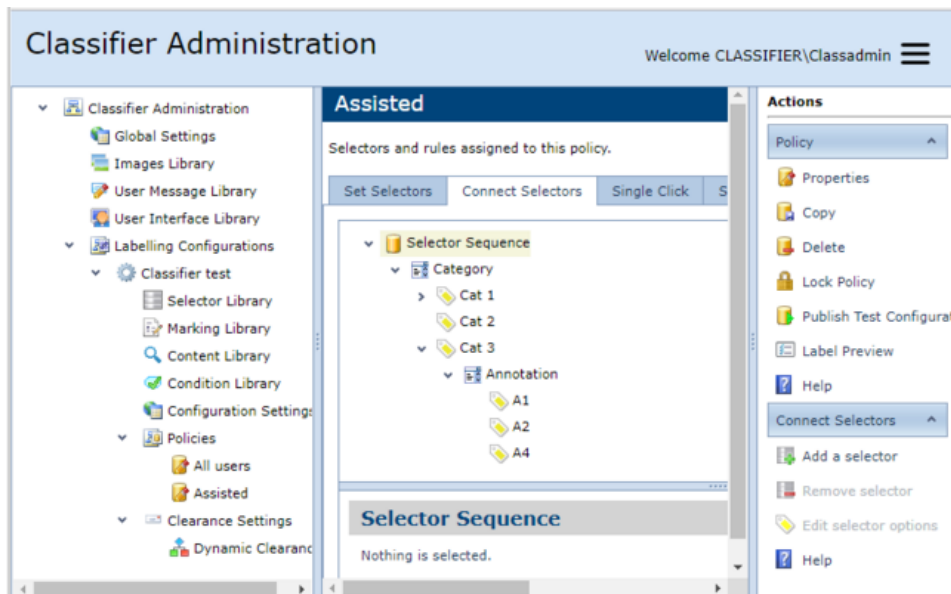
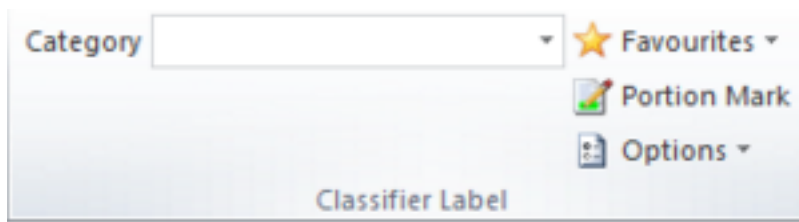


Figure:Category and Annotation Sequence Tree.

The user experience is different under Microsoft Office and OWA as per the following.

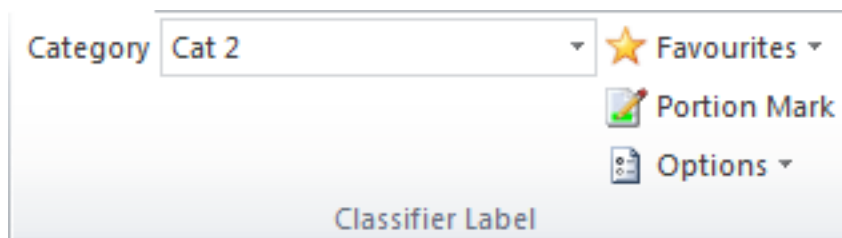
Office Classifier

Initially the Classifier label shows only the **Category** selector with no default value.



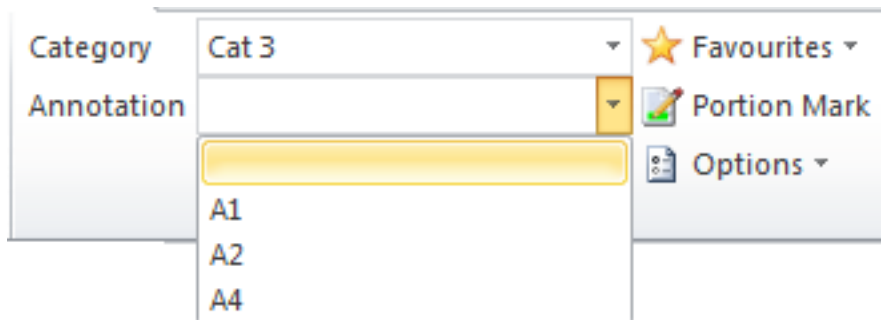
Initial state: no category selected.

Selecting Cat 2 will not show the Annotation selector as there are no annotations defined for this Category.



Cat 2 selected.

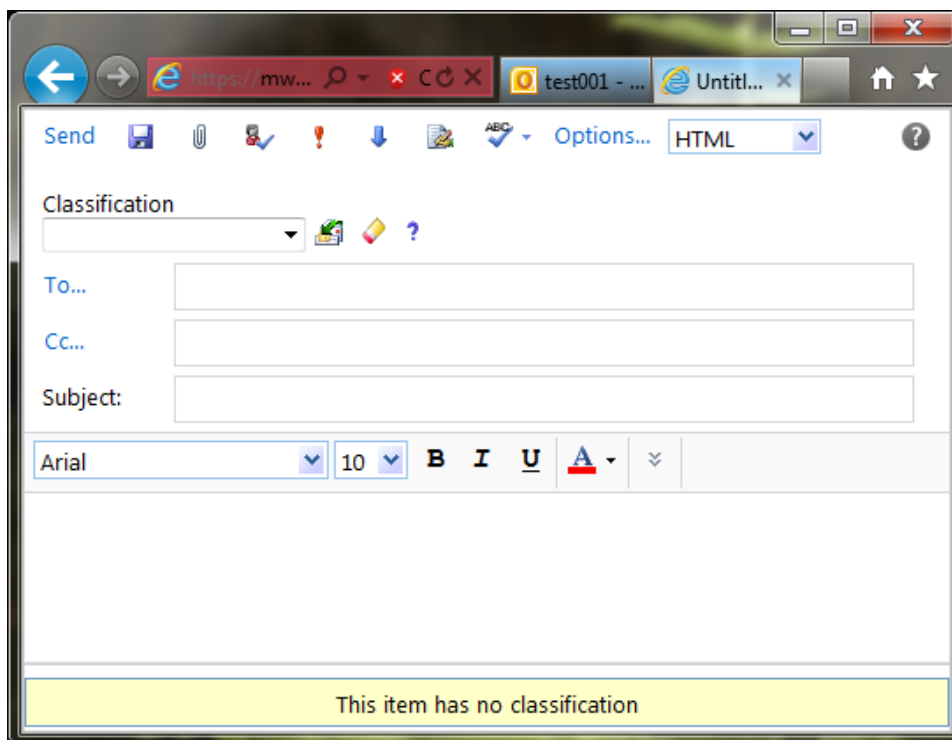
Selecting Cat 3 will add the Annotation selector to the display and present the configured Annotation values.



Cat 3 with Annotations.

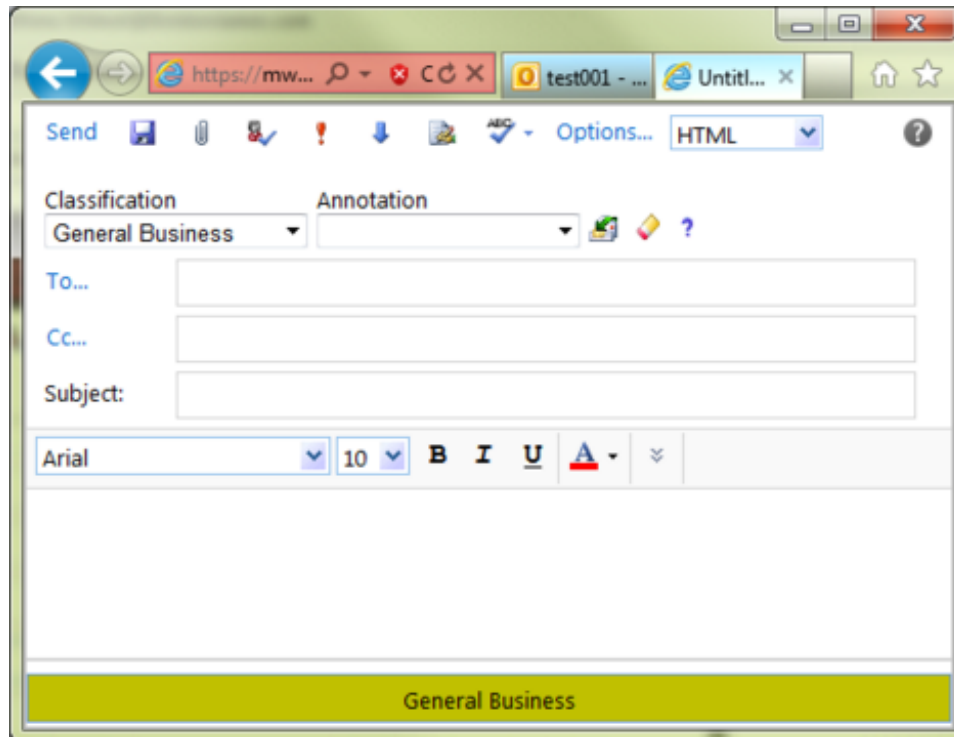
OWA Classifier

initially only the first selector is shown - in this example [Classification](#):



OWA Assisted Labelling initial state.

Selecting a value extend the label selection according to the configuration. In the example below, selecting General Business has made Annotation available for selection.



OWA Assisted Labelling General Business selected.

Example 2 - An Additional User Choice if Category 2 is Selected

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors]

This example assumes the previous example ([Example 1 Categories with many Annotations](#)) has been configured as its starting point.

In the previous example, Cat 2 might have no annotations because it relates to externally consumable information where the annotations would have no meaning. The organisation wishes to give users further control if they select Cat 2 value over the applicability of Visible Markings (Header / Footer / Flot etc.) to such information (documents and messages). Assisted Labelling allows you to define different rules that only take effect based on a user choice.

This might be achieved as follows using the [Selector](#) in the Configuration called **Visual Markings** with two values (**Yes** and **No**).

1. Select the **Connect Selectors** Tab. Expand the tree.
2. Select the **Cat 2** node and choose [Add a selector](#) . Select **Visual Markings** and click **Add** .
3. Select **Visual Markings** in the tree and choose [Edit selector options](#) .
4. Set the default value to **Yes** .

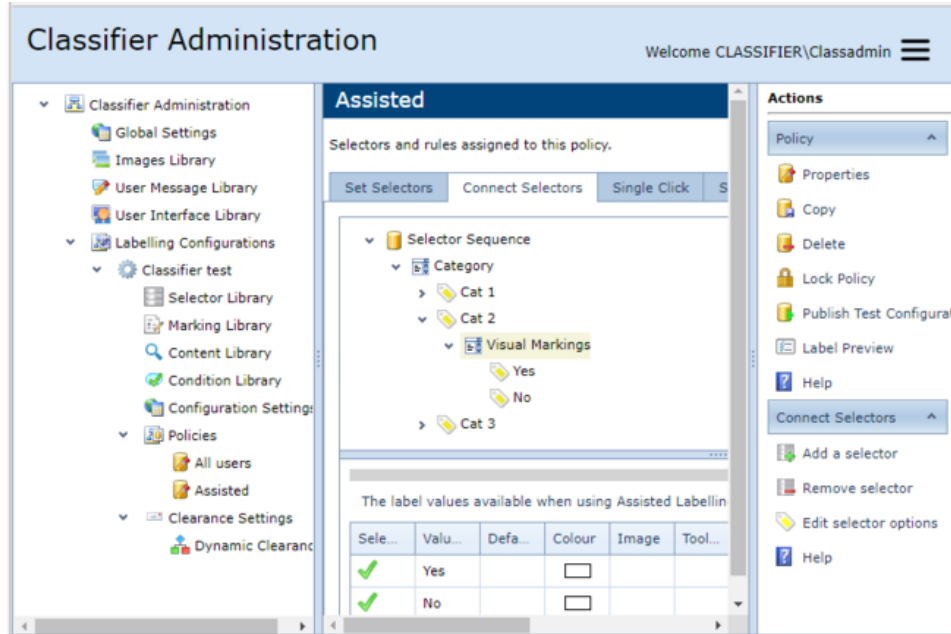


Figure: Visual Markings selector.

5. Define rules that only fire if **Visual Markings = No** and insert blank Visual Markings (a blank Marking is one that generates no text).

The user experience is different under Microsoft Office and OWA as per the following:

Office Classifier

Initially the Classifier label shows only the Category selector with no default value.

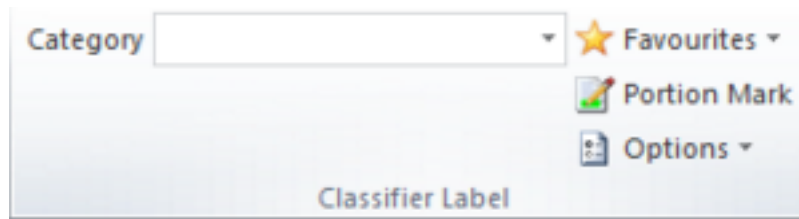


Figure: Initial state - no category selected.

6. Selecting **Cat 2** will show the Visual Markings selector with Yes and the default and No as the other choice.

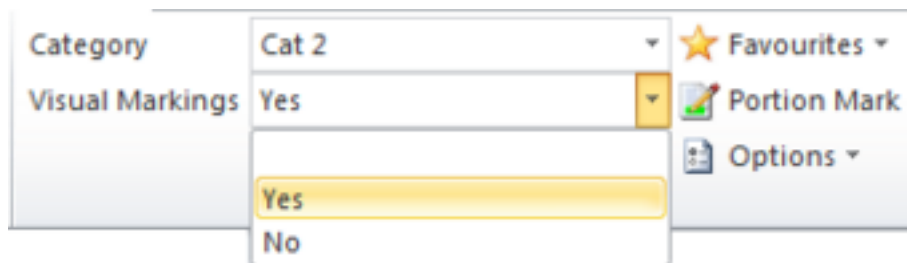


Figure: Visual Markings choice.

OWA

The operational sequence is the same, but the presentation is different as per the examples under [Example 1 - Categories with many Annotations](#).

Example 3 - Separation of Personal and Corporate Information

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Connect Selectors]

In this example an organisation wishes to have a clear distinction between Personal (e.g. users arranging social activities using e-mail) information and Corporate information.

All Corporate information must be labelled with a **Classification** and **Department**, and rules are defined to apply visual markings etc. Personal information is the responsibility of the individual who must ensure that it does not contain corporate information. Personal information is marked simply with PERSONAL which can be checked by Firewalls etc.

This can be achieved as follows:

1. Configure the three Selectors and their values, **Nature** (Personal and Corporate), **Classification** (Public, Internal and Confidential) and **Department** (Sales, Finance and Engineering).
2. Create a **Policy** and add all three **Selectors** into the policy. Ensure that the order in the policy is as listed above ([Set selector order](#)).
3. Check that the **Policy** works and that the selectors and values are all available.
4. Set **Use assisted labelling** on the policy.
5. Select the policy and select the **Connect Selectors** tab.
6. Select the **Root** node and choose [Add a selector](#) .
7. Select **Nature** and click **Add** .
8. Expand the tree to show the **Nature** values.
9. Select **Corporate**, choose **Add a selector** .
10. Select **Classification** and click **Add** .
11. Re-select **Corporate**, choose **Add a selector** .
12. Select **Department** and click **Add** .
13. This will result in the following **Selector Sequence** tree:

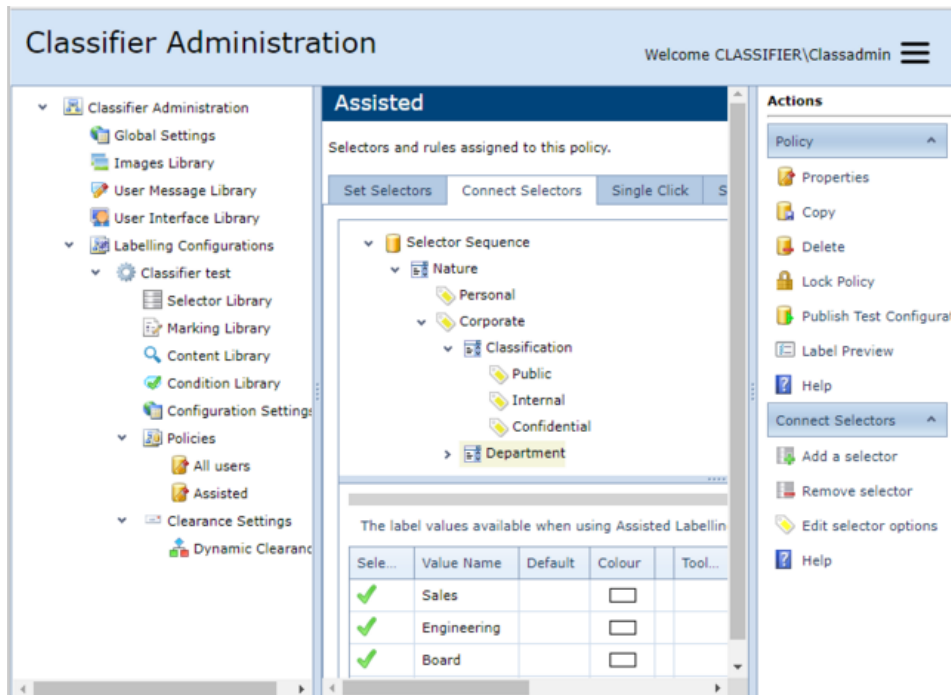


Figure: Nature of Information.

14. Both **Classification** and **Department** are immediately below **Corporate** which means that both selectors will appear when **Nature = Corporate**.
15. Select **Nature** and choose [Edit selector options](#) .
16. Set the default to **Corporate** .

The user experience is different under Microsoft Office and OWA as per the following:

Office Classifier

Initially the Classifier label shows the default **Nature = Corporate** with the **Classification** and **Department** selectors available for selection.

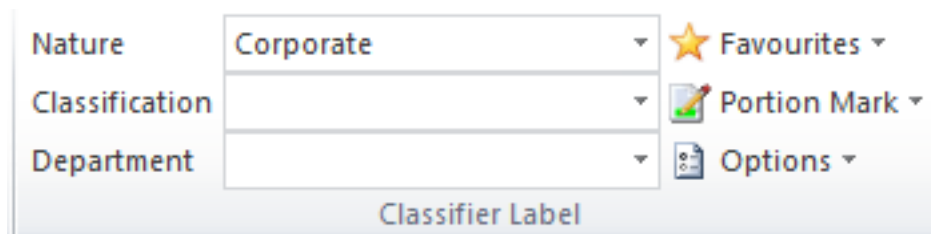


Figure: Nature set to Corporate.

If the user switches to **Nature = Personal** , the **Classification** and **Department** selectors are removed.

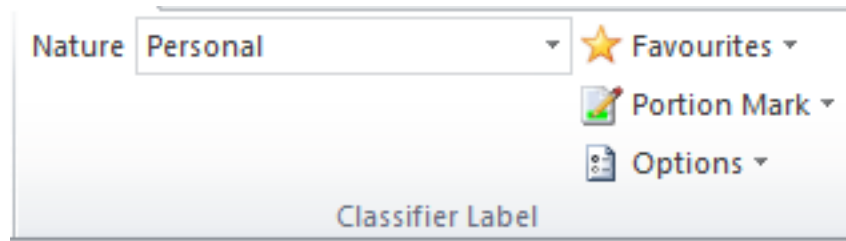


Figure: Nature set to Personal.

OWA

The operational sequence is the same, but the presentation is different as per the examples under [Example 1 - Categories with many Annotations](#).

Suggested Classifications

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} ⇒ [Suggested Classifications]

Note: Suggested Classifications are only supported by **Microsoft Outlook, Word, Excel, PowerPoint, Project** and **Visio** applications.

This feature allows you to define one or more Suggested Classifications for a policy. These can then be referenced in [Check for suggested classification](#) rules such that when a document is saved or printed, or a message is sent the Suggested Classifications are evaluated and the appropriate action is performed.

Each Suggested [Classification](#) has one or more Conditions defined (stored in the Condition Library), and [Selector](#) settings that indicate either selector value(s) to be applied, and/or that a selector should be cleared.

Notes

- Currently, suggested classifications are only triggered if you enable the 'check for a suggested classification and automatically apply' rule. This change will allow the user trigger the Suggested Classification manually by selecting a button from the [Ribbon](#) Bar or from within the Labeller UI.
- If you run the suggested classification manually, the suggested label will automatically be calculated and shown in the [Policy](#) Check dialog. If we fail to suggest a label, a message box would be displayed to inform the user, e.g. **"Document was set to the suggested classification" / "Unable to determine a Classification for the document"**.
- If you as the Admin have enabled the original '**check for a suggested classification**' rule and this new manual option was also enabled, then both will apply. So even if the user manually triggered the suggest label, when they save, send or print the document, the rules will also be triggered, including the '**check for a suggested classification and automatically apply**' rule.
- This manual option will only be applicable to the outer labeller UI, i.e. not the inner labeller UI which can be launched from within the Policy Check dialog.
- Policy Dialog Summary label button will be disabled when displayed from a Use Suggested manual operation to avoid looping.

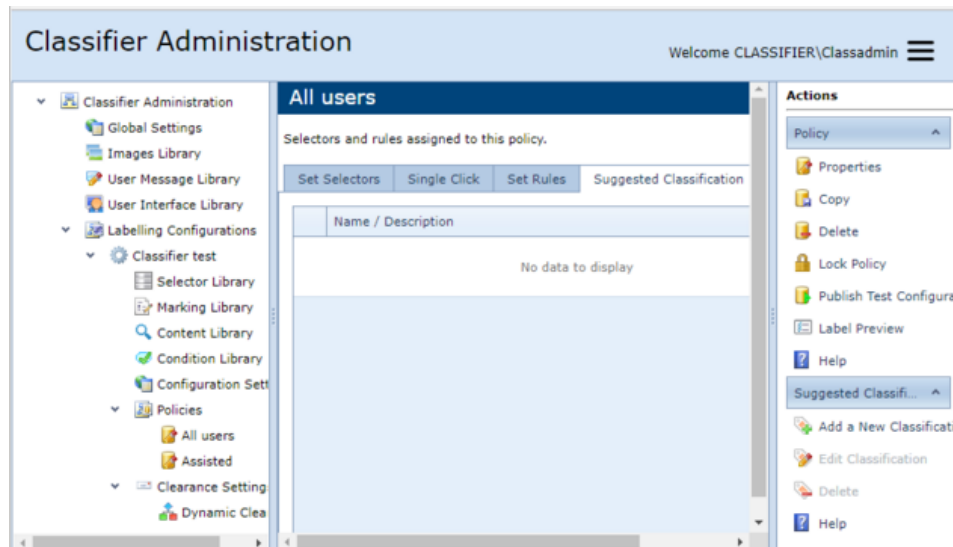


Figure: Suggested Classifications.

To view the Suggested Classification:

1. Go to **Labelling Configurations**>(Configuration Name)>**Policies**>(Policy Name)>**Suggested Classification** Tab.
2. Select the **Policies** node and in the **Policies** tree, select the relevant **policy** .
3. Select the **Suggested Classifications** tab. Initially there are no **Suggested Classifications** defined. Suggested Classifications are listed alphabetically.

The functions supported are:

- [Add a new Classification](#) .
- [Edit Classification](#) .
- [Delete \(Suggested Classification\)](#) .
- [Suggested Classification Warnings](#)

Add a New Classification

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [Suggested Classification] > Add a new classification

Note: [Suggested Classifications](#) are only supported by Microsoft Outlook, Word, Excel, PowerPoint, Project and Visio applications.

Note: Text and Date selectors cannot be specified within a suggested classification.

Note: The Admin must enable the [Check for a suggested classification](#) rule and select the checkbox for the **Automatically apply when possible** then both will apply.

To add a new (suggested) [Classification](#) :

1. Go to **Labelling Configurations**>(Configuration Name)>**Policies**>(Policy Name)>**Suggested Classification Tab**>**Add a New Classification**.
2. Select the **Suggested Classifications** tab.
3. In the **Actions** column, select **Add a New Classification**. This will present the same dialog as **Properties (Suggested Classification)**:
4. Specify a **Name** and **Description**. The Name is referenced from Check for Suggested Classification rules.
5. The current selector settings are displayed as:

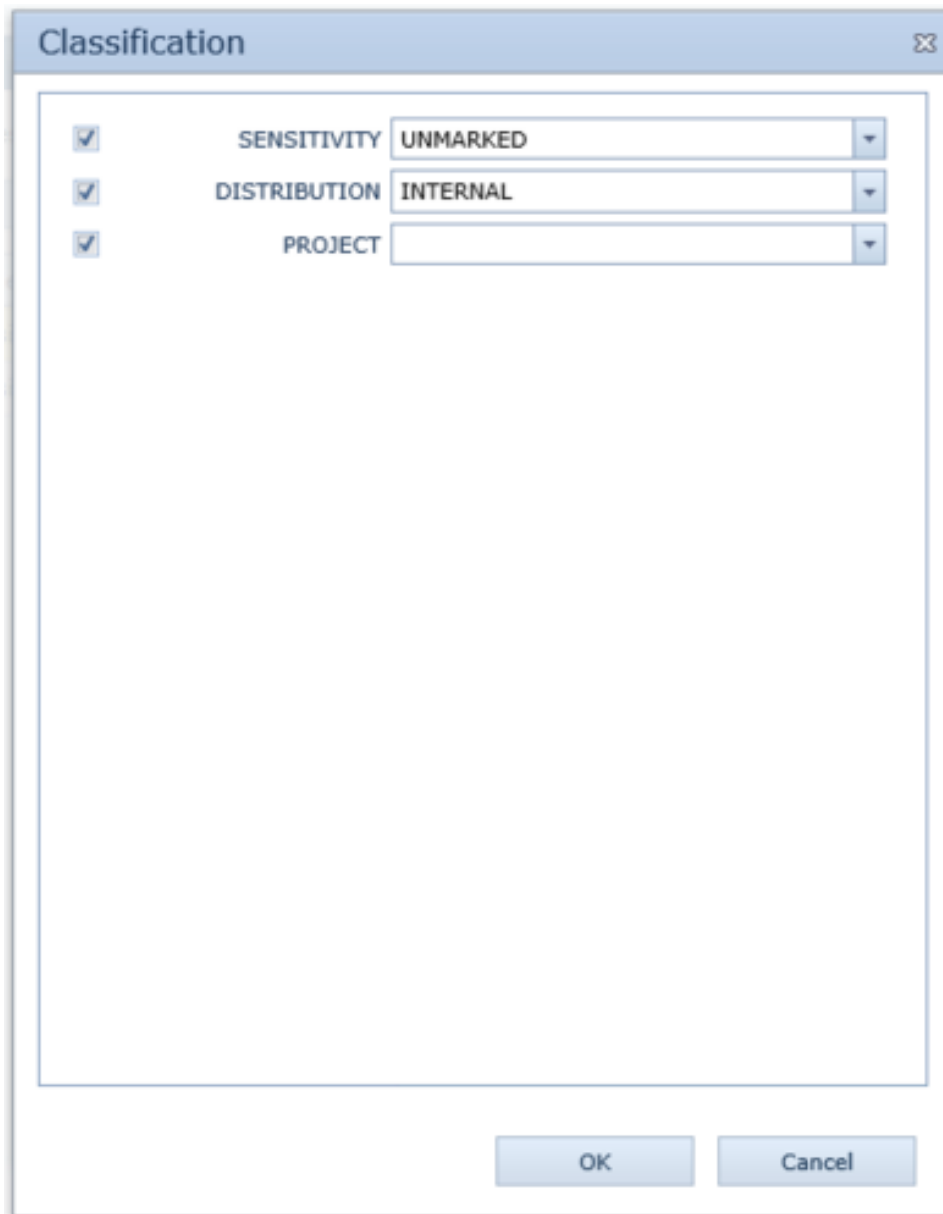
The screenshot shows a dialog box titled "Properties" with a close button in the top right corner. The dialog contains the following elements:

- Name:** A text input field containing "New classification 1".
- Choose label elements to be included or excluded:** A button labeled "Classification".
- Set:** and **Clear:** labels.
- Choose any conditions that must be satisfied in order for the label to be applied:** A list box containing two items: "Apples" and "Board member", each with an unchecked checkbox.
- Automatically apply when possible**
- Message to display when this Suggested Classification cannot be applied:** A dropdown menu with "Prevent - Content search" selected.
- At the bottom, there are "OK" and "Cancel" buttons.

Figure: Properties (Suggested Classification).

6. The current selector settings are displayed as:
 - **Set:** <list of values>
 - **Clear:** <list of selectors>
7. To display a dialog that allows you to define which selectors are to participate; which selector values should be applied; and the Selectors that should be cleared of any current value. click on the **Classification** button.

Note: Text and Date selectors cannot be specified within a suggested classification and will not be presented in the dialog shown below.



The image shows a dialog box titled "Classification" with a close button in the top right corner. Inside the dialog, there are three rows of settings, each with a checked checkbox on the left:

- SENSITIVITY UNMARKED
- DISTRIBUTION INTERNAL
- PROJECT

Each setting is followed by a dropdown menu. The "SENSITIVITY" dropdown shows "UNMARKED", "DISTRIBUTION" shows "INTERNAL", and "PROJECT" is empty. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Figure: Classification Label Values.

Note: A selector takes no part unless it is **Checked**. If a selector is **Checked**, you can either defined the value(s) to be applied, or select the 'empty' selector value to indicate that any value currently defined should be cleared.

8. Select one or more of the following:
 - **Sensitivity** - Unmarked/Sensitive/Commercial-In-Confidence.
 - **Distribution** - Internal/External.
 - **Project** - In the drop down menu, select a project.
9. To apply your specified settings, click on the **OK** button. Then the **Properties** dialog window is displayed.

10. Define the **conditions** that are to apply. Either select from the conditions listed, or click **New...** which displays the [Add a new condition](#) dialog. (See [Properties\(Condition\)](#) for details of the Condition types, options and Actions).
11. If you want to **Check / Uncheck " Automatically apply when possible "** select the checkbox. ([Default](#) is Enabled). This setting influences the operation of an [Check for a suggested. classification](#) rule.
12. Select a (or define a **New...**) **Message to display when this Suggested Classification cannot be applied** . This text will be displayed in the policy check dialog if (for example) there are two incompatible selector values defined by different Suggested Classifications, or the Suggested Classification is incompatible with the current Classification.

Edit Classification

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [Suggested Classification] -> Edit [Classification](#)

A user can edit the properties of a Suggested Classification and select the label elements that will be included or excluded. There is an option to automatically apply conditions that must be satisfied in order for the label to be applied and to choose the message that will be displayed when the Suggested Classification cannot be applied.

Essentially, the same dialog and operation is presented when you [Add a new Classification](#) .

Note: Any Property may be modified.

Properties

Name:

Choose label elements to be included or excluded:

Set: UNMARKED INTERNAL
Clear: Project

Choose any conditions that must be satisfied in order for the label to be applied:

Automatically apply when possible

Message to display when this Suggested Classification cannot be applied:

Figure: New Classification.

To view or change the properties of a Suggested Classification:

1. Go to Labelling Configurations>(Configuration Name)>Policies>(Policy Name)>Suggested Classification Tab>Edit Classification.
2. Select the relevant Suggested Classification .
3. In the [Actions](#) column, select Edit Classification . A Properties dialog window will appear.
4. Edit the name of the classification.
5. Select the label elements to be included or excluded. To do this click on the Classification button. A Classification dialog window will appear.

The image shows a 'Classification' dialog box. It has a title bar with the text 'Classification' and a close button (X). The main area contains three rows, each with a checked checkbox, a label, and a dropdown menu. The first row is 'SENSITIVITY' with a dropdown menu showing 'UNMARKED'. The second row is 'DISTRIBUTION' with a dropdown menu showing 'INTERNAL'. The third row is 'PROJECT' with an empty dropdown menu. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Figure: Classification Label Elements.

6. Select one or more of the following:
 - **Sensitivity:** Unmarked/Sensitive/Commercial-In-Confidence
 - **Distribution:** Internal/External
 - **Project:** In the drop down menu, select a project.

7. Click on the **OK** button. Then the Properties dialog window is displayed.
8. Check or Uncheck **Automatically apply when possible** select the checkbox. (Default is Enabled). This setting influences the operation of an [Check for a suggested classification](#) rule.
9. In the drop down menu, select the " Message to display when this Suggested Classification cannot be applied" .
10. Click on the OK button. To cancel, click on the Cancel button.

Delete (Suggested Classification)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[Suggested Classification]/Delete

You can easily delete a **Suggested Classification** assigned to a policy.

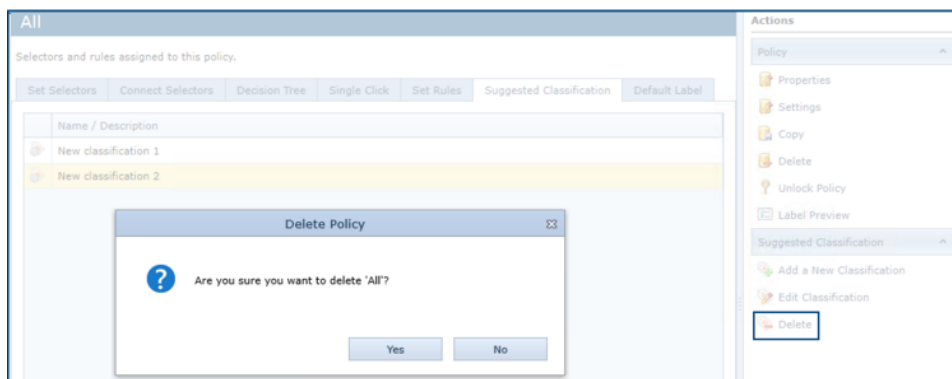


Figure: Deleting a Suggested Classification.

To delete a Suggested Classification:

1. Go to **Labelling Configurations**>(Configuration Name)>**Policies**>(Policy Name)>**Suggested Classification Tab**>**Delete Classification**.
2. Select the [Suggested Classifications](#) tab.
3. In the list, select the relevant **Suggested Classification** .
4. Select **Delete**. A **Delete Policy** confirmation dialog is presented.
5. It asks the question, **Are you sure you want to delete (Policy Name)?** To complete the deletion, click on the **Yes** button. To cancel, click on the **No** button.

Suggested Classification Warnings

This is a setting that allows multiple suggested classification warnings for the same content to be prevented. It is an option to allow you to stop showing the same content warning when saving or printing a document.

Note: If **Enabled**, the policy check result will display a checkbox to allow the user to **'Don't show this warning again.'**

Note: This check only applies to Microsoft Office Documents, it is not applicable for Outlook.

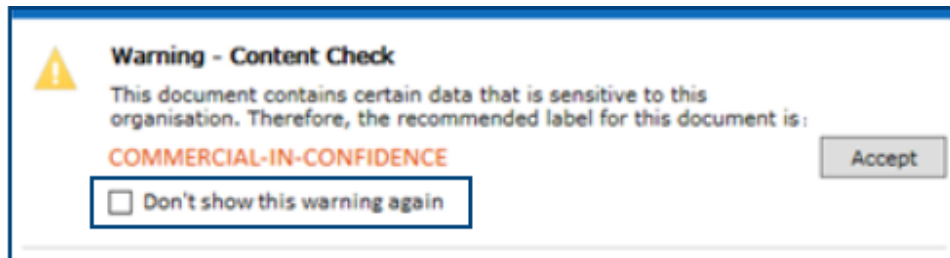


Figure: Content Check Warning, Don't show this warning again.

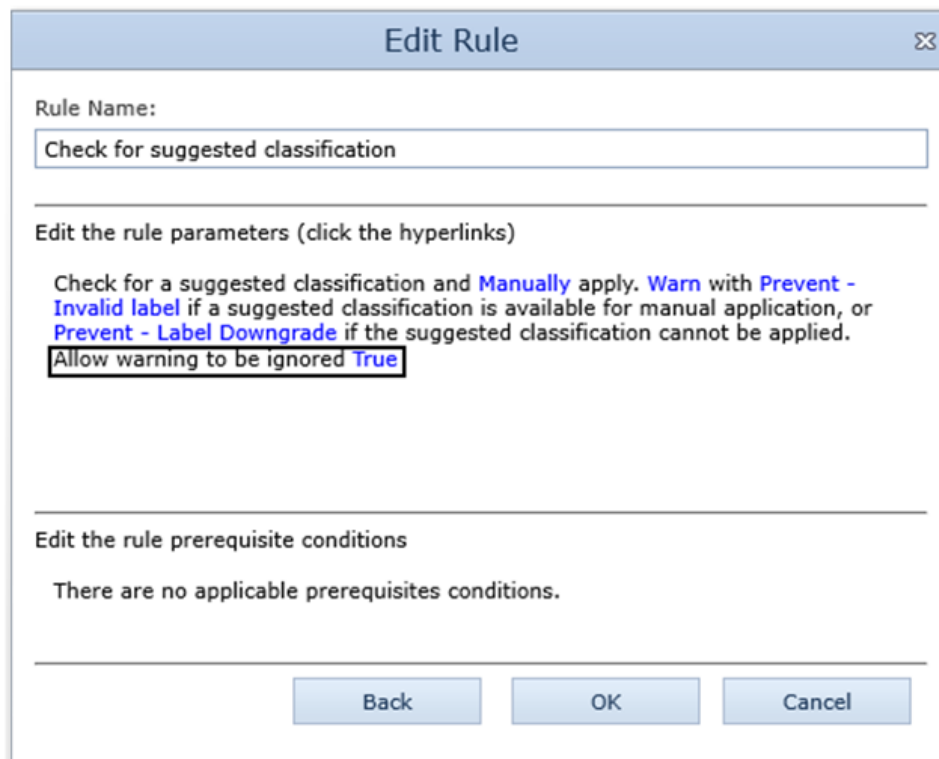


Figure: A true enabled rule.

To enable a rule:

1. Go to **Labelling Configuration>Policies>(Policy)>[Set Rules Tab](#)**.
2. In the list select **Word Documents - Check for suggested classifications**.
3. In the [Actions](#) Column under **Set Rules** select **Edit Rule**. The Edit Rule window will appear.
4. Edit the rule by clicking on the highlighted text. Set to the **Suggested [Classification](#) to Warn** and the **Action to Warn**. Then select warning messages from the user defined message library as appropriate.

Note: This only applies if it is set to **Warn** or **Challenge**. It does not apply to the **Prevent** rule.

5. Set "**Allow warning to be ignored**" to True .
6. To save, click on the **OK** button.

Default Label (Policies)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} ⇒ [[Default Label](#)]

This feature allows you to define one or more Default Labels that can then be referenced when configuring SharePoint Classifier (3.10 or later) Library Default Label values (see the SharePoint Classifier Guide (3.10 or later) for further details). Any Default Labels that are configured with an associated condition can be used when deriving an Intelligent Default Label.

Each defined Default Label has a unique name and an associated classification/label. Additionally, a condition can be assigned to the Default Label.

Initially there are no Default Labels defined. Default Labels are listed alphabetically.

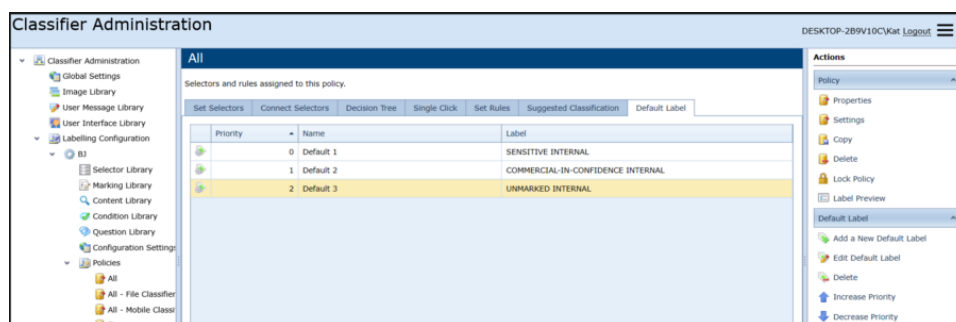


Figure: Default Label tab.

The following actions are supported:

- [Add a new Default Label](#)
- [Properties \(Default Label\)](#)
- [Delete \(Default Label\)](#)

Add a New Default Label

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [[Default Label](#)] -> Add a New Default Label

Note: Only applicable to SharePoint Classifier.

To add a new Default Label:

1. Select **Policies** and select the relevant 'policy' and select the **Default Label** tab.
2. Choose **Add a new Default Label**. This will present essentially the same dialog as [Properties \(Default Label\)](#) :

Figure: Add a new Default Label.

3. Specify a unique **Default Label Name** . The name is used when configuring a SharePoint Library default label.
4. Click on the [Classification](#) button and select the required values from the Classifier Label dialog presented.
5. Click on the **Conditions** button if you want to associate conditions with the Default label. When used in conjunction with the Intelligent Defaults feature, the Default label values will be used when deriving the Intelligent Default if the conditions match.
6. Click **Ok** to complete the process.
7. The summary list of **Default Labels** is updated.

Properties (Default Label)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/[[Default Label](#)] -> Properties

Note: Only applicable to **SharePoint Classifier (3.10 or later)**.

To view or change the properties of a Default [Label](#):

1. Select **Policies** and select the relevant 'policy' and select the **Default Label** tab.
2. Select the relevant **Default Label**.
2. Choose **Properties** . Any Property may be modified.

Essentially the same dialog and operation is presented when you [Add new Default Label](#) .

Delete (Default Label)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [[Default Label](#)] -> Delete

Note: Only applicable to **SharePoint Classifier (3.10 or later)**.

To delete a Default Label:

1. Select **Policies** and select the relevant '**policy**' and select the **Default Label** tab. Select the relevant **Default Label**.
2. Choose **Delete**, a confirmation dialog is presented. Click **OK** to complete the deletion.

Note: Classifier Administration has no way of knowing whether a '**Default Label**' item has been used within SharePoint, so all deletions are allowed. If you delete a **Default Label** entry, then it will disappear from the Configuration and SharePoint will not be able to apply any action that referenced that **Default Label Name**.

Rules Management

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}

Classifier uses Rules to control the operations performed by individual applications. Each rule applies to a single application. It is only the effect of Rules that end users see; the Rule definitions are purely a matter for Administrators.

Rules apply to a single Policy. If you need to support multiple policies using similar rules it may be useful to establish the first Policy and then use the [Copy \(Policy\)](#) mechanism to establish initial rules for the second Policy that may then be edited to achieve the required effects.

This section describes the general Rule administration mechanisms illustrated by a few specific examples. The set of [Rules supported](#) varies across individual applications. The complete list of rules supported by the various applications can be found in [Rules supported](#). The rules supported fall into three general types:

- [Add rules](#) which cause a Marking or Meta-data to be added to a message or document.
- [Apply rules](#) which apply a setting to a message or document.
- [Check rules](#) that check some aspect of site policy and involve the user if the policy is contravened.

The general Rule management topics available are (knowledge of these is assumed in the [Rules supported](#) section and its sub-topics):

- [What is a rule?](#)
- [Set Rules tab](#), which provides access to the **Rules Management functions**.
- [Add a rule](#)
- [Edit \(Rule\)](#)
- [Delete \(Rule\)](#)
- [Copy \(Rule\)](#)

- [Defining Label Conditions](#)
- [Rule Overlap Handling](#)

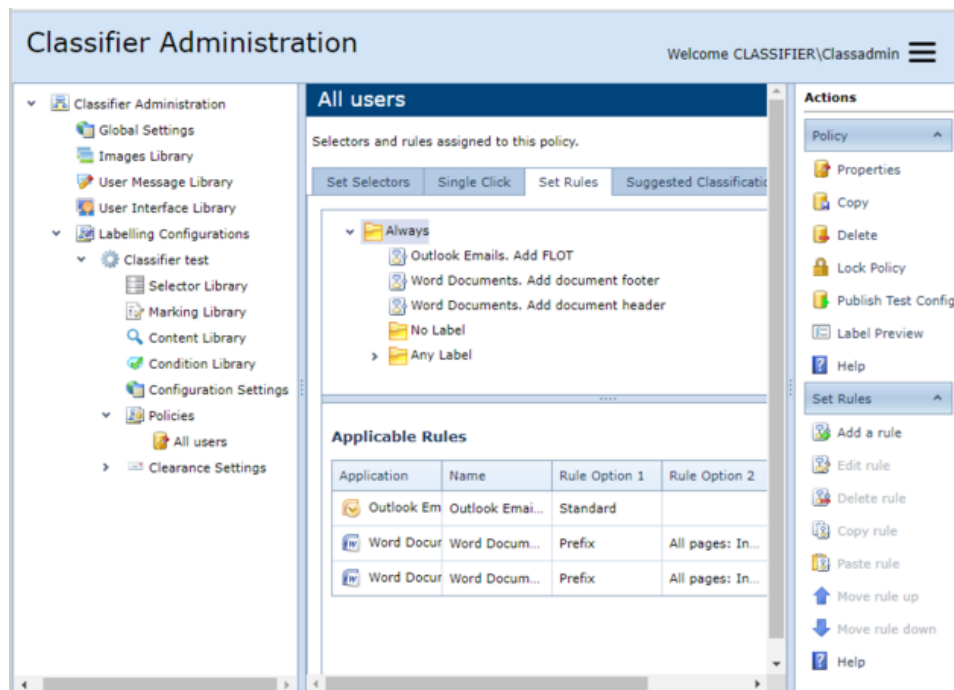


Figure: Rules Management View.

What is a Rule?

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}

Each Rule definition comprises:

- **Name:** A name that is unique in the Labelling Configuration. This value may appear in audit messages.
- **Application:** One of the applications that Classifier supports (Microsoft Excel, Outlook, PowerPoint, Project, Visio, Word, OWA or Notes etc.).
- **Label condition:** The Rules are organised as a tree which presents the rules as a hierarchy under nodes (Always, No Label and Any Label nodes) with the most generally applicable rules at the top (under Always) and the most specific rules (in label value terms) towards the bottom and right. This tree structure is explained fully under the [Set Rules Tab](#).

Each rule is either label independent (**Always, No label, Any label**), or label related and appears as follows:

- Rule action and configurable settings.
- With this label, Rule action and configurable setting.

Each rule is application specific, but the administration interface allows you to create (common) rules for multiple applications:

- **Action** : This is the action to be performed by the application if the Label condition applies. [Actions](#) may require additional configurable parameters (Rule Options) to define their effects. Rules fall into three broad groups:

Rules that add Visual or Meta data . These rules allow you to add a **Marking** to a Location using a **Marking Format** to the existing information. E.g.:

- Add a header **here** to any existing text in **this** format (documents).
- Add **this** x-header in **this** format.

Rules that apply settings to ensure particular effects are achieved involving an application other than Classifier.

E.g.:

- Apply this RMS policy (various applications).
- Apply a delivery report request (Outlook).

Rules that perform policy checks . These rules allow you to check various aspects of a user's actions against your site policy, and to alert the user if the policy check fails. E.g.

- Check these mandatory selectors. **Warn user** if check fails with **this** message. (All applications).
- [Check number of recipients](#) does not exceed **number** . **Warn user** if check fails with **this** message. (Outlook and OWA).
- **Rule options** : Zero, one or two Rule options that supply any variable aspects of the rule such as those highlighted in the Action examples above.
- **Label value** : This defines the label value(s) to which the rule applies. When a rule is created you choose at the outset whether it applies **Always** (i.e. regardless of the current label value); when there is specifically **No Label** selected; to **Any label** (i.e. there is a label value but specific settings are not relevant); or to a specific **configurable label value** .
- **Prerequisite conditions**: These are optional and are not applicable to **OWA** rules. Prerequisite conditions may be defined such that the rule is only applicable if the prerequisite conditions are satisfied. It is possible to define two rules for the same application at the same point in the rules tree. This potential conflict is resolved by the rule highest up the tree taking preference (see Rule Up / Down).

All Rules are managed through the [Set Rules Tab](#) which is available once you have selected the relevant policy.

You can define multiple rules as described in [Adding Rules](#) . This may lead to situations where more than one rule could apply to a single application and action. Classifier decides rule precedence as described in [Rule Overlap handling](#) .

Note: New versions of Classifier Administration may provide **new** rules which although quite similar to an existing rule, provide additional features in such a way that they must be treated as a brand new rule that supersedes the existing rule type. In such circumstances, existing rules will continue to operate, but cannot be edited through Classifier Administration. To take advantage of the new facilities you must establish a brand new rule; modify the configuration to make use of that new rule, and deleted the original rule.

Set Rules Tab

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [Set Rules]

Selecting the **Set Rules tab** shows all existing rules and provides access to all Rule management functions ([Add a rule](#) , [Edit \(Rule\)](#) , [Delete \(Rule\)](#) and [Copy \(Rule\)](#)).

The Rules are organised as a tree which presents the rules as a hierarchy under nodes (**Always** , **No Label** and **Any Label** nodes) with the most generally applicable rules at the top (under **Always**) and the most specific rules (in label value terms) towards the bottom and right.

When you create a rule, you choose at the outset where it resides in the tree by selecting a node from the tree. The selected node can be one of the following:

- **Always:** A rule inserted here is applied regardless of the label value (includes No Label) unless there is a more specific rule (lower down the tree) that takes precedence.
- **No Label:** The rule will only be applicable if there is no label value selected (all selectors are blank). There are no rules associated with this node in the example below.
- **Any label:** There is a label value defined (it does not match a No label rule) but specific selector values are not relevant.

A node below Any Label relating to a more specific Label value

(e.g. [Classification](#) = Public, Department = Any in the example below). These nodes all appear as an expandable tree structure under the Any Label node, reflecting the Selectors and Values available in the [Policy](#). The example below shows a rule "Outlook Emails apply FLOT" under Always and a more specific Rule to be applied only when Classification is Public ("Outlook Emails apply FLOT a").

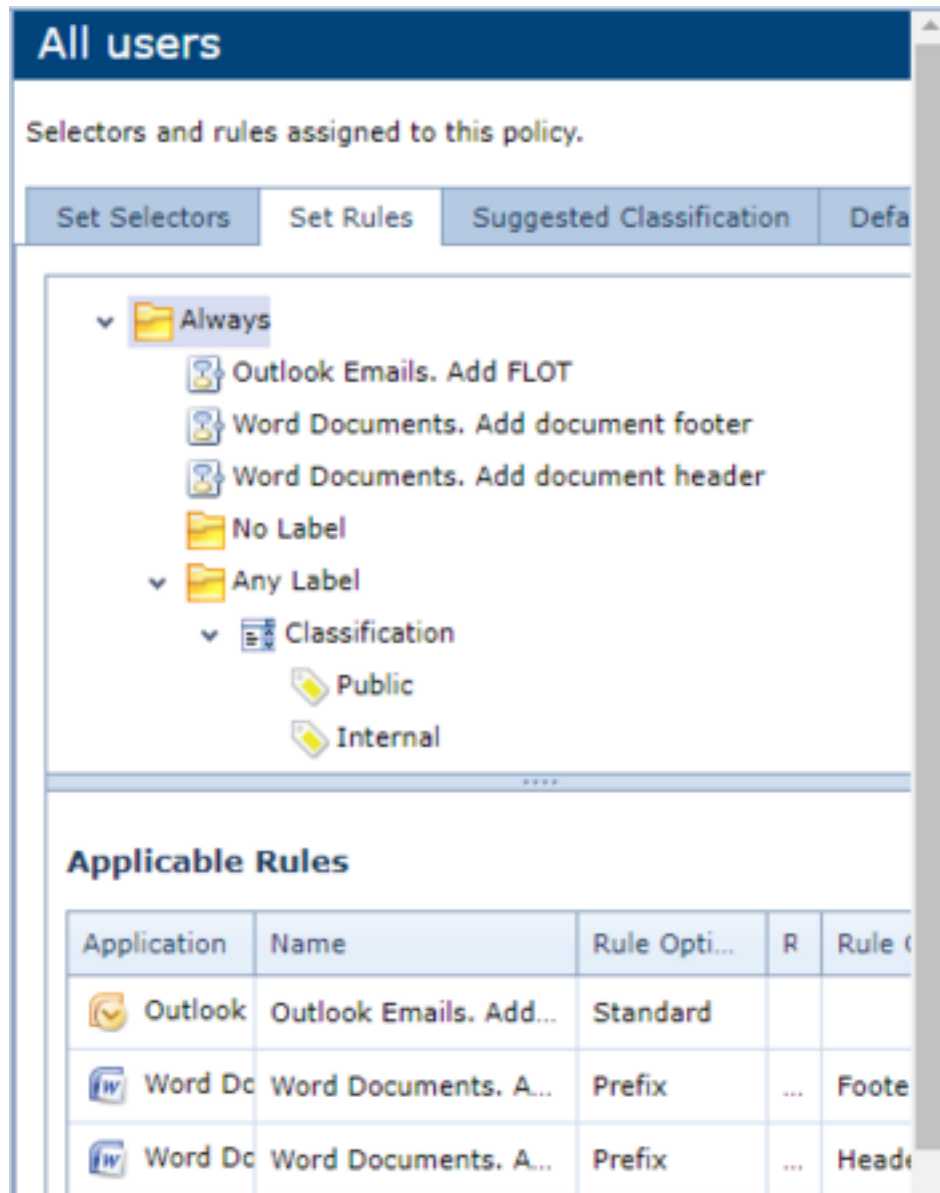


Figure: Rules tree.

The top part of this display shows a tree structure view that presents all the current Rules.

The bottom part of the display shows a summary list of the Rules applicable to the node selected in the top part. Selecting the **Always** node will show all the rules associated with that in the lower half of the display.

The Rules Triggered summary shows:

- **Application** : Excel, Outlook, PowerPoint, Project, Visio, Word, OWA or Notes.
- **Name**: The name of the rule.

- **Rule option 1/2/3** : Shows the value of the first / second / third rule parameters (if any). These will contain Label values for rules having specific label conditions, or Format names for example.

The following presentation features are available in the lower part:

- Sort according to column using a column heading option.
- Re-order the columns using drag and drop.
- Hovering over a cell in the display pops-up the full value of the cell.
- Filter the list by selecting the context menu in the column header and choosing the appropriate value from the list presented. To revert to the full list select the All option from the head of the list.

Tip : You can expand / contract the entire rules tree by selecting a node in the labels tree (e.g. the Always labels node) and pressing the Plus (+) or Minus (-) keys on the numeric key pad.

Add a Rule

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> Add a rule

Rules can only be added when the [Set Rules Tab](#) is selected.

To define a new rule for a policy:

1. Select the **Policies** node, and select the **relevant policy** .
2. Select **Set Rules** Tab and select the relevant node in the Rules label tree.
3. If you want to:
 - Add a rule that applies regardless of whether a Label value is defined or not then select **Always** .
 - Add a rule that applies only if there is no label value then select **No Label**.
 - Add a rule that applies if any label value is defined (not blank) then select **Any label**.
 - Otherwise select **a node corresponding to label value in the label tree** . The example below shows Classification selected, so adding a rule here would apply if there was any Classification value selected.

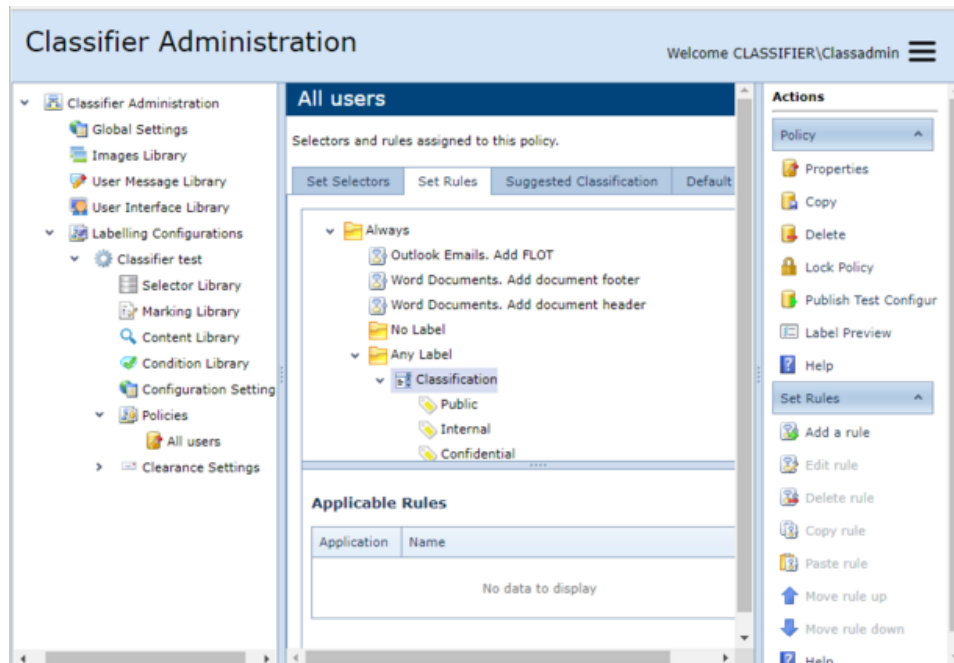


Figure: Add a rule.

4. Choose **Add a Rule** . This will launch the Rule wizard which operates as described in [Rules Wizard operation](#) . The wizard is aware of whether you have chosen All Labels or a specific label value and tailors its operation appropriately. Selecting a node in the Label structure tree (e.g. Sensitivity = Confidential) and then selecting **Add a rule** with a specific label value selected assumes that you want a rule dependent on that Label Value and adopts the selected label value as the initial value for the Label condition. You may modify this during the wizard sequence. **Note** : Certain rule types (Label Change Check, Mandatory [Selector](#) Check, Selector Expiry Check and Content Check) provide a setting (Allow multiple rules of this type) which influences the duplicate rules checking.

If you inadvertently add a duplicate rule at the same point in the rule tree, the wizard will warn you, but will establish the new rule. However, a rule with prerequisites defined is not a duplicate of a rule without prerequisites defined. The following shows an example of a duplicate rules dialog:

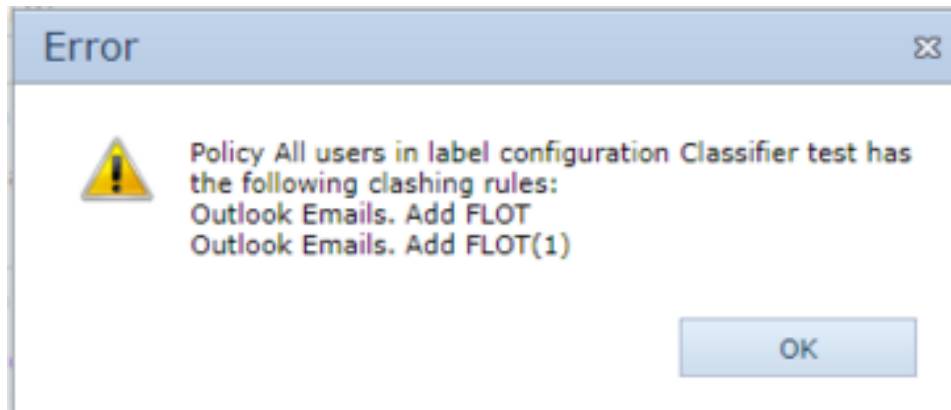


Figure: Rule Conflict.

Rules Wizard Operation

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#)

This topic describes how new rules can be added.

Note: The full set of Rule Templates supported by each of the various Classifier applications and all the associated settings is defined in [Rules supported](#) .

To add a new rule:

1. Invoking **Add a Rule** starts a wizard.
2. You can go forward and backwards through the wizard (**Next / Back**), or **Cancel** the sequence at any time. Only if you click **Finish** at the end of the sequence will the changes be finalised.
3. A list of applications is presented (Outlook Emails, Outlook Web Emails, Word documents, etc. depending upon your [licence](#)).

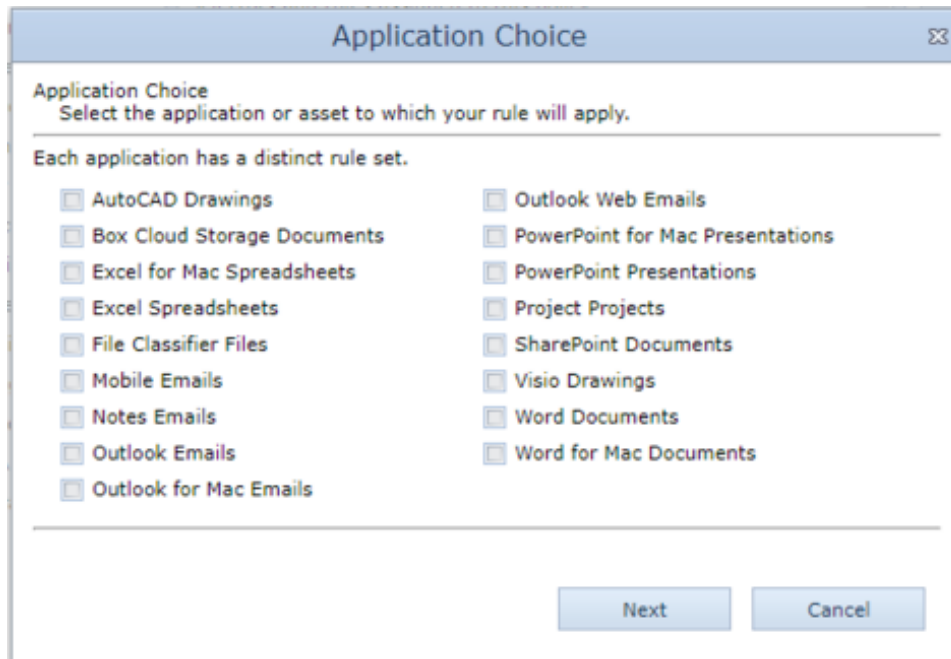


Figure: Choose Application.

4. Choose the **application(s)** to which this rule will apply.
5. An Action choice screen is presented listing the Rule templates relevant to your chosen application(s). If you select multiple applications, the list will only show those rules that are common all the applications selected. If the list is empty, there are no rules common to the chosen applications.
6. By default the list shows all the rules relevant to your chosen applications. You can filter this list to show only the **Add**, **Apply** or **Check** rules. The example below shows the general layout of the dialog presented for Word:

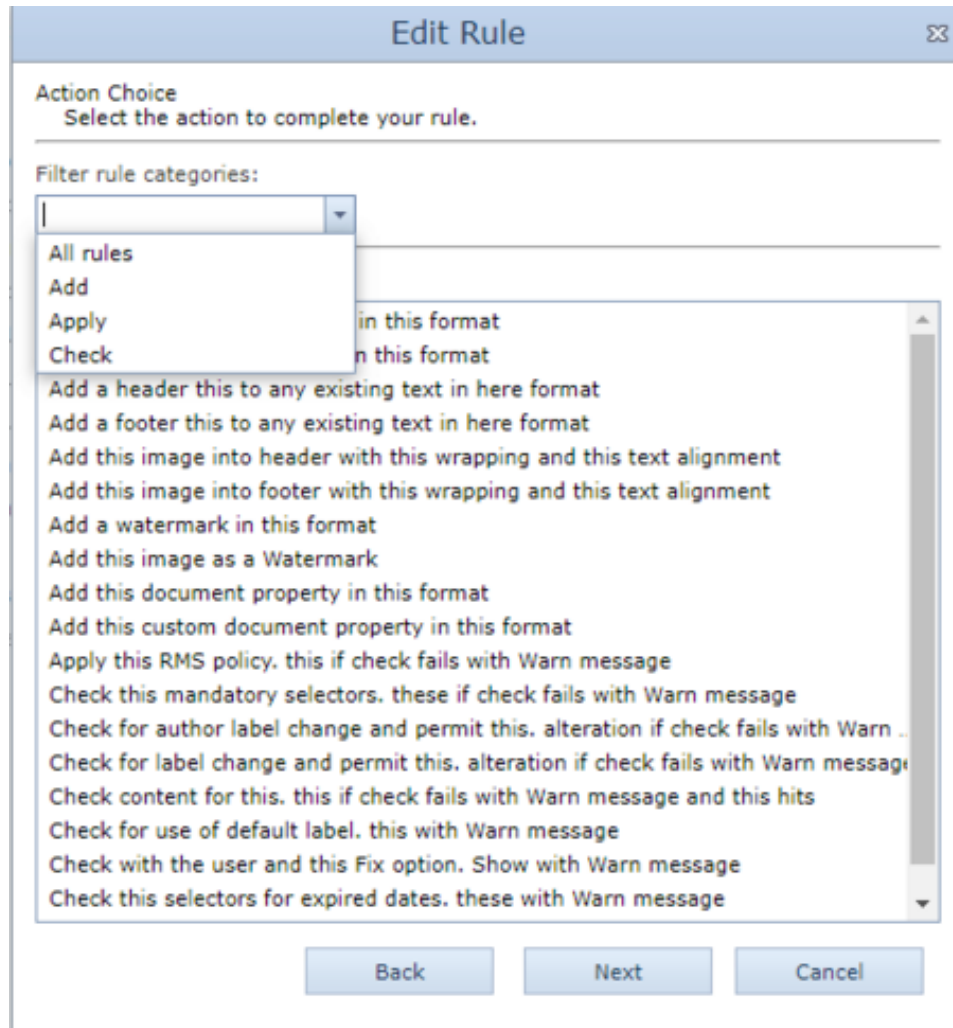


Figure: Rule wizard: Word Rule Templates.

7. Select the required rule **entry** from the list and click **Next** .
8. The Edit Rule dialog is presented containing the selected rules template.
9. If required, modify the default **Rule Name** supplied - the name must be unique.
10. A template may contain configurable features. These appear highlighted in the template.

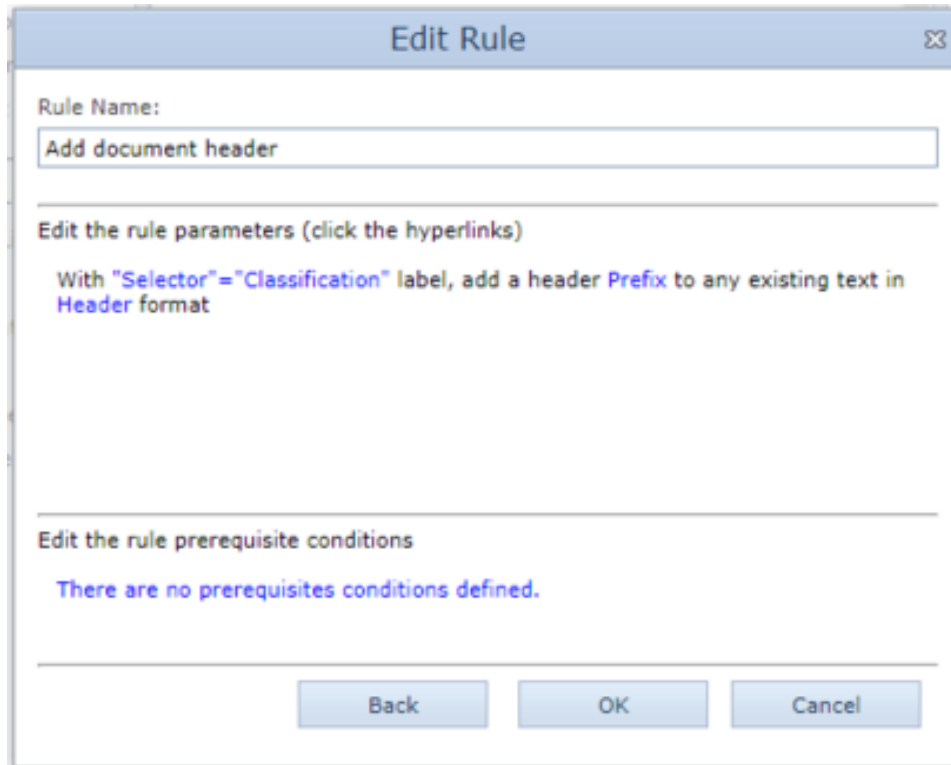


Figure: Rule wizard: Label value placeholder.

11. To set any configurable feature, click on the **placeholder** to launch the associated configuration dialog.
12. If you are creating or modifying a rule that is Label value specific, the currently defined label value is presented as one of these placeholders. Click on the **current label value placeholder** to modify the label setting ("**Selector**" = "**Classification**" in the example above). This is described fully in [Defining Label Conditions](#) .
13. Other examples of configurable features are **Message Format** names, **Action** choices, S/MIME security level, RMS policy selection and Warning level configuration.

Note: The full set of Rule Templates supported by each of the various Classifier applications and all the associated settings is defined in [Rules supported](#) .

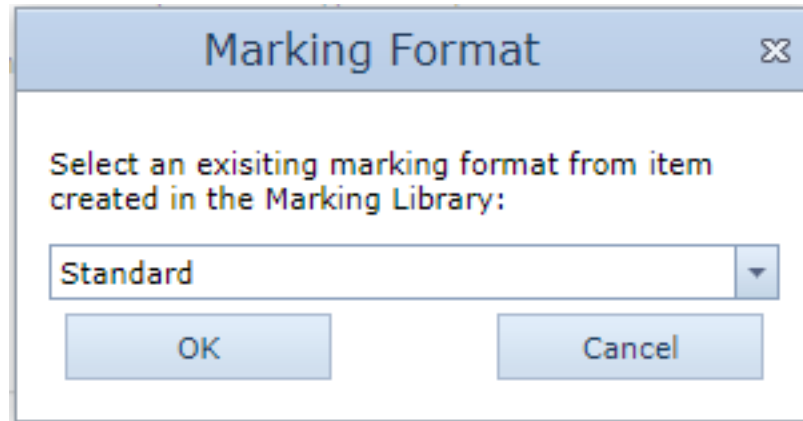


Figure: Rule wizard – Choosing Format.

14. You can if necessary establish a New Marking format using the **New...** button on the above dialog.
15. **Prerequisite conditions** may be defined (Step 4: at the bottom of the rule configuration dialog) such that the rule is only applicable if the prerequisites are met. Selecting the prerequisite placeholder (Initially There are no prerequisite conditions defined) will present the dialog below showing currently defined Conditions applicable to this application.

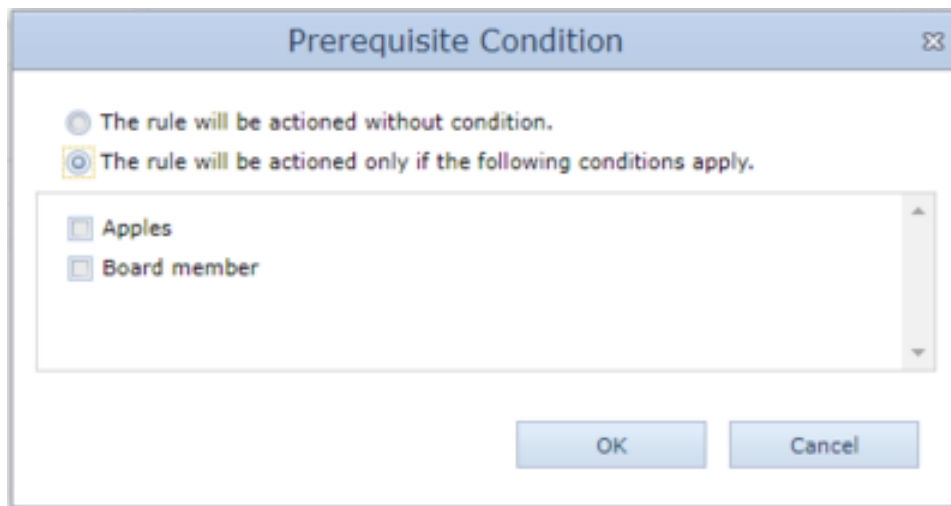





Figure: Prerequisite Conditions.

16. You can choose from the currently defined conditions, or click **New** to [Add a new condition](#) .
17. Once you have finished making changes, select **OK** and the new rule is added to the Rule tree.

Rule Icons

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules]

Each rule presented by the wizard has a status indicated by an icon that appears at the start of its entry.

| Icon | Status | Description |
|---|------------------|--|
|  | Rule Available | A rule that you can add, modify or delete. |
|  | Rule Unavailable | A rule that is not available under the licence you currently have applied. The rule is greyed out, and no actions are available. |
|  | Rule Deprecated | A rule that was created using a previous version of Classifier Administration , and that is no longer supported. The rule is greyed out, will have no effect and the only action supported is Delete . |

Edit (Rule)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> Edit rule

Note: Although you can establish a (common) rule for more than one application at a time, you must subsequently edit those rules individually.

Existing Rules may be edited.

To edit a rule:

1. Select **Labelling Configuration**>(Configuration Name)>**Policies**>(Policy Name)>Set Rules Tab.
2. Expand the **Rules** tree to display the relevant rule.
3. Select the relevant **Rule** .

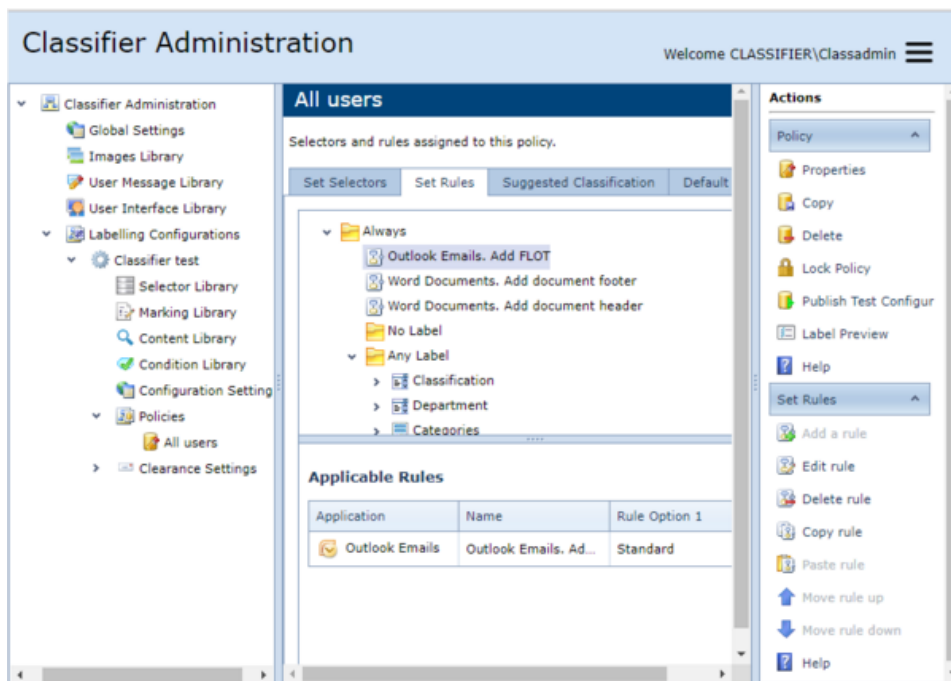


Figure: Edit a rule.

4. Select **Edit Rule** . This will launch the **Edit Rule** dialog which operates as described in [Rules Wizard operation](#) . The wizard is aware of the rule you have selected and uses this to set initial values for the rule.
5. You may change various aspects of the rule. You **CANNOT** move rules between the primary nodes in the rule tree other than by a suitable copy / paste / rename sequence. You can modify a specific label condition as long as the change would not cause the rule to move between the primary nodes in the tree.
6. **Amend** settings as required.
7. Once all changes have been made proceed to the end and click on the **OK** button.

Delete (Rule)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> Delete rule

Rules may be deleted at any time.

To delete a rule:

1. Select the **Policies** node, and select the relevant **Policy**.
2. Select the **Set Rules** Tab.
3. Expand the **Rules** tree to display the relevant rule. Select the relevant **Rule**.
4. Select **Delete Rule** .
5. Click **OK** on the delete confirmation. The rules tree is updated accordingly.

Copy (Rule)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> Copy rule

You can use an existing rule as the basis for a new rule. The new rule will be given a name derived from the source Rule with a unique suffix, such as (1), added at the end.

The new rule will have configurable features added or removed to ensure it complies with the destination in the rule tree. Thus you can copy a rule from below the **No Label** node and paste it below a **specific Label value** . For example if the source is a "**For emails...**" rule and the destination is under a specific label (e.g. Classification Selector) then the new rule will adopt the target Label value as its starting point.

To use an existing Rule as a template for a new rule:

1. Select the **Policies** node, and select the **relevant policy** . Select the **Set Rules** Tab.
2. Select the relevant source **Rule** in the **Rule tree** (Outlook apply FLOT in the example below).

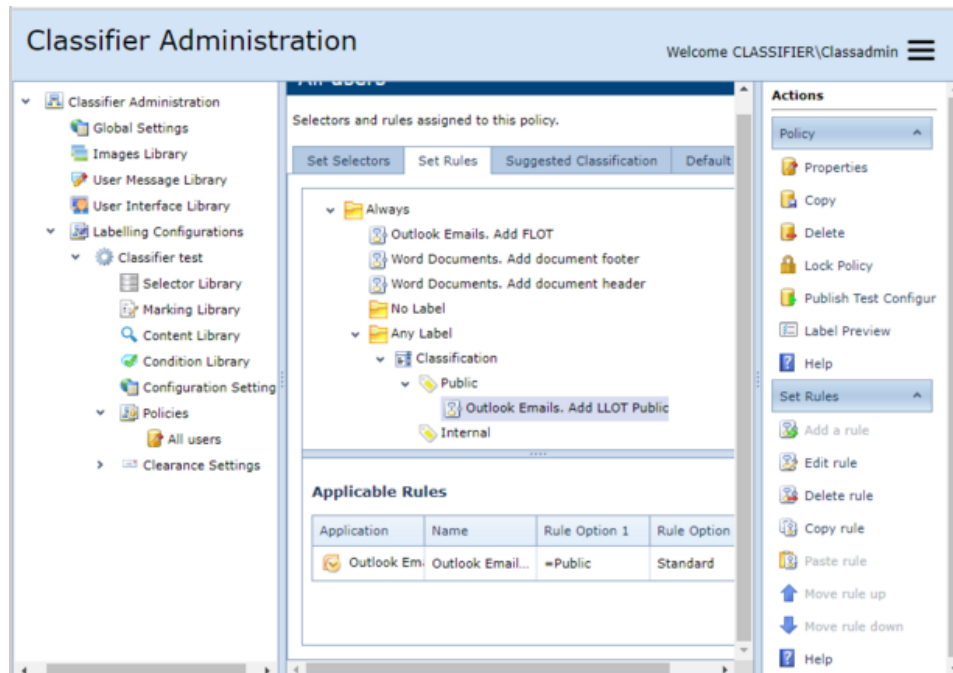


Figure: Copy Rule - Select Source.

3. Choose **Copy Rule** .
4. Choose the target location for the rule (e.g. below **Internal** in the example above).
5. Choose **Paste Rule** . This will insert a copy of the source rule into the selected location in the rules tree.

Copy Rule - Pasted Copy

Note: If you attempt to copy a rule into a location that already has an instance of the same rule you will be warned and requested to address the anomaly as per the screen shot below. The copy will be inserted but you should take appropriate steps to rectify the situation.

6. Select the **copy** (Outlook apply FLOT(1) in the example above) and edit it to match your requirements, including **Renaming** the rule.

Note: Certain rule types (Label Change Check, Mandatory [Selector](#) Check, Selector Expiry Check and Content Check) provide a setting (Allow multiple rules of this type) which influences the duplicate rules checking.

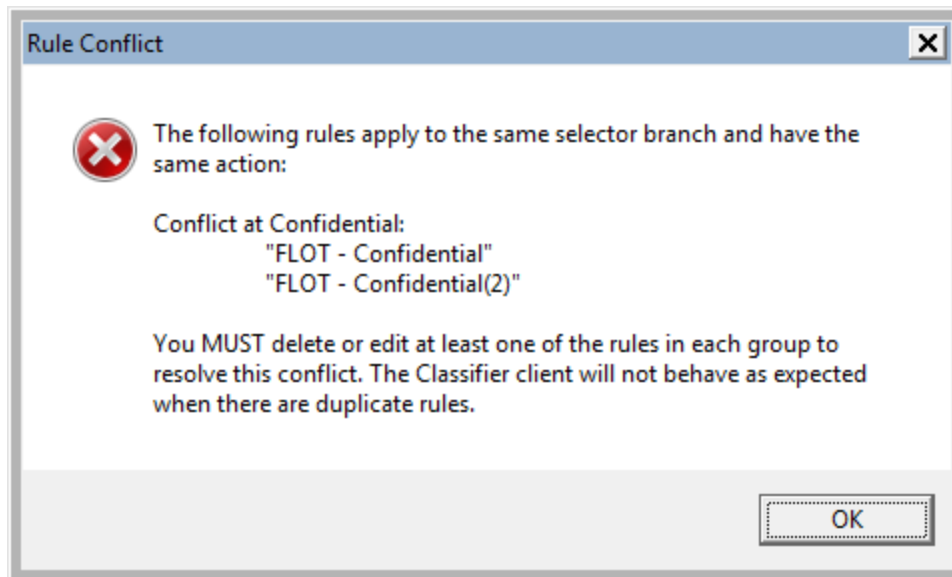


Figure: Copy rule - Duplicate warning.

Defining Label Conditions

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

When you define a Rule that includes a label condition (e.g. **For documents with this label, add a watermark in this format**), the Rule Wizard presents you with a dialog (when you select the label condition placeholder) that allows you to define the label matching criteria for the available Selectors.

The initial Selections will reflect the location in the Rule tree that you chose to add the rule.

The screenshot shows a dialog box titled "Label" with a close button in the top right corner. The main text inside the dialog reads: "Select an existing label from those Controls previously added to your rule:". Below this text are six rows of controls, each consisting of an icon and a dropdown menu. The controls are: "Classification" with a dropdown menu showing "Public"; "Department" with a dropdown menu showing "Undefined"; "Categories" with a dropdown menu showing "Undefined"; "Text entry" with a dropdown menu showing "Not Present"; "Date offset list" with a dropdown menu showing "Undefined"; and "Date picker" with a dropdown menu showing "Not Present". At the bottom of the dialog are two buttons: "OK" on the left and "Cancel" on the right.

Figure: Rule wizard: Setting Label Condition.

Choose the criteria for each of the presented Selectors. The choices presented are:

- **<Any>**: Any valid value from the set of Values defined for this Selector. Blank (no selection) would **not** match. Selecting <Any> results in the Selector name appearing in the label condition.
- **Undefined** : Any valid selector value or <Blank>.
- **Value** : A specific value from the set of values available for the Selector. Selecting a value results in the chosen Value appearing in the label condition.

Note: For [Text entry](#) and [Date Picker](#) selectors you use presence of a value in the rule condition, the actual value is irrelevant.

Note: For [Multiple selection list](#) selectors you can only choose one value from those available. You can of course define other (similar) rules that fire on other values of that same selector. If several rule instances apply because more than one value has been selected for that Multiple selection list, the [Rule overlap handling](#) algorithm applies.

- So choosing **Classification = Public / Department = <Any>** results in a label condition of **“Classification”=“Public”, “Selector”=“Department”** being presented in the label condition placeholder.

Note: If you change the Label condition in a rule, the rule position in the rule tree will change to reflect the new settings.

Note: You cannot set a label condition where all selectors are set to Undefined; you should add the rule directly under the Any Label node instead.

Rule Overlap Handling

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules]

If there are multiple rules defined affecting a single application location, the rule having the “best match” is actioned. The “best match” is determined using an algorithm which treats the last [Selector](#) defined in the policy as being the most significant, and the first Selector defined in the policy as being the least significant.

For many sites the Rules Tree contains a small number of rules affecting any one [Marking](#) location (e.g. FLOT), and rule precedence can be determined visually based on the algorithm: “The rule associated with the most important selector (towards the Bottom) in the tree wins unless there is a rule using a more specific label value (towards the Right) for that selector”.

Note: It is possible to have multiple similar rules defined below the same node in the rule tree. For example, there might be two Add LLOT rules, one with a specific Condition associated (e.g. If External recipient), and one with no associated Conditions. The Rule highest up the tree takes precedence. Use the [Move rule up / down](#) actions to manage this precedence.

Rules are defined in the Rule tree below:

- Always
- No Label
- Any Label
- Further nodes under **Any Label** corresponding to the specific defined Label condition.

More than one rule affecting the same location may be defined in the overall Rule tree. Classifier uses the following algorithm to determine the Rule to apply where more than one rule might apply:

- **Always** rules only apply if there is no other similar Rule that takes precedence, including **<No label>** rules.
- [A similar rule would be one that affects the same location (e.g. FLOT). Note that you could have multiple rules applying for X-Header / document property etc. from different branches of the Rule tree as long as they are for different X-Header / document property values].
- **No Label** rules only apply if there is no label value selected. It is mutually exclusive with **<Any Label>** rules, with **<Label condition>** rules, and with **<Always>** rules.
- **Any Label** rules only apply if a label value has been selected and there is no other similar Rule with a specific label condition that also applies – i.e. there is no other applicable rule further down the tree.
- A **<specific selector value>** defined in a rule makes a 'better' match in the label matching algorithm than **<Any>** that is in turn 'better' than a **<Not Relevant>**, that in turn is better than an **<Always>** match.
- For **Multiple selection lists**, the value at the head of the list is treated as the least significant and the value at the bottom of the list is treated as the most significant. Consider a [Multiple selection list](#) having three values V1, V2 and V3; and rules R1, R2 and R3 that apply Markings M1, M2 and M3 associated with each of those selector values. If the user select values V1 + V3, there are two applicable rules (R1 and R3) - Classifier

uses the list order to determine rule precedence (bottom of list is most significant) and Rule R3 / M3 will be applied.

Example Scenario:

Consider a scenario where you want three different FLOT Markings depending upon the label value:

- **No Label:** "This message has no label value defined".
- **Label of [Confidential + any Department]** : "CONFIDENTIAL / <Department> - HANDLING CHECKS APPLY".
- **All other label values:** "<Classification> / <Department>".

To create three FLOT markings:

1. Define the three **Marking Formats**.
2. Define three separate **FLOT rules** under the relevant nodes in the Rules tree (**No Label** , **Always** and **Classification = Confidential**) assigning the appropriate [Marking Format](#).
3. The code will apply the relevant Marking depending upon the label value selected.

A more complex example of rule overlap handling is explored in the [Appendix - Example of 'Best matching Rule' algorithm](#).

Note: Duplicate rules are rules that affect the same application location AND have the same label condition. [Classifier Administration](#) flags such duplicates at appropriate times, and you should address such anomalies by removing one of the duplicate rules.

Note: Certain rule types (Label Change Check, Mandatory Selector Check, Selector Expiry Check and Content Check) provide a setting (Allow multiple rules of this type) which influences the duplicate rules checking.

Move Rule Up / Down

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [Set Rules]

It is possible to have multiple similar rules defined for an application below the same node in the rule tree. For example, there might be two Add LLOT rules, one with a specific Condition associated (e.g. If External recipient), and one with no associated Conditions. The Rule highest up the tree takes precedence.

Rules relating to a single application are grouped together below a node (Always / Any Label / Label value etc.) in the rules tree. Use the **Move rule up / Move rule down** actions to manage this precedence by moving rules within the group of rules applicable to an application.

To select a rule:

1. Select a **rule** in the **rule tree**.

Note : The Move rule up / down actions will only be available if there is more than one rule applicable to the application and there is a rule above (Up is available) and/or there is a rule below (**Down** is available).

2. Use the **Up / Down** actions to rearrange the rules.

Rules Supported

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules]

This section covers all the rules supported by Classifier applications. Rules are application specific but may vary according to the Classifier policy in use. The **Application Rule support** table below shows the rules presented for each application. Rules for an application are only available if the relevant [licence](#) has been applied.

In the table below, x.y (e.g. 3.5) indicates a feature that is new in that version of [Classifier Administration](#). Application versions prior to that number do not support the feature (Classifier 1.3 (which preceded 3.4) is assumed as the baseline).

Note: Component release notes may document limitations that apply even if the table below indicates support for a feature.

The rules are grouped into the rule categories (topics) shown in the table:

- [Add rules](#) : Rules that add a marking or meta-data to the document or message.
- [Apply rules](#) : Rules that apply a setting to a document or message.
- [Check rules](#) : Rules that check that the policy (as defined by these rules) is being followed.

You may define multiple instances of each type of rule and may set pre-requisite [Conditions](#) . Multiple instances of a rule may be associated with a single label value as long as different conditions apply to each rule (e.g. Insert a different FLOT if there is an attachment). Classifier determines which rule to apply based on the ‘ best fit ’ between the run time label and the label values associated with the rule as described in [Rule Overlap Handling](#) .

Details on the individual rules can be found by following the links above.

Add Rules

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Office, Email, OWA, Mail Add-in, Notes and Mobile Classifier allow Markings and/or Metadata based on the current label value to be applied to the current document / message. One common use is to facilitate recognition by software and users that the email message is labelled, and the value of that label.

Any Marking defined through these mechanisms overwrites any existing value in the same location defined by any other means (e.g. the user).

Note: Any rich text formatting specified in a Format is ignored when used in a location that does not support such features (e.g. Subject field).

Note: If your site uses Word templates to set Header/Footers etc. you may find that [Insert Marking as Field Code \(Word only\)](#) is more appropriate for Word than some of the rules below.

Separate rules appear for each supported “Location”. For each Location rules are available in a general (Add ...) or a [Label](#) specific (With this < Label >, add) form depending on whether you are adding the rule as an **Any label** or a rule associated with a specific label value .

Application Rule Support

The table below indicates the rules supported by each application [OL (Outlook) / O(WA) / Notes / Mob / M (ailAdd-in) / W(ord) / Ex(cel) / PP(PowerPoint) / Pr(oject) / V(isio) / CAD / SP / F(ile)/DCS/ Box indicates that the application supports the setting].

| Marking/ Metadata | Outlook | OWA | Mail Add-in | Notes | Mob | Word | Excel | Power Point | Project Visio | CAD | SharePoint File ClBox | DCS |
|------------------------------------|---------|-----|----------------|-------|-------|------|-------|----------------|------------------|-----|--------------------------|-----|
| Add a FLOT | OL | OWA | 3.10.0 | Notes | Mob | | | | | | | |
| Add a LLOT | OL | OWA | 3.10.0 | Notes | Mob | | | | | | | |
| Add to Subject here | OL | OWA | 3.10.0 | Notes | Mob | | | | | | | |
| Add this X-Header | OL | OWA | 3.10.0 | Notes | 3.7.4 | | | | | | | |
| Add attachment list | OL | OWA | 3.10.0 | Notes | | | | | | | | |
| (Attachment list format) | OL | OWA | | Notes | | | | | | | | |
| Add these addresses | OL | OWA | | | | | | | | | | |
| Add this Outlook item propety | OL | | | | | | | | | | | |
| Add a Textbox on the header | | | | | | W | | | | | | |
| Add a Textbox on the footer | | | | | | W | | | | | | |
| Add a textbox on the top | | | | | | | | PP | | | | |
| Add a textbox on the bottom | | | | | | | | PP | | | | |
| Add a textbox to top of page | | | | | | | | | V | | | |
| Add a textbox to bottom of page | | | | | | | | | V | | | |
| Add a cover page marking | | | | | | W | Ex | PP | V | | | |
| Add a header here | | | | | | W | | | | | | |
| Different 1st page | | | | | | W | | | | | | |
| Different odd/even pages | | | | | | W | | | | | | |
| Add a header | | | | | | | Ex | | Pr + V | CAD | | |
| Different 1st page | | | | | | | Ex | | | | | |
| Different odd/even pages | | | | | | | Ex | | | | | |
| Smart selection | | | | | | | Ex | | | | | |
| With alignment | | | | | | | | | | | | |
| Add a footer here | | | | | | W | | | | | | |

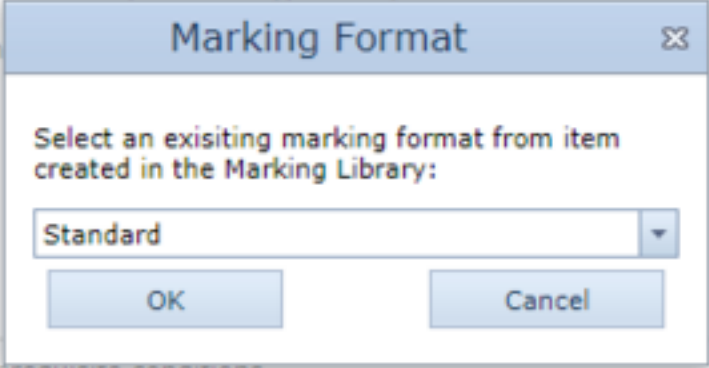

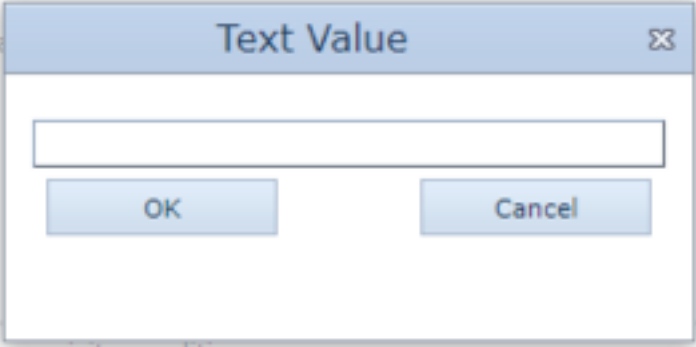
| Marking/ Metadata | Outlook | OWA | Mail Add-in | Notes | Mob | Word | Excel | Power Point | Project Visio | CAD | SharePoint File ClBox | DCS |
|--------------------------------------|---------|-----|----------------|-------|-----|------|-------|----------------|------------------|-----|--------------------------|-----|
| Different 1st page | | | | | | W | | | | | | |
| Different odd/even pages | | | | | | W | | | | | | |
| Add a footer | | | | | | | Ex | PP | Pr + V | | | |
| Different 1st page | | | | | | | Ex | | | | | |
| Different odd/even pages | | | | | | | Ex | | | | | |
| Smart selection | | | | | | | Ex | | | | | |
| With alignment | | | | | | | | | | | | |
| Add an image into header | OL | | | | | W | Ex | PP | | | | |
| Add an image into footer | | | | | | W | Ex | PP | | | | |
| Add watermark image | | | | | | W | | | | | | |
| Add a cover page marking | | | | | | W | Ex | PP | V | | | |
| Add an image as a watermark | OL | | | | | W | | | | | | |
| Add this document property | | | | | | W | Ex | PP | Pr + V | CAD | | DCS |
| Add this custom document property | | | | | | W | Ex | PP | Pr | CAD | | DCS |

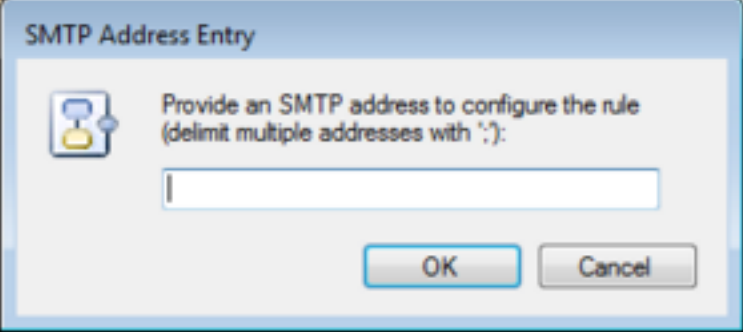
To add a new Add Rule:

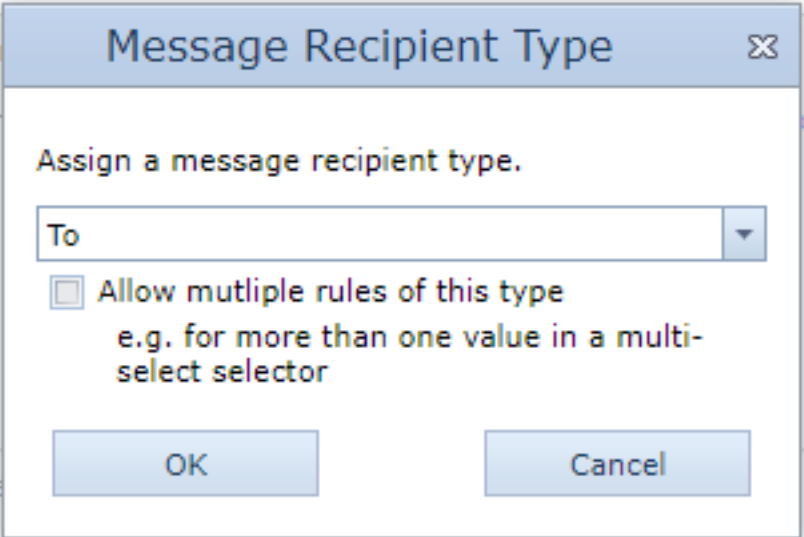
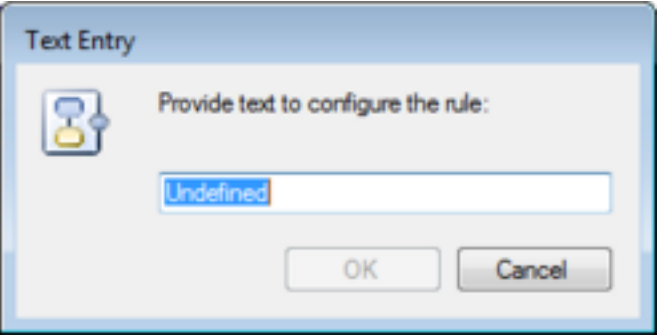
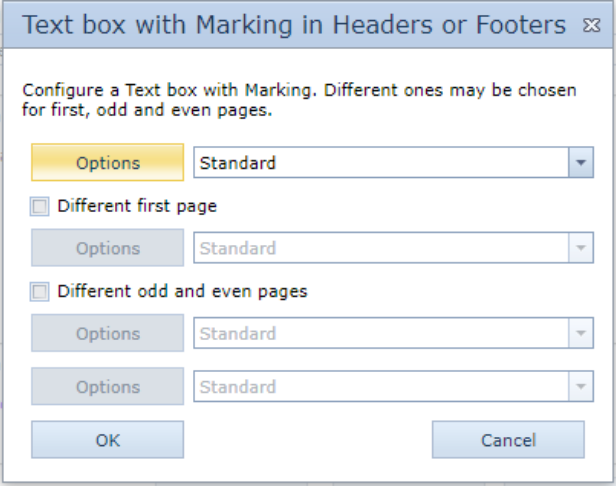
- a. Perform the operations common to all rules.
 1. Select the policy and select the **Set Rules** Tab.
 2. Select either the Always, No Label, Any Label node or a specific label value node in the rules tree.
 3. Choose **Add a rule** to start the [Rules wizard](#) . Select the appropriate application(s) and click Next. This presents the rules available for the application(s) chosen.
 4. If required, choose the appropriate rule category filter (Add/Apply/Check rules).
 5. Select the appropriate **'Add ...'** rule from the list of rules displayed. This will present the appropriate rule edit template.
 6. If the rule is label value based then select the **label value** token and configure the label setting to meet your requirements.
- b. Set any rule specific settings and be aware of any rule specific features as described in the relevant sub-topic. The **Add ...** rules supported and their settings tokens (**<Label>**, **here**, **this**, **...**) are:

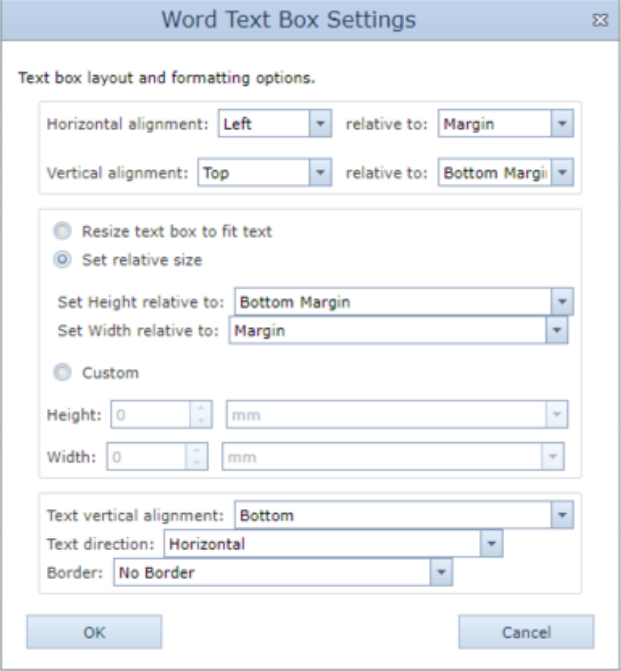
Note: In the table below, Mail Add-in (3.10.0) only supports messages (not meeting requests for example).

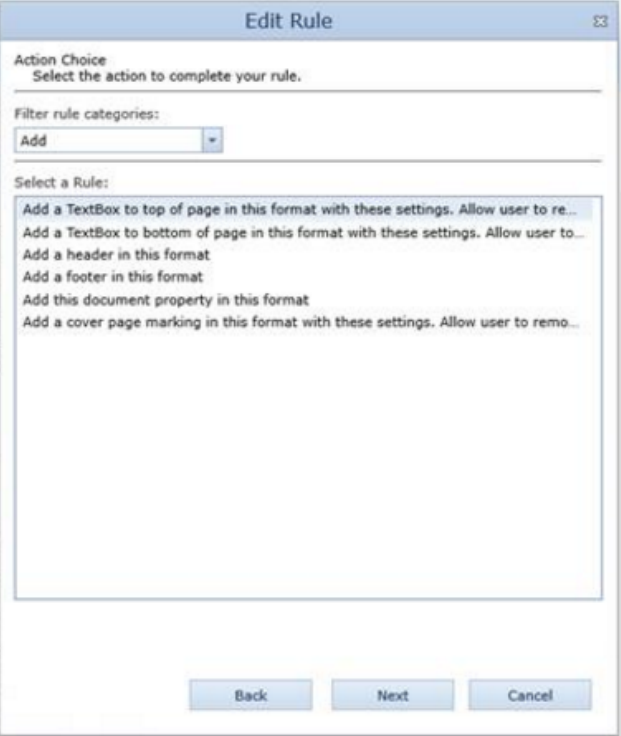
Note: You may subsequently [edit the rule](#) to change any of the settings (e.g. the marking format used).

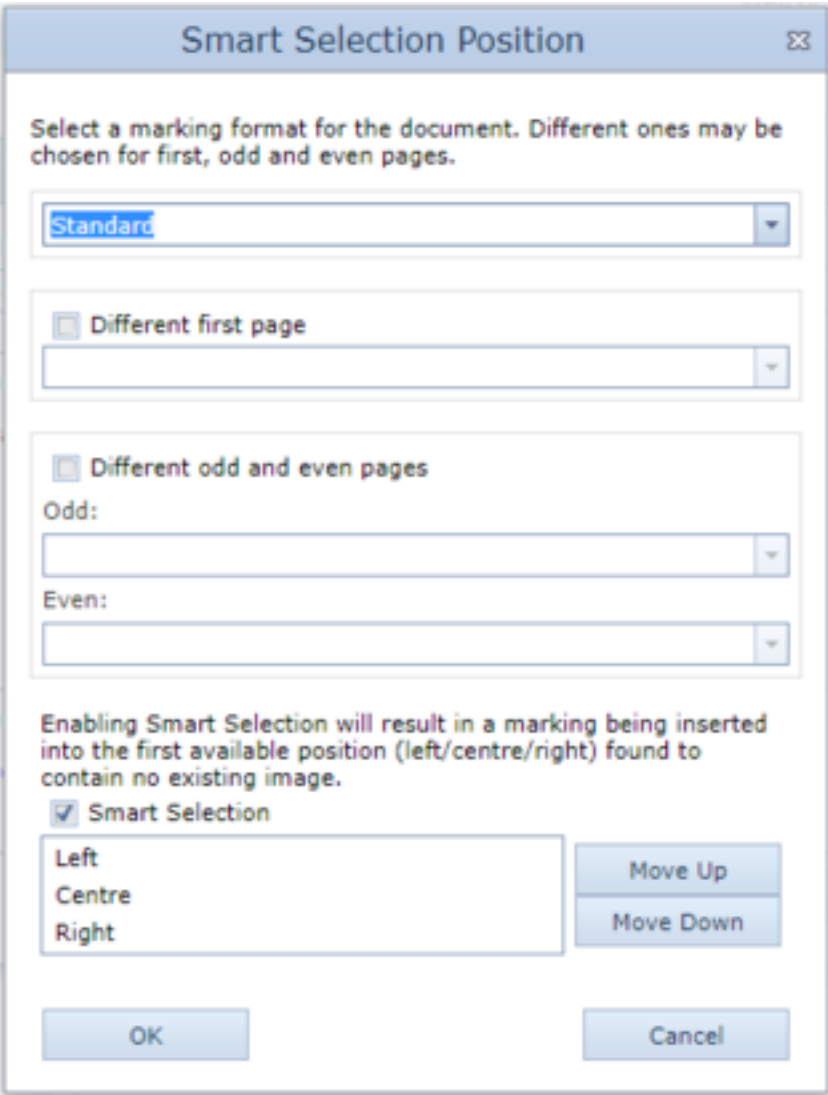
| For Emails | Dialog presented when a placeholder is selected |
|---|--|
| <p>Add a FLOT in this format . Add a LLOT in this format .</p> <p>See also Examples of FLOT .</p> <p>Note: Only supported for messages and meeting requests.</p> |  <p>(Basic this format selection dialog referenced below)</p> |
| <p>Add to subject here in this format .</p> <p>Note: Only supported for messages and meeting requests.</p> <p>Note: A Reply/Forward operation will check for any existing recognisable Subject marking and strip if found before applying a Subject marking appropriate to the current label.</p> <p>Note: Email Classifier may truncate the original subject to accommodate the Prefix / Suffix. Note that if the Prefix or Suffix is itself longer than the maximum subject length, then the Prefix / Suffix is not included in the updated Subject value.</p> |  <p>(Basic this format selection dialog above)</p> |
| <p>Add this x-header in this format.</p> <p>Note: In a Lotus Notes environment, for the x-classification (above) to be transmitted across an SMTP connection, classification must be included in the Domino server list of x-headers to be transmitted across that connection (the "x-" is automatically applied by Domino).</p> |  <p>(Basic this format selection dialog above)</p> |

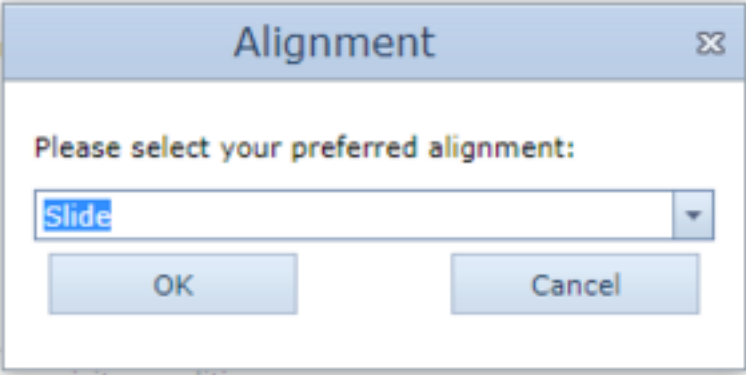

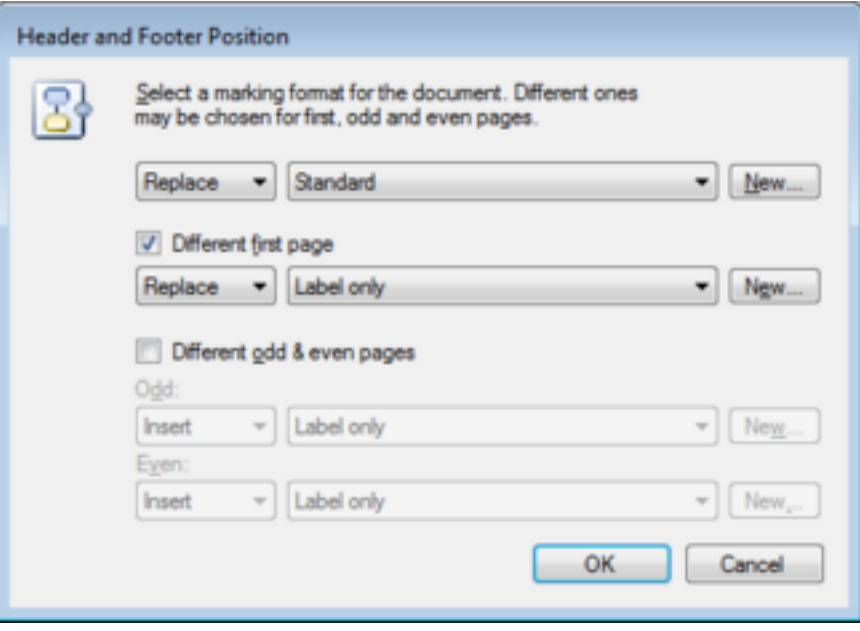
| For Emails | Dialog presented when a placeholder is selected |
|--|--|
| <p>Note: Any characters that are not "7 bit US-ASCII" in a marking format that is used to populate an X-Header field on an email generated by Email or OWA Classifier appear as '?' when the message is sent.</p> <p>You might use the Alternate Value mechanisms described in Administration Guide/Configuration Settings/Label Locations/Recognising and Parsing Label Markings to provide a mapping from your selector values (non-Ascii) to 7 bit US-ASCII and back again. However, this approach will not work for Text entry selector values.</p> | |
| <p>Add an attachment list of Classifier documents showing labels in this format .</p> <p>(Not supported by Mobile Classifier, nor Appointments).</p> <p>See also Attachment List Notes .</p> <p>Note: Only supported for messages and meeting requests.</p> | <p>(Basic this format selection dialog above)</p> |
| <p>Add these addresses to these recipients.</p> <p>(Not supported by Notes Classifier or Mobile Classifier and not supported for Tasks)</p> <p>Note: The addition of recipients is performed after any recipient type checks.</p> |  |

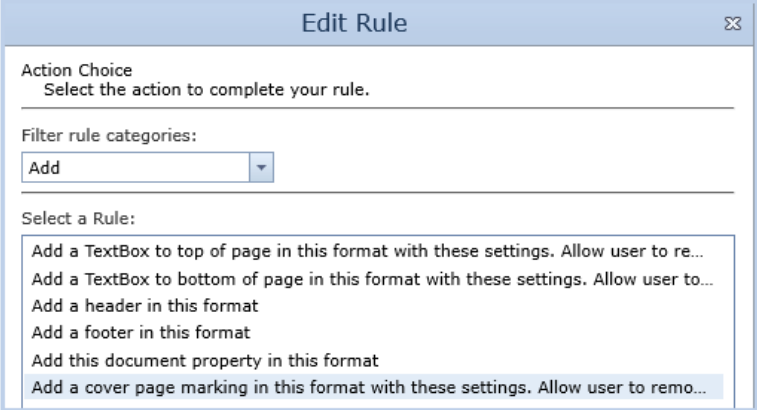
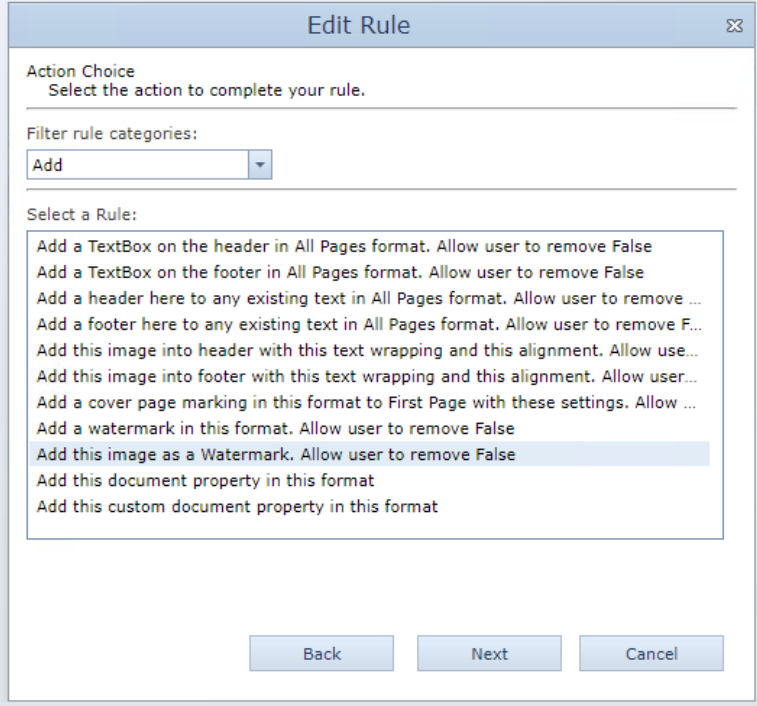
| For Emails | Dialog presented when a placeholder is selected |
|---|--|
| |  |
| <p>Add this Outlook Item property in this format.</p> <p>(Only supported by Outlook)</p> <p>See also Search for Outlook Item Properties that match email label locations .</p> |  |
| <p>For documents:</p> <p>Add a Textbox on the header in this format</p> <p>Add a Textbox on the footer in this format</p> <p>(Word only)</p> <p>When a TextBox has been inserted via the rule, the text is formatted according to the defined Marking Format. The user is free to manipulate the Textbox (e.g. move it, format it etc).</p> <p>When the rules run, if an existing Classifier 'TextBox' exists in the header/footer only the text (field code) is updated, thus any</p> |  <p>Word Textbox in header or footer</p> |

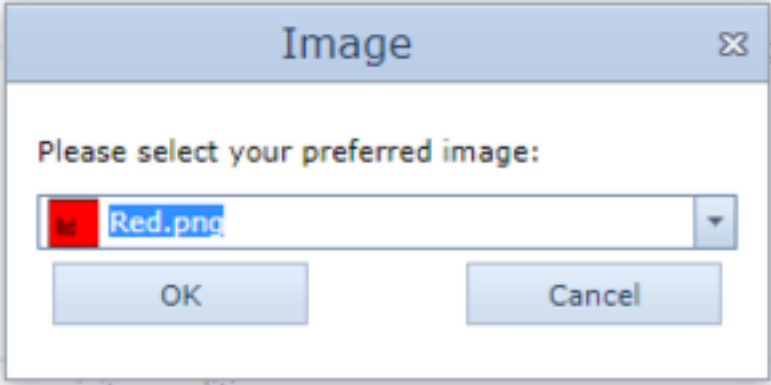
| For Emails | Dialog presented when a placeholder is selected |
|--|---|
| <p>customisations made by the user to the box will remain, and the alignment applied from the original marking format is retained regardless of alignments of marking formats associated with subsequent rules applied (e.g. due to label change).</p> <p>This means that any changes made by the user to the text content (e.g. font, colour, size, etc.) will be lost the next time the rule fires.</p> <p>For Word: This behaviour is modified if the Marking Format has 'Use Plain Text' specified. In this case Classifier will simply replace the text content, but leave any surrounding formatting unchanged.</p> <p>Note: that any formatting set by the user within the text will still be replaced.</p> |  <p>(Presented when Options above is pressed)</p> <p>Word Add Textbox settings</p> |
| <p>Add a Textbox on the top of the slides in this format.</p> <p>Add a Textbox on the bottom of the slides in this format.</p> <p>(PowerPoint Only)</p> <p>Add a textbox to bottom of page in this format.</p> <p>(Visio Only)</p> <p>Note: Add TextBox to top of page in this format” is only applicable to Visio.</p> <p>When a TextBox has been inserted via the rule, the text is formatted according to the defined Marking Format. The user is free to manipulate the Textbox (e.g. move it, format it etc).</p> | <p>Basic this format selection dialog above</p> |

| For Emails | Dialog presented when a placeholder is selected |
|---|--|
| <p>When the rules run, if an existing Classifier 'TextBox' exists in the header/footer only the text (field code) is updated, thus any customisations made by the user to the box will remain, and the alignment applied from the original marking format is retained regardless of alignments of marking formats associated with subsequent rules applied (e.g. due to label change).</p> <p>This means that any changes made by the user to the text content (e.g. font, colour, size, etc.) will be lost the next time the rule fires.</p> |  |
| <p>Add a header in this format. (Supported by Excel, Project, Visio and AutoCAD)</p> <p>Add a footer in this format (Supported by Excel, Project, Visio)</p> <p>For Excel, you can choose Smart Selection which will cause Classifier to add the header/footer into the first vacant location found following the order that you define. If there are no vacant slots, the marking is not written.</p> <p>The other applications always replace any existing text.</p> <p>See also Add Header / Footer additional notes .</p> | <p>(For most applications - Basic this format selection dialog above)</p> <p>(For Excel - only the following:)</p> |

| For Emails | Dialog presented when a placeholder is selected |
|--|--|
| |  <p>Excel Header/Footer placement</p> |
| <p>Add a footer in this format with this alignment.</p> <p>Add a header in this format with this alignment.</p> <p>(Supported by PowerPoint only)</p> <p>PowerPoint always replaces any existing text.</p> <p>The alignment option supports two settings:</p> | <p>Basic this format selection dialog above applies.</p> |

| For Emails | Dialog presented when a placeholder is selected |
|---|--|
| <p>Fit to Placeholder The Footer placeholder is not resized.</p> <p>Fit to Slide/Page (Default) The Header/Footer placeholder is resized to be the width of the slide.</p> <p>See also Add Header / Footer additional notes .</p> |  <p>PowerPoint Alignment</p> |
| <p>Add a header here to any existing text in this format.</p> <p>Add a footer here to any existing text in this format.</p> <p>(Word only)</p> <p>This format allows you to define the marking format, and provides control over Insert / Replace , and first page and Different odd/even page usage.</p> <p>See also Add Header / Footer additional notes and Settings to Auto Enable Microsoft Office Header / Footer controls .</p> |  |
| |  |

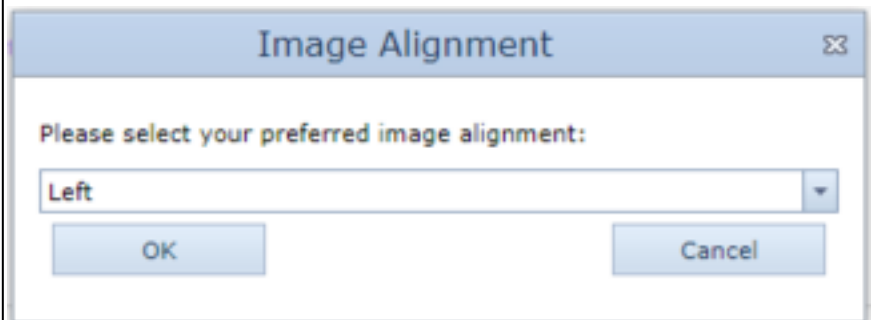
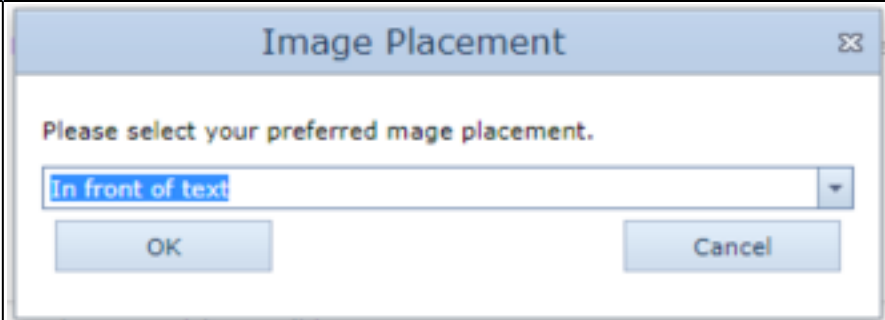
| For Emails | Dialog presented when a placeholder is selected |
|--|--|
| <p>(Word) Add a cover page marking in this format to First Page with these settings.</p> <p>(Excel/PowerPoint/Visio) Add a cover page marking in this format with these settings.</p> | <p>Word Header and Footer position</p> <p>This rule will apply a Text Box marking to the first page of a Word document / PowerPoint document / Excel spreadsheet (only the first spreadsheet) / Visio drawing when the document is saved.</p> <p>The first page may be a Word 'Cover Page' if one has been inserted.</p> <p>The application rules supported provide control over the placement of the text box through the settings dialog presented when the these hyperlink is clicked.</p>  |
| <p>Add a watermark in this format.</p> <p>(Word and Outlook)</p> <p>Note: If documents are protected then Allow label change on protected documents may be relevant.</p> <p>Note: Under Word, Classifier adds an entry to the Watermark gallery if there is an Add Watermark rule configured applicable to the current label value. Although the user might use this gallery entry to remove the current watermark, Classifier will always perform any applicable rule when the document is saved.</p> <p>Note: Classifier also supports a mutually exclusive 'Add this image as a watermark' rule to apply an image rather than a text watermark.</p> | <p>(Basic this format selection dialog above)</p>  |

| For Emails | Dialog presented when a placeholder is selected |
|--|--|
| <p>Note: You can use the Watermarks use marking format font to control the font used for the Watermark.</p> <p>Note: To configure Classifier to display watermarks diagonally in Word:1. Using image software, create a new PNG file.</p> <p>2. Set the background to transparent.</p> <p>3. Add text and rotate the watermark text by 45 degrees. Save the PNG file.</p> <p>4. Import the PNG file into the Classifier Administration Web UI by selecting Image Library > Add a new image > Browse > (select image name). Click OK.</p> <p>5. In Classifier Administration > Policies > (policy name) > Set Rules > Add a rule, create a new rule by selecting Word Documents then Next then Add > Add this image as a watermarkrule.</p> <p>6. Select Next. Click on this and in the drop-down menu, select the PNG file then click OK.</p> | |
| <p>Add this image into header with this text wrapping and this alignment.</p> <p>Add this image into footer with this text wrapping and this alignment.</p> <p>(Word Only)</p> <p>Add this image to top of page with this text wrapping and this alignment.</p> <p>Add this image to bottom of page with this text wrapping and this alignment.</p> <p>(PowerPoint Only)</p> |  |

For Emails

Note: These above can be used alongside the corresponding Add a Header or Footer rules.

Dialog presented when a placeholder is selected



For Emails

Add **this** image into header with **this** format.

Add this image into footer with this format.

(Excel Only)

Note: These above can be used alongside the corresponding Add a Header or Footer rules.

Dialog presented when a placeholder is selected

Image [Close]

Select an image to insert. Different ones may be chosen for first, odd and even pages.

[Image Selection Dropdown]

Position: Left Centre Right

Different first page

[Image Selection Dropdown]

Position: Left Centre Right

Different odd and even pages

Odd:

[Image Selection Dropdown]

Position: Left Centre Right

Even:

[Image Selection Dropdown]

Position: Left Centre Right

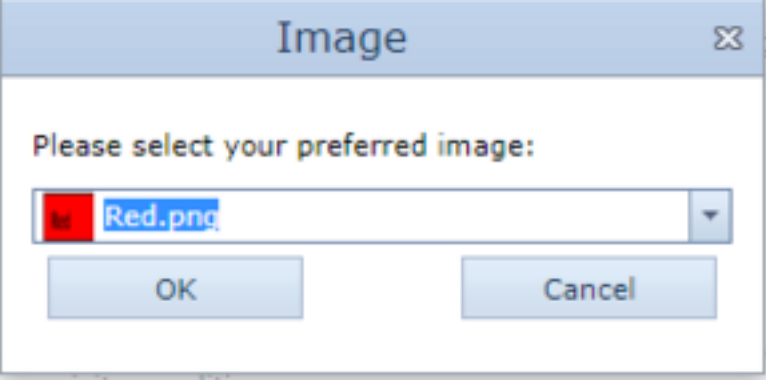
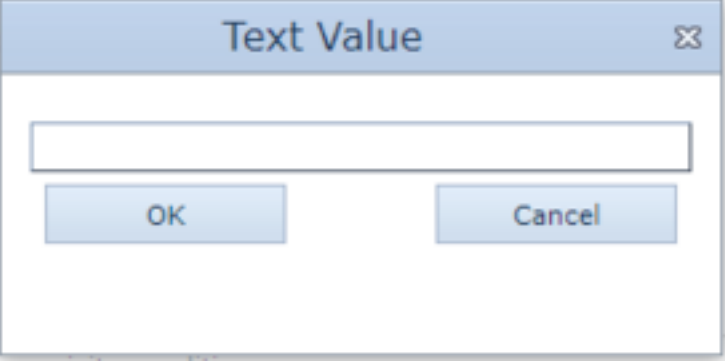
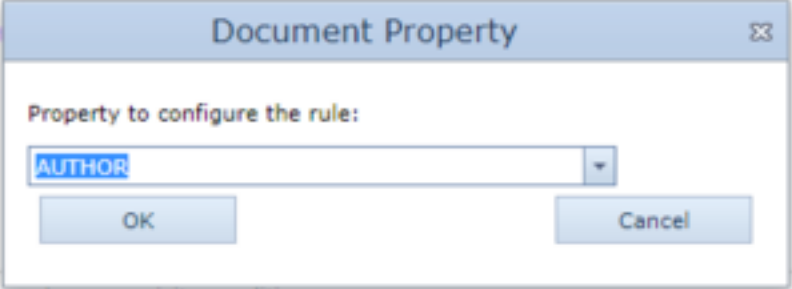
Enabling Smart Selection will result in a marking being inserted into the first available position (left/centre/right) found to contain no existing image.

Smart Selection

Left
Centre
Right

Move Up
Move Down

OK Cancel

| For Emails | Dialog presented when a placeholder is selected |
|--|--|
| <p>Add this image as a watermark.</p> <p>(Word Only)</p> <p>Note: Classifier also supports a mutually exclusive 'Add a watermark' rule to apply text rather than an image as a watermark.</p> |  |
| <p>Add this document property in this format .</p> <p>Add this custom property in this format .</p> <p>(Custom Property feature is not supported by Visio)</p> <p>If the Marking to be written is empty, the Custom Property is removed.</p> <p>Note: Document properties are visible through the standard Office property viewing menu action.</p> <p>Office Document Properties > Advanced</p> <p>Note: Saving as PDF: You can populate various standard document properties (Title, Author, Subject and Keywords) that will be propagated if you save an Office document as PDF. However, Office applications do NOT propagate any Custom Properties to the PDF. In particular the bjDocumentSecurityLabel is NOT propagated. Email, OWA and Notes Classifier will check defined Label Locations for recognisable labels in standard PDF file properties for the Check for the high-water mark and Add an attachment list rules.</p> |  <p>Define Custom Property</p>  <p>Select Document Property (Basic this format selection dialog above)</p> |

| For Emails | Dialog presented when a placeholder is selected |
|---|---|
| <p>Note: Not all properties listed are supported by all applications. Properties supported by an application can be found via File->Info->Properties (Advanced Properties) or similar.</p> <p>Note: Office Classifier and CAD Classifier always populates the private Classifier label Document Property.</p> | |

Multiple instances of the these rules can be defined as long as each Rule contains a different Custom / Document Property name.

(d) Specify any Prerequisite Conditions required. Not applicable to OWA.

(e) Complete the wizard sequence by supplying a **name** for the rule. The name of the application will automatically be pre-pended.

Attachment List Notes

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

You may configure a rule that adds an attachment list into the body of the email or web email message (see [Add rules](#)).

The attachment list comprises the attachment names and any label value associated with each attachment (only for attachment types supported by Classifier).

Note: Further details on how Email, OWA and Notes Classifier try to determine a label value for various file types can be found in [Appendix - Label Propagation Mechanisms](#).

Examples of how attachment lists appear in received messages are shown below:

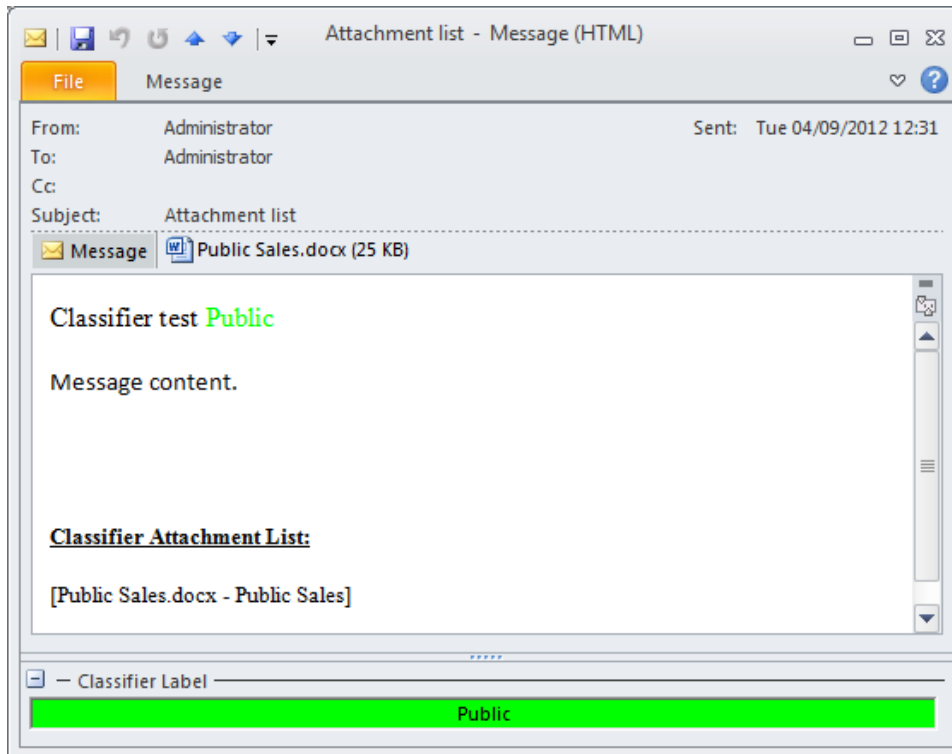


Figure: Outlook: Example of Attachment List.

The Classifier Attachment List: text is configurable via the [User Interface Library > General Messages \(UID\)General Email Content > Classifier Attachment List](#) setting.

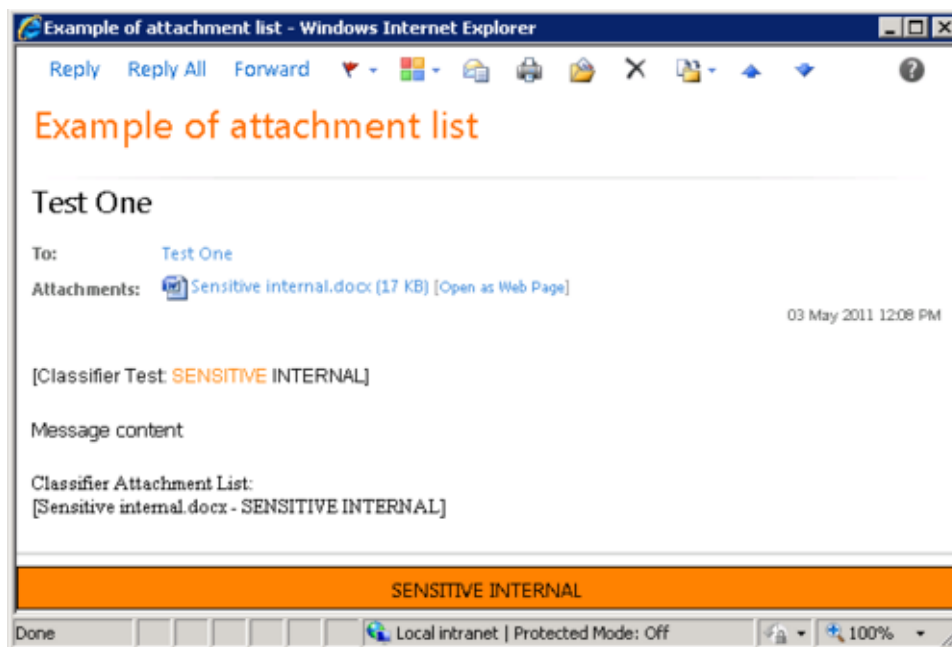


Figure: OWA: Example of Attachment List.

Add Header/Footer Additional Notes

Office Classifier configures the **Header/Footer** as defined by the relevant rules, but it is the Office application that applies the **Header/Footer** to the document. For example, configuring Word or Excel rules to apply different First/Odd/Even page header/Footer will only have the desired effect if you have also configured the document to use different First/Odd/Even page header/Footer.

[Settings to Auto Enable Microsoft Office Header / Footer controls](#) allows you to further automate control over these features.

Note: Some applications apply limits to the size of headers/footers (including formatting control information - font size, name and colour e.g. "&"Arial,"&11&K00C000 UNMARKED&"Arial,"&11&K000000 EXTERNAL&"). If limits are exceeded, Classifier first removes formatting information before truncating the text. Excel has a limit of 253 characters, Project has a limit of 256 characters and Visio has a limit of 127 in each of Header/Footer Left/Right/Centre. Check that the expected effects apply in each of your applications.

- **Word** : Header/Footer markings cannot be added to 'form-filling' protected documents. For documents protected in other ways [Allow label change on protected documents](#) may be relevant.
The [Add a header / footer here](#) rules allow you to define whether the [Marking](#) is merely inserted, or replaces any pre-existing header / footer.
- **PowerPoint** :
Headers : PowerPoint does not support application of headers to slides. Any Rules to apply headers will only take effect on Notes produced by PowerPoint.
Footers : In order to apply footers to PowerPoint presentations users must ensure that standard PowerPoint footers are enabled on each slide via the slide masters layout.
If you need to apply formatting as gradient fill or colour to header or footer shapes, these should be applied to the presentation using the slide master and not directly to the slide itself. Applying such formatting directly to the header and footer may be lost if the label is changed (and not applied to the slide master).
Copy/Paste Considerations : This situation can become further confused if slides are pasted from another presentation. Depending upon the Copy/Paste options selected (e.g. 'Use Destination Theme' or 'Keep source formatting'), the source PPT Master/Slide settings can take effect in the target presentation. Microsoft KB article KB913500 describes a scenario where headers and footers may become out of sync when slides have been pasted from other presentations. The following link may also be useful - <http://social.msdn.microsoft.com/Forums/en-US/innovateonoffice/thread/2085dcd1-6977-4bcb-9e74-7f1f49a83d61/>.
- **Visio** : Visio only supports plain text modifications to headers so any rich text features defined in the Marking format are ignored.
You can view any plain text header you have applied via File / Print / Print Preview.
Visio does not support multiple line Headers / Footers. Only the first line defined by a Marking appears.
- **Project** : Do not create headers or footers of 256 characters or more in Project as COMException fatal errors are likely to occur.
- **CAD** : AutoCAD and DraftSight support the Add a Header rule, but the header only appears when the design is printed, and the location of the header is an application matter.

- **Excel** : Headers/Footers may not be displayed in Excel even when Classifier is configured to display headers/footers in Excel. This may be because you do not have a printer configured, or you do not have a printer set as the default. Please refer to Microsoft KB article <http://support.microsoft.com/kb/172320/en-us>.

Note: To view headers and footers in **Excel** click the **View** tab then **Page Layout**.

Removable Visual Markings

Certain rules that apply visual markings can be configured to allow the user to remove them, or in the case of Outlook to choose not to apply them. The administrator can configure on a per rule basis whether a marking can be suppressed by the user. If a marking can be suppressed, the display of the relevant visual marking can be toggled on/off by a menu item under the Options menu in the Classifier ribbon in the relevant Office application.

Note: If the 'allow user to remove' option is set to true then when a rule applies then the user can choose to remove the marking from the **Options** menu (under **Visual Markings**).

Note: The user can then 'restore the markings' by re-checking the appropriate item under the **Options -> Visual Markings** menu.

To add a rule that allows user control over the display of the visual markings:

1. Go to **Labelling Configuration>(Configuration Name)>Policies>(Policy Name)>Set Rules** Tab.
2. In the **Actions** column, select **Add a rule**. An **Application Choice** window will appear.

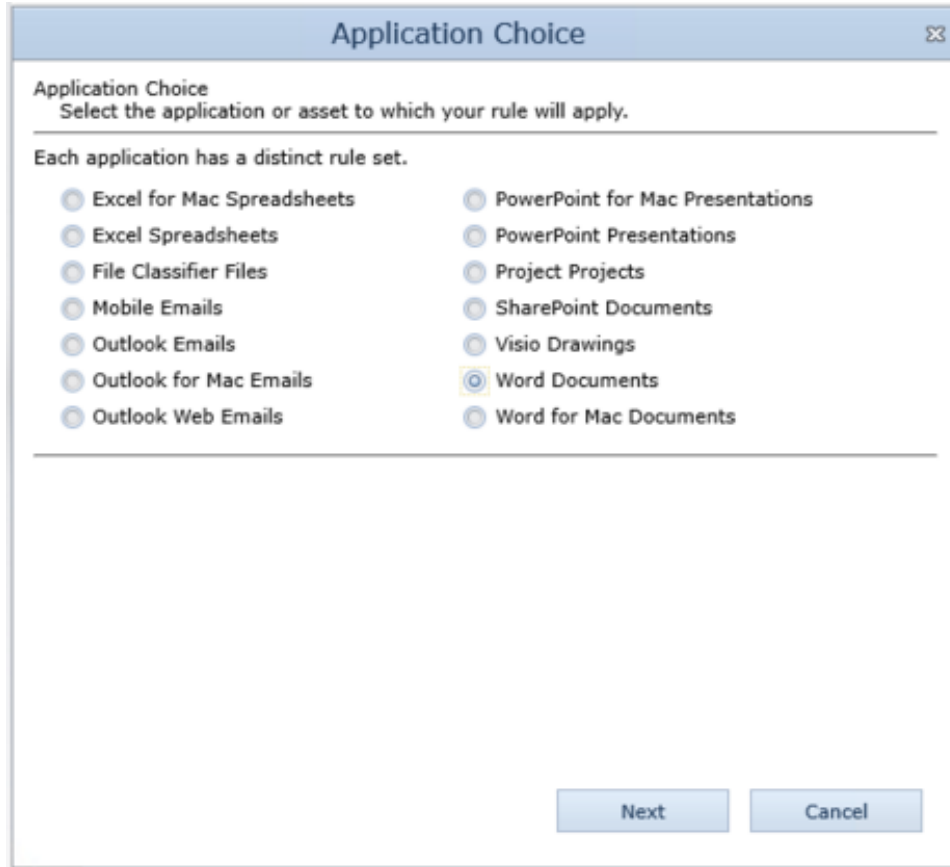


Figure: Select an application or asset to which the rule you select will apply.

3. Select an **application**, for example, **Word Documents** .
4. Click on the **Next** button. An **Edit Rule** window will appear.
5. In the drop down menu, select **All Rules** .

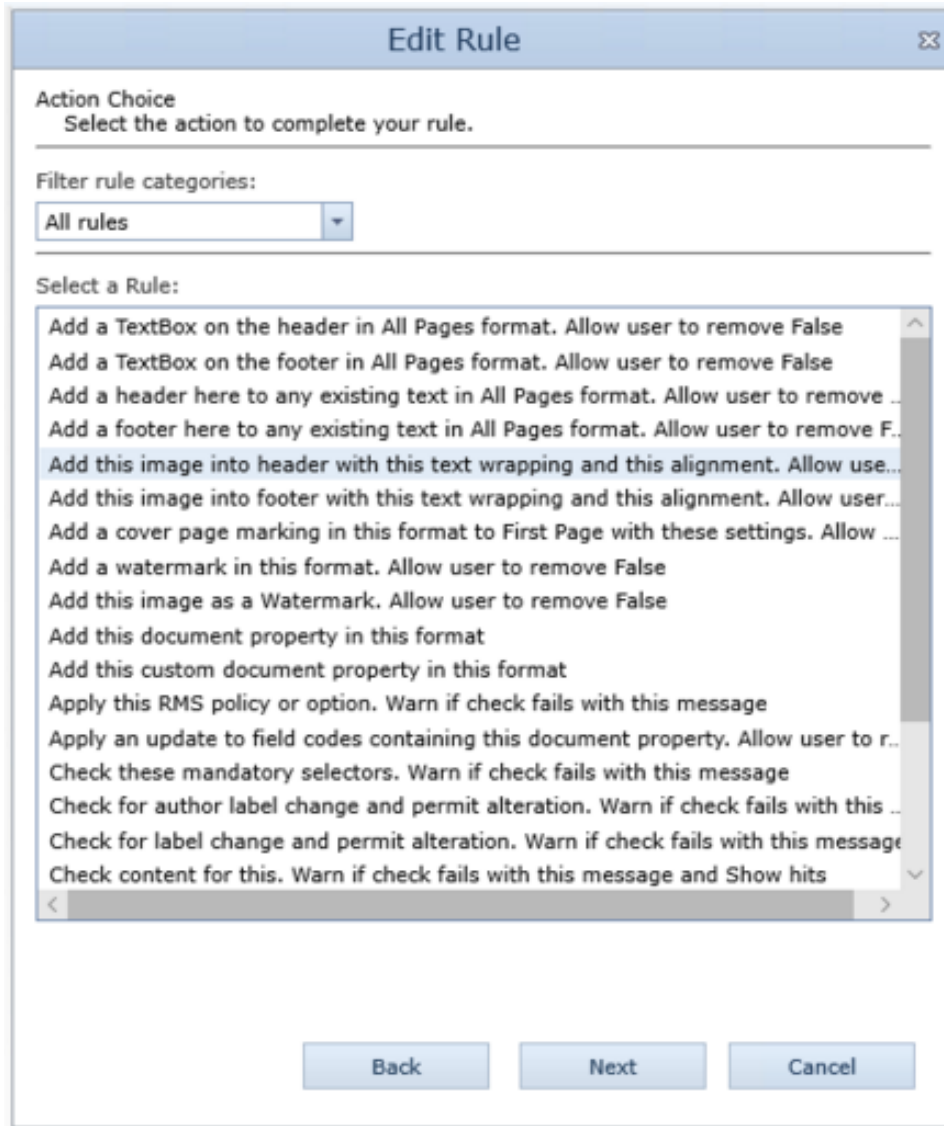


Figure: A list of all the rules.

6. Add a rule that supports the **Allow user to remove** option.
7. Click on the **Next** button. An **Edit Rule** window will appear.

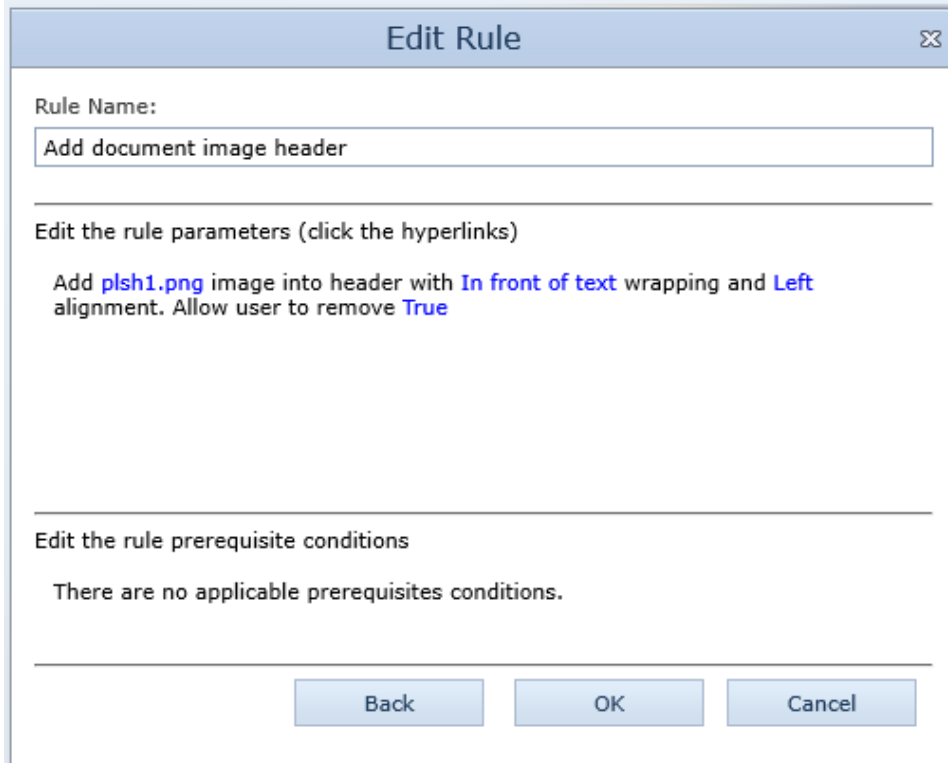


Figure: Editing the rules parameter hyperlinks.

8. Set the appropriate options on the rule and click on the highlighted "Allow user to remove" text and in the dropdown menu select true to allow the user to control the visibility of the marking.
9. Click on the **OK** button.

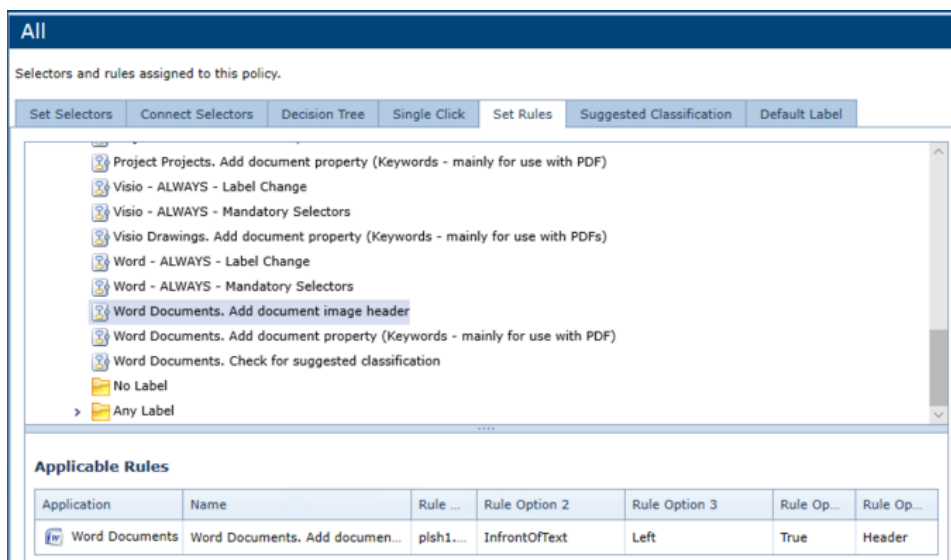


Figure: The applicable rule that was just added as an example.

10. To finish and save, click on the **OK** button. To not save, click on the **Cancel** button. The rule will be updated and added to the list of **Set Rules** in the **Applicable Rules** area.

Visual Markings Controlled By The User

A visual marking refers to content that is added to a document or message via an appropriate Classifier rule, for example, text in a Word document header, or a subject prefix for Email messages. If a rule to add a visual marking is applicable for the current application and label then the Classifier will add the content. In some circumstances, it may be useful to allow the user to decide on whether the visual marking should be present on a particular document or added to an email.

The Administrator can configure on a per rule basis whether the visual marking can be suppressed by the user by setting the **Allow user to remove** element of a visual marking rule.

If a document has visual markings whose display can be toggled by the user then they will be able to remove/restore them via the ribbon.

The text for the menu items in the ribbon can be configured in the usual way by modifying the appropriate default text in the **Menus** section of the [User Interface Library](#).

Examples of FLOT

A **FLOT (First Line of Text)** label is inserted into the email or web email message when a Send operation is performed. The FLOT displays a visual representation of the Label value to the recipient of the email message.

The figures below show examples of a received email message containing a FLOT Marking.

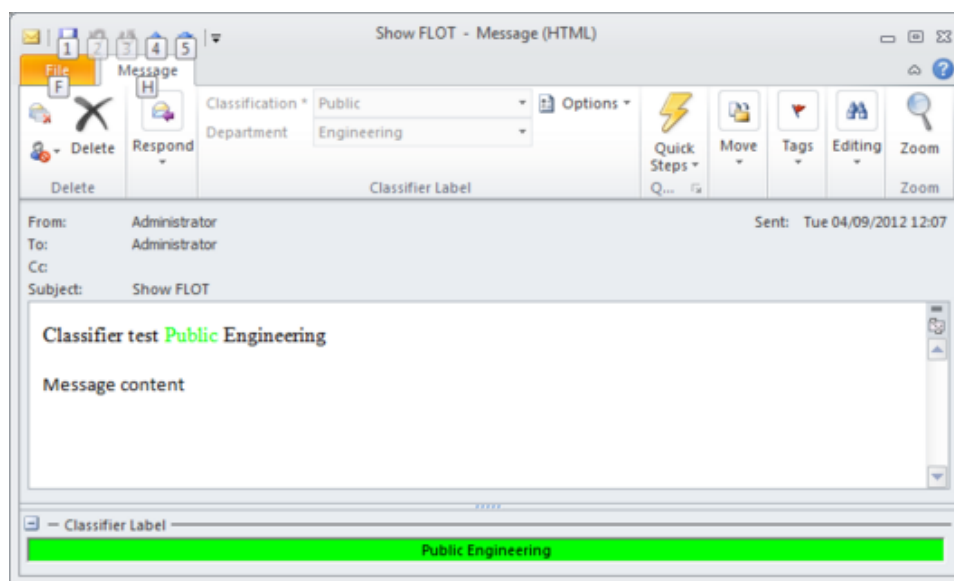


Figure: Outlook FLOT example 2010.

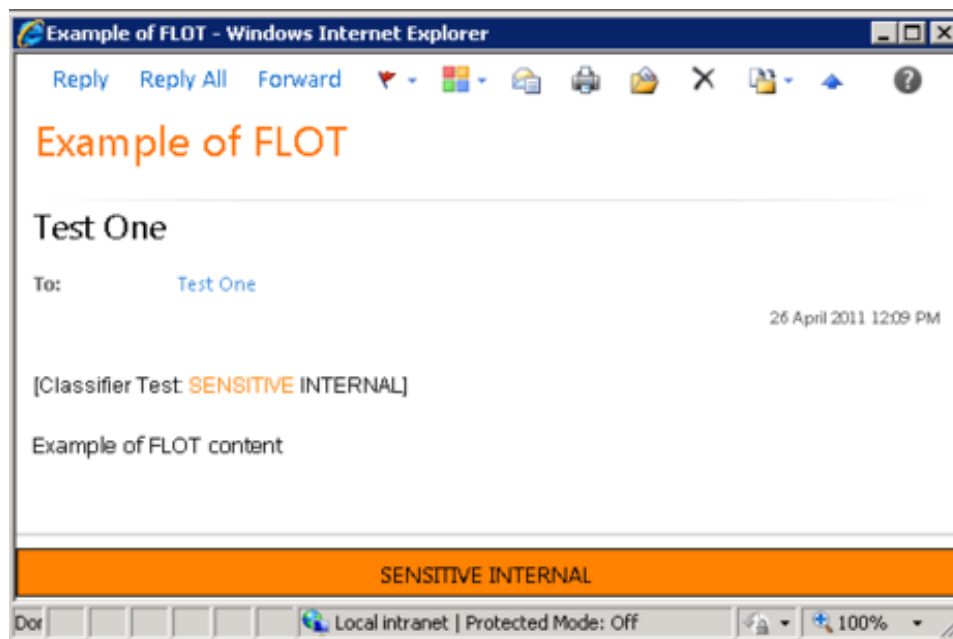


Figure: OWA FLOT example.

Apply Rules

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [SetRules] -> [Add a rule](#) or Edit rule

Office, Email, OWA and Notes Classifier allow settings based on the current label value to be applied to the current document / message.

Separate rules appear for each supported “Location”. For each Location rules are available in a general (Add ...) or a [Label](#) specific (With this <Label>, add) form depending on whether you are adding the rule as an **Any label** or a rule associated with a specific label value .

Application Rule Support

The table below indicates the rules supported by each application [OL (Outlook) / OWA) / Notes / Mobile / MailAdd-in / Word / Excel / PowerPoint / Project / Visio / CAD / Sharepoint/ File / Box indicates that the application supports the setting].

| Rule | Outlook | OWA | Mail Add-in | Notes | Mobile | Word | Excel | PowerPoint | Project | CAD | SharePoint |
|-------------------------------|---------|-----|-------------|-------|--------|------|-------|------------|---------|-----|-------------|
| | | | | | | | | | Visio | | File Cl Box |
| Apply S/MIME security | Outlook | OWA | | | | | | | | | |
| Apply this Box Classification | | | | | | | | | | | Box |
| Apply this Category | Outlook | | | | | | | | | | |
| Apply a delivery report | Outlook | OWA | | | | | | | | | |

| Rule | Outlook | OWA | Mail Add-in | Notes | Mobile | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint File Cl Box |
|---------------------------------|---------|-----|-------------|-------|--------|------|-------|------------|---------------|-----|------------------------|
| request | | | | | | | | | | | |
| Apply a read receipt request | Outlook | OWA | | | | | | | | | |
| Apply this importance value | Outlook | OWA | | | | | | | | | |
| Apply this sensitivity value | Outlook | OWA | | | | | | | | | |
| Apply this expiry value | Outlook | OWA | | | | | | | | | |
| Apply this RMS policy or option | Outlook | | | | | Word | Excel | PowerPoint | | | |
| Apply an update to field codes | | | | | | Word | | | | | |
| Apply SealPath protection | Outlook | | | | | | | | | | File Cl |
| Apply Seclre protection | Outlook | | | | | | | | | | File CL |
| Do this with the document | | | | | | | | | | | Box |

To add a new Apply... rule:

(a) Perform the operations common to all rules:

1. Select the **policy** and select the **Set Rules** Tab.
2. Select either the **Always, No Label, Any Label** node or a **specific label value** node in the rules tree.
3. Choose **Add a rule** which starts the [Rules wizard](#) .
4. Select the appropriate application(s) and click **Next** . This will present the rules available for the application (s) chosen. If required, choose the appropriate rule category filter (**Add/Apply/Check rules**).
 - Select the appropriate '**Apply ...**' rule from the list of rules displayed. This will present the appropriate rule edit template.
 - If the rule is **label value** based then select the label value token and configure the label setting to meet your requirements.

(b) Set any rule specific settings - see [Apply rules - descriptions](#) .

(c) Specify any Prerequisite Conditions required (Not applicable to OWA).

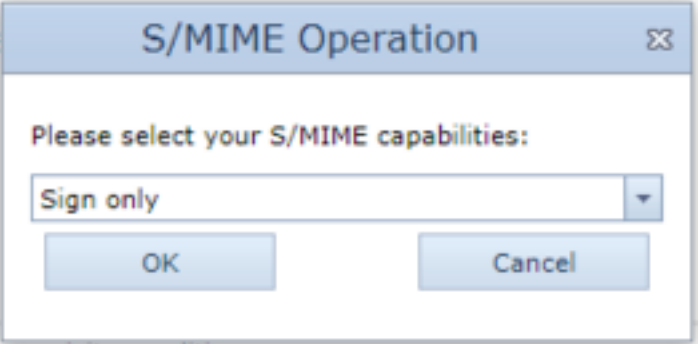
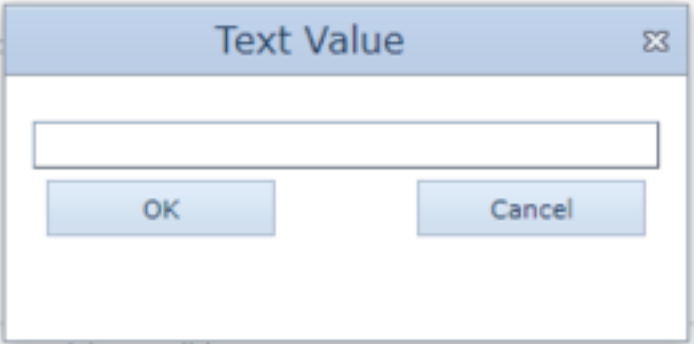
(d) Click **OK** and **Next** on the edit template dialog and complete the wizard sequence by supplying a name for the rule. The **name** of the application will automatically be pre-pended.

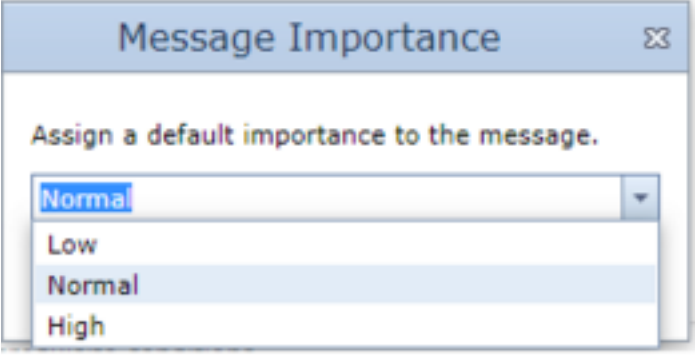
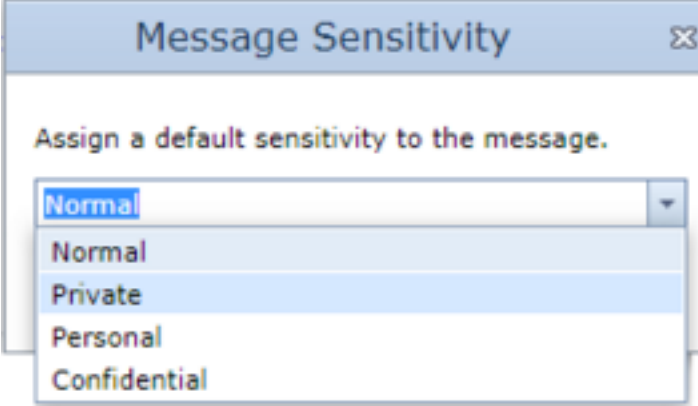
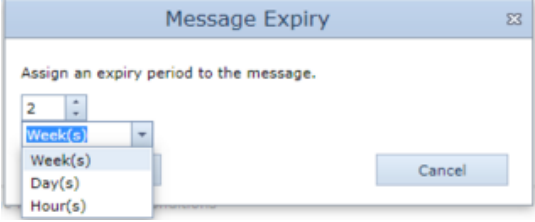
Note: You may subsequently [edit the rule](#) to change any of the settings (e.g. the marking format used).


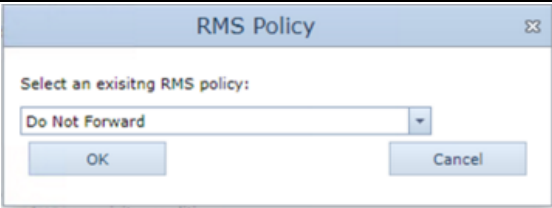
Apply Rules - Descriptions

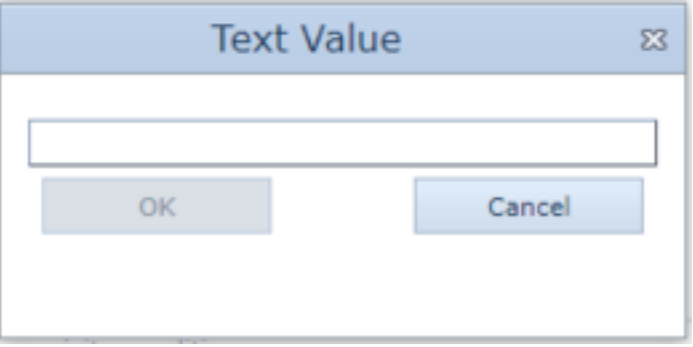
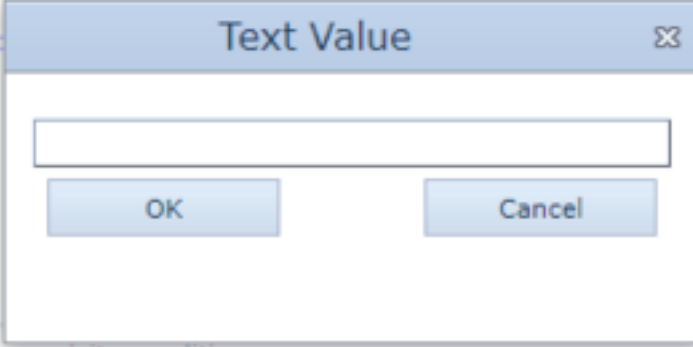
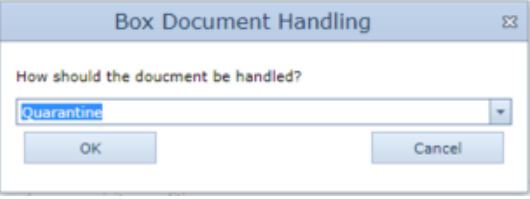
Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

This topic provides Apply rule specific information.

| For Emails Only | Dialog Presented When the Placeholder is Selected |
|---|---|
| <p>Apply S/MIME security to the message using Sign Only</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that S/MIME security be applied when the message is sent</p> <p>Note: Any label value included in the body (e.g. FLOT) is protected. A label value included as an X-Header or Subject value is outside the data protected by signing/encrypting the email message.</p> |  |
| <p>Apply this Category</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that a named Outlook Category be applied when the message is sent.</p> <p>Note: Categories are stripped from messages once they reach the message store - i.e. a recipient will not see the Category that was set.</p> |  |
| <p>Apply a delivery report request</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that a delivery report is requested when a message is sent.</p> | <p>There are no rule specific settings.</p> |
| <p>Apply a read receipt request</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that a read receipt is requested when a message is sent.</p> | <p>There are no rule specific settings.</p> |

| For Emails Only | Dialog Presented When the Placeholder is Selected |
|--|---|
| <p>Apply this importance value</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that a specific message Importance property is set when a message is sent.</p> |  |
| <p>Apply this sensitivity value</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that a specific message Sensitivity is set when a message is sent.</p> |  |
| <p>Apply this expiry value</p> <p>(Not supported by Notes or Mobile Classifier)</p> <p>This rule allows you to request that a specific expiry value is set when a message is sent.</p> |  |
| <p>Apply SealPath protection. Warn user if check fails with this message</p> <p>(Only supported by Email Classifier and File Classifier)</p> <p>This rule causes the current Label information to be passed to SealPath (via an API) which determines the appropriate RMS policy and applies that policy. The warn/prevent dialog will appear if for some reason that call to SealPath fails.</p> | <p>There are no rule specific settings.</p> <p>To define the action to take if for some reason the Sealpath protection cannot be applied, assign the required Warn user and this message settings as described in Warn / Prevent / Audit / Challenge options for Check rules.</p> |
| <p>Apply Seclore protection. Warn user if check fails with this message</p> <p>(Only supported by Email Classifier and File Classifier)</p> | <p>There are no rule specific settings.</p> <p>To define the action to take if for some reason the Seclore protection cannot be applied, assign the required Warn user and this message settings as described in Warn / Prevent / Audit / Challenge options for Check rules.</p> |

| For Emails Only | Dialog Presented When the Placeholder is Selected |
|--|---|
| <p>This rule causes the current Label information to be passed to Seclore (via an API) which determines the appropriate RMS policy and applies that policy. The warn/prevent dialog will appear if for some reason that call to Seclore fails.</p> |  |
| <p>For Outlook Emails, and Word, Excel and PowerPoint Documents</p> <p>Apply this RMS policy or option Warn user if check fails with this message</p> <p>(This rule is applicable to emails and documents, but is NOT supported by OWA Classifier, Notes Classifier, Visio or Project applications)</p> <p>This rule allows you to request that a specific RMS policy be applied to a message or document [chosen from the list presented - empty if none are found for the user] or, that a specific action is taken.</p> <ul style="list-style-type: none"> • All applications Remove Protection . • For emails the policy is applied when the message is sent - the associated RMS banner will not be visible prior to this time . • For documents the RMS policy is assigned whenever the label value is changed. • Outlook only Do not forward which will cause the MailItem.OlPermission to be set to 1 or olDoNotForward. <p>Additional notes on usage of this rule can be found in Apply RMS policy notes .</p> <p>Additional considerations apply if you are using Azure RMS as documented in Azure RMS support .</p> | <p>Dialog Presented When the Placeholder is Selected</p>  <p>To define the action to take if for some reason the RMS policy cannot be applied, assign the required Warn user and this message settings as described in Warn / Prevent / Audit / Challenge options for Check rules .</p> |
| <p>For Documents</p> | |

| For Emails Only | Dialog Presented When the Placeholder is Selected |
|--|--|
| <p>Apply an update to field codes containing this document property</p> <p>(Only supported by Word)</p> |  |
| <p>For Box Classifier</p> <p>Apply this Box Classification</p> |  <p>The text value entered should exactly match (including case sensitivity) a Classification value defined within your Box environment.</p> <p>See the Box Classifier Guide.</p> |
| <p>Do this with the document</p> |  <p>See the Box Classifier Guide.</p> |

Apply RMS Policy Notes

Admin: [Labelling](#) Configurations ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: The Apply RMS policy feature is only available if your site has an RMS (Microsoft Windows Rights Management Services) environment configured.

Note: Ensure that all clients are configured to use the RMS policies you have deployed before trying Office Classifier integration. If you can apply an RMS policy from Word, Excel, Outlook, and PowerPoint manually then the Office Classifier integration features should function.

Note: A user may view their RMS permissions through the usual RMS View permissions action.

Note: If the configured RMS template can't be enabled for some reason, then the current action (e.g. email message submission) is blocked.

Note: All RMS templates should allow programmatic access to email contents. Otherwise, issues may arise when Outlook tries to reply to or forward a received message. For example, FLOT, LLOT and Attachment block may not be as expected because the content of the message cannot be processed by Classifier. [Check that the user has **Access the message programmatically** RMS permission set to **Yes** .]

Note: [Classifier Administration](#) queries the AD RMS Service Configuration point specified in AD and connects to the AD RMS management web service to query the list of templates. If the web service is accessible the RMS combo box is populated with a list of templates.

Note: Additional considerations apply if you are using Azure RMS as documented in [Azure RMS support](#) .

Azure RMS Support

Admin: [Labelling Configurations](#) => {configuration} => [Policies](#) => {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

The following applies if you are using Azure RMS:

Classifier does **not** currently support Managed (Department) templates.

[Classifier Administration](#) and Email and Office Classifier need to know how to located the Azure RMS templates.

1. Ascertain the required location using the **Get-AadrmConfiguration** PowerShell administration tool and noting the value associated with **LicensingExtranetDistributionPointUrl** .

```
PS D:\> Get-AadrmConfiguration
: 36dac985-1daa-4117-b487-d5587c696717
RightsManagementServiceId : 69600d68-df53-4f88-be7e-71e8ee4bfd66
LicensingExtranetDistributionPointUrl : https://69600d68-df53-4f88-be7e-71e8ee4bfd66.rms.eu.aadrm.com/_wmcs/licensing
LicensingExtranetDistributionPointUrl : https://69600d68-df53-4f88-be7e-71e8ee4bfd66.rms.eu.aadrm.com/_wmcs/licensing
CertificateExtranetDistributionPointUrl : https://69600d68-df53-4f88-be7e-71e8ee4bfd66.rms.eu.aadrm.com/_wmcs/certification
CertificateExtranetDistributionPointUrl : https://69600d68-df53-4f88-be7e-71e8ee4bfd66.rms.eu.aadrm.com/_wmcs/certification
AdminConnectUrl : https://admin.eu.aadrm.com/admin/admin_svc/Tenants/69600d68-df53-4f88-be7e-71e8ee4bfd66
Admin02ConnectUrl : https://admin.eu.aadrm.com/admin02/admin_svc/Tenants/69600d68-df53-4f88-be7e-71e8ee4bfd66
OnPremiseDomainName :
Keys : (5836a844-2bc4-468a-b024-55a71ff82276)
CurrentLicensorCertificateGuid : 5836a844-2bc4-468a-b024-55a71ff82276
Templates : (41fa5c8b-24a0-466b-bb01-485001da5e66, c7e970ed-ba21-44c5-a33b-cd9270700149, 7c5efad1-f6a5-4246-9dde-331fa1a723f3, 91c5c1e4-ae4e-4f8a-8c43-ded00070cf85)
FunctionalState : Enabled
SuperUsersEnabled : Disabled
SuperUsers : C
AdminRoleMembers : C
KeyRolloverCount : 0
ProvisioningDate : 25/02/2015 10:25:26
IPoPServiceFunctionalState : Enabled
DevicePlatformState : (Windows -> True, WindowsStore -> True, WindowsPhone -> True, Mac -> True...)
PciEnabledPopConnectorAuthorization : True
```

Figure: Get-AadrmConfiguration.

2. Set the following registry entry to enable Classifier Administration to find the policy values to be presented when configuring an **Apply RMS policy rule** :

HKLM\Software\Wow6432Node\Microsoft\MSDRM\ServiceLocation\EnterprisePublishing (REG_SZ) default value: <http(or https)://RMS_Cluster_Name/_wmcs/Licensing>.

(See AD RMS Service Discovery under [https://technet.microsoft.com/en-us/library/dd772753\(v=ws.10\).aspx](https://technet.microsoft.com/en-us/library/dd772753(v=ws.10).aspx) for related information.)

3. Classifier will first look for Azure templates under **%LocalAppData%\Microsoft\DRM\Templates** .

If none are found it will check the location configured under one of the following:

HKCU\Software\Policies\Microsoft\Office\15.0\Common\DRM\AdminTemplatePath

HKCU\Software\Microsoft\Office\15.0\Common\DRM\AdminTemplatePath

which should contain an expandable string that points to the file store where the admin templates are kept.

Check Rules

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

The Configuration can define that the following checks be performed when a message is sent, or a document is saved / printed.

For each type of Check supported, rules are available in a **general** (Check ...) or a Label specific (With this <Label>, check.....) form depending on whether you are adding the rule as an **Any label** or a rule associated with a specific label value .

Some checks (e.g. **mandatory selectors**) are supported by all applications, others (e.g. **Perform Clearance** checks) are only applicable to one class of application, or only a subset of the applications.

Application Rule Support

Outlook / OWA / Notes / Mob / MailAdd-in / W(ord) / Excel / PowerPoint / Project / Visio / CAD / SharePoint / File / Box indicates that the application supports the setting.

^ The operation of these rules is limited under CAD Classifier for DraftSight. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

| Rules | Outlook | OWA | Mail Add-in | Notes | Mobile Emails | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint & File | DCS |
|---|---------|-----|-------------|-------|---------------|------|-------|------------|-----------------|----------|-------------------|-----|
| Check these mandatory selectors | Outlook | OWA | 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project + Visio | CAD ^ | SharePoint + File | |
| Check for Author label change | | | | | | Word | Excel | PowerPoint | Project + Visio | CAD ^ | | |
| Check for label change | Outlook | OWA | 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project + Visio | CAD ^ | SharePoint + File | |
| Check for the high-water mark | Outlook | OWA | 3.10.0 | Notes | | | | | | | | |
| Check clearance for attachments | Outlook | | 3.10.0 | | | | | | | | | |
| Check clearance for recipients | Outlook | OWA | 3.10.0 | Notes | Mobile | | | | | | | |
| Check clearance for originator | Outlook | OWA | | | | | | | | | | |

| Rules | Outlook | OWA | Mail Add-in | Notes | Mobile Emails | Word | Excel | PowerPoint | Project Visio | CAD | SharePoint & File | DCS |
|---|---------|-----|-------------|-------|---------------|------|-------|------------|-----------------|-----|-------------------|-----|
| Check subject length does not exceed | Outlook | OWA | 3.10.0 | | Mobile | | | | | | | |
| Check subject length exceeds | Outlook | OWA | 3.10.0 | | Mobile | | | | | | | |
| Check message size | Outlook | OWA | 3.10.0 | | | | | | | | | |
| Check content (Enterprise) | Outlook | | | | | Word | Excel | PowerPoint | | | | |
| Check number of recipients | Outlook | OWA | 3.10.0 | | | | | | | | | |
| Check for these recipients | Outlook | OWA | 3.10.0 | | | | | | | | | |
| Check for Reply to All response | Outlook | | 3.10.0 | | | | | | | | | |
| Check for use of default label | Outlook | OWA | 3.10.0 | | Mobile | Word | Excel | PowerPoint | Project + Visio | | | |
| Check with the user | Outlook | OWA | 3.10.0 | Notes | Mobile | Word | Excel | PowerPoint | Project + Visio | CAD | File | |
| Check these selectors for expired dates | Outlook | OWA | 3.10.0 | | | Word | Excel | PowerPoint | Project + Visio | CAD | SharePoint + File | |
| Check for additional recipients on reply or forward | Outlook | OWA | 3.10.0 | | | | | | | | | |
| Check for unlabelled attachments | Outlook | | | | | | | | | | | |
| Check for a suggested classification | Outlook | | | | | Word | Excel | PowerPoint | Project + Visio | | | DCS |
| Check RMS user defined permissions for uncleared recipients | | | | | | Word | Excel | PowerPoint | | | | |
| Check for RMS protection | | | | | | Word | Excel | PowerPoint | | | | |

To add a new Check... rule:

(a) Perform the operations common to all rules.

1. Select the **policy** and select the **Set Rules Tab**.
2. Select the **Always / No Label / Any Label node / or a specific label value node** in the rules tree.

3. Choose **Add a rule** which starts the Rules wizard . Select the appropriate **applications(s)** and click **Next**. This will present the rules available for the application(s) chosen.
4. If required, choose the appropriate rule category filter (**Add/Apply/Check** rules).
5. Select the appropriate rule '**Check ...**' rule from the list of rules displayed. This presents the appropriate rule edit template.
6. If the rule is a label value based then select the label value token and configure the label setting to meet your requirements.
7. Set any rule specific settings (the items below follow the rule list order above):

(b) Set any rule specific settings and be aware of any rule specific features as described in the relevant sub-topic. The **Check ...** rules supported and their settings tokens (<Label>, **this**, **these**, ...) are:

- [Check these mandatory selectors](#) . Warn user if check fails with this message.
- [Check for author label change](#) and permit alteration. Warn user if check fails with this message.
- [Check for label change](#) and permit alteration. Warn user if check fails with this message.
- [Check for the high-water mark](#) of all attachments. Warn user if check fails with this message.
- [Check clearance for attachments](#) . Warn user if check fails with this message. See [Perform Clearance Checks when sending messages](#) for details of how these checks are implemented.
- [Check clearance for recipients](#) . Warn user if check fails with this message. See [Perform Clearance Checks when sending messages](#) for details of how these checks are implemented.
- [Check clearance for originator](#) . Warn user if check fails with this message. See [Perform Clearance Checks when sending messages](#) for details of how these checks are implemented.
- [Check subject length does not exceed](#) these characters. Warn user if check fails with this message.
- [Check subject length exceeds](#) these characters. Warn user if check fails with this message.
- [Check message size](#) including all attachments does not exceed these kilobytes (KB). Warn user if check fails with this message.
- [Check content](#) for this . Warn user if check fails with this message and Show hits.
- [Check number of recipients](#) does not exceed these . Warn user if check fails with this message.
- [Check for these recipients](#) . Warn user if check fails with this message.
- [Check for Reply to All response](#) and Warn user if check fails with this message.
- [Check for use of default label](#) . Warn user with this message.
- [Check with the user](#) . Warn user with this message.
- [Check these selectors for expired dates](#) . Warn user with this message.
- [Check for additional recipients on reply or forward](#) . Warn user with this message.
- [Check for these unlabelled attachments](#) . Warn user with this message.
- [Check for a suggested classification](#) and Automatically apply. Warn user with this message if a suggested classification is available for manual application, or this message if the suggested classification cannot be applied.
- [Check RMS user defined permissions for uncleared recipients](#)
- [Check for RMS protection](#)

The bold items in the rules above indicate configurable settings. Warn user and this (message) place holders are common to all these rules and only described once in [Warn / Prevent / Audit / Challenge options for Check rules](#) . The other bold items are rule specific and are described discretely below.

(c) For all the Check rules the **Warn / Prevent / Audit / Challenge** options should be assigned as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .

(d) Complete the **wizard sequence** by supplying a **name** for the rule. The name of the application will automatically be pre-pended.

Note: You may subsequently [edit the rule](#) to change any of the settings (e.g. the marking format used).

Check These Mandatory Selectors

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

This rule is applicable to all applications and can be used to define what checks should be applied to ensure that the label chosen meets label validity criteria, in particular that any **Selector set as Mandatory** has a **value** chosen.

Different rules can be defined for different applications. So a selector may be Mandatory for documents (e.g. an archive annotation), but such a setting might be irrelevant to emails. You might also have a label value related rule that requires a value for one Selector only if another Selector has a particular value.

Note: For Outlook Emails only - See also, for further information on the user experience when this rule fires for an Outlook [Show label dialog when Mandatory Label](#) message.

Note: A single **Check these mandatory selectors rule** may be defined for SharePoint which will apply to all document types. See **SharePoint Classifier Guide / Viewing and Changing Label Value after upload** section for usage.

Note: The operation of this rule is limited under **CAD Classifier for DraftSight**. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

The rule has the form:

1. Check these **mandatory selectors** . **Warn user** if check fails with **this** message.
2. Perform the **operations common to all rules** as described in [Check rules](#) (a) (**Select policy, Set rules** tab, etc).
3. Select these **mandatory selectors**, which will present you with a dialog showing all the active **Selectors** available in the **policy**.

Figure: Define [Mandatory Selectors](#).

4. For each **Selector** choose **Mandatory** or **Optional** as required.
5. **Set / unset Allow multiple rules of this type** . By default (**Disabled**), [Classifier Administration](#) will detect duplicate rules of this type and only action '**the first**' in the rules tree. **Enabling** this setting means that Classifier will action each of the '**duplicate**' rules in turn, which may of course lead to multiple policy check dialogs.

Note: Each potentially **duplicate rule** must have the setting **enabled**, otherwise duplicates are not allowed.

6. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
7. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for Author Label Change

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or

Edit rule

The rule is only applicable to Office Classifier applications and allows you to define label change abilities specific to the 'Author' which apply instead of the abilities defined via a general [Check for label change](#) rule. If no **Check for Author label change rule** is applicable, then the Author will be subject to any general [Check for label change](#) rule defined.

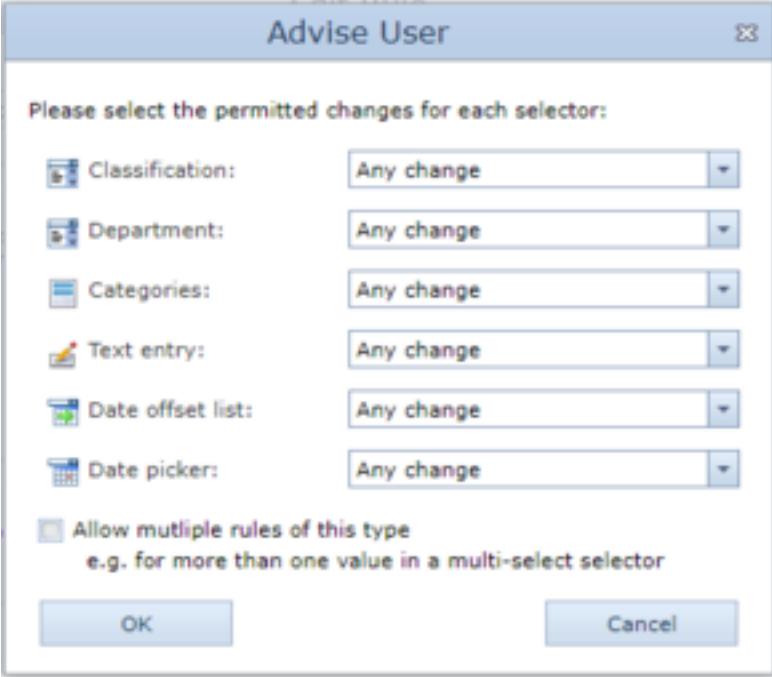
Note: For the purposes of this rule the 'Author' is not the Microsoft Office Author which is easily changed by the user, but is a value stored in a Classifier specific manner in a bj-Saver custom property. This property holds the identity of the first person to save the document. All documents, new, old, unlabelled and labelled have the bj-Saver property set on them when they are first changed (saved) and there is not an existing bj-Saver property present. If an existing document is opened which does not have a bj-Saver value, the current user's identity will be used to populate bj-Saver. Deletion of the bj-Saver value is possible. **[For Visio documents bj-saver is stored as a 'Solution XML Element', rather than a document custom property]**

Note: If both a Check for Author [Label](#) Change rule and a general [Check for Label Change](#) rule are configured, then the Check for Author Label Change rule will apply if the current user is the 'Author', otherwise the general [Check for Label Change](#) rule will apply.

Note: The operation of this rule is limited under **CAD Classifier for DraftSight**. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

The rule has the form:

1. Check for author label change and permit **alteration**. **Warn user** if check fails with **this** message,
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Select the **alteration** token which will present you with the following per-selector choices:



The image shows a dialog box titled "Advise User" with a close button in the top right corner. The main text reads "Please select the permitted changes for each selector:". Below this, there are six rows, each with a small icon and a dropdown menu. The rows are: "Classification:" with a dropdown set to "Any change"; "Department:" with a dropdown set to "Any change"; "Categories:" with a dropdown set to "Any change"; "Text entry:" with a dropdown set to "Any change"; "Date offset list:" with a dropdown set to "Any change"; and "Date picker:" with a dropdown set to "Any change". At the bottom of the dialog, there is a checkbox labeled "Allow multiple rules of this type" with the text "e.g. for more than one value in a multi-select selector" below it. The checkbox is currently unchecked. At the very bottom, there are two buttons: "OK" on the left and "Cancel" on the right.

Figure: Label Change Check Options.

| Permitted Change | Description |
|-------------------|---|
| Any change | This is the default and means that the user may make any change to this selector value but the rule is not triggered. Rule success auditing still occurs. |
| No change | This means that no change is permitted and therefore any change to the label value for this selector triggers the rule and perform the prevent / warn / audit action. |
| Downgrade | Only appears for Hierarchic selectors, and means that the user is permitted to downgrade the value of a hierarchic selector, any attempt to raise the value (e.g. from Public to Internal) triggers the rule and perform the prevent / warn / audit action. |
| Upgrade | Only appears for Hierarchic selectors, and means that the user is permitted to upgrade the value of a hierarchic selector, any attempt to lower the value (e.g. from Internal to Public) triggers the rule and perform the prevent / warn / audit action. |
| Additional Values | Only appears for Multiple selection list selectors indicating that the user may add additional values, but may not remove any existing values set. |
| Removing values | Only appears for Multiple selection list selectors indicating that the user may remove values, but may not add additional values. |
| Increase Date | Only appears for Date picker or Date offset selectors, indicating that the user can set a date / choose a new offset that results in a date later than any currently applied date |
| Decrease Date | Only appears for Date picker or Date offset selectors, indicating that the user can set a date / choose a new offset that results in a date earlier than any currently applied date. |

Note: The upgrade downgrade check feature is only applicable if you have designated a Selector available in the Policy to be Hierarchic (see [Properties \(Selector values\)](#) Hierarchy Setting).

Note: If the Microsoft Office auto save feature is enabled in any of the applications, the user warning messages may be displayed when the auto save feature executes.

- Set / unset **Allow multiple rules of this type** . By default (Disabled), Classifier Administration will detect duplicate rules of this type and only action **the first** in the rules tree. **Enabling** this setting means that Classifier will action each of the 'duplicate' rules in turn, which may of course lead to multiple policy check dialogs.

Note: Each potentially duplicate rule must have the setting enabled, otherwise duplicates are not allowed. Assign the required Warn user and this message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#).

- Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for Label Change

Admin: [Labelling](#) Configurations ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or

Edit rule

This rule is applicable to all applications.

Note: A single **Check for label change** rule may be defined for SharePoint. However, SharePoint Classifier limits the scope for label changing. See **SharePoint Classifier Guide / Viewing and Changing [Label Value after upload](#)** section for further details.

Note: The operation of this rule is limited under **CAD Classifier for DraftSight**. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

Note: Mail Add-in only supports this rule when forwarding or replying to a message item (not for meeting requests etc.).

The rule can be used to limit user's ability to change labels:

- To change labels on existing documents, that is if they open an existing document that is labelled any changes to the label are policed according to this rule.
- To limit the user's ability to change labels if using Sent or Received email or web email messages as the basis for a new email message. Thus the option affects Reply to / Forwarding and Re-send actions and limits the user's ability to manipulate the label for the new email message (which uses the label from the existing email message as its initial label value).

Note: If both a [Check for Author Label Change](#) rule and a general Check for Label Change rule are configured, then the [Check for Author Label Change](#) rule will apply if the current user is the 'Author', otherwise the general Check for Label Change rule will apply.

The rule has the form:

1. Check for label change and permit alteration. **Warn user** if check fails with **this** message
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Select the **alteration** token which will present you with the following per-selector choices :

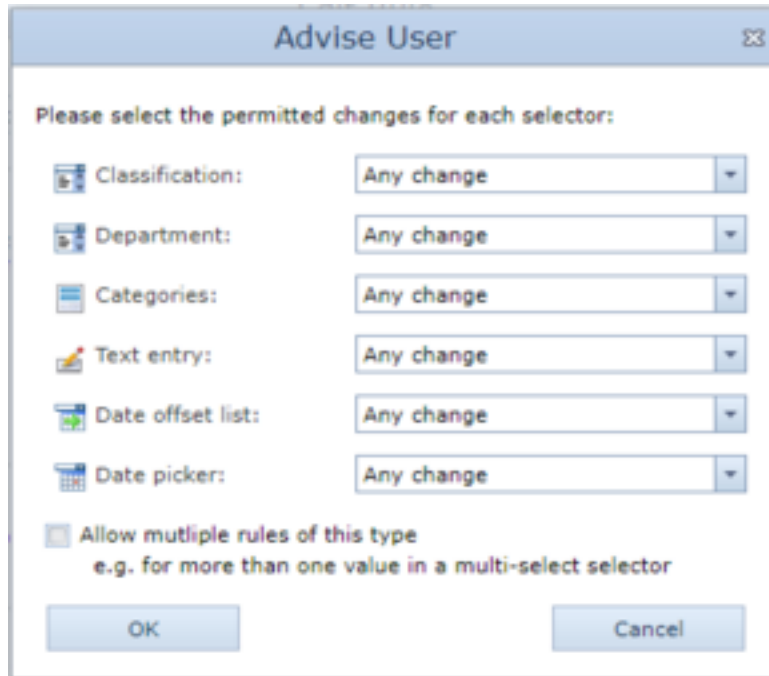


Figure: Label Change Check Options.

- **Any change** is the default and means that the user may make any change to this selector value but the rule is not triggered. Rule success auditing will still occur.
- **No change** means that no change is permitted and therefore any change to the label value for this selector will trigger the rule and perform the prevent / warn / audit action.
- **Downgrade** will only appear for Hierarchic selectors, and means that the user is permitted to downgrade the value of a hierarchic selector, any attempt to raise the value (e.g. from Public to Internal) will trigger the rule and perform the prevent / warn / audit action.

Note: Mobile Classifier will treat the **Downgrade** setting the same as **Any change**.

- **Upgrade** will only appear for Hierarchic selectors, and means that the user is permitted to upgrade the value of a hierarchic selector, any attempt to lower the value (e.g. from Internal to Public) will trigger the rule and perform the prevent / warn / audit action.

Note: Mobile Classifier will treat the **Upgrade** setting the same as **Any change**.

- **Additional Values** will only appear for [Multiple selection list](#) selectors indicating that the user may add additional values, but may not remove any existing values set.
- **Removing values** will only appear for Multiple selection list selectors indicating that the user may remove values, but may not add additional values.
- **Increase Date** will only appear for [Date picker](#) or Date offset selectors, indicating that the user can set a date / choose a new offset that results in a date later than any currently applied date.

- **Decrease Date** will only appear for Date picker or Date offset selectors, indicating that the user can set a date / choose a new offset that results in a date earlier than any currently applied date.

Note: The upgrade/downgrade check feature is only applicable if you have designated a Selector available in the Policy to be Hierarchic (see Selector Value Properties Hierarchy Setting).

Note: If the Microsoft Office auto save feature is enabled in any of the applications, the user warning messages may be displayed when the auto save feature executes.

4. Set / unset **Allow multiple rules of this type** . By default (Disabled), Classifier Administration will detect duplicate rules of this type and only action 'the first' in the rules tree. **Enabling** this setting means that Classifier will action each of the '**duplicate**' rules in turn - which may of course lead to multiple policy check dialogs.

Note: Each potentially duplicate rule must have the setting enabled, otherwise duplicates are not allowed.

5. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
6. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for the High-Water Mark

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Email, OWA and Notes Classifier.

This rule can be configured to apply checks when sending an email or web email message to ensure that the email message Label '**dominates**' labels associated with any attachments (including attached email messages, and documents in .ZIP files). The checks are limited to attachment types supported by Classifier (see [Appendix - Label Propagation Mechanisms](#)). Examples of the end user experience when these rules are triggered can be found in [Attachment Handling](#).

Note: Saving as PDF: You can populate various standard document properties (**Title, Author, Subject** and **Keywords**) that will be propagated if you save an Office document as PDF. However, Office applications do **NOT** propagate any Custom Properties to the PDF. In particular **the bjDocumentSecurityLabel** is **NOT** propagated. Email, OWA and Notes Classifier will check defined [Label Locations](#) for recognisable labels in standard PDF file properties for the **Check for the high-water mark** and [Add an attachment list](#) rules.

Note: For Outlook Emails, the operation of this check is modified if [Automatically Elevate email label](#) is **Enabled**. If the label can be elevated automatically to dominate all attachments ([Label Dominance](#)), the user will not be involved in the operation regardless of the rule settings.

Note: Due to the nature of the OWA and Notes environments it is not possible to support an equivalent to the [Automatically elevate email label](#) feature. In some unusual circumstances this can give rise to different user experiences as described in [User experience variance between Email, OWA and Notes](#).

The rule has the form:

1. Check for the high-water mark of all attachments. **Warn user** if check fails with **this** message
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. There are no rule specific settings applicable to these rules.
4. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
5. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a name for the rule.
6. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Note: A High-water mark check including Visio attachments requires that Visio is installed for the check to complete successfully. If Visio is not installed, a prompt may appear to install Visio. The same consideration applies to Visio files inside a ZIP. OWA does not support High-water mark checks for Visio files.

Note: Embedded images may be excluded from these checks using the [Include embedded images when performing attachment checks](#) setting.

Attachment Handling

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ { policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: Opening attachments from emails and then attempting to change the [Label](#) is not recommended because this can lead to Email Classifier only seeing the original attachment. It is strongly recommended to save the attachment first, amend it, and then re-attach it.

Note: OWA Classifier does not support checking of Labels on Visio files since it requires that the application is installed on the server.

Note: Images pasted into a message (e.g. using a 'Snipping tool') appear as an unlabelled attachment but with no meaningful name (file type) and as a consequence these are ignored by high-water mark checks.

Note: ADS (Additional Data Stream) - Email Classifier (Outlook) can access label values stored in ADS for an attachment (e.g. as might be set on a text file by File Classifier), and use that value as part of high-water mark checks. Any value found is then stored with the attachment and is available for use in a subsequent Forward action. However:

- Saving any attachment will **NOT** preserve ADS information.
- Attaching a file using drag and drop will **NOT** preserve ADS information.

Selecting an ADS labelled item in explorer and then invoking Send to will **NOT** provide access to the label value.

Email, OWA and Notes Classifier can be configured to take account of the label values of attachments when performing high-water mark checks when sending an email, web or Notes email. Further details on how Email, OWA and Notes Classifier try to determine a label value for various file types can be found in [Appendix - Label Propagation Mechanisms](#).

Note: By default documents embedded in Office documents will be ignored when performing high-water mark checks. This behaviour can be modified using the [HWMCheckEmbeddedOfficeDocuments](#) registry setting (see [Client Configuration Registry settings](#)).

Note: Outlook - You can control how embedded images are handled using the [Include embedded images when performing attachment checks](#) setting.

The checks are intended to ensure the Email label dominates any attachment labels (see [Label Dominance](#)).

If the high-water mark check fails and the setting [Automatically elevate email label](#) (Outlook Emails only) is set then the software will try to apply a label that allows the check to pass (Least upper bound).

If this setting is not Enabled, or the software cannot automatically rectify the problem, then the sender is presented with a dialog (examples below) presenting the possible actions as permitted by the Allow / Warn settings in the [Check for the high-water mark](#) rule.

Note: OWA and Notes Classifier do not support [Automatically elevate email label](#) , nor [Ensure label dominates all portion markings](#). In some circumstances this can give rise to different user experiences as described in [User experience variance between Email, OWA and Notes](#).

Zippered Files Handling

It is possible to send an email or web email message containing a compressed zipped file. These compressed zipped files may contain labelled items. Upon sending an email message containing zipped files as an attachment, Email, OWA and Notes Classifier will attempt to de-compress these zip files and check the contents for any Classifier labelled items (e.g. Word, Excel or PowerPoint document) include their labels in the high-water mark checks.

Attempts to access encrypted .ZIP files triggers a high-water mark check failure if the setting [Warn if file contents cannot be accessed](#) is **Enabled** . If the setting is disabled, failures are ignored by the check. Similarly failure to access a file within a ZIP file triggers a warning depending upon the setting.

Note: Email, OWA and Notes Classifier impose no limit on the nesting levels in a ZIP file, but have only been tested to de-compress to a nesting level of 7.

High-water Mark Check Failure User Interface

If high-water mark checks are applied, then Classifier performs the necessary checks and presents a dialog should one or more attachments fail the checks. The failing attachments are listed (under details) along with a reason for failure (either the attachment label value, or "**Failed to access archive**"). If [Allow manual upgrade when sending messages](#) is **Enabled** AND a high-water mark label can be derived (and [Automatically elevate email label](#) is **Disabled**), then both the **Upgrade Message** and **Remove** buttons will be presented; otherwise only the **Remove** button will be available. Clicking **Upgrade Message** will raise the label to the high-water mark value; clicking **Remove** will remove the attachment.

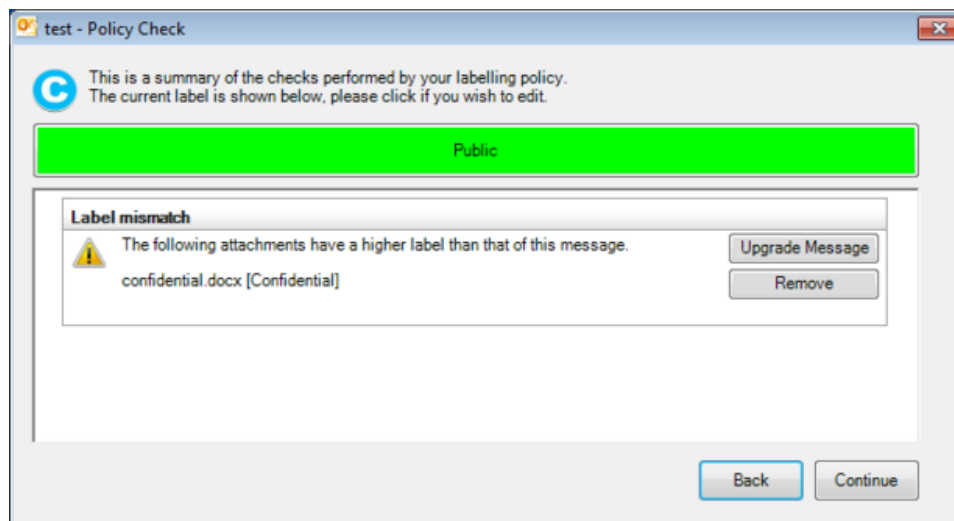


Figure: Attachment Check.

The user selects from the available options - **Remove /Upgrade Message (Outlook Emails only)**, Click **Back** or **Continue**.

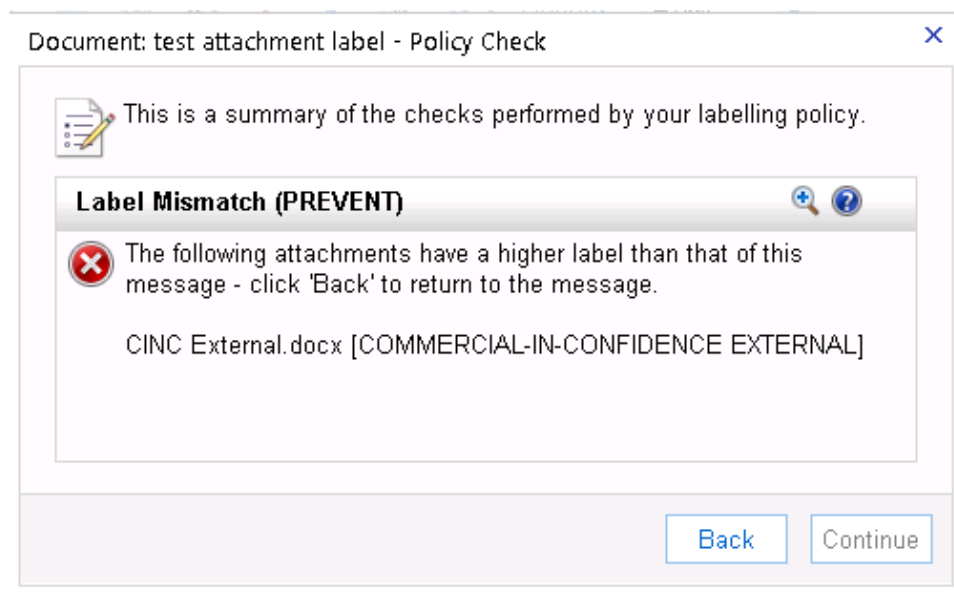


Figure: OWA Attachment Check.

Note: OWA Classifier does not support the [Automatically elevate email label](#) setting supported by Email Classifier. This is because the nature of OWA Classifier architecture means that there is no means of informing the user of any actions taken.

User Experience Variance Between Email, OWA and Notes

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Email Classifier (Outlook) supports two settings that OWA Classifier and Notes Classifier do not:

- [Automatically elevate email label](#)
- [Ensure label dominates all portion markings](#)

If these settings are enabled, the user experience of an apparently similar sequence may be different as outlined in the following examples:

A With a **high-water mark** check configured and [Automatically elevate email label](#) enabled:

Draft a message and attach a document with a label value **above** the label set on the message; then click **Send** .

- Under Outlook the **Automatically elevate email label** setting will come into play and, assuming that the document label is suitable, the message label will be raised automatically and message submission can proceed without user involvement.
- Under OWA and Notes the **high-water mark** check will be triggered and the user will be asked to resolve the mismatch.

B With **high-water mark** and **label change** checks configured, and with **Automatically elevate email label** , [Ensure label dominates all portion markings](#) and [Portion Marking](#) enabled for Outlook:

1. Define a rule to **add to Subject** as a marking prefix (e.g. a parsable marking such as [RES] for Restricted),
2. **Reply to** a message that contains a **high** label value in its Subject prefix (e.g. [RES]),
3. Change the **label** on the (reply) message to a '**lower**' level (e.g. Public)
4. Click **Send** .
5. Under Outlook, the [Ensure label dominates all portion markings](#) setting will cause [RES] in the received Subject to activate the Automatically elevate email label action to reset the label to [RES] and the submission proceeds without user involvement.
6. Under OWA and Notes the label change rule will be triggered (**Automatically elevate email label** and **Portion Marking** are not supported) and the user is asked to resolve the issue.

Check Clearance for Attachments, Recipients or Originator

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: Classifier only supports domain based recipient clearance checks.

Note: Mobile Classifier only supports domain based recipient clearance checks, and does **NOT** support Originator clearance checks.

Note: Mail Add-in does not support Check clearance for originator. Check clearance for recipients / attachments only supports SMTP domain clearance checks.

These rules can be used if your configuration has [Clearance](#) features configured (see [Clearance settings](#)). You can configure rules to check the clearance of the Originator, or Recipients or both. These checks are performed when a message is sent.

Definition of these rules is straightforward and described below. Implementation of the checking process and related Classifier configuration settings is described in [Perform Clearance Checks when sending messages](#).

Note: When Recipient Checks are performed, then the membership of any distribution group (DG) is also checked (not Notes).

Note: Outlook Emails only - If a member of a DG is **'removed'** as part of the Remove action then the DG is replaced by the expanded set of **'cleared'** members prior to submission.

Note: Attachment clearance checks check that the recipient clearance (however derived) allows each individual attachment to be sent, as opposed to a High-water mark check which calculates the high-water mark across all the attachments and the message label before performing a recipient clearance check.

Note: Embedded images may be excluded from these checks using the Include embedded images when performing attachment checks setting.

Note: Recipient clearance check is not supported for tasks.

See [Perform Clearance Checks when sending messages](#) for details of how these checks are implemented.

These rules have the form:

1. Check clearance for attachments. **Warn user** if check fails with **this** message.
2. Check clearance for recipients. **Warn user** if check fails with **this** message.
3. Check clearance for originator. **Warn user** if check fails with **this** message.
4. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc.).
5. There are no rule specific settings applicable to these rules.
6. See [Check attachments/recipients/Originator - Warn / Prevent](#) for a description of the end user experience when these checks are triggered.
7. Assign the required **Warn user** and **this** message settings as described in [Warn/Prevent/Audit/Challenge options for Check rules](#) .
8. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check Subject Length

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: These rules are only applicable to Email and OWA Classifier.

These rules can be used to check that the message subject size is within site defined values. The rules have the following form.

To check subject the length:

1. Check if the **subject length does not exceed** these characters). Warn user if check fails with this message.
2. Check if the **subject length exceeds** these characters. Warn user if check fails with this message.
3. Perform the **operations common to all rules** as described in [Check rules](#) (a) (**Select policy, Set rules** tab, etc).

4. Select the these size **token** which will present you with a text entry dialog allowing you to enter a numeric value for the **Upper/Lower** subject size.

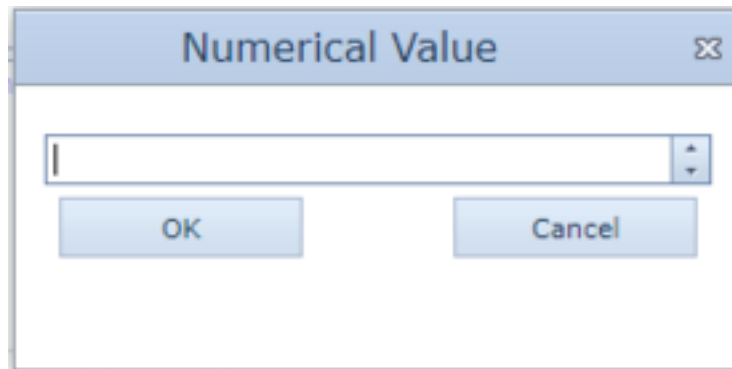


Figure: Supply size or number.

5. Enter the required **value** in bytes.
6. The **Subject Length** check takes place before any **Subject Prefix/Suffix** rule is applied.
7. Assign the required Warn user and this message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules.](#)
8. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check Message Size

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: These rules are only applicable to **Email and OWA Classifier**.

Note: A message size check is only approximate and includes the message body and all attachments (including embedded images). The check is performed before any markings or attachment list is applied to the body (excludes recipient addresses for example).

These rules can be used to check the overall message size. The rule has the form:

1. Check the message size including all attachments does not exceed **these kilobytes(KB)**. **Warn user** if check fails with **this** message.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Select this size token which will present you with a text entry dialog allowing you to enter a numeric value for the message size limit.

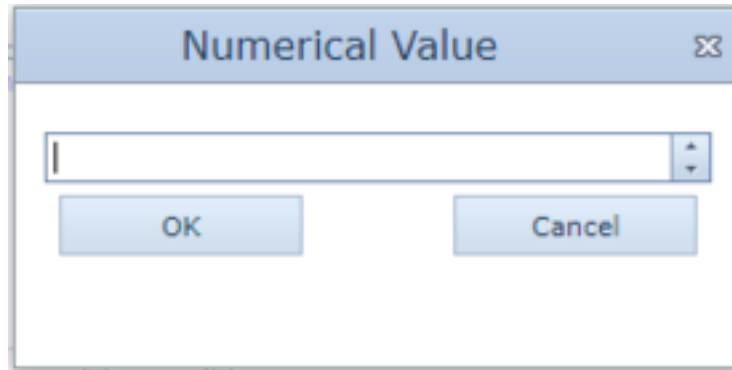


Figure: Supply size or number.

4. Enter the required **value** in kilobytes (KB).
5. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
6. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check Content

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Email Classifier, Office Classifier (Word, Excel and PowerPoint) and Notes Classifier.

Note: Content checking of RMS protected items never yields a match as the content is not accessible.

Note: Embedded images are excluded from Outlook Content Checks.

You must have configured one or more "**matchers**" as described in the [Content Library](#) before you can configure these rules .

See [Content Checking User view](#) for further details of how the checks are performed and the user interaction.

Further control of the operation of a content check is provided through the following [General Settings](#):

- [Content checking: case sensitive](#) .
- [Content checking: include document properties](#)

The rule has the form:

1. Check content for **this**. **Warn user** if check fails with **this** message and **Show** hits.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc.).
3. Select **this** choose one or more [Matchers](#) to be used when performing this content check.



Figure: Choose Content Matchers.

4. Set / unset **Allow multiple rules of this type** . By default (Disabled), [Classifier Administration](#) will detect duplicate rules of this type and only action **the first** in the rules tree. **Enabling** this setting means that Classifier will action each of the '**duplicate**' rules in turn, which may of course lead to multiple policy check dialogs.

Note: Each potentially duplicate rule must have the setting enabled, otherwise duplicates are not allowed.

5. Click **OK** .
6. Select **Show** hits.



Figure: Show hits.

7. Check the **Show highlighted content matches** if you want the user to see full detail. If Show highlighted content matches is unchecked, the user will see no details of matches found.

Note: Highlighting of matches in PDF files is only possible if Adobe Reader / Adobe Acrobat if Edit > Preferences > Search > **Enable search highlights from external server** is **Enabled** .

8. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
9. Click **OK** and **Next** on the edit template screen and supply a **name** to complete the wizard.

Check Number of Recipients

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: These rules are only applicable to **Email and OWA Classifier** and are not supported for tasks.

Note: The **number of recipients** check will, where possible, include the **number of recipients** introduced by Distribution Lists. The number of recipients check is performed before any **Add these addresses to recipient type rule**.

The rule has the form:

1. Check number of recipients does not exceed these . **Warn user** if check fails with **this** message.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. For **Check number of recipients** rules (Email and OWA Classifier only).
4. Select **this** token which will present you with a text entry dialog allowing you to enter a numeric value.

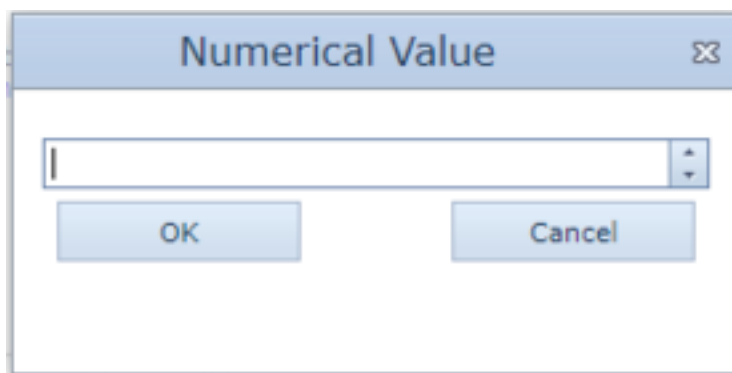


Figure: Supply size or number.

5. Enter the required **value** .
6. Assign the required **Warn user** and this message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#).
7. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check For These Recipients

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Email and OWA Classifier and is not supported for tasks.

Note: The **Recipient type check** is performed before any action to add additional recipients.

The rule allows you to check for use of a particular recipient type. For example you may wish to discourage the use of BCC. The rule has the form:

1. Check for these recipients . **Warn user** if check fails with **this** message
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Select **these** (the recipient **type** token) which will present you with a dialog allowing you to choose which type of recipient the check applies (To, Cc or Bcc).

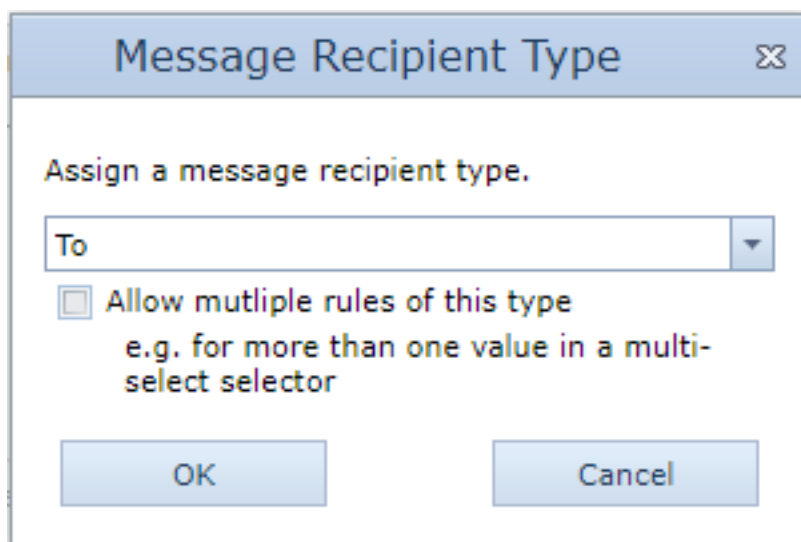


Figure: To Cc Bcc.

4. Set / unset **Allow multiple rules of this type** . By default (Disabled), Classifier Administration will detect duplicate rules of this type and only action **'the first'** in the rules tree. **Enabling** this setting means that Classifier will action each of the **duplicate** rules in turn - which may of course lead to multiple policy check dialogs.

Note: Each potentially duplicate rule must have the setting enabled, otherwise duplicates are not allowed.

5. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
6. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for Reply to All Responses

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Email Classifier.

The rule allows you (for example) to limit the use of the **Reply to All** action.

If **Warn user** is set to **Prevent**, Classifier will attempt to disable the **Reply to all** button. However, it is sometimes possible for a user to circumvent this disabling. If the setting is Warn, or the user finds a way to circumvent the disablement, the user is prompted in the usual manner.

The rule has the form:

1. Check for **Reply to All** response and **Warn user** if check fails with **this** message.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
4. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for Use of Default Label

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is applicable to Email, OWA and Office Classifier, but not Notes or SharePoint Classifier).

This rule might be used to draw the user's attention to the fact that they are sending an email or saving / printing a document with the default label value. This may be useful if for example you have defined a default label setting in the policy that limits circulation forcing users to specifically choose another label value to achieve a broader circulation.

Note: This **Check for use of default label** rule only takes effect the first time a message is sent. If the user changes the label to a different value then back to the default, the rule still fires. The rule does not apply to replies or forwards.

Note: Availability of the <Label> specific variant of the Check for default rule might seem unnecessary. However, it is included for consistency and may still be configured.

The rule has the form:

1. Check for use of **default label**. **Warn user** with **this** message.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
4. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check With The User

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is applicable to **Email, OWA, Notes, Office Classifier** and **File Classifier**.

Note: The operation of this rule is limited under **CAD Classifier for DraftSight**. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

This rule type can be used so that (for example) the user's attention is drawn towards the action they are about to perform or to remind them of site process requirements they should follow prior to sending a message or saving / printing a document. Such rules will take effect every time a message is sent, or document is saved or printed.

The rule has the form:

1. Check with the **user** and **Show Fix** option .**Warn user** with **this** message.
2. Perform the **operations common to all rules** as described in [Check rules](#) (a) (**Select policy, Set rules** tab, etc).
3. Set the **Show / Hide Fix** option.

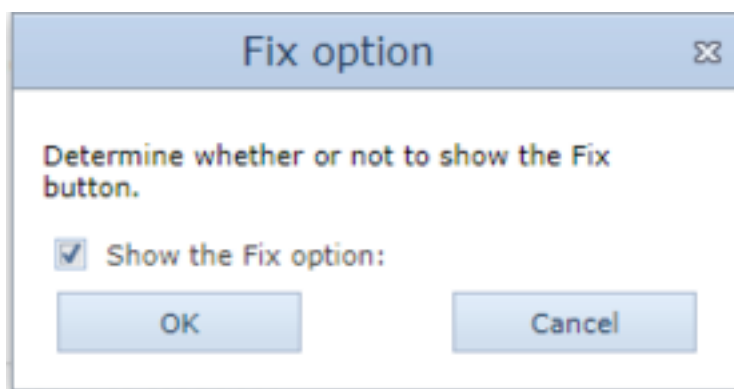


Figure: Show or Hide the Fix button.

Note: The **default** is to **Show the Fix button** which will be assumed for any rules defined prior to this option being available (3.10).

4. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
5. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check These Selectors for Expired Dates

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is not applicable to **Notes Classifier**.

Note: The operation of this rule is limited under **CAD Classifier for DraftSight**. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

Note: This check is performed when opening a **document (Office Classifier)**; when sending a **message (Email Classifier and OWA Classifier)**; when setting the classification on a **file (File Classifier)**; and when the **label dialog** is opened (**SharePoint Classifier**).

The rule allows you to warn users that they are about to view / send an item that includes a date selector item that has expired. The check compares the date in the item classification with the current local date. If the current local date is **later** than the date in the item classification, the rule fires and the relevant **warn** action taken. The rule has the form:

1. Check these **selectors** for expired dates . **Warn user** if check fails with **this** message.
2. Perform the **operations common to all rules** as described in [Check rules](#) (a) (**Select policy, Set rules** tab, etc).
3. Select **these** which will present you with a dialog allowing you to choose which of the date selectors are to be checked. If you do not have any [Date picker](#) or **Date offset** selectors defined in the **policy** the list will be empty.

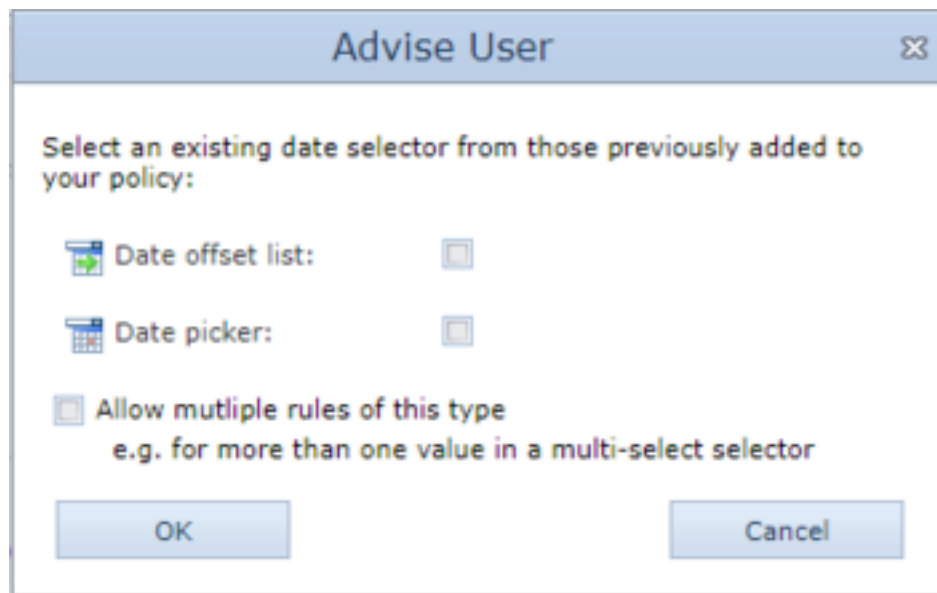


Figure: Label Expiry.

4. Choose the **selectors** that are to be checked for **expiry**.
5. **Set / unset Allow multiple rules of this type** . By default (Disabled), [Classifier Administration](#) will detect duplicate rules of this type and only action **'the first'** in the rules tree. **Enabling** this setting means that Classifier will action each of the **'duplicate'** rules in turn, which may of course lead to multiple policy check dialogs.

Note: Each potentially **duplicate rule** must have the setting **enabled**, otherwise duplicates are not allowed.

6. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
7. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for Additional Recipients on Reply or Forward

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Email, OWA Classifier and Mail Add-in.

Note: Mail Add-in only supports this rule when forwarding or replying to a message item (not for meeting requests etc.).

This rule might be used to draw the user's attention to the fact that they are forwarding or replying to an email and have inserted additional recipients (you can remove recipients and the rule will pass).

The rule has the form:

1. Check recipients list for additions on reply or forward. **Warn user** with **this** message
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
4. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

Check for Unlabelled Attachments

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy} / [Set Rules] -> [Add a rule](#) or Edit rule.

Note: This rule is only applicable to Email Classifier and Notes Classifier.

Note: Embedded images may be excluded from these checks using the [Include embedded images when performing attachment checks](#) setting.

This rule might be used to draw the user's attention to the fact that they are sending an email containing an attachment that is unlabelled when attachments of that type would normally be labelled (e.g. an unlabelled Word document).

Note: Pasting images into a message (e.g. using a **Snipping tool**) does not trigger an attachment check as there is no meaningful file name (file type) associated with the '**attached image**'.

The rule allows you to configure the attachment types (file extensions) that trigger the rule.

The rule has the form:

1. Check for these **unlabelled attachments**. **Warn user** with **this** message.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab,

etc.).

3. Select these and a dialog is presented allowing you to control the file extensions that will trigger the rule.

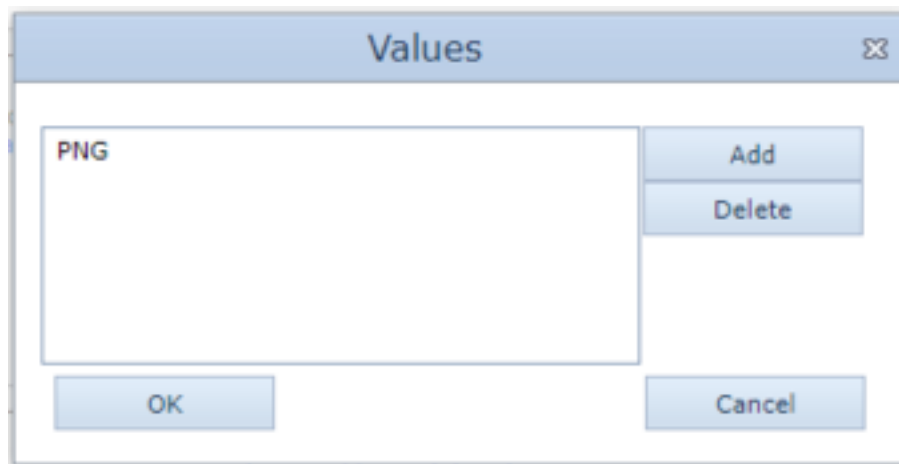


Figure: Unlabelled attachment types.

4. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#).
5. Click **OK** and **Next** on the edit template screen and supply a **name** for the rule to complete the wizard.

Check for a Suggested Classification

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Email Classifier, Word, Excel, PowerPoint, Project and Visio.

This rule might be used to check aspects of the document/message (as defined by the **associated conditions**) and to suggest modifications to the current [Classification](#) according to the Classification [Settings](#) defined by [Edit Classification](#).

Suggested Classification Processing

All [Suggested Classifications](#) defined for the policy are checked. If the conditions associated with a Suggested Classification are met then that Suggested classification is applicable.

The set of applicable Suggested Classifications is then checked as follows:

1. If one applicable Suggested Classification **sets a value for a selector** and another applicable Suggested Classification **Clears that selector** then Classifier stops the process and the defined **Warn** action is invoked using the '**cannot be applied**' message.
2. If one or more Suggested Classifications are applicable, Classifier will attempt to apply each of the applicable Classification settings. Classifier uses its high-water mark algorithm to determine whether a defined selector value should be applied. It then takes notice of any **Clear** setting(s).

Note: This rule is applied before the Check mandatory selector rule, so the option to Clear a selector value should be used with care.

3. If the Suggested Classification includes a setting that cannot be applied to the current Classification (e.g. set a value for a single selection non-hierarchic selector that already has a different value defined), then Classifier stops the process and the defined **Warn** action is invoked with the '**cannot be applied**' message.
4. If all the applicable **Suggested Classifications** are successfully processed and the resulting Classification is different to the original Classification then the **Automatically/Manually** apply setting is invoked. That is:
 - **Manually apply**: The user is warned using the 'suggested classification available' message.
 - **Automatically apply**: Any suggested classifications that are designated as [Automatically apply if possible](#) will be automatically applied (if possible) with any unprocessed suggested classification being flagged to the user using the 'suggested classification available' message.

The rule has the form:

1. Check for a suggested classification and **Automatically apply. Warn** the user with **this** message if a suggested classification is available for manual application, or this message if the suggested classification cannot be applied.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
4. Click **OK** and **Next** on the edit template screen and complete the wizard sequence by supplying a **name** for the rule.

User Driven Suggested Classification

There is a '**suggested classification check**' which can be configured to be run when a message is sent or a document is saved. The suggested classification can be run on demand.

Enabled Via Policy Setting

When messages are configured to display when a suggestion can be found, can ' t be found, or can ' t be resolved (this means a clash of 2 or more suggestions that can ' t be decided between).

Note: Suggested Classifications can be run on demand by enabling the **Allow user driven suggested classification** setting.

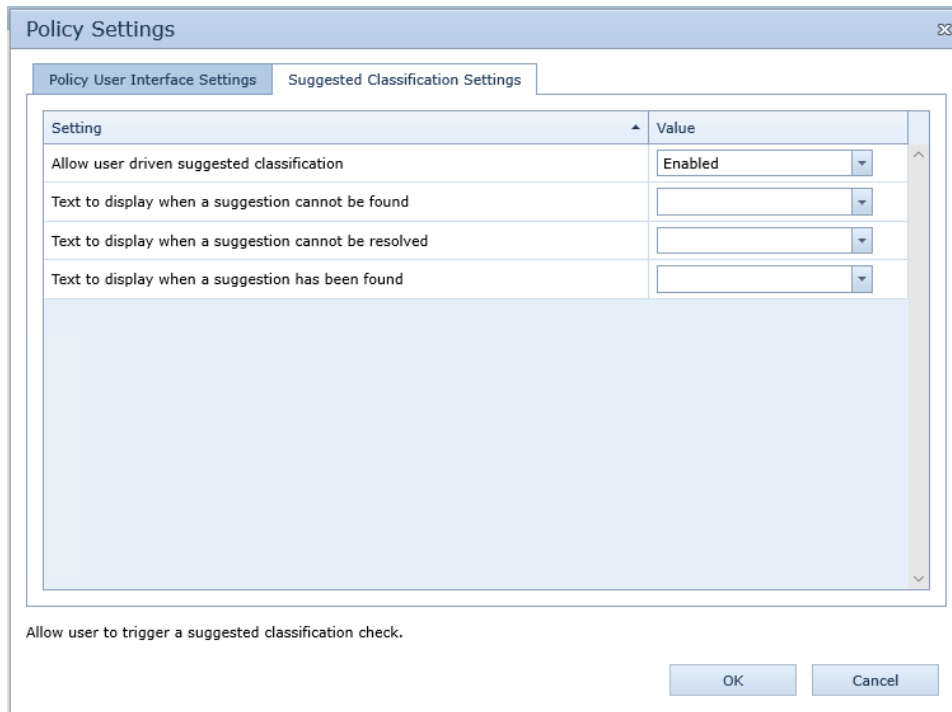


Figure: Allow user driven suggested classification setting enabled.

Enabling the **Allow user driven suggested classification** setting. The suggested classifications can be selected in the "Text to display" drop down menus.

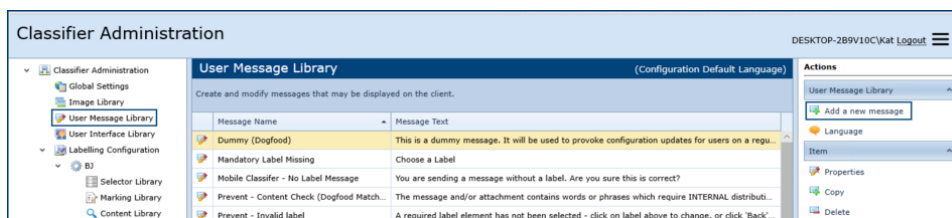


Figure: The messages are configured in the [User Message Library](#) of the Classification Administration Web UI:

To configure a message:

1. Go to the **User Message Library** .

Figure: Adding a new user message.

2. Select **Add a New Message** . An **Add User Message** dialog window will appear.
3. Fill in the fields (**Name, Language, Message Text, Help URL**).
4. To finish, click on the **OK** button.

Check RMS User Defined Permissions for Uncleared Recipients

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is **only** applicable to **Word, Excel and PowerPoint**.

Note: This rule is **ONLY** meaningful if your users have a **working RMS system**.

This rule will check any **Ad Hoc RMS protection applied to a document** to ensure that any users given access are **'cleared'** (SMTP domain clearance) for the current label.

The rule is configured in the same manner as described in [Check clearance for attachments, recipients or originator](#) .

Check for RMS Protection

Admin: [Labelling](#) Configurations ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: This rule is only applicable to Word, Excel and PowerPoint.

Note: This rule is ONLY meaningful if your users have a working RMS system. For example, an attempt to invoke the Apply Ad Hoc Protection button without RMS established may cause the application to crash.

This rule is used to inform the user that **no** RMS protection has yet been applied.

The rule has the form:

1. Check for RMS protection. **Warn user** if check fails with **this** message.
2. Perform the operations common to all rules as described in [Check rules](#) (a) (Select policy, Set rules tab, etc).
3. Assign the required **Warn user** and **this** message settings as described in [Warn / Prevent / Audit / Challenge options for Check rules](#) .
4. Click **OK** and **Next** on the edit template screen and complete the sequence by supplying a **name** for the rule.



Figure: The Edit Rule screen.

5. If a **Check for RMS protection** rule is configured, Classifier will check a document for applied RMS. If RMS has been applied, the check passes.
6. If the check fails, a policy check dialog is presented:

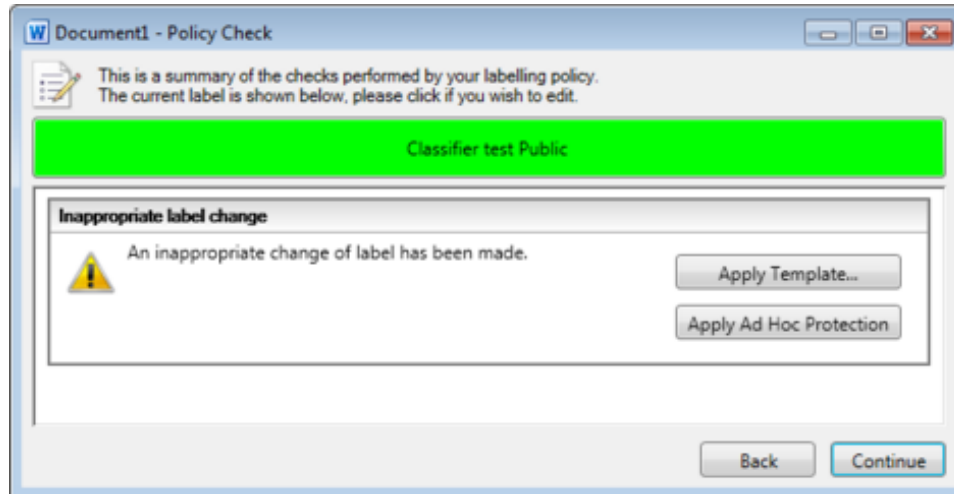


Figure: Check for RMS protection dialog.

7. [The UID configuration settings (buttons and tool-tips) for the RMS protection policy check dialog are found under the [Policy Check \(UID\)](#) item.]
8. If the user clicks **Apply Template** , then a list of available templates is presented.
9. Depending upon the whether [User defined RMS protection](#) is **Enabled** , the **Apply Ad Hoc Protection** **button** may be presented which presents the following dialog:

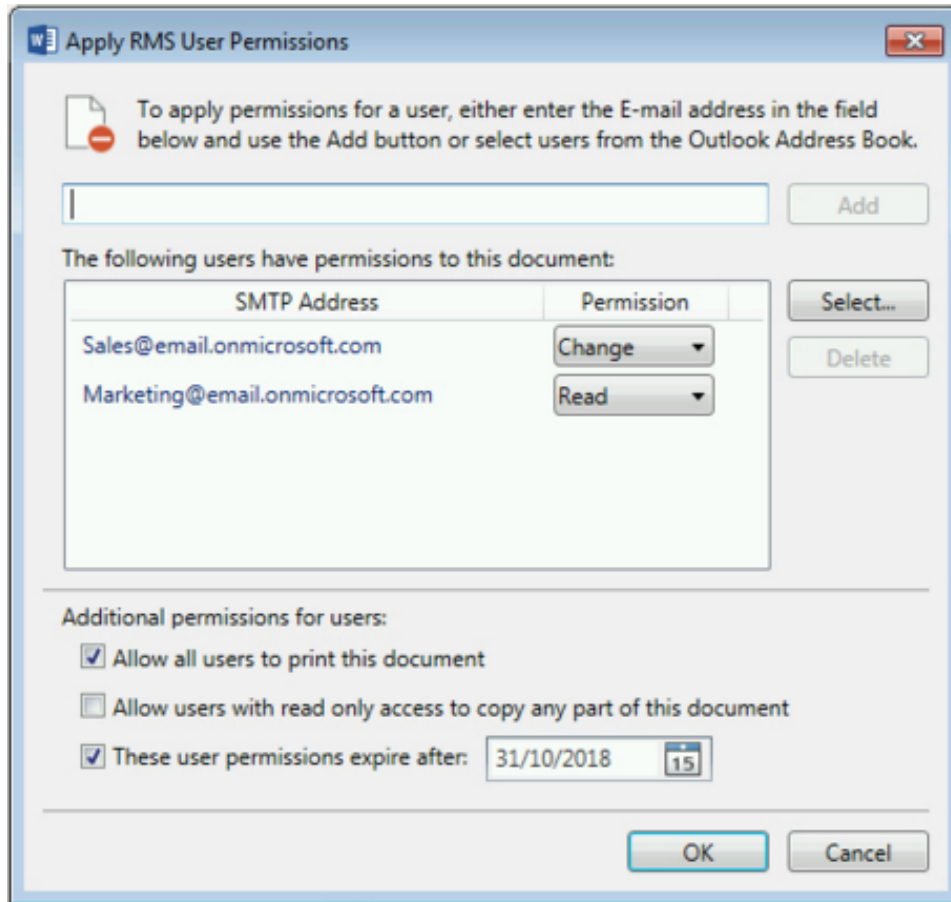


Figure: RMS Apply Ad Hoc Protection.

10. [The UID configuration settings (buttons and tooltips) for the **RMS Apply user defined permissions** dialog are found under the [RMS Apply User Permissions \(UID\)](#) item.]
11. The dialog presents a subset of the settings available through the standard **Restrict Access** action, presenting only those items that are available anagrammatically.

Warn / Prevent / Audit / Challenge Options For Check Rules

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

All [Check rules](#) require the items below to be configured:

1. If a Check rule is triggered, a Policy Check dialog will be presented; the dialog contents and buttons shown will depend on the configuration of the rules triggered.

Note: The operation of various check rules are limited under **CAD Classifier for DraftSight**. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

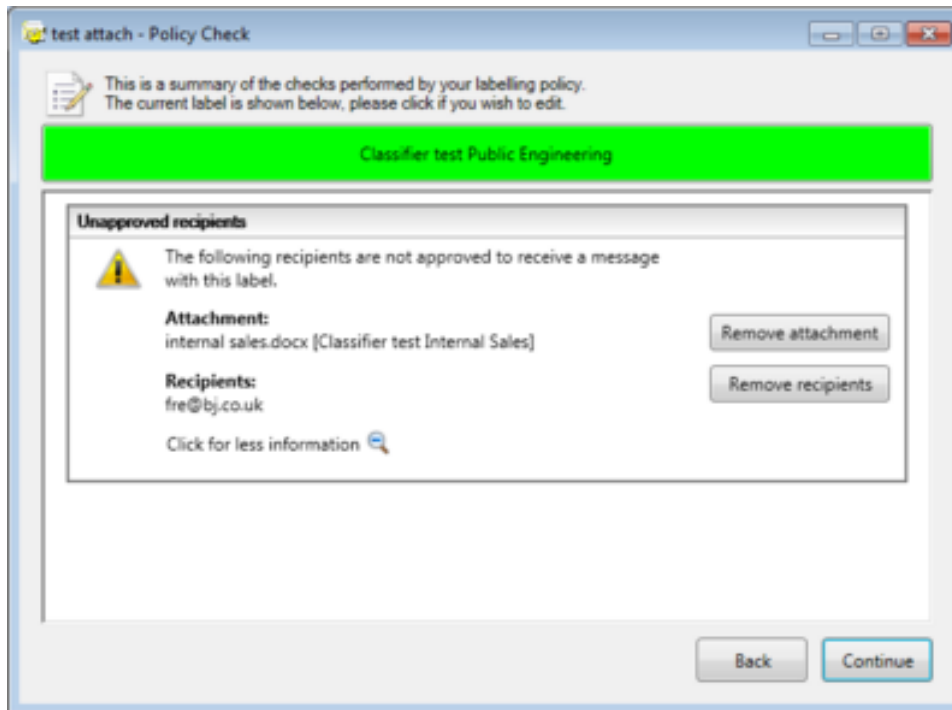


Figure: Example Policy Check dialog.

Note: The Back button may be unavailable in some circumstances. See [Process rules when printing](#) and [Process rules when saving](#).

2. Select the **Warn User** token which will present you with a choice of **Warn**, **Prevent**, **Audit only** or **Challenge Advise User** settings.

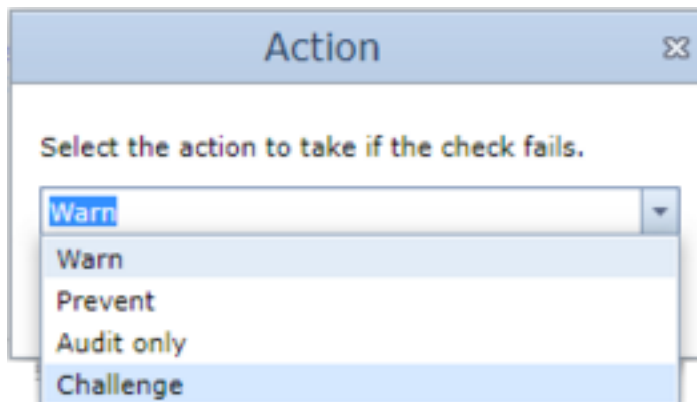


Figure: Select the action to take if the check fails.

3. Choose **Warn** / **Prevent** / **Audit only** / **Challenge** as required:
 - **Warn** : Allows users to override the check at submission time by using the **Continue** button.
 - **Prevent** : Inhibits override capability by removing the **Continue** button.

Note: The Prevent option may never be used. It is included for consistency and may be configured.

- **Audit only** : No dialog is presented to the user, but the occurrence is audited and the action allowed to proceed.
- **Challenge** - Is similar to the **Warn** option above (presenting the **Continue** button), but provides the ability to present the user with a pre-configured set of reasons. Choosing Challenge enables the **Options** button which is described further under [Challenge options](#) .

Note: Mobile Classifier will treat a **Challenge** setting as if **Warn** had been chosen.

3. Click **OK** .
4. Select this message and choose the message to be displayed.

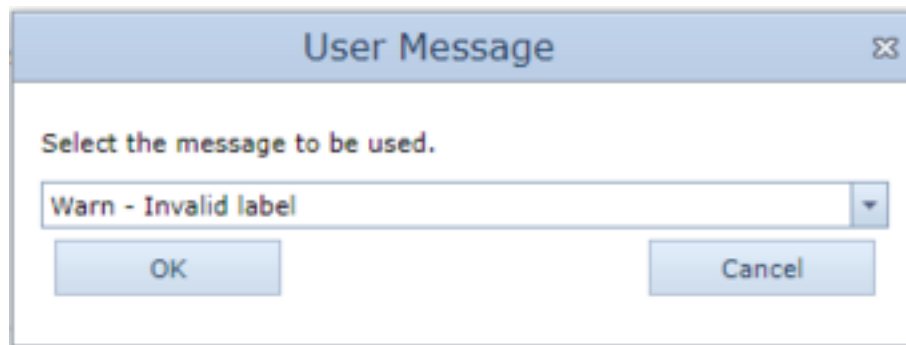


Figure: Select the message that will be used.

Challenge Options

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Policies](#) ⇒ {policy}/ [Set Rules] -> [Add a rule](#) or Edit rule

Note: The operation of various check rules are limited under CAD Classifier for DraftSight. If a rule triggers, a warning is presented to the user, but the action cannot be cancelled regardless of the buttons visible.

If (Challenge) **Options** is selected from the **Advise** user dialog (see [Warn / Prevent / Audit / Challenge options for Check rules](#)), the **Options** button becomes available providing access to the **Challenge Options** dialog shown below:

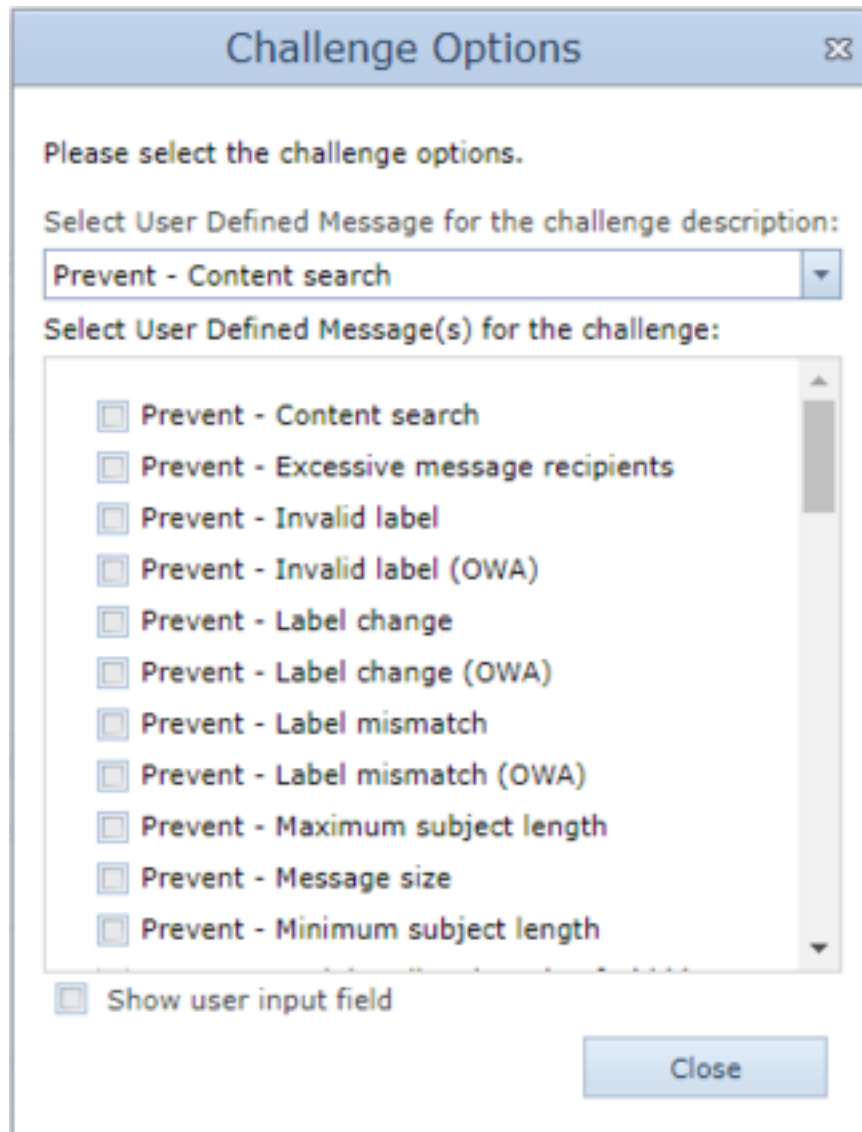


Figure: Challenge Options.

This allows you to define how the Challenge Policy Failure dialog appears:

- The message containing the Challenge description text presented in the dialog.
- Zero, one or more pre-configured reasons (messages) that appears in the dialog presented to the user.
- Whether the user can supply a **free text** reason (**Show user input field** above and **Other** below).

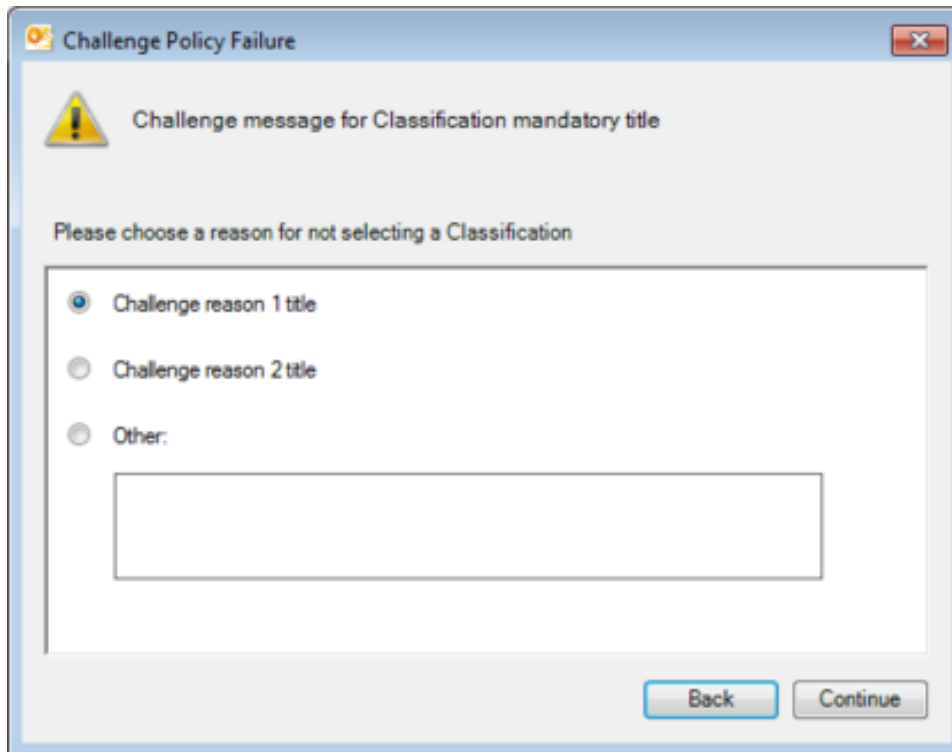


Figure: Challenge Policy Failure.

The Challenge description heading and supporting text for the dialog above are configured as the **Message Title** and **Message Text** respectively of a message within the [User Message Library](#). The **Message Name** appears in the list of messages presented.

The Challenge reasons are configured as messages with the User Message Library:

- **Message Name** appears in the list of messages presented in the Challenge Options dialog.
- **Message Title** appears as the caption alongside the radio button in the Challenge dialog.
- **Message Text** appears as a tool-tip, and is also included in the audit event log written.

Clearance Settings

Admin: Labelling [Configurations](#) ⇒ {configuration} ⇒ Clearance [Settings](#)

Note: Clearance Settings are only relevant if your site has decided to implement the Classifier Clearance handling features.

The Clearance Settings nodes are hidden until the associated setting ([Application Settings](#)) is **Enabled** .

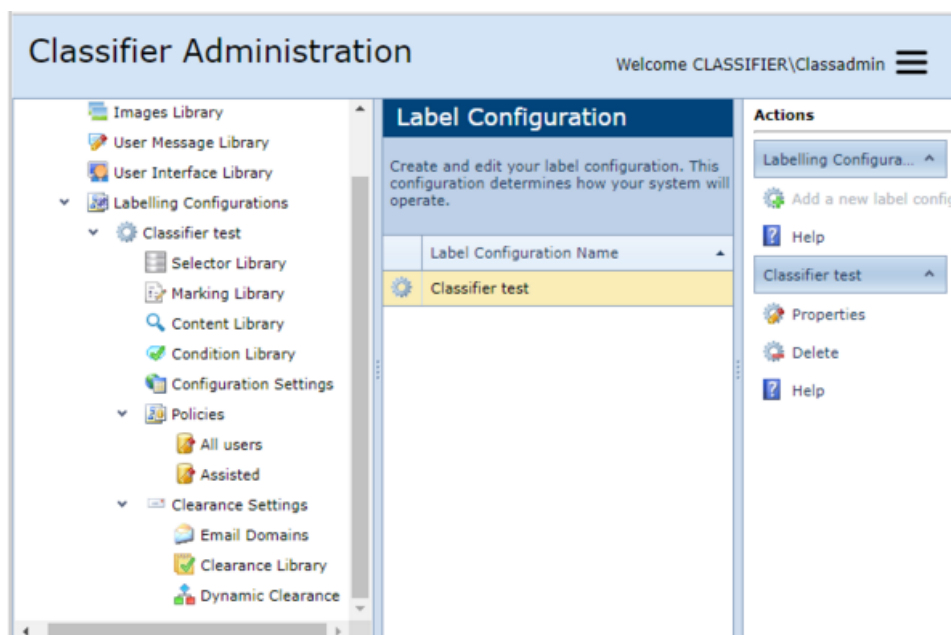


Figure: Clearance Settings.

If the Clearance settings nodes (e.g. [Email Domains](#)) do not appear then:

- Open [Global Settings/Application Settings](#) .
- Set **Clearance Check email domains** to **Enabled** (if required) to allow you to configure and use Email Domain clearances .
- Set **Clearance check Library** to **Enabled** (if required) to allow you to define clearances for use with SharePoint Classifier .
- Set [Dynamic Clearances](#) to **Enabled** if required (to allow you to define Dynamic Clearances)

The features supported are summarised as:

- [Email Domains](#): This allows you to apply checks to messages destined for external email domains. The clearances defined can be used by Email, OWA or Notes Classifier, in conjunction with rules, to ensure that labelled messages are not sent to recipients that do not have the necessary Clearance.
- [Clearance Library](#): This allows you to define Clearance definitions which can then be used by Classifier SharePoint (2016) to apply clearance based control over the items that can be inserted into a SharePoint

(2016) library.

- [Dynamic Clearances](#): This allows you to define recipient Clearances derived at run time from an items Active Directory attributes (User / Contact or Exchange Distribution Group).

Note: For new Classifier Configurations, Dynamic Clearances are **Enabled** by default, although no Dynamic Clearances are defined and therefore there is no effect.

The performance of clearance checks is controlled by the relevant application Check clearance for attachments / recipients / originator rules. Operation of these rules and the effects of associated configuration settings is described in [Perform Clearance Checks when sending messages](#).

The end user experience when these rules are triggered is described in [Check attachments/recipientsOriginator - Warn / Prevent](#).

Email Domain Clearances are held in the configuration and distributed via the same mechanism.

Changes to email domain clearances take effect the next time each client is started and retrieves the updated configuration information.

Perform Clearance Checks When Sending Messages

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Clearance Settings](#)

Note: Only [Single Selection list](#) and [Multiple selection list](#) selectors with **Include this selector in clearance and attachment checks** set take part in Clearance Checking.

[See [Check attachments/recipients/Originator - Warn / Prevent](#) for a description of the end user experience when these checks are triggered.]

The Configuration can use the policy rules:

- [Check clearance for attachments](#) (Email Classifier)
- [Check clearance for recipients](#) (Email, OWA, Notes and Mobile Classifier)
- [Check clearance for originator](#) (Email and OWA Classifier)

To define that, depending on the label, attachment / recipient and / or Originator clearance should be checked if an email or web email message is sent. That is each recipient / originator must have a group, specific or domain clearance that indicates they are permitted to receive / send information with the current label. These checks are configured as described in [Check rules](#).

Note: For the purposes of an Originator check the Originator is determined according to the Email Classifier setting "[Use From field for Originator Clearance](#)". By default this will be the identity of the Primary Mailbox - that is the first mail box configured in the current profile.

The operation of the Clearance check is influenced by which of the following settings is enabled (see [Clearance Settings](#)):

- [Dynamic Clearances](#)
- [Clearance Check email domains](#) (Email, OWA and Notes Classifier)

- If none of the above is **Enabled** then no clearance checks are performed.
- If [Dynamic Clearances](#) are enabled, then Classifier first checks to see whether a Dynamic Clearance for the recipient provides suitable Clearance. If no suitable dynamic clearance is available, the algorithm will proceed domain clearance checks (if **Enabled**).
- If **Clearance Check** email domains is set then perform clearance checks on all external recipients using the appropriate email domain clearance value.
- For [Single selection list](#) selectors , the label value must be permitted by the domain / recipient clearance for the check to pass.
- For **Permissive** Multi-select selectors , the domain / recipient clearance must include one of the values in the label for the check to pass.
- For **Restrictive** Multi-select selectors , the domain / recipient clearance must include ALL of the values in the label for the check to pass.

Check Attachments/Recipients/Originator - Warn/Prevent

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#)

If no Check attachment / recipients / originator rules are defined then recipient clearances are not checked at email message submission time.

If rules are defined, and the originator / all recipients are cleared for information/ attachments within the current email message label then email message submission continues uninterrupted regardless of whether Warn or Prevent is chosen.

If the originator or recipients fail the clearance check then the effect is dependent upon the Warn/Prevent or Challenge setting in the Rule definition:

- If **Audit only** is set then the occurrence is audited and the email submission proceeds but requires no user involvement.
- If **Warn, Prevent** or **Challenge** is set then email message submission is interrupted and the sender is presented with a dialog (shown below) indicating the problem and presenting options as to how to proceed as per the examples below.

Note: If Recipient Checks are performed, then the membership of any expanded distribution group (DG) as governed by [Always use Distribution List clearance](#) is also checked.

Note: Outlook Emails only - If a member of a DG is 'removed' as part of the Remove action then the DG is replaced by the expanded set of '**cleared**' members prior to submission.

The dialogs below are shown in accordance with the **Warn, Prevent** or **Challenge** settings

1. Attachments / Recipients / Originator failing the clearance check are presented, with the text as defined by the relevant rule(s).

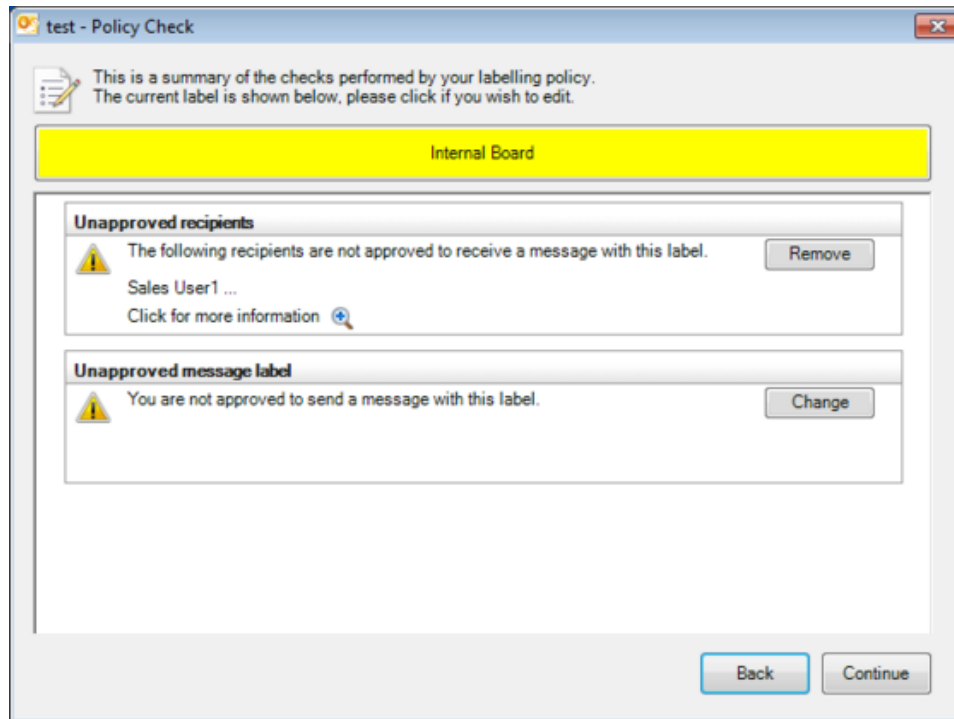


Figure: Originator - Recipient Clearance Check dialog.

2. Clicking on the **Remove** button (Outlook only) for recipients removes all failing recipients.
3. Clicking on the **Change** button (Outlook only) alongside the Originator (or the large [Label](#) button at the top of the dialog) will show a label selection dialog allowing the user to change the label.
4. The **Back** button allows the user to cancel the Send action and return to the email message window to make adjustments to the email message content and/or recipients.
5. The **Continue** button is only available if the **Warn** or **Challenge** option has been selected and if clicked proceeds with the email message submission. Any clearance check failures still applicable will be audited.

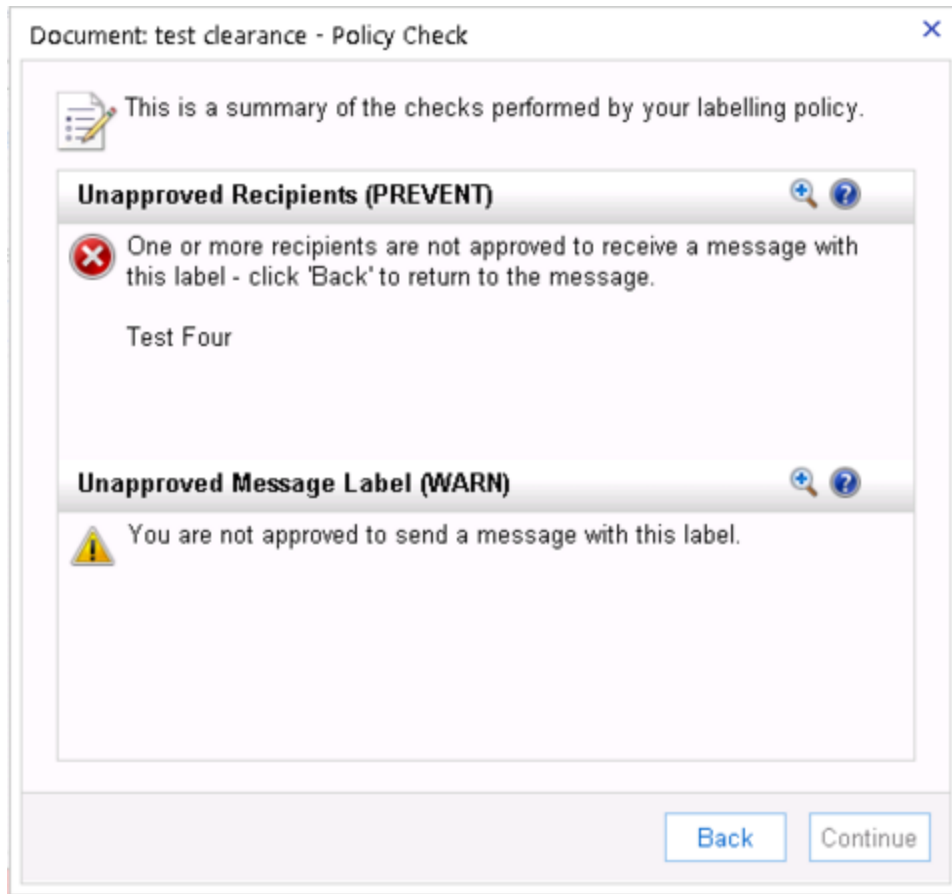


Figure: OWA Originator - Recipient Check.

6. If all problems are fully addressed then the message proceeds to submission.

Note: However that Portion marking and/or attachment label checks may still prevent submission.

Email Domains

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#) ⇒ Email Domain Clearances

Note: Not supported by **Classifier Mail Add-in**.

An **Email Domain Clearance** defines the clearance that should be assigned to a given email domain address space.

The configuration features are only available if **Clearance check email domains** is **Enabled** as described in [Clearance Settings](#).

If recipient clearance checking is enabled through an appropriate [Check clearance for attachments /recipients](#) rule for Outlook, OWA or Notes, then any external recipient is checked using an Email domain clearance that matches their email address.

These domain clearances are administered through the **Clearance Settings / Email Domain**. The following actions are supported:

- [Add a new email domain clearance](#) .
- [Edit email domain clearance](#) .
- [Delete email domain clearance](#) .

The summary display shows all defined email domain clearances and the associated clearance information in per selector columns.

Note: You should probably **establish a domain clearance setting** for your own (**internal**) domain, and it may be useful to **establish a default (minimal) domain** clearance to handle any recipient addresses that do not match any other configured domain clearance (see [Add a new email domain clearance](#)).

Add a New Email Domain Clearance

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#) ⇒ Email Domain Clearances → Add a new email domain clearance

Note: Remember to establish one or more email domain clearances to cover your internal users.

To add a new email domain clearance:

1. Select **Email Domain Clearance Configuration** in the left hand pane.

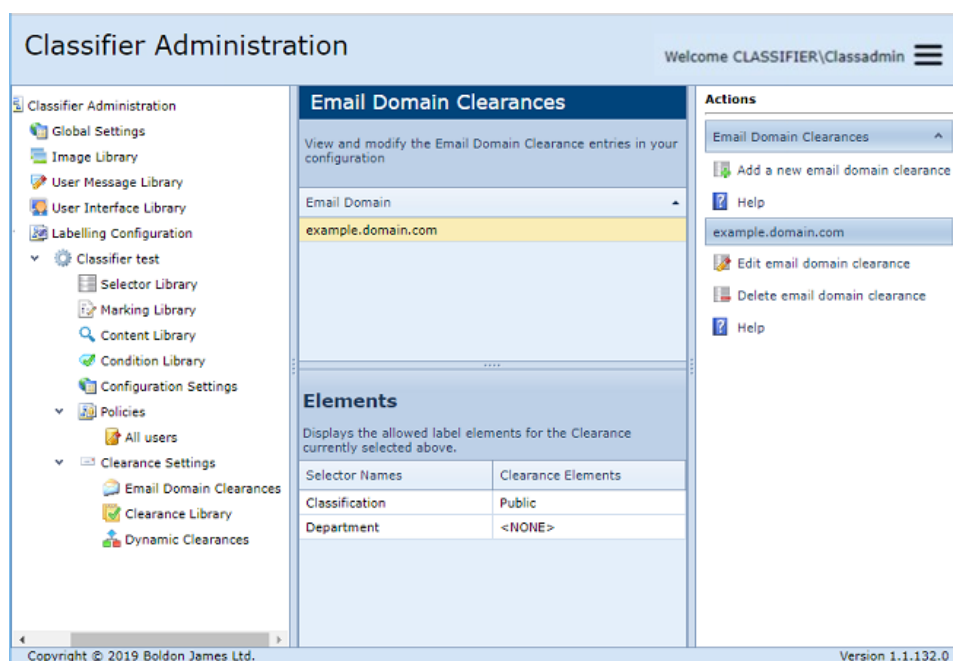


Figure: Email Domains.

2. Choose **Add a new email domain clearance** . This will start a wizard.

Note: You can establish a 'default' email domain clearance (one that matches any addresses that do not match any other configured email domain clearance) by leaving the Email domain field blank. The resulting entry will appear in the summary list as **Any unmatched email domains**, and operate as a backstop.

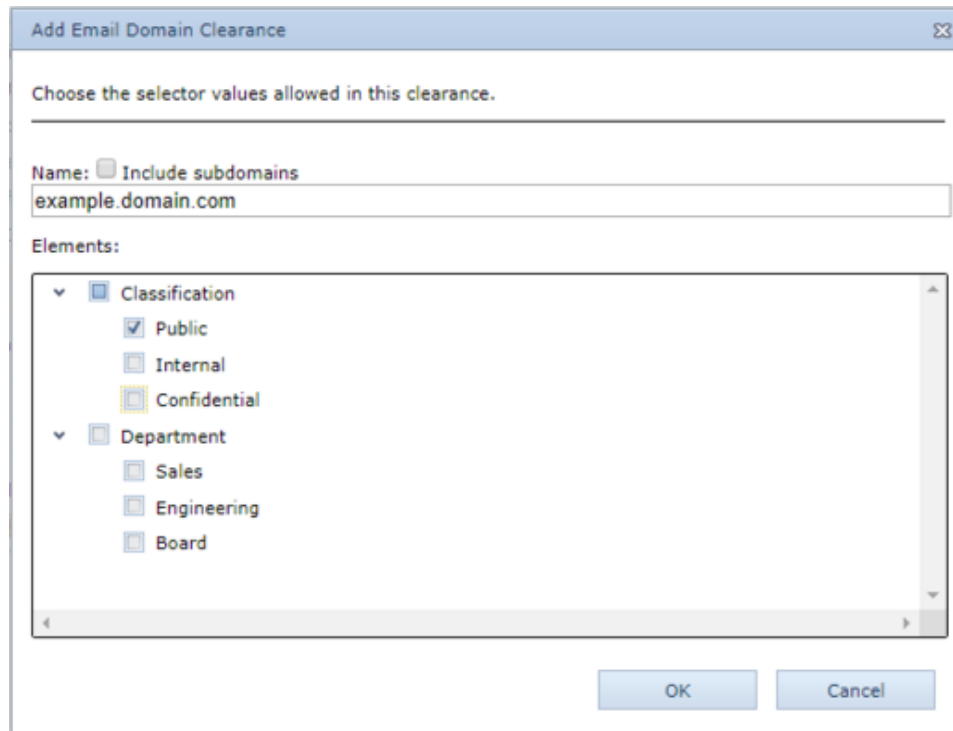


Figure: New Domain Clearance.

3. Enter the Email domain **Addressspace** for the SMTP domain for which you wish to define a clearance in the usual form (e.g. for a second level domain abc.xyz, or for a first level domain zxy - no leading '.' and no '*').
4. You can check **Include subdomains** if you want the clearance to apply to all sub domains of that address space. So for example an address space of abc.xyz with **Include subdomains** checked would apply to domains with addresses of pqr.abc.xyz or lmn.abc.xyz etc.
5. Check all the **Label values** that the domain is cleared for.
6. Complete the wizard and the domain clearance entry will appear in the summary list pane.

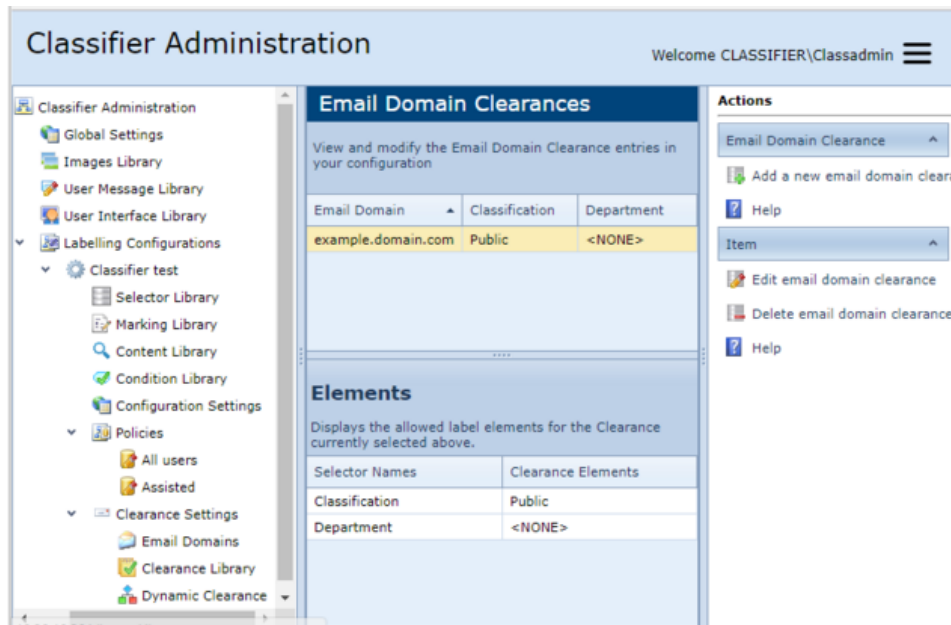


Figure: Domain Clearance Summary.

Edit Email Domain Clearance

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#) ⇒ Email Domain Clearances → Edit email domain clearance

To edit the email domain clearance:

1. Select **Clearance Settings / Email Domain Clearances** . This will show a list of configured domain clearances.
2. Select the relevant **entry** .
3. Select **Edit email domain clearance** . This will present a (pre-populated) **Email Domain Clearance Properties** dialog box.
4. Change the **Name** for the **SMTP domain** if required in the usual form (e.g. xxx.yyy).
5. You can select the checkbox **Include subdomains** if you want the clearance to apply to all sub domains of that address space. So for example an address space of abc.xyz with **Include subdomains** checked would apply to domains with addresses of pqr.abc.xyz and lmn.abc.xyz.
6. Check all the **Label values** that the domain is cleared for. **Complete** the wizard.
7. Click on the **OK** button and the summary display will be updated.

Delete Email Domain Clearance

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Clearance Settings](#) ⇒ Email Domain Clearances → Delete email domain clearance

Note: Only applicable to **SharePoint Classifier (3.10 or later)**.

To delete the email domain clearance:

1. Select **Clearance Settings / Email domain clearance** . This will show a list of configured domain clearances.
2. Select the relevant **Entry** .
3. Select **Delete** email domain clearance .
4. Click on the **Yes** button to the delete the confirmation or **No** to cancel the action.

Clearance Library

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#) ⇒ Clearance Library

Note: Only applicable to SharePoint Classifier (3.10 or later).

The Clearance Library allows you to define Clearance definitions which can then be used by Classifier SharePoint (2016) to apply clearance based control to the items being inserted into a SharePoint (2016) library. That is, an item can only be inserted into a Library if its label is allowed by the clearance associated with the Library.

These features are only available if **Clearance Library** is **Enabled** as described in [Clearance Settings](#) . Initially there are no **Clearances** defined.

Each defined Clearance has a Clearances Default Labels defined. Clearances are listed alphabetically.

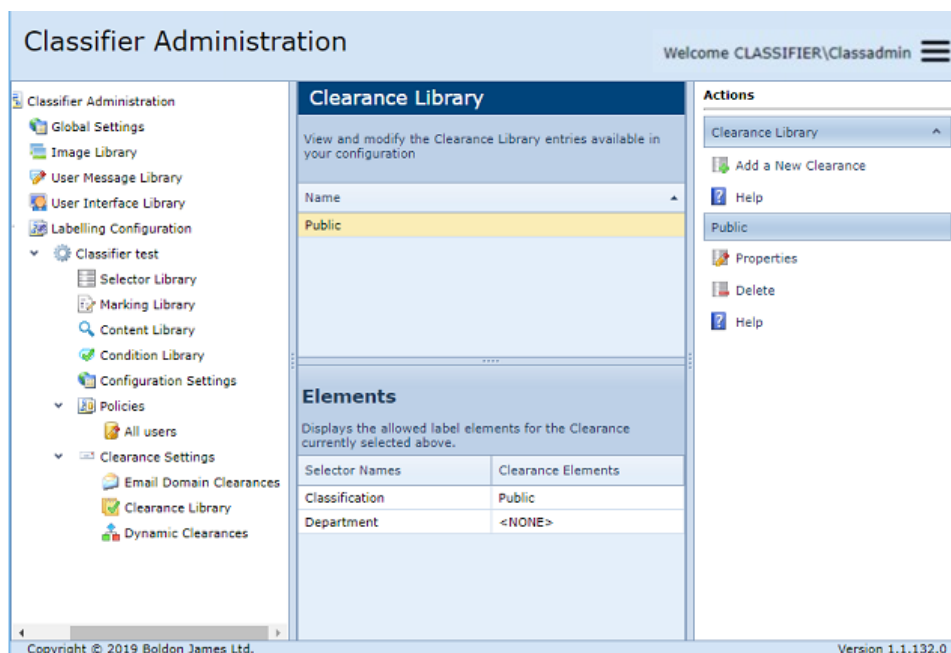


Figure: Clearance Library.

The following functions are supported:

- [Add a new clearance](#)
- [Properties \(Clearance\)](#)

- [Delete \(Clearance\)](#)

The summary display shows all defined clearances and the associated clearance information in per selector columns. You can reorder these columns, but not delete any of them.

Add a New Clearance

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#) ⇒ [Clearance Library](#) ⇒ Add a new clearance

Note: Only applicable to SharePoint Classifier (3.10 or later).

To add a new clearance:

1. Select **Clearance Library** in the left hand pane, display a dialog similar to the following:

The screenshot shows a dialog box titled "Add Clearance". At the top, it says "Choose the selector values allowed in this clearance." Below this is a text input field for "Name:" containing the word "Public". Underneath is a section labeled "Elements:" which contains a tree view. The tree view has two main categories: "Classification" and "Department". Under "Classification", there are three items: "Public" (which is checked), "Internal", and "Confidential". Under "Department", there are three items: "Sales", "Engineering", and "Board". At the bottom right of the dialog are "OK" and "Cancel" buttons.

Figure: New Clearance.

2. Enter the **Name**.
3. Check all the **Label values** relevant to the Clearance.
4. Click **OK**, and the domain clearance entry will appear in the summary list pane.

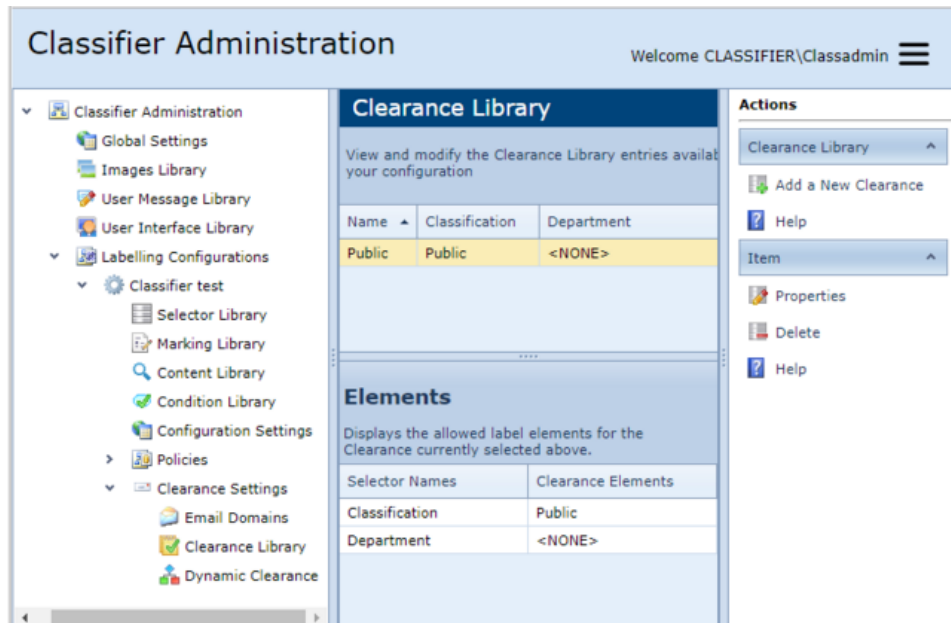


Figure: Clearance Library summary.

Properties (Clearance)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Clearance Settings](#) ⇒ [Clearance Library](#) ⇒ Properties clearance

Note: Only applicable to SharePoint Classifier (3.10 or later).

To change the clearance:

1. Select [Clearance Settings](#) / **Clearance Library**. This will show a list of configured clearances.
2. Select the relevant **entry**.
3. Choose **Properties**. This will display the same dialog (pre-filled) as that displayed by [Add a New Clearance](#).
4. Change the **Name** as required.
5. Check all the **Label values** relevant to the **Clearance**.
6. Click **OK**, and the summary display will be updated.

Delete (Clearance)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Clearance Settings](#) ⇒ [Clearance Library](#) ⇒ Delete clearance

Note: Only applicable to SharePoint Classifier (3.10 or later).

To delete a clearance:

1. Select **Clearance Settings** / **Clearance Library**. This will show a list of configured clearances.
2. Select the relevant Entry.

3. Choose **Delete clearance** .
4. Click **Yes / No** to the delete confirmation.

Note: SharePoint Classifier (3.10 or later) associates the Clearance Name with a Library and then uses that Name to access the actual Clearance from the [Classifier Configuration](#) . If the Clearance Name cannot be found in the current Configuration, then no clearance checks will apply to the library. Therefore take care before you delete a Clearance.

Dynamic Clearances

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [ClearanceSettings](#) ⇒ Dynamic Clearances

Dynamic Clearances allow you to define Clearances that will be determined at run time based on User property value conditions.

Such Clearance values will be used if **Dynamic Clearances** is **Enabled** under [Application Settings](#) and in the following situations:

- To check **Originator Clearance** in conjunction with a [Check clearance for Originator](#) rule.
- To check **Recipient Clearance** in conjunction with a [Check clearance for recipients](#) rule.
- To check **Attachment Clearances** in conjunction with a [Check clearance for attachments](#) rule.
- To apply **Clearance Filters** to the Label dialog if [Masking of selectors against clearance](#) is **Enabled** .

The Conditions relating to Dynamic Clearances are similar to other conditions, but have a specific '**Condition Type**' of Dynamic Clearance [User Properties](#) . They are managed as other Conditions ([Condition Library](#)).

A configuration option [Always use Distribution List clearances](#) is supported by **Email** and **OWA Classifier**. If the option is **Disabled** then DGs are always expanded. If the option is **Enabled** , then DG address is used to derive a clearance (if available), otherwise the DG will be expanded to perform clearance checks.

Add a New Dynamic Clearance

Admin : [Labelling Configurations](#) ⇒ {configuration} ⇒ [Clearance Settings](#) ⇒ [Dynamic Clearances](#) → Add a new Dynamic Clearance

Note: You can define a Dynamic Clearance with no associated conditions. In such cases the Dynamic Clearance operates as a 'default clearance' applicable to every recipient/originator etc.

Note: If you select multiple conditions, those conditions must All be true for the Dynamic Clearance to be applied.

To add a Dynamic Clearance:

1. Select **Dynamic Clearances** in the left hand pane.

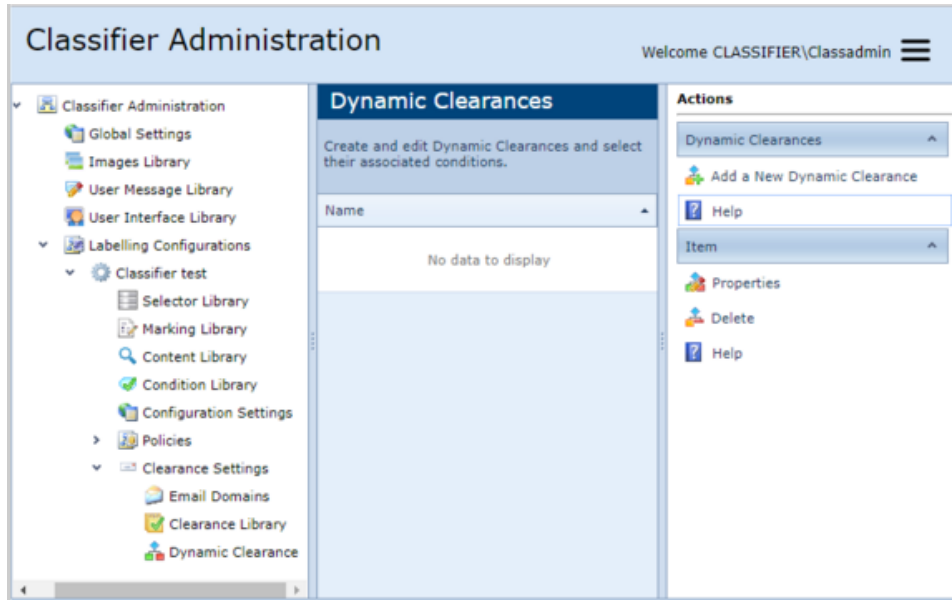


Figure: Dynamic Clearance.

2. Choose **Add a New Dynamic Clearance** . This will display the following:

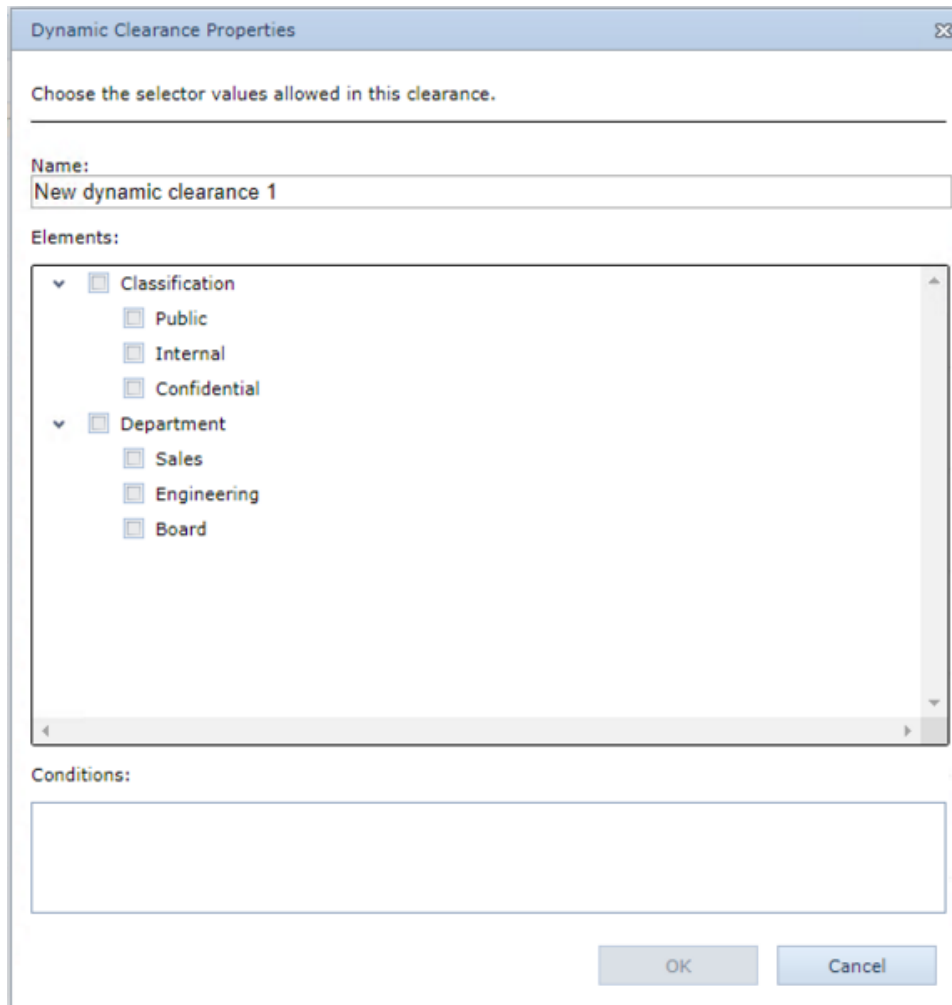


Figure: Add a New Dynamic Clearance.

3. Enter a **name** for the Clearance.
4. Check all the [Selector values](#) contributing to this Dynamic Clearance.
5. All conditions of type '**Dynamic Clearance User Properties**' defined are presented. Select one or more existing conditions. Conditions can be created using the [Condition Library](#) actions - indeed '**Dynamic Clearance User Properties**' conditions can only be modified / deleted using [Properties \(Condition\)](#) / [Delete \(Condition\)](#).
6. Complete the wizard and the **Dynamic Clearance** entry will appear in the list.

Properties (Dynamic Clearances)

Admin: [Labelling Configurations](#) ⇒ {configuration} ⇒ [Clearance Settings](#) ⇒ [Dynamic Clearances](#) → Properties

To set the Dynamic Clearances properties:

1. Select **Dynamic Clearances** in the left hand pane.
2. Select the relevant **Dynamic Clearance** and click **Properties** .
3. This presents the same dialog as [Add a new Dynamic Clearance](#) , populated with the existing settings.
4. Modify any **elements** of the Dynamic Clearance and click **OK** .

Delete (Dynamic Clearance)

Admin: [Labelling Configurations](#) ⇒ {configuration}⇒ [Clearance Settings](#) ⇒ [Dynamic Clearances](#) → Delete

Note: If you delete a **Dynamic Clearance**, any associated **Conditions** are unaffected.

To delete a Dynamic Clearance:

1. Select **Dynamic Clearances** in the left hand pane.
2. Select the relevant Dynamic Clearance and click **Delete** .
3. A confirmation dialog is presented. Are you sure you wish to delete this Clearance item? If you want to delete it the item, click **Yes** otherwise click **No** .

Email, OWA, Mail Add-in, Notes and Mobile Differences

Enabling and Disabling Functionality

- **Email and Notes Classifier functionality** can be **enabled** and **disabled** globally via [Global Settings / Classifier Application Settings](#).
- **OWA Classifier functionality** can only be **enabled** and **disabled** via **install/remove product actions**. Browser support information can be found under [Browser Support \(OWA\)](#).
- **Notes and Mobile Classifier functionality** can only be **enabled** and **disabled** via **install/remove product actions**.

Application Differences

Taking Outlook functionality as the baseline, the following topics summarise the differences between the applications:

- [OWA Classifier and Classifier Mail Add-in vs Email Classifier](#).
- [Notes Classifier vs Email Classifier](#).
- [Mobile Classifier vs Email Classifier](#).

OWA Classifier And Classifier Mail Add-in VS Email Classifier

OWA Classifier and Classifier Mail Add-in (3.10.0) support subsets of the features supported by Email Classifier (Outlook) as detailed in the various tables in this document:

- [Classifier Application Settings](#)
- [General Settings](#)
- [Rules supported](#)

In addition there are various other differences summarised below:

- [Portion Marking](#) in a message (nor any related Portion [Marking](#) features) is not supported by OWA / Mail Add-in Classifier.
- Policy Test Mode capability does not extend to testing in OWA or Mail Add-in environments.
- Mail Add-in only supports messages. Other message types (e.g. appointments) are not supported.
- Labelling of Calendar items is only supported in OWA Premium view.
- During a Reply / Forward sequence, Email Classifier removes any existing subject markings at the time the new message is created. Due to the environment, OWA / Mail Add-in can only 'replace' the subject markings at the time the message is sent.
- Enable/Disable of the OWA / Mail Add-in Classifier is via server based Install/Uninstall and [Licence](#).

- Message templates are not supported by OWA / Mail Add-in Classifier.
- Assisted labelling and Environment properties in Marking Formats are supported by OWA / Mail Add-in Classifier, but there are some differences.
- The following are not supported:
 - [Favourites](#),
 - [Recently Used Labels and Portion Marks](#),
- Document properties in Marking Formats, Content Checking.
- The Add Category to message rule is not supported by OWA / Mail Add-in Classifier: since Folder View Labelling (Outlook) is not available, the category can only be set on Sent Items and the feature would be incomplete.
- Whilst OWA / Mail Add-in supports the Help links defined in a [Classifier Configuration](#), the nature of accessing these environments may mean that a defined link is not accessible due to external access controls (e.g. additional authentication requirements).
- The nature of the OWA / Mail Add-in environments means that checking must take place at the Server (when the message is sent) and the error handling interactions do not always operate quite the same as in the Outlook client. In particular, Attachment labels are not checked until the message is sent and it is not possible to support an equivalent to the [Automatically elevate email label](#) feature.
- The server tends to run for extended periods and changes to the configuration do not take place in the same manner as for a client (where closing and restarting all Classifier supported applications will ensure the latest configuration is used by a desktop client).
- The end user experience may vary in some scenarios outlined in [User experience variance between Email, OWA and Notes](#) .
- Mail Add-in: On send, Classifier add-in code is invoked and Classifier performs any checks required. If Classifier checks pass, all configured markings are applied. Note that subsequent checks by OWA/Mail Add-in (e.g. no recipients), or indeed other add-ins, or user (e.g. no Subject) may cause message submission to be halted with the draft message now showing the marking information. This is different to Email Classifier where Classifier is invoked after Recipient / Subject checks etc.

Notes Classifier VS Email Classifier

Notes Classifier essentially supports a subset of the features supported by Email Classifier (Outlook).

The **key differences** are:

- Application of RMS and S/MIME security to a message is not supported by Notes Classifier.
- [Portion Marking](#) in a message is not supported by Notes (nor any related [Portion Marking](#) features) and attachment labels are not checked until the message is sent (there is no Automatically elevate email label). The end user experience may vary in some scenarios as outlined in [User experience variance between Email, OWA and Notes](#) .
- Enable/Disable of the Notes Classifier is via server based Install/uninstall and [Licence](#).
- Message templates are not supported by Notes Classifier.
- [Folder View labelling](#) is not supported by Notes Classifier.

- The [Favourites](#) button is not supported under Notes 8.
- The nature of the environment means that error handling interactions does not operate quite the same as in the Outlook client. In particular the dialogs presented if [Check rules](#) fail (e.g. Recipient clearance or high-water mark checks) do **NOT** present the Fix actions (e.g. Upgrade, Remove), the user has to rectify the anomalies.
- Only a subset of [Classifier Applications Settings](#) is supported by Notes Classifier.
- Only a subset of [General Settings](#) are supported by Notes Classifier.
- Only a subset of Rules are supported by Notes Classifier.

Mobile Classifier VS Email Classifier

Mobile Classifier essentially supports a subset of the features supported by Email Classifier (Outlook).

The key differences are:

- Label selection presents a Single click interface - as a consequence the policy to be used must define single click settings.
- The label of a message is presented at the top of the message body.
- Images (e.g. in Single Click buttons) are not supported by Mobile Classifier.
- UI Definitions are not supported by Mobile Classifier, so actions on dialogs such as Back and Continue will always appear as such.
- Application of RMS and S/MIME security to a message is not supported by Mobile Classifier.
- [Portion Marking](#) in a message is not supported by Mobile Classifier (nor any related [Portion Marking](#) features).
- Enable/Disable of the Mobile Classifier is via App install/uninstall on the users device, using server based Service Install/uninstall applying [Licence](#) control.
- Message templates are not supported by Mobile Classifier.
- [Folder View labelling](#) is not supported by Mobile Classifier.
- The [Favourites](#), Recently Used and Options features are not supported under Mobile Classifier.
- The nature of the environment means that error handling interactions does not operate quite the same as in the Outlook client. In particular the dialogs presented if [Check rules](#) fail (e.g. Recipient clearance) do NOT present the Fix actions (e.g. Upgrade, Remove), the user has to use Back/Continue rectify/ignore the anomalies.
- There are currently no [Classifier Applications Settings](#) specified for Mobile Classifier.
- Only a subset of the [General Settings](#) are supported by Mobile Classifier.
- Only a subset of [Rules are supported](#) by Mobile Classifier.

Browser Support

OWA Classifier supports Client Basic and Client Premium.

For information regarding support for other browsers see the [OWA Classifier Release Note](#).

Note: Chrome is the recommended browser.

The recommended browsers are:

- Google Chrome
- Microsoft Edge
- Internet Explorer 11
- Safari
- Firefox
- Opera

Configuration Deployment

Note: If you wish to Publish the Classifier Configuration via Active Directory then the Active Directory Schema must be updated ([Extending the Active Directory Schema](#)). Schema update is not required if you intend to Publish the configuration via file store.

If you wish to use the optional Classifier Management Agent, then this must be installed and configured as described in the Management Agent Guide.

The schematic below shows logically how the Classifier configuration is deployed.

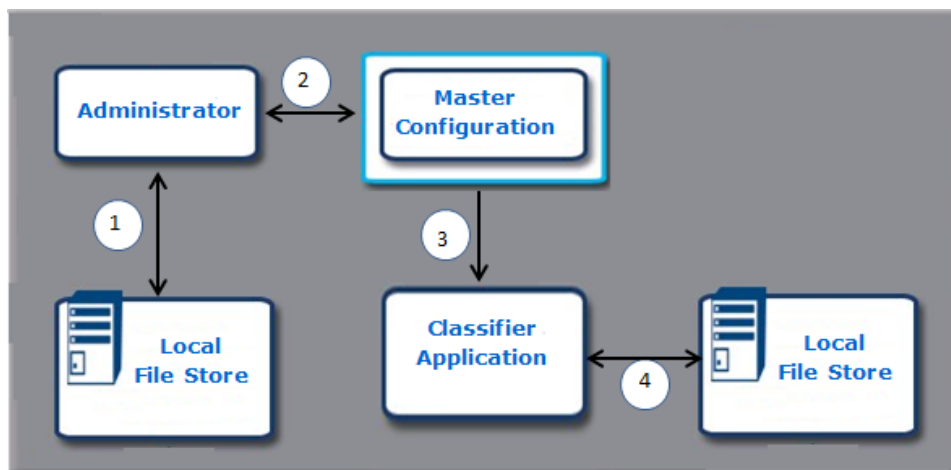


Figure: Configuration Deployment.

Creating and Modifying the Configuration

1. The process starts by the Administrator creating an initial configuration on their local machine and evolving that configuration to the point where it is deemed suitable for deployment to a user community. This might initially be to a pilot group or into a test environment, but might ultimately be the entire user population.
2. Once the configuration is stable the Administrator will Publish the configuration to the Master Configuration location. This can be the Active Directory (needs [Extending the Active Directory Schema](#) to have been run), some suitable (shared) File Store location. You can also produce a copy of the configuration in a format suitable for retrieval from a URL location as supported by Classifier Clients (Outlook, Word etc.) and Classifier Management Agent using [Create Web Configuration](#).
3. **(Modifying the configuration)** If an Administrator plans to modify the Master Configuration they must ensure their local machine holds an up to date copy of the Master Configuration, [Get Server Configuration](#) will overwrite any existing local copy. The Administrator can then modify the configuration and re-publish using [Publish Configuration](#).

Note: If you Publish the configuration to File Store you must ensure that the target (Master) location has suitable permissions. End users should have the ability to Read from that location and Administrators who are to modify the Master configuration must also have the ability to write to that location using the network path.

Classifier Application Retrieval Of Configuration

Classifier applications need to know where to find the Master Configuration, and which Policy in the Configuration should be used. All Classifier Applications determine this by searching Registry Key settings in precedence order as described in [Configuration Registry Search Algorithm](#) and its sub-topics These registry settings may be established either directly, or using Group Policy Option mechanisms as described in:

- [Set the Registry Keys Directly](#)
- [Set the Registry Keys using Group Policy](#)

The next steps vary according to whether the Classifier Management Agent is in use.

Management Agent in use:

4. The Management Agent retrieves the Master Configuration, checking for updates according to its own configuration settings in conjunction with [Web Host Settings](#) if applicable. The retrieved configuration is stored locally (Management Agent setting: CommonConfigFolder).
5. The client application(s) are configured to retrieve their configuration from the location written by the Management Agent.

Management Agent not in use and for applications not using the Management Agent (OWA Classifier etc.):

6. Each Classifier application periodically (e.g. on start up) retrieves the configuration from the Master location, but only if the Master configuration is **'later'** than the local version. For Email and Office Classifier the **Validity Period** registry setting can be used to control when the check should be performed. The retrieved configuration is stored locally unless ClientServerOverride is **Enabled** , or the application (e.g. OWA) is operating in ServiceMode.

Classifier Registry Entry Grouping

The Registry entries relevant to Classifier operations are grouped as follows:

- **Label Configuration:** policy settings to ensure that Classifier Client products (e.g. Email and Office Classifier) will obtain their Classifier Configuration from the correct location and that users will be assigned the correct Classifier policy (available for Local Machine and Current User). The Registry Keys and the effects if the policy setting is not configured corresponding to these settings are described in [Label Configuration Registry Settings](#) .
 - This includes a sub-group of settings relating to Service Mode that are only available for the Local Machine.
 - Web Host settings that are only applicable if you plan to retrieve master configuration from a URL location.
- **Client Configuration:** Policy settings that can be used in unusual circumstances to control some aspects of Classifier Client operation (available for Local Machine and Current User). The Registry Keys corresponding to these settings are described in Client Configuration [Registry Settings](#).
- **Manually Configurable:** [Settings to Auto Enable Microsoft Office Header / Footer controls](#) .

- **File Classifier:** Policy settings available for Local Machine and Current User that can be used to control aspects of File Classifier operation. These are only relevant if you are using File Classifier and are described in [File Classifier Registry settings](#) .
- **Management Agent:** Policy settings as described in the Classifier Management Agent Guide .

Note: OWA Classifier is configured per server, and all users of that OWA server will operate under the Configuration and Policy used by that server.

Note: OWA Classifier only changes its configuration after a restart. Thus after publishing an updated configuration, an IISRESET would be required to cause OWA Classifier to use that new configuration.

Note: If you are using Group Policy mechanisms, the Client operation relies on the Group Policy settings reaching the client. If the effects are not as expected you should run regedit and check that the relevant entries are present. Running GPUPDATE /Force may be of assistance. Check that the client machine is properly recognised in the domain - removing and re-introducing the client can resolve this issue.

Note: If a user is a member of more than one grouping you can use Group Policy Resultant set of Policy (RosP) to establish the configuration they will actually get (i.e. the Classifier Policy they will use).

Configuration Registry Search Algorithm

Each Classifier application / service context (e.g. Email or Office Classifier, OWA Classifier, etc.) looks for relevant configuration registry settings below various locations in the registry.

The locations searched vary with the application type and further details can be found under:

- [Client Registry Locations](#) (Email and Office Classifier, Notes Classifier, File Classifier, CAD Classifier, Power Classifier for files and Power Classifier for SharePoint).
- [Classifier Service Registry Locations](#) (OWA Classifier, Classifier Reporting, SharePoint Classifier, Classifier Management Agent).
- [Exchange Classifier Registry Locations](#) (Exchange Classifier).
- [Classifier Administration Registry Locations](#)

Client Registry Locations

Note: Power Classifier for files and Power Classifier for SharePoint also provide support for their own ServiceMode settings as documented in Power Classifier for Files Guide and Power Classifier for SharePoint Guide.

Note: Application specific settings can be found in similar locations with ConfigManager replaced by the application name (e.g. HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ **File Classifier**).

Note: For 64-bit machines that are to run 32-bit Classifier applications (e.g. Email Classifier and Office Classifier), item 3 above would need registry keys establishing under HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Boldon James\ConfigManager.

This covers the Classifier Applications:

- Email and Office Classifier
- Notes Classifier
- File Classifier
- CAD Classifier
- Power Classifier for files
- Power Classifier for SharePoint.

Each will look for the configuration registry settings:

| Setting (Examples) |
|----------------------------------|
| ClientServerOverride |
| LabelConfiguration |
| Policy |
| PolicyFileClassifier |
| PolicyOutlook |
| ServerFileSystemRoot |
| ServerRootType |
| UseWebServer etc |
| ValidityPeriod |

In the following registry locations, in the order shown:

HKEY_CURRENT_USER\SOFTWARE\Policies\Boldon James\ConfigManager .

HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager .

HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager .

Classifier Service Registry Locations

This topic covers the Classifier Applications: **OWA Classifier**, **Classifier Reporting**, **SharePoint Classifier**, **Classifier Management Agent**.

Note: If more than one service (**OWA Classifier**, **SharePoint Classifier**, etc.) is installed on a single system, they will all use the same registry settings. For these services, use of ServiceMode (items 1 or 2 below) is recommended as it ensures separation of registry key usage by these services and other Classifier applications (e.g. Email and Office Classifier) running on the same system.

Note: For 64-bit machines that are to run 32-bit Classifier applications (e.g. Management Agent), items 2 and 4 above would need registry keys establishing under:HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Boldon James\ConfigManager\ServiceMode or HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Boldon James\ConfigManager.

Each will look for relevant registry settings (**Blank** = Not used by that service):

| Setting | OWA | Reporting | SharePoint | ManagementAgent(32-bit) |
|--------------------------------------|-----|-----------|------------|-------------------------|
| LabelConfiguration | Y | Y | Y | |
| Policy | Y | Y | Y | |
| ServerFileSystemRoot | Y | Y | Y | Y |
| ServerRootType | Y | Y | Y | Y |
| UseWebServer etc. | | | | Y |

Below the following registry locations in the order shown:

HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager\ServiceMode

HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager\ServiceMode

HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager

HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager

Exchange Classifier Registry Locations

Exchange Classifier looks for the following configuration registry settings:

- [LabelConfiguration](#)
- [ServerFileSystemRoot](#)
- [ServerRootType](#)

Below is its own private **ExchangeServiceMode** branch and it searches the following locations in the order shown:

1. HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager\ExchangeServiceMode
2. HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager\ExchangeServiceMode

See [Exchange Classifier Guide > Classifier Routing Agent](#) for further information.

Classifier Administration Registry Locations

Classifier Administration uses the following registry location to store the last **published to** location:

HKEY_CURRENT_USER\SOFTWARE\Boldon James\ConfigManager.

Registry Key Requirements

The **Classifier Clients** (Email and Office Classifier, File Classifier etc.) rely on registry keys in order to work correctly. These registry keys tell the Classifier Clients where to find the configuration and which policy to use.

For more detailed information about registry keys and entries see the [Classifier Registry Keys Deployment and Troubleshooting Guide](#).

Environmental Requirements

- Windows OS architecture (32 or 64-bit)
- Client application architecture (32 or 64-bit)
- Configuration store type (AD, File Store or Web Server)
- Path / URL for the configuration (If using File Store or Web Server)
- [Classifier Configuration](#) Name
- Classifier [Policy](#) Name

Registry Setting Locations

Note: When the same key is specified in multiple locations the highest location from the list below will be used.

Note: * Locations including **'under the Policies subtree'** are typically set via Group Policy and should not be manually updated.

Classifier Registry Settings can be added to any of the following locations:

HKEY_CURRENT_USER\SOFTWARE\Policies\Boldon James\ConfigManager*

HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager*

HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager†

† When using 32-bit client applications on a 64-bit Operating System, the registry settings need to be placed under the equivalent Wow6432Node shown below:

HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Boldon James\ConfigManager

If a customer's environment consists of 64-bit OS machines running a 32-bit version of Microsoft Office, the following should be considered when deploying File Classifier 64-bit and Email and Office Classifier 32-bit. To ensure both applications are covered, the registry keys should be created under one of the three sets:

File Classifier will use the 64-bit location (1) and Email and Office Classifier will use location (2).

Note: The HKLM\SOFTWARE\Policies area is shared by both 32 and 64-bit applications.

1. HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager

OR

1. HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager
2. HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Boldon James\ConfigManager

OR

1. HKEY_CURRENT_USER\SOFTWARE\Policies\Boldon James\ConfigManager
2. HKEY_CURRENT_USER\SOFTWARE\WOW6432Node\Policies\Boldon James\ConfigManager

You can generally set up relevant entries under any of the supported registry locations. However, the algorithm expects to find the following as 'pairs' under a sub-tree:

- Label Configuration + Policy
- ServerRootType + ServerFileSystemRoot (if relevant)

| Name | Type | Value |
|----------------------|-------------------------|---|
| LabelConfiguration | REG_SZ | The name that was given to the label configuration in the Administration Console. |
| Policy | REG_SZ | The name that was given to the policy in the Administration Console. |
| ServerFileSystemRoot | REG_SZ | <p>Note: Only required if ServerRootType = 0</p> <p>The path to the location that holds the Classifier Configuration folder.</p> <p>Note: For remote locations, this value should be specified as a full UNC path, rather than using Drive letters.</p> |
| ServerRootType | DWORD (32-bit) Value | <p>Note: This is only required if the deployment is using File Store or Active Directory (i.e. this setting is not required if the deployment is using Web Config).</p> <p>0 The configuration is held in File Store (ServerFileSystemRoot key is then significant).</p> <p>1 The configuration is held in Active Directory.</p> |

Required Registry Entries to Configure Classifier (Minimum Set)

The registry entries required by Classifier depend on the desired configuration. Classifier has a small set of keys which are needed and has a further set of keys to alter/override the normal behaviour and enable optional features.

The registry entries required to configure Classifier vary depending on the type configuration store in use, the minimum set of required keys are shown below:

- **Active Directory:** Defines the users and computers inside the organisation. The database can be extended to store the Classifier configuration.
- **File Store:** Any readable file system, network or local where the Classifier software is running can retrieve the configuration files.
- **Web Config:** Classifier configuration can be retrieved from a password-protected zip file stored on a web server or a file store.

Active Directory

| Name | Type | Value |
|--------------------|-----------|---|
| ServerRootType | REG_DWORD | <p>Note: This is only required if the deployment is using File Store or Active Directory (i.e. this setting is not required if the deployment is using Web Config).</p> <p>1 The configuration is held in Active Directory.</p> |
| LabelConfiguration | REG_SZ | Service Mode Label Configuration Name The name of |

| Name | Type | Value |
|--------|--------|--|
| | | the label configuration to use. e.g. Classifier test. |
| Policy | REG_SZ | The name of the Classifier policy to use in the Label Configuration. |

File Store

| Name | Type | Value |
|----------------------|-----------|---|
| ServerRootType | REG_DWORD | Service Mode Configuration Distribution Server Type Note: This is only required if the deployment is using File Store or Active Directory (i.e. this setting is not required if the deployment is using Web Config). 0 The configuration is held in File Store (ServerFileSystemRoot key is then significant). |
| ServerFileSystemRoot | REG_SZ | Service Mode File-Based Configuration Location Note: Only required if ServerRootType = 0 The path to the location that holds the Classifier Configuration folder. Note: For remote locations, this value should be specified as a full UNC path, rather than using Drive letters. |
| LabelConfiguration | REG_SZ | Service Mode Label Configuration Name The name of the label configuration to use. e.g. Classifier test. |
| Policy | REG_SZ | The name of the Classifier policy to use in the Label Configuration. |

Web Server

| Name | Type | Value |
|---------------------|-----------|---|
| UseWebServer | REG_DWORD | 0 (Default): Disabled. The relevant applications will retrieve the Master Configuration according to other configuration settings (e.g. File Store). 1 Web config will be enabled. The location is defined by the WebServerConfigFile and other settings defined in this table. |
| WebServerConfigFile | REG_SZ | A valid URL to the file containing the zipped version of the Master Configuration on your web server, e.g. http://yourserver/classifier/config.zip or file://\localhost\c\$\classifier\config.zip or file://\yourserver\sharedfolder\config.zip |

| Name | Type | Value |
|--------------------|--------|--|
| WebConfigKey | REG_SZ | The string returned by Classifier Administration when the Web Config is published. |
| WebClientTimeout | DWORD | An optional setting only needed in unusually slow network environments, a DWORD value which specifies the number of milliseconds allowed before the web request for Classifier configuration times out. 0 (Default): The relevant network default timeout applies (e.g. 20 seconds). >0 The number of milliseconds allowed before the attempt to retrieve the Master Configuration times out. |
| LabelConfiguration | REG_SZ | The name of the label configuration to use. e.g. Classifier test. |
| Policy | REG_SZ | The name of the Classifier policy to use in the Label Configuration. |

Additional Considerations

- **Spelling Mistakes:** Make sure both the name and value of each registry key is spelt correctly. The Classifier Support Tool can be used to quickly and easily verify this.
- **Permissions:** Ensure the users have read access to the configuration folder, this can be checked by navigating to the value from **ServerFileSystemRoot** or **WebServerConfigFile** for File Store and Web Server respectively.
- **Competing Registry Locations :** If the registry keys appear correct with no spelling mistakes and users are able to navigate to the configuration another possibility is conflicting keys in another location. To ensure this is not the case, first remove all Classifier settings and then manually re-add the required keys to one location.
- **Verification :** After verifying the registry keys are correct, restart all Office applications. If the issue has not been resolved then the Classifier add-in may not be installed, the incorrect version may be installed (32 vs 64-bit) or, the add-in may be disabled. The configuration cache should be cleared.

Set The Registry Keys Directly

The screen shot below shows an example (from a 64-bit environment) of the values you need to establish if you are setting the keys for end users that control access to the Classifier configuration information under

HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager

The values will of course depend on your local environment and whether you are using Active Directory or File Store as the Master Configuration location, and whether Classifier Management Agent is deployed. See description in "[Label Configuration Registry Settings](#) " on [page 476](#) for more information.

For more detailed information about registry keys and entries see the [Classifier Registry Keys Deployment and Troubleshooting Guide](#).

Note: For Management Agent, OWA Classifier and SharePoint Classifier it is recommended that registry entries are established under **ServiceMode** (see [Label Configuration Registry Settings](#)).

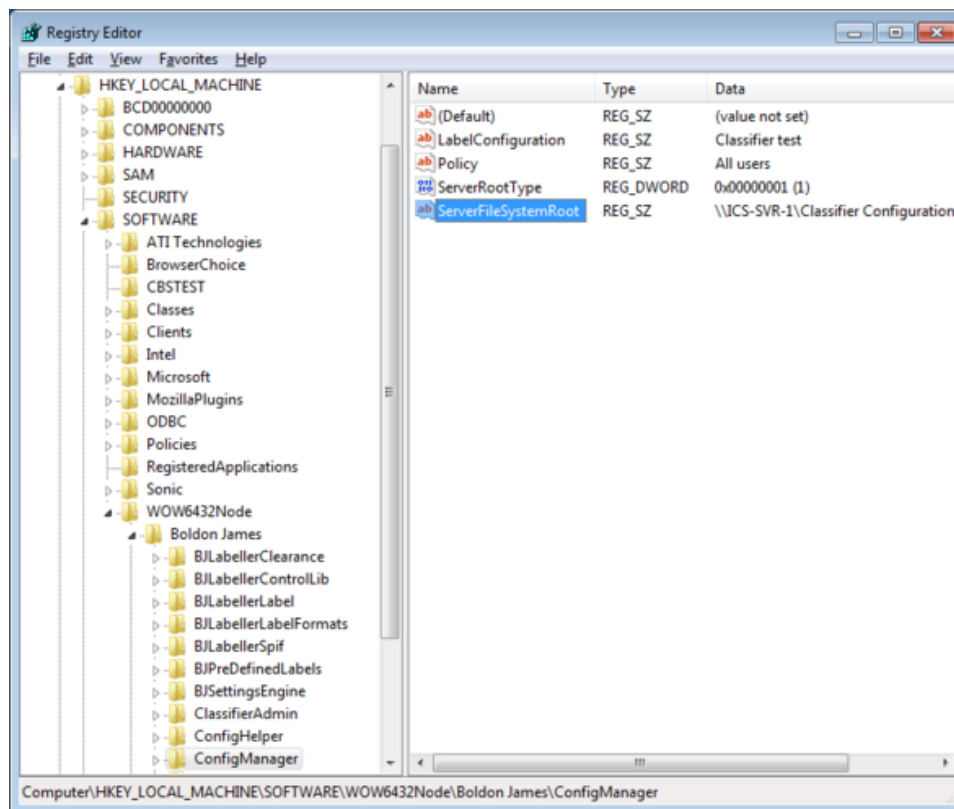


Figure: Local Machine Registry Keys.

Add Classifier Registry Keys

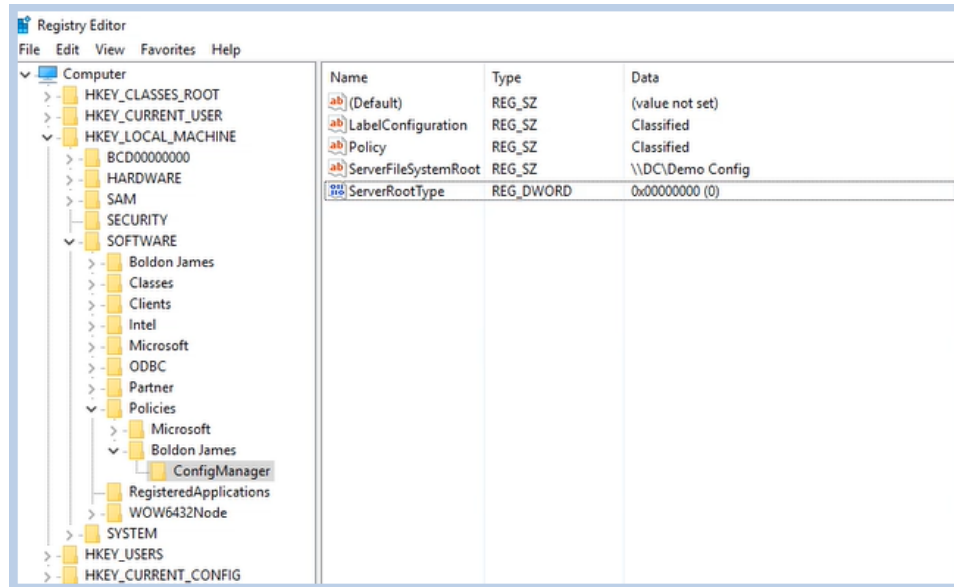


Figure: Adding Registry Keys under ConfigManager.

To add Classifier registry keys:

1. In the Windows Start field enter **Registry Editor** . A Registry Editor box should appear.
2. In the Registry Editor, go to **HKEY_LOCAL_MACHINE>SOFTWARE>Policies>Microsoft** .
3. Right-click over the registry name and select **New>Key** .
4. Enter the name you will use, (for example Boldon James).
5. Right-click over the registry name and select **New>Key** .
6. Enter the name, **ConfigManager** .
7. Right-click over ConfigManager and in the menu, select **New>Key** .
8. Enter the name as **LabelConfiguration** and the data as **Classified** .
9. Right-click over LabelConfiguration and in the menu, select **New>String Value**.
10. Enter **Policy** then right-click over it and in the menu, select **Modify** and enter the Value data as **Classified**.
11. Right-click over Policy and in the menu, select **New>String Value**.
12. Enter **ServerFileSystemRoot** then right-click over it and in the menu, select **Modify** and enter the Value data as **\\DC\Config**.
13. Right-click over **ServerFileSystemRoot** and in the menu, select **DWORD (32-bit) Value** . This will fill in the Type column with REG_DWORD.
14. Enter **SystemRootType** .

Set The Registry Keys Using Group Policy

This assumes that your Group Policy has been extended as described in [Applying the supplied ADM/ADMX/ADML files](#) .

The following types of Group Policy settings are provided for Classifier:

- **Label Configuration Settings:** Are described in [Label Configuration Registry Settings](#) .
 - A sub group of settings relating to **Service Mode** are only available for the Local Machine.
- **Client Configuration Settings:** Are described in [Client Configuration Registry Settings](#) .
- **File Classifier Settings:** Are only relevant if you are using File Classifier. They are described in [File Classifier Registry settings](#) .
- **Management Agent Settings:** Are only relevant if you are deploying the Classifier Management agent. These settings are described in the **Management Agent Guide** .

The mechanisms are the same for each of the above. The examples below cover the [Label Configuration settings](#) as these are the most likely to be used.

To set the registry keys using Group Policy:

1. Firstly, define the settings that are to be common to all users of a PC (i.e. HKEY_Local_Machine).
2. **For 2003;** from **Active Directory Users and Computers** select the **domain** (e.g. CLASSIFIER.TEST) and select **Properties** from the context menu
3. Select the **Group Policy** tab.
4. For 2010; use **Group Policy Management Editor MMC** to get directly to the tree.
5. Select the **Default Domain Policy** entry and click **Edit** .
6. Select **Computer Configuration / (Policies /) Administrative Template / (Classic Administrative Templates) / Boldon James / Label Configuration** which will present the following settings:

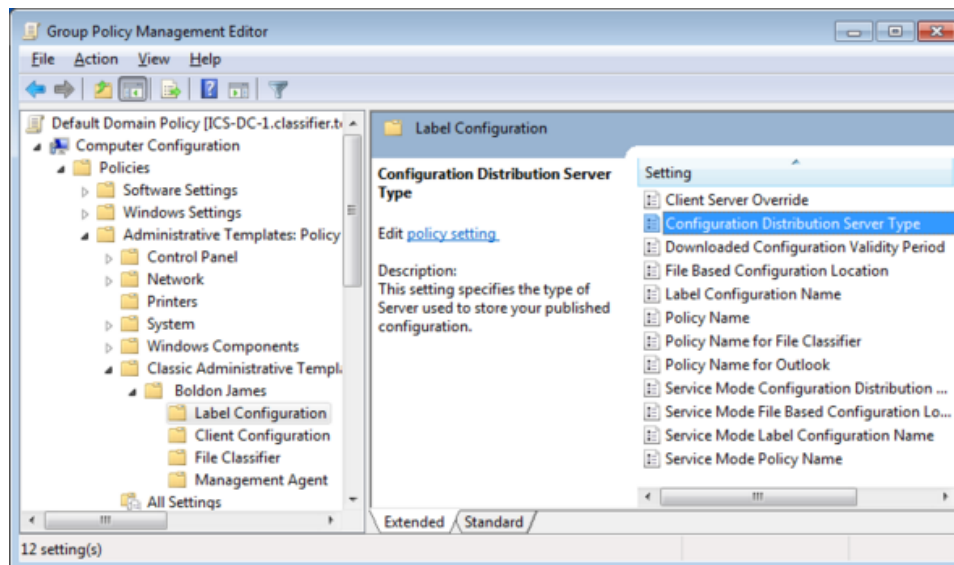


Figure: Set HKLM Group Policy Settings.

7. Select **Configuration Distribution Server Type** and choose **Properties (2003)** or **Edit policy setting (2010)**.

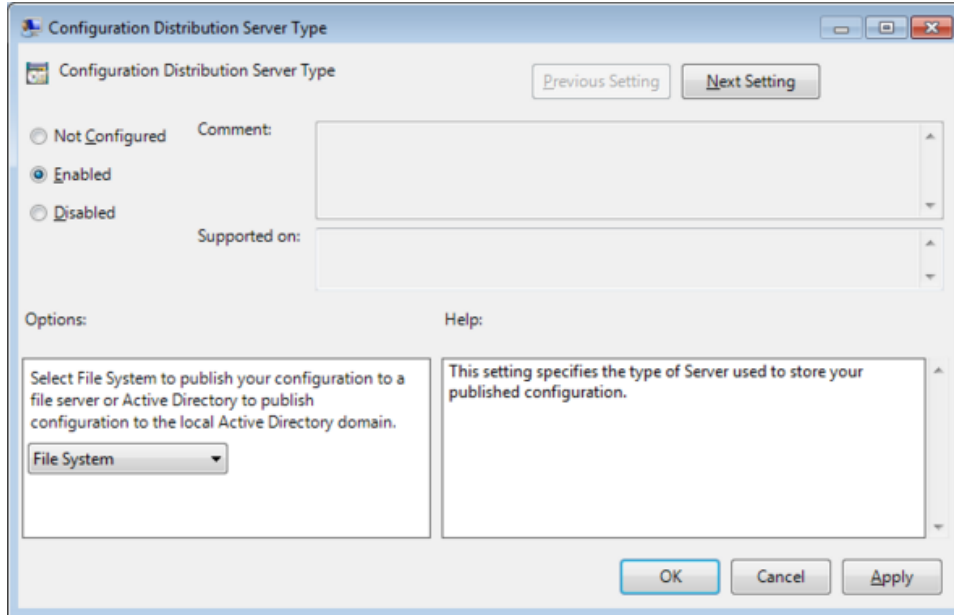


Figure: Configuration Distribution Server Type.

8. Ensure that the setting is **Enabled** , and choose which method you wish to use (**File System** or **Active Directory**). Click **OK** .
9. If you choose **File System** you will then have to define the (shared) location of the configuration files by selecting **File Based Configuration Location** , choosing **Properties** and then entering the network path to the location (e.g. **\\ICS-SVR-1\Classifier Configuration**) as per the example below.

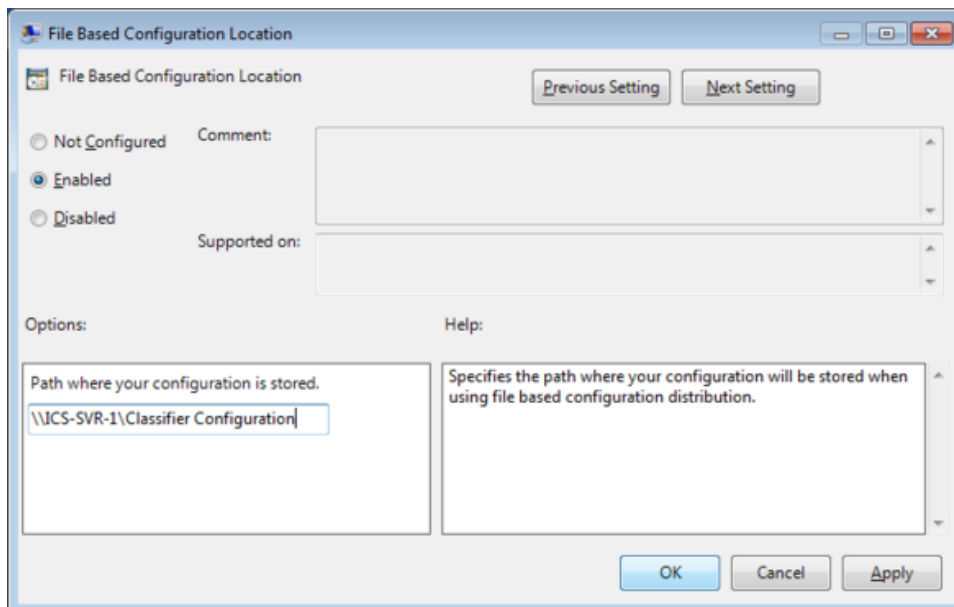


Figure: Define Master Configuration Location.

10. Secondly, apply the settings that may vary per user.
11. Select **User Configuration / Administrative Template / (Classic Administrative Templates) / Boldon James / Label Configuration** which will present the following settings:

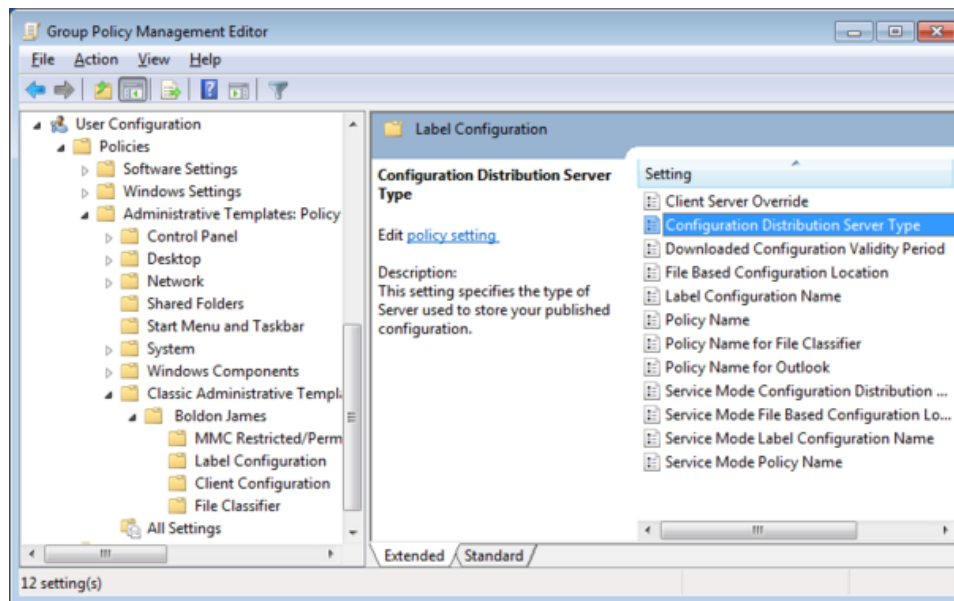


Figure: Set HKCU Group Policy Settings.

12. Select **Label Configuration Name** and choose **Properties** . Ensure that it is **Enabled** and enter the name of your Configuration (e.g. **Classifier test**). Click **OK** .
13. Select **Policy Name** and choose **Properties** . Ensure that the setting is **Enabled** and enter the name of the policy applicable (e.g. **All Users**). Click **OK** .
14. If you need to set the **Configuration Validity Period** - described in [Label Configuration Registry Settings](#) , then select **Downloaded Configuration Validity Period** and choose **Properties** .
15. Ensure that it is **Enabled** and enter the required validity period in hours. Setting a value of **0 (zero)** will restore default operation so that the Configuration validity is checked each time a Classifier enabled application starts. Click **OK** .

Applying Supplied ADM/ADMX/ADML Files

[Classifier Administration](#) supplies various .ADM and ADMX/ADML files available from the sub-folder **Classifier Group Policy Templates** beneath the **Classifier Administration** folder in the **Base Bundle** . These can be used to extend the group policy settings. The steps below provide an example of how to extend Group Policy settings using the supplied files.

ADM Style Files:

- **ClassifierConfig.ADM** and **ClassifierConfigPerUser.ADM** .
- **FileClassifierConfig.ADM** and **FileClassifierConfigPerUser.ADM** (only relevant if you are using File Classifier, but benign if installed and not used).

Note: If when upgrading to a later version of Classifier Administration the settings supported by an ADM file have been extended, you will have to Remove the old template before adding the new ADM file.

Note: The precise steps will depend on your environment.

To apply supplied ADM/ADMX/ADML files:

1. Navigate to **Computer Configuration**.
2. For Windows Server 2003 this may be from Active Directory Users and Computers; select **CLASSIFIER.TEST** and select **Properties** from the context menu, then select the **Group Policy** Tab; Select the **Default Domain Policy** entry and click **Edit**.
3. For **Windows Server 2008** you can use the **Group Policy Management Editor** MMC snap-in to get directly to the target tree. Expand **Domains** and then expand the **domain** (e.g. CLASSIFIER.TEST) and select **Default Domain Policy** below that
4. Choose **Edit...** from the context menu.

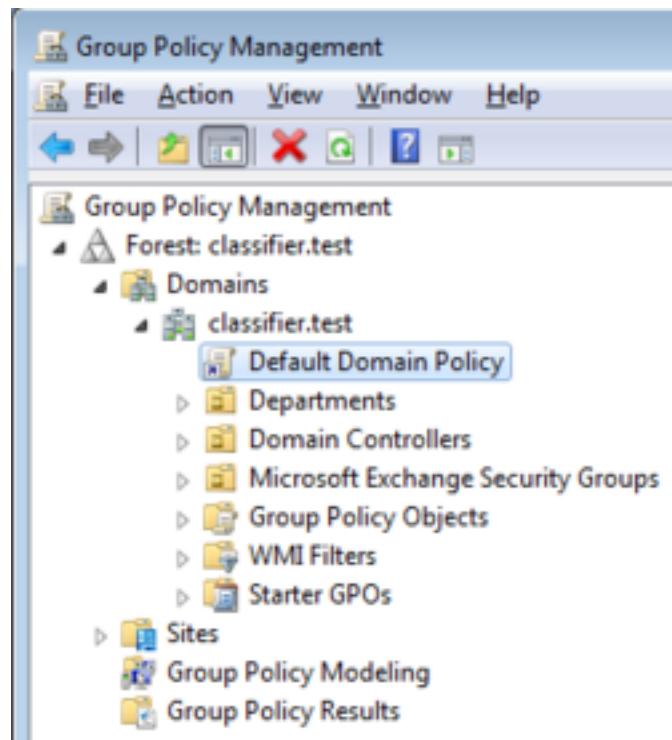


Figure: Group Policy Management

5. Select **Computer Configuration/(Policies/) Administrative Templates** and select **Add/Remove Templates** from the context menu.
6. Select **Add** and then browse to the relevant install location (e.g. **Program Files\Boldon James\Classifier Administration**).
7. Select the relevant **ADM files** and click **Open** followed by **Close** . The files will be added which will add new entries below both the Computer Configuration and User Configuration Administrative Template nodes.

ADMX/ADML style files (provided in pairs)

- **ClassifierManagementAgent.admx** and **ClassifierManagementAgent.adml** (these are only relevant if you are using the Classifier Management Agent, but benign if applied and not used).
8. Copy the pair of files from the **Classifier Group Policy Templates** folder:
 - **ClassifierManagementAgent.admx** to **Windows\PolicyDefinitions**
 - **..\en-US\ClassifierManagementAgent.adml** to **Windows\PolicyDefinitions\en-US**
 9. Start the **Group Policy Management** tool.

Once the ADM/ADMX/ADML files have been applied, the various settings can be configured through the Group Policy Management Editor:

9. Select a group policy object and choose **Edit...** from the context menu.
10. Open the relevant branch in the tree e.g. one of:
 - **..\Classic Administration (ADM)\Boldon James\...**
 - **..\Administrative Templates: Policy definitions..\Boldon James\Classifier Management Agent** in the screen shot below:

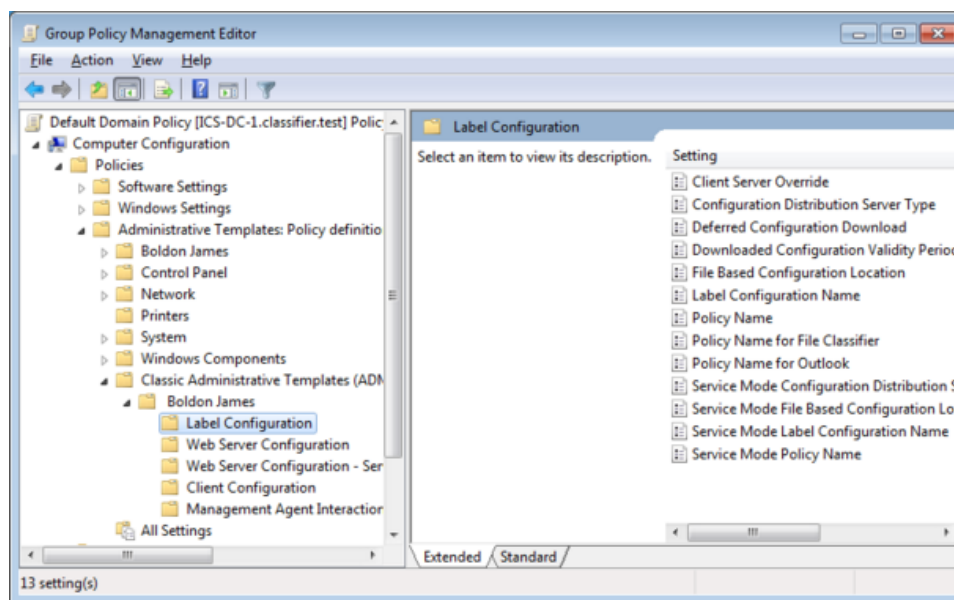


Figure: Group Policy Management Editor.

11. Select the relevant sub-tree and configure the settings as required.

Registry Keys Set By Group Policy

The following keys (HKEY_LOCAL_MACHINE) relate to Configuration location, the Configuration and Policy.

Note: It is recommended that registry entries are established under **ServiceMode** ([Label Configuration Registry Settings](#)) for Management Agent, OWA Classifier, SharePoint Classifier.

Note: A full description of all the Registry settings relevant only to the Management Agent can be found in the Management Agent Guide.

The example below shows entries under ...**Policies\Boldon James\ConfigManager**. You can generally set up relevant entries under any of the supported registry locations and the precedence defined in [Configuration Registry Search Algorithm](#) applies if entries appear in more than one sub-tree. However, the algorithm expects to find the following as 'pairs' under a sub-tree:

- Label Configuration + Policy
- [ServerRootType](#) + [ServerFileSystemRoot](#) (if relevant)

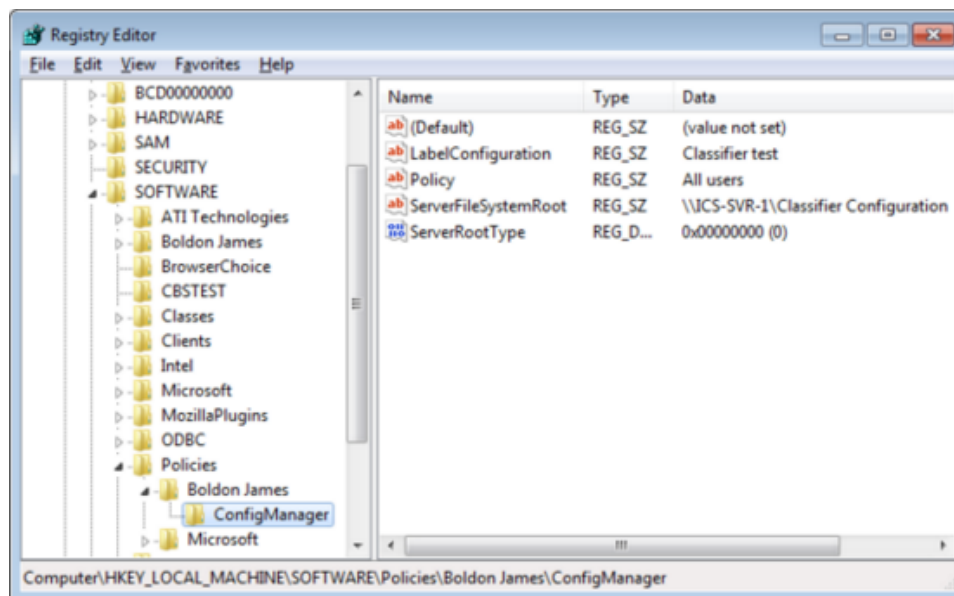


Figure: Registry Keys: [Configuration Settings](#).

Label Configuration Registry Settings

These registry settings are used to indicate the location from which a Classifier application should retrieve its Classifier Configuration, the applicable Label Configuration and the Policy that it will use. The Registry settings are defined below under [Registry Settings](#) .

Certain Classifier applications are more suited to a Service style of operation and a set of equivalent keys is defined below under [Service Mode Registry Settings](#) .

Classifier applications use a common precedence algorithm to search for their Registry settings below HKEY_LOCAL_MACHINE and HKEY_CURRENT_USER. The locations and the precedence algorithm are described in [Configuration Registry Search Algorithm](#) .

The settings can be established either directly, or using Group Policy mechanisms as described in:

- [Set the Registry Keys Directly](#)
- [Set the Registry Keys using Group Policy](#)

Further details can be found in the sub-topics below:

- [Registry Settings](#)
- [Service Mode Registry settings](#)
- [Web Host Settings](#)

Registry Settings

The Entries (and Policy setting name) listed below are established under ...**Boldon James\ConfigManager** . For more detailed information see the **Classifier Registry Keys Deployment and Troubleshooting Guide**.

| Name | Type | Value |
|---|-----------|--|
| ClientServerOverride | REG_DWORD | Normally Classifier client applications (e.g. Email and Office Classifier) retrieve their configuration from the designated location (AD or file store) AND save a copy locally to facilitate offline operation. In some environments, this can be inappropriate. This setting can be used to inhibit the local storage of the configuration. 0 (Default if not configured) The standard operation applies (local storage of the configuration). 1 The configuration is not stored locally. |
| CommonConfigFolder (Configuration download folder) | REG_DWORD | This item is only applicable if you are using the Classifier Management Agent and is documented in the Classifier Management Agent Guide. |
| DeferredConfigDownload | REG_DWORD | This setting controls configuration download behaviour for Client mode only. 0 (Default if not configured) Immediate - if an updated configuration is detected by a new instance of a client application, the download completes before the application proceeds. 1 Deferred - if an updated configuration is detected by a new instance of a client application, the application does not wait for the new configuration download to complete. Instead, the application proceeds using the existing configuration and the configuration download proceeds as a separate thread. |
| LabelConfiguration | REG_SZ | This setting controls configuration download behaviour for Client modes. The default is to download server configuration immediately. |
| Policy | REG_SZ | The name of the policy in the configuration that this user should use. E.g. "All users". |

| Name | Type | Value |
|---|-----------|---|
| PolicyFileClassifier | REG_SZ | <p>File Classifier Policy Name The name of the policy in the configuration that this user should use when running File Classifier. All other applications will use the value defined by Policy. The entry, like in PolicyOutlook, will be found in the same registry key as the Policy entry. It is an optional setting; if it is not present, then the value of the Policy entry is used. There are four options: HKEY_LOCALMACHINE\SOFTWARE\Policies\Boldon James\ConfigManager</p> <p>HKEY_CURRENT_USER\SOFTWARE\Policies\Boldon James\ConfigManager</p> <p>HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager</p> <p>HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Boldon James\ConfigManager (for 32-bit apps on a 64-bit OS).</p> <p>Note: Only required if there is a need for File Classifier to operate under a different policy to that used by other classifier applications.</p> |
| ServerFileSystemRoot | REG_SZ | <p>Note: Only required if ServerRootType = 0</p> <p>The path to the location that holds the Classifier Configuration folder.</p> <p>Note: For remote locations, this value should be specified as a full UNC path, rather than using Drive letters.</p> |
| ServerRootType | REG_DWORD | <p>This is only required if the deployment is using File Store or Active Directory (i.e. this setting is not required if the deployment is using Web Config).</p> <p>0 The configuration is held in File Store (ServerFileSystemRoot key is then significant).</p> <p>1 The configuration is held in Active Directory.</p> |
| ValidityPeriod (Downloaded Configuration Validity Period) | REG_DWORD | <p>This setting also works with UseWebConfig.</p> <p>0 The centrally held Configuration (held in File Store or AD) is checked for validity at the start of each session.</p> |

| Name | Type | Value |
|--------------------|-----------|--|
| | | <p>This is the default assumed if the entry is not set.</p> <p>> 0 The time in hours for which the local (cache) copy of the Configuration is assumed to be valid. No further downloads of the Configuration will be performed until the ValidityPeriod has expired, even if the central version is updated. This setting can be useful for some workstation environments (e.g. due to the network speed the time to check the Configuration validity at the start of each application becomes noticeable and annoying). It should be used with care as it may result in users operating with out of date configurations.</p> |
| UseManagementAgent | REG_DWORD | <p>Note: This entry is only supported under HKEY_LOCAL_MACHINE.</p> <p>This entry controls whether the Classifier Client applications (Email and Office Classifier / File Classifier (3.10 or later)) use Classifier Management Agent (see Classifier Management Agent Guide for further details).</p> <p>0 (Disabled - the default if not configured). Classifier Client applications will continue to retrieve configuration directly and will not register with the Management Agent.</p> <p>1 (Enabled) Classifier Client applications will use the Management Agent:</p> <p>Each Classifier client will obtain its configuration via the Management agent and not check for a more recent configuration as described in Management Agent Guide > Configuration update – a single point of contact.</p> <p>The Email and Office Classifier clients (not File Classifier) will register with the Management Agent as part of Client Application Monitoring.</p> |

Service Mode Registry Settings

The **Keys** (and **Policy setting name**) listed below are established under ...**Boldon James\ConfigManager\ServiceMode**. If defined these are used by the Management Agent, OWA Classifier, Classifier Add-in for OWA, SharePoint Classifier, and the Mobile Classifier in preference to any other settings that

may be defined. Use of Service Mode is recommended for these components. Under ServiceMode the configuration is retrieved from the designated Master location - no local cache is maintained. These items are not supported for PerUser policy settings.

| | |
|--------------|---|
| Entry | \ServerRootType (Service Mode Configuration Distribution Server Type) |
| Type | REG_DWORD |
| Data | 0 Configuration is held in File Store (ServerFileSystemRoot key is then significant) 1 Configuration is held in Active Directory |

| | |
|--------------|--|
| Entry | \ServerFileSystemRoot (Service Mode File Based Configuration Location) |
| Type | REG_SZ |
| Data | (Only required if ServerRootType = 0) Path to the location that holds the Classifier Configuration folder |

| | |
|--------------|---|
| Entry | \LabelConfiguration (Service Mode Label Configuration Name) |
| Type | REG_SZ |
| Data | The name of the label configuration to use. e.g. Classifier test. Only applicable to some applications. |

| | |
|--------------|--|
| Entry | \ Policy (Service Mode Policy Name) |
| Type | REG_SZ |
| Data | The name of the policy in the configuration that this user should use. E.g. "All users". Only applicable to some applications. |

Web Host Settings

The **Keys** (and **Policy setting name**) listed below are required if you wish either Classifier Clients or Classifier Management Agent to retrieve the Master Configuration from a Web location. See also [Create Web Configuration](#).

For more detailed information about registry keys and entries see the **Classifier Registry Keys Deployment and Troubleshooting Guide**.

Two sets of settings are defined which should be established under ...**Boldon James\ConfigManager\ServiceMode** for Management Agent use, or under ...**Boldon James\ConfigManager** for Classifier Clients usage. The names presented through the Policy Manager interfaces differ (e.g. Service Mode Use Web Server for the Management Agent vs Use Web Server for direct client use).

| Name | Type | Data |
|--------------------|-----------|------------------------|
| (Default) | REG_SZ | (value not set) |
| CommonConfigFolder | REG_SZ | |
| LabelConfiguration | REG_SZ | Company Name |
| Policy | REG_SZ | Company Name Policy V2 |
| ServerRootType | REG_DWORD | 0x00000001 (1) |
| UseManagementAgent | REG_DWORD | 0x00000001 (1) |

Figure: The UseManagementAgent registry entry setting.

If the client [UseManagementAgent](#) registry entry is set, then any client related settings are ignored.

| Name | Type | Data |
|--------------------|-----------|------------------------|
| (Default) | REG_SZ | (value not set) |
| CommonConfigFolder | REG_SZ | |
| LabelConfiguration | REG_SZ | Company Name |
| Policy | REG_SZ | Company Name Policy V2 |
| ServerRootType | REG_DWORD | 0x00000001 (1) |
| UseWebServer | REG_DWORD | 0x00000001 (1) |

Figure: The UseWebServer registry entry setting.

If the Management Agent is not in use, then these settings can be used to direct the clients to retrieve the Master Configuration from the designated web location.

| Name | Type | Value |
|---------------------|-----------|--|
| UseWebServer | REG_DWORD | <p>0 (Default): Disabled. The relevant applications will retrieve the Master Configuration according to other configuration settings (e.g. File Store).</p> <p>1 Web config will be enabled. The location is defined by the WebServerConfigFile and other settings defined in this table.</p> |
| WebServerConfigFile | REG_SZ | <p>A valid URL to the file containing the zipped version of the Master Configuration on your web server, e.g.</p> <p>http://yourserver/classifier/config.zip</p> <p>or</p> <p>file://\localhost\c\$\classifier\config.zip</p> <p>or</p> <p>file://\yourserver\sharedfolder\config.zip</p> |

| Name | Type | Value |
|--------------------------------|--------|--|
| WebConfigKey | REG_SZ | The string returned by Classifier Administration when the Web Config is published. |
| WebClientTimeout | DWORD | An optional setting only needed in unusually slow network environments, a DWORD value which specifies the number of milliseconds allowed before the web request for Classifier configuration times out. 0 (Default): The relevant network default timeout applies (e.g. 20 seconds). >0 The number of milliseconds allowed before the attempt to retrieve the Master Configuration times out. |
| WebServerCertificateValidation | DWORD | Determines whether Classifier will attempt to check for a valid SSL cert (HTTPS). 0 Ignore errors. Certificate validation errors on https sites will be ignored. 1 (Default if not defined) Stop if errors. The download will fail if https sites return errors. |
| LabelConfiguration | REG_SZ | The name of the label configuration to use. e.g. Classifier test. |
| Policy | REG_SZ | The name of the Classifier policy to use in the Label Configuration. |

Client Configuration Registry Settings

The following Registry settings are available that can be used to control some aspects of Classifier Client operation (available for **Local Machine** and **Current User**). The settings can be established either directly, or using the **Group Policy Option** mechanisms as described in:

- [Set the Registry Keys Directly](#)
- [Set the Registry Keys using Group Policy](#)

Note: For more information, please see the Classifier Registry Keys Deployment and Troubleshooting Guide.

Client Configuration keys can be used in unusual circumstances to override Classifier configuration settings, and can be defined under:

HKEY_LOCAL_MACHINE / HKEY_CURRENT_USER\SOFTWARE\Boldon James\Classifier:

| Registry Entries Name | Type | Description |
|---------------------------------|-----------|--|
| AllowClassificationHistoryClear | REG_DWORD | Allow User to clear Classification History |

| Registry Entries Name | Type | Description |
|---------------------------------|-----------|--|
| | | <p>0 The user is not allowed to Clear Classification History.</p> <p>1 (default) The user is allowed to clear Classification History.</p> |
| DisplayContentCheckProgress | REG_DWORD | <p>0 Progress information is not displayed whilst performing Content Checks.</p> <p>1 (default) Progress information is displayed whilst performing Content\ Checks.</p> <p>Prior to Classifier 3.14, the progress information was shown throughout the Content Check which could sometimes cause flickering. From 3.14, the progress indicator is only shown during the (possibly lengthy) index building activity.</p> |
| HWMCheckEmbeddedOfficeDocuments | REG_DWORD | <p>(Check high-water mark in embedded Office documents)</p> <p>Note: Only applicable when high-water mark checks are performed.</p> <p>0 (Default): Documents embedded within Office documents will not be included in high-water mark checks. 1 Documents embedded within Office documents will be included in high-water mark checks.</p> |
| IgnorePasswordProtectedZips | REG_DWORD | <p>(Ignore Password Protected Zip Files)</p> <p>Note: Only applicable when high-water mark checks are performed. It overrides any Warn if file contents cannot be accessed setting.</p> <p>Not configured - The Warn if file contents cannot be accessed setting will take effect.</p> <p>0 The Warn if file contents cannot be accessed setting will take effect. 1 Any failures to access zip files (or files in zip files) during high-water mark checking are ignored.</p> |
| SetOutlookResiliency | REG_DWORD | <p>1 Outlook Resiliency Keys will be enabled.</p> <p>0 Outlook Resiliency Keys will be disabled/inactive.</p> <p>The SetOutlookResiliency setting creates a set of Registry keys and values that will configure Outlook Resiliency for the Classifier Add-in.</p> <p>By default, Outlook will abide by the following performance checking criterion:</p> <p>Add-ins should not take an average of more than 500 ms to start, over 5 successive occasions.</p> <p>Outlook will, therefore, disable any Add-in that is deemed not</p> |

| Registry Entries Name | Type | Description |
|-----------------------------------|-----------|---|
| | | <p>to fulfil this performance criterion. To prevent the Email Classifier Add-In from being disabled in Outlook, Classifier's SetOutlookResiliency Registry option can be configured to prevent the Add-in from being disabled at start-up.</p> <p>This setting can be configured under either of the following Registry locations:</p> <p>HKEY_CURRENT_USER\SOFTWARE\Boldon James\Classifier</p> <p>HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\Classifier</p> <p>If this setting is configured, it will add and configure the following Registry keys under the HKEY_CURRENT_USER\Software\Microsoft\Office\<version>\Outlook\Resiliency location:</p> <ul style="list-style-type: none"> • DoNotDisableAddinList • NotificationReminderAddinData <p>Note: For further information about Office Resiliency see the Classifier Registry Keys Deployment and Troubleshooting Guide.</p> |
| ShowNotificationMessagesAtStartup | REG_DWORD | <p>(Show Notification Messages At Startup)</p> <p>This can be used to control whether the Application Test Mode warning dialog (see Publish Test Configuration) appears.</p> <p>Not configured: The default behaviour applies and the Application Test Mode warning dialog appears.</p> <p>0 The Application Test Mode warning dialog is not shown. You still cannot exit Test Mode if Classifier applications are active. 1 The Application Test Mode warning dialog is shown.</p> |

Settings To Auto Enable Microsoft Office Header / Footer Controls

The following **Registry Settings** are available that can be used to automatically enable certain Microsoft Office application settings pertinent to Header / Footer operation (available for **Local Machine** and **Current User**).

These settings can be established directly ([Set the Registry Keys Directly](#)); the delivered Group Policy templates do not include these settings.

The settings can be established under:

HKEY_LOCAL_MACHINE/HKEY_CURRENT_USER\SOFTWARE\Boldon James\Classifier.

For more detailed information about registry keys and entries see the **Classifier Registry Keys Deployment and Troubleshooting Guide**.

The Registry Keys corresponding to these settings are:

| Name | Type | Value |
|--------------------------------------|-----------|---|
| ExcelAutoEnableDifferentFirstPage | REG_DWORD | <p>0 (Default) Feature is disabled.</p> <p>1 Auto enables 'Different First Page' header/footer on the first worksheet of a workbook.</p> <p>2 Auto enables 'Different First Page' header/footer on all worksheets of a workbook.</p> |
| ExcelAutoEnableDifferentOddEvenPages | REG_DWORD | <p>0 (Default) Feature is disabled.</p> <p>1 Auto enables 'Different Odd/Even Pages' header/footer on the first worksheet of a workbook.</p> <p>2 Auto enables 'Different Odd/Even Pages' header/footer on all worksheets of a workbook.</p> |
| PowerPointSlideMarkings | REG_DWORD | <p>0 (Default) Classifier footer markings will be added to all the slides in the presentation.</p> <p>1 Classifier markings footer will be added to the First slide only of the presentation.</p> <p>2 Classifier markings footer will be added to the Title slides only of the presentation.</p> <p>3 Classifier markings footer will be added to all slides Except the first slide of the presentation.</p> <p>4 Classifier markings footer will be added to all slides Except title slides of the presentation.</p> <p>5 Classifier markings footer will be added to None of the slides of the presentation.</p> |
| WordAutoEnableDifferentFirstPage | REG_DWORD | <p>0 (Default) Feature is disabled.</p> <p>1 Auto enables the 'Different First</p> |

| Name | Type | Value |
|-------------------------------------|-----------|--|
| | | Page' header/footer setting for first section of a document. 2 Auto enables the 'Different First Page' header/footer setting on all sections of a document. |
| WordAutoEnableDifferentOddEvenPages | REG_DWORD | 0 (Default) Feature is disabled. 1 Auto enables the 'Different Odd/Even Pages' header/footer setting on all sections of a document. |

File Classifier Registry Settings

These settings (available for Local Machine and Current User) can be used to control aspects of File Classifier operation.

The settings can be established either directly, or using Group Policy Option mechanisms as described in:

- [Set the Registry Keys Directly](#)
- [Set the Registry Keys using Group Policy](#)

The settings can be established under:

HKEY_LOCAL_MACHINE/HKEY_CURRENT_USER\SOFTWARE\Boldon James\File Classifier.

For more detailed information about registry keys and entries see the **Classifier Registry Keys Deployment and Troubleshooting Guide**.

The Registry Keys corresponding to these settings are:

| Name | Type | Value |
|----------------------|--------|--|
| PolicyFileClassifier | REG_SZ | File Classifier Policy Name The name of the policy in the configuration that this user should use when running File Classifier. All other applications will use the value defined by Policy . The entry, like in PolicyOutlook, will be found in the same registry key as the Policy entry. It is an optional setting; if it is not present, then the value of the Policy entry is used. There are four options: HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Boldon James\ConfigManager HKEY_CURRENT_USER\SOFTWARE\Policies\Boldon James\ConfigManager |

| Name | Type | Value |
|------------------------|-----------|---|
| | | <p>HKEY_LOCAL_MACHINE\SOFTWARE\Boldon James\ConfigManager</p> <p>HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Boldon James\ConfigManager (for 32-bit apps on a 64-bit OS).</p> <p>Note: Only required if there is a need for File Classifier to operate under a different policy to that used by other classifier applications.</p> |
| EnableFileLabelCaching | REG_DWORD | <p>Not currently supported by FileClassifierConfig.ADM</p> <p>When File Classifier is invoked in Windows Explorer to present Icon Overlays indicating the label, File Classifier has to open each item to determine the label, and this can take a noticeable amount of time if large files are involved.</p> <p>This EnableFileLabelCaching option can be used to cause the File Classifier to store a copy of the label in an Alternate Data Stream (for All file types) facilitating faster access the next time. File Classifier will not change the 'last modified time' when caching label values. File Classifier will look for the first instance of the registry key in the following locations:</p> <p>HKCU\SOFTWARE\Policies\Boldon James\File Classifier</p> <p>HKLM\SOFTWARE\Policies\Boldon James\File Classifier</p> <p>HKLM\SOFTWARE\Boldon James\File Classifier</p> <p>0 (Default if not defined): File Classifier will not use an Alternate Data Stream to hold a cache of the Label for all file types.</p> |

| Name | Type | Value |
|----------------------|-----------|--|
| | | <p>Non-zero: File Classifier will cache the label in an Alternate Data Stream for all file types.</p> <p>Note: However, in some non-NTFS environments (e.g. 'NetApp ONTAP') the action to preserve 'modified time' does not work and all files accessed end up with a modified time set to the current date/time.</p> |
| SelectableFilesLimit | REG_DWORD | <p>Selectable Files Limit</p> <p>0 (Default if not defined): An unlimited number of files are selectable by the user.</p> <p>1 or > The number of files that may be selected for Classification. If this value is exceeded the "Classify" option becomes disabled.</p> |
| UseSingleColour | REG_DWORD | <p>0 (Default): File Classifier attempts to use all the overlays to reflect the colours associated with the first selector value. 1 File Classifier only uses the default icon overlay.</p> |

Extending the Active Directory Schema

Note: In order to extend the schema, the user / Administrator needs to have permission to write to the configuration container and the schema.

Note: For Windows 2003, the Windows Server 2003 Administration Tools Pack (ADMINPAK.MSI) must be installed.

Note: The schema extension requires LDIFDE.EXE to be available - this may only be available by default on a Domain Controller system. LDIFDE.EXE can be made available by using Server Manager to add either Active Directory Domain Services (ADDS) or Active Directory Lightweight Directory Services (AD LDS roles).

1. Install the **Classifier Schema Extension** package from the **Classifier Schema Extension** sub-folder of the **Classifier Administration** in the **Base Bundle**.
2. The **Classifier Schema Extension** package can be deployed using either **ClassifierSchemaExtension.msi** or **Setup.exe**.
3. After installation, from the Start menu locate **All Programs / Boldon James / Administration Tools**.

Note: Extending the schema is a non-reversible operation.

4. Run **Classifier Schema Extension**.

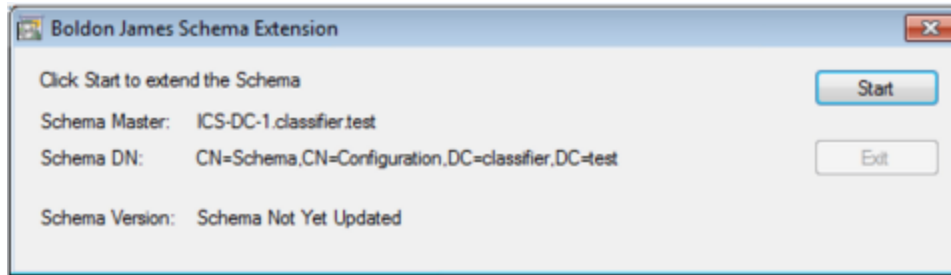


Figure: Schema Extension.

5. Click **Start** to update the schema
6. The tool will update the **Active Directory** schema and show a confirmation dialog; click **OK**. For Windows 2008 systems, ensure that the **Active Directory Domain Services (AD DS)** tools are installed, otherwise this will fail with error "**Please ensure that the Active DirectoryDomain Services tools are installed**".
7. Click **Exit** .

Software Deployment

Desktop Clients

Email and Office Classifier and Notes Classifier can be deployed via standard MS Group [Policy](#) mechanisms using the appropriate **EMailAndOfficeClassifier.MSI** or **NotesClassifierClient.msi** files. The licence (distributed as part of the Configuration) controls the applications to which you have access.

OWA Classifier

OWA Classifier must be installed on each Server that runs OWA supporting users that are to use Classifier features.

Classifier Administration

[Classifier Administration](#) must be installed on a central (Administrator) server that can be accessed by the designated administrators via a web browser. Classifier Administration controls access to features in accordance with the [Licences](#) applied. The licence information is distributed as part of the Configuration and is utilised by client applications to determine which features are presented to users.

Classifier Clearance Service

The Clearance Service can only operate on a single system at a time (the service should only be running once in the domain). Note that there is no associated licence file for this component - you are granted the rights to use it through the client licence you purchase.

Appendix - Label Propagation Mechanisms

To support [Label Propagation](#) , the various Classifier products need to Read and Set Labels and Markings on items in a consistent manner.

This topic summarises the mechanisms used by each Classifier Application when processing a label value.

Note: This section describes functionality available in the current version. Classifier product versions prior to this may support only a subset of features described below.

Note: In the text below, BJ label refers to a custom Classifier property that holds the Label value in an encoded form. This is usually converted to a Summary [Marking](#) if it is to be presented to a user. It is sometimes referred to as the 'SISL' label. [For Visio documents BJ label is stored as a 'Solution XML Element', rather than a document custom property]

The three tables below summarise:

- Document types supported.
- Supported file extensions and [Label Locations](#) .
- Application operation.

Document Types Supported:

- **L:** Set the **Label** on an item of this type. Depending on the item type, the label is stored in an application custom property, as Meta-data, or a 'standard' property (e.g. ZIP Comment field). The ability to change a label can be limited by [Check for label change](#) rules.
- **M :** Apply a **Marking** on an item of this type. A marking held in a Label Location may be used to determine a label value.
- **R: Read** the label of an item of this type.
- **SPL :** Set a SharePoint label (only visible under SharePoint).
- **U:** For these items, labels under SharePoint cannot be changed.
- **ADS:** Set a Label value stored in NTFS Alternate Data Stream (**ADS**). Note that this is not available in all environments (neither OWA attachments nor SharePoint upload). See also [Attachment Handling](#) for further details of high-water mark handling of ADS under Outlook.
- **SA (Save as):** Document properties containing label information will be stored.

| Type | Office Classifier (MS Office) | Email Classifier | Mail Attachments (Email, OWA & Notes Classifier) | SharePoint Classifier | File Classifier | Power Classifier for files | CAD Classifier | API | Box |
|------------|-------------------------------|------------------|--|-----------------------|-----------------|----------------------------|----------------|-----|-----|
| Word (5) | R/L/M | - | R | R/L | R/L | R/L | | R/L | R |
| Excel (5) | R/L/M | - | R | R/L | R/L | R/L | | R/L | R |
| PowerPoint | R/L/M | - | R | R/L | R/L | R/L | | R/L | R |
| Project | R/L/M | - | R | R/L | R/L | R/L | | R/L | R |

| Type | Office Classifier (MS Office) | Email Classifier | Mail Attachments (Email, OWA & Notes Classifier) | SharePoint Classifier | File Classifier | Power Classifier for files | CAD Classifier | API | Box |
|-----------------|-------------------------------|------------------|--|-----------------------|-----------------|----------------------------|----------------|-----|-----|
| Visio (4) | R/L/M | - | R (4 - not OWA) | - | - | ADS | | - | |
| DWG, DXF | - | - | R | R | R | R | R/L/M | R | R |
| ZIP | - | - | R | R/L | R/L | R/L | | R/L | R |
| Message (3A) | - | R/L/M | R | R/U | R/L | R/L | | R/L | R |
| PDF (6) | SA | | R | R/L | R/L | R/L | | R/L | R |
| HTML (3) | (2) | - | (2) | (2) | (2) | (2) | | (2) | R |
| Open Office (3) | (1) | - | (1) | (1) | (1) | (1) | | (1) | R |
| Media (3) | - | - | R | R/L | R/L | R/L | | R/L | R |
| Text / RTF | - | - | - | SPL | ADS | ADS | | R/L | |
| Other | - | - | - | SPL | ADS | ADS | | ADS | |

1 (Open Office Documents)

Office applications (e.g. **Word**, **Excel**) will store private custom properties containing label information when saving as OpenOffice documents and that Label information is available if the document is subsequently opened by the same office application. However, this information is not available to other Classifier applications (e.g. File Classifier or Outlook). By default **File Classifier / Power Classifier** stores label information in the ADS (not available to Outlook). A specific plug-in (3) can be configured that will cause FC/PC to store the label information as a custom property that can be accessed by that same plug-in meaning it will be accessible to Outlook (for attachment checks). Label information set by File Classifier / Power Classifier is not available to Office Classifier. Label information set by whatever mechanism may be meaningless to Open Office applications. Thus MS Office applications and File Classifier may manifest different label values for the same file.

2 (HTML Documents)

Word can save as a web page (HTM/HTML) or a single Web page (MHT/MHTML) both of which will store private custom properties (e.g. the label) that are recovered if Word subsequently opens that document. However, this information is not available to other Classifier applications (e.g. File Classifier or Outlook).

[**Word** can also save as a filtered Web page (HTM/HTM) which does **NOT** include the custom properties - such a document will appear as unlabelled when subsequently opened using Word. **Excel** can save as HTML, but does not store custom properties so is unlabelled if opened subsequently.]

By default **File Classifier / Power Classifier** stores label information in the ADS (not available to Outlook). A specific plug-in (3) can be configured that will cause FC/PC to store the label information as meta-data that can be accessed by that same plug-in meaning it will be accessible to Outlook (for attachment checks).

Label information set by File Classifier / Power Classifier is not available to Office Classifier.

Thus MS Office applications and File Classifier may manifest different label values for the same file.

3 (3A - Exchange Classifier Only)

Support for these requires additional configuration of Classifier [Plugins](#) under guidance from Classifier Customer Support.

4 Visio

Visio must be installed on the platform for this to work (e.g. so not supported under SharePoint).

Visio is launched to access a Visio file, so can incur a significant overhead (e.g. HWM checks in Outlook).

5 **Word and Excel** can save documents as other types (e.g. Word to TXT and Excel to CSV). Such Save actions will typically indicate to the user that some information may be lost. Classifier labelling and marking information may be lost.

6 **Saving as PDF:** You can populate various standard document properties (**Title, Author, Subject and Keywords**) that will be propagated if you save an Office document as PDF. However, Office applications do NOT propagate any Custom Properties to the PDF. In particular the **bjDocumentSecurityLabel** is **NOT** propagated. Email, OWA and Notes Classifier will check defined [Label Locations](#) for recognisable labels in standard PDF file properties for the [Check for the high-water mark](#) and [Add an attachment list](#) rules. File Classifier, Power Classifier and the Classifier API (API is only supplied to support integration with technology partner products) can set the relevant custom properties of a PDF document.

Supported File Extensions and Label Locations

| Type | Supported File Extensions | Label May Be Found From |
|-------------------|---|---|
| Word | doc, dot, docx, docm, dotm, dotx | BJ Label custom property, Supported document label locations . |
| Excel | xls, xlt, xlsx, xlsx, xltm, xltx | BJ Label custom property, Supported document label locations . |
| PowerPoint | ppt, pps, pot, pptx, pptm, ppsx, ppsm, potx, potm | BJ Label custom property, Supported document label locations . |
| Project (2010>) | mpp, | BJ Label custom property, Supported document label locations |
| Visio (4) (2010>) | vsd, vss, vst, vsdx [vsdx support introduced in Classifier 3.5] | BJ Label custom property, Supported document label locations Note: Visio must be installed for labels to be accessible, and Visio checks are never performed under OWA for example. |
| HTML (2,3) | html, htm | See note 2 |
| Open Office (1,3) | odf, odt, odp | See note 1. |
| PDF | PDF | BJ Label custom property, Supported document label locations . |
| ZIP | ZIP | Comment field (as might be set using File or Power Classifier). |
| Message (3A) | EML, MSG | BJ Label custom property, Supported document label locations |

| Type | Supported File Extensions | Label May Be Found From |
|-----------------------|--|--|
| | | label locations . |
| Media (3) | JPG, JPEG, JPE, JPC, JPF, JPS, JPX, JP2, J2C, J2K, JFIF, MP4, TIF, TIFF, WMA | BJ Label custom property (XMP Metadata). |
| Text / RTF | TXT, RTF | Alternate Data Stream (as might be set using File or Power Classifier). |
| AUTOCAD DraftSight | DWG, DXF | BJ Label custom property, Supported document label locations . |
| Other | | Alternate Data Stream (as might be set using File or Power Classifier). |

Application Operation

| Application | Notes |
|---|--|
| Office Classifier | <p>Open:</p> <ul style="list-style-type: none"> For the supported document types (see tables above) it uses the BJ label value if it exists, otherwise it checks configured locations (Supported document label locations) to determine the current label value. <p>Save:</p> <ul style="list-style-type: none"> For the supported file extensions (above) it sets the current BJ label , plus any Markings defined by the configured rules. For all other document types (e.g. PDF, RTF, TXT etc.) markings may be applied (using configured rules) to the document properties (e.g. Author, Header). These markings may be visible in the saved item, but there is no separate BJ label available to other applications. Other Classifier applications (e.g. Email Classifier) may see the file as unlabelled. <p>See notes above (1,3) regarding Open Office documents.</p> <p>See notes above (2,3) regarding HTML documents.</p> |
| Email Classifier OWA Classifier Notes Classifier Mobile Classifier | <p>Open:</p> <p>Received messages use the BJ label value if it exists, otherwise check configured locations (Supported mail label locations) to determine the current label value.</p> <p>When performing operations on attachments (not Mobile Classifier) relating to high-water mark or Attachment list rules:</p> <p>Try to ascertain a label for each item as per 'Label may be found from' in the table above. Attachment types that are not supported, or not configured are treated as unlabelled.</p> <p>Save/Send: Sets the current BJ label , plus any Markings defined by the configured rules to message properties when the message is Saved or Sent.</p> |
| SharePoint Classifier | Uploading a Classifier labelled file: |

| Application | Notes |
|--|---|
| | <p>Try to ascertain a label for the item as per 'Label may be found from' in the table above. Attachment types that are not supported, or not configured are treated as unlabelled.</p> <p>Uploading an unlabelled file:</p> <p>Unlabelled items may be labelled after upload. For Classifier supported items (excluding Visio and message items) the BJ label value will be stored, and for Office Classifier supported items a custom property is set to direct Office Classifier to update the Markings when the documents is next opened.</p> <p>For all other items, any label applied is only associated with the item whilst it is stored in SharePoint. This value is referred to a SharePoint label.</p> |
| <p>File Classifier</p> <p>Power Classifier</p> | <p>Read:</p> <p>Try to ascertain a label for the item as per 'Label may be found from ' in the table above. Attachment types that are not supported, or not configured are treated as unlabelled.</p> <p>Write:</p> <ul style="list-style-type: none"> • For documents supported by Office Classifier , write the BJ label value, and set a custom property to ensure that Office Classifier will update all Marking locations the next time the file is opened. <p>Note: Visio is not supported by Power Classifier or File Classifier.</p> <p>Note: That from version 3.8 Power Classifier has a Set Update Markings option which controls this effect as described in the Power Classifier Guide.</p> <ul style="list-style-type: none"> • For PDF write the BJ label custom property . • For ZIP files overwrite the Comment field. <p>Note: The Comment is visible via Actions / Comment if the archive is opened using Winzip.</p> <ul style="list-style-type: none"> • MSG files can be labelled using File or Power Classifier. • For other supported file types write the BJ label custom property. • All other attachment types optionally write the label to the NTFS Alternate Stream Data. |
| <p>CAD Classifier</p> | <p>Open:</p> <ul style="list-style-type: none"> • For the supported document types (see tables above) it uses the BJ label value if it exists, otherwise it checks configured locations (Supported document label locations) to determine the current label value. <p>Save:</p> <ul style="list-style-type: none"> • For the supported file extensions (above) it sets the current BJ label , plus |

| Application | Notes |
|---|--|
| | any Markings defined by the configured rules. |
| Classifier API (Only supplied to support integration with technology partner products.) | Read: <ul style="list-style-type: none"> For the supported document types (dll, zip, pdf, html, jpg, xls, xlsx, ppt, pptx, vsd, doc, docx, mpp, odp, ods, odt, msg, pdb, txt, xps) it uses the BJ label value if it exists, otherwise it checks configured locations (Supported document label locations) to determine the current label value. Write: <ul style="list-style-type: none"> For the supported file extensions (above) it sets the current BJ label , but no rules (e.g. markings) are applied. See Classifier API documentation for run-time parameters. Note: Visio files can only be accessed if Visio is installed AND there is a significant overhead as Visio will be loaded for each document accessed. |
| Box Classifier | Read: <ul style="list-style-type: none"> For the supported document types (dll, zip, pdf, html, jpg, xls, xlsx, ppt, pptx, vsd, doc, docx, mpp, odp, ods, odt, msg, pdb, txt, xps) it uses the BJ label value if it exists, otherwise it checks configured locations (Supported document label locations) to determine the current label value. (Any information held in the Alternate Data Stream is lost when uploaded.) Write: <ul style="list-style-type: none"> Box Classifier never changes any document. |

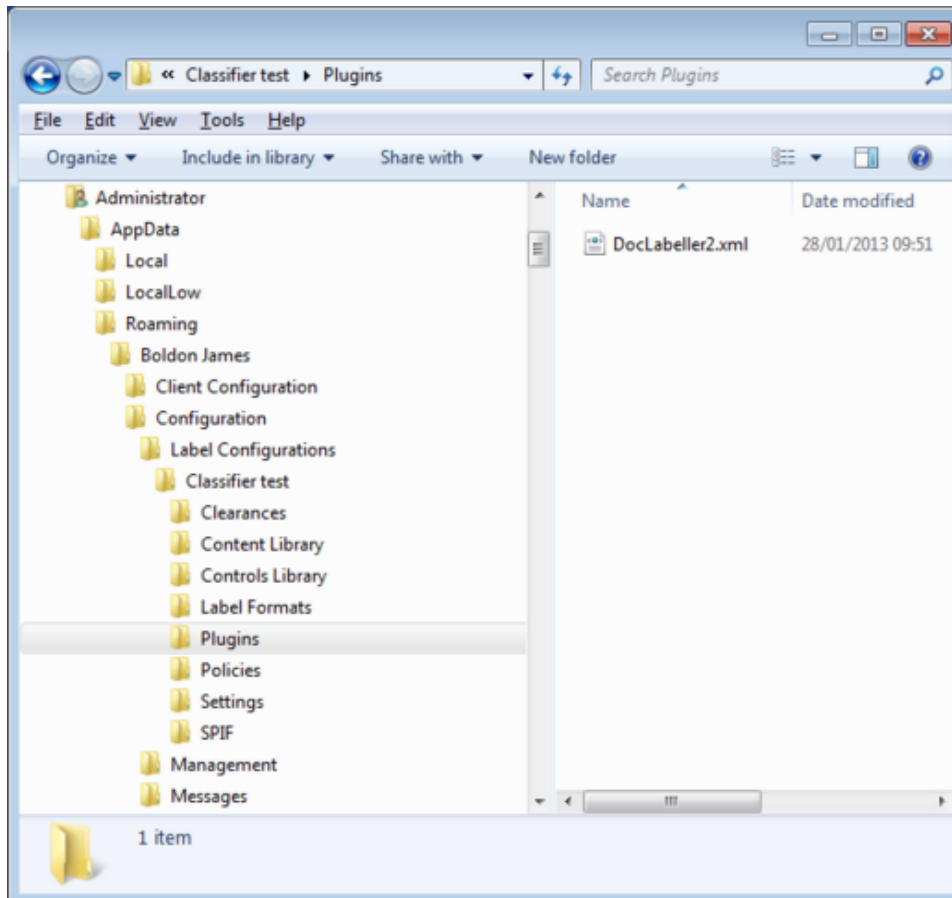
Note: The Open operational above described the general order when trying to find a label value. This can be reversed by the [Check label Locations first](#) setting.

General Limitations

- Any Classifier label assigned to an **RMS** or **S/MIME** protected item will only be available when the item is fully opened by a suitable application, so File / Power Classifier, Email /OWA / Notes Classifier and SharePoint Classifier does not have access to labels in these circumstances.
- Attempts to Write a label value fail if the file is Read Only, or if the file is in use by another application.
- Attempts to Read a label may fail if the file is in use by another application.
- Attempts to Read or Write a label fail if you do not have permission to access the file, or the file is RMS protected or encrypted.
- Attempts to Read or Write a label fail if the file is masquerading - i.e. the content does not match the file extension (e.g. .TXT renamed as .DOC).

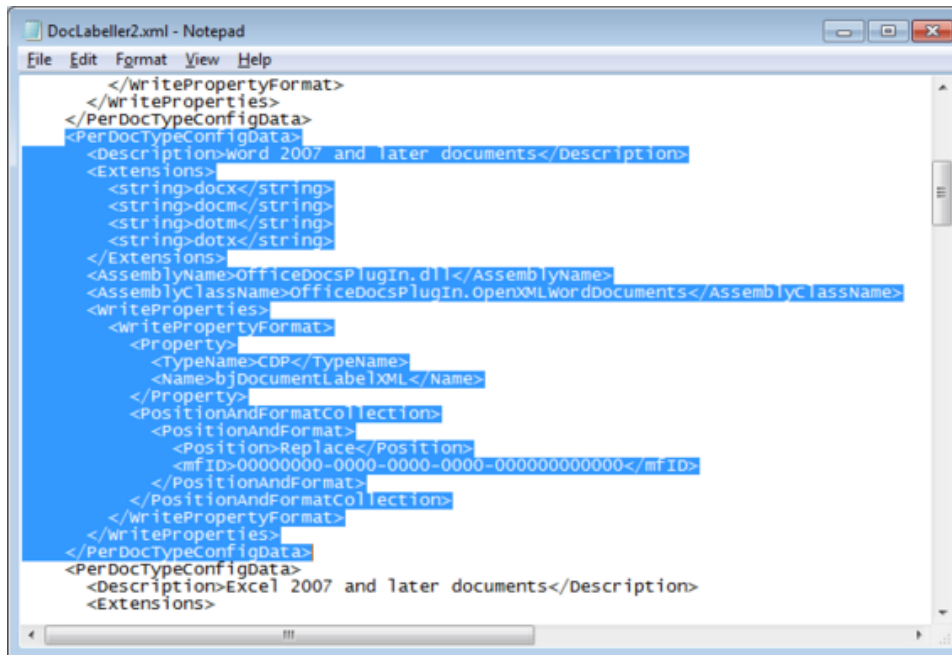
Plugins

Label recognition is performed by a Classifier component that is common across the Classifier applications. This component utilises information held in an XML file (DocLabeller2) in a Plugins folder in the configuration:



Plugins DocLabeller2.

The file contains a section for each file type supported, defining information such as the file extensions relevant to the file type, the (Write) properties that Classifier supports and the DLL used to process that file type:



```
DocLabeller2.xml - Notepad
File Edit Format View Help
</writePropertyFormat>
</writeProperties>
</PerDocTypeConfigData>
<PerDocTypeConfigData>
  <Description>word 2007 and later documents</Description>
  <Extensions>
    <string>docx</string>
    <string>docm</string>
    <string>dotm</string>
    <string>dotx</string>
  </Extensions>
  <AssemblyName>officeDocsPlugin.dll</AssemblyName>
  <AssemblyClassName>officeDocsPlugin.OpenXMLworddocuments</AssemblyClassName>
  <writeProperties>
    <writePropertyFormat>
      <Property>
        <TypeName>CDP</TypeName>
        <Name>bjDocumentLabelXML</Name>
      </Property>
      <PositionAndFormatCollection>
        <PositionAndFormat>
          <Position>Replace</Position>
          <mfID>00000000-0000-0000-0000-000000000000</mfID>
        </PositionAndFormat>
      </PositionAndFormatCollection>
    </writePropertyFormat>
  </writeProperties>
</PerDocTypeConfigData>
<PerDocTypeConfigData>
  <Description>Excel 2007 and later documents</Description>
  <Extensions>
```

Figure: Plugins XML.

Support for new file types, and extending support for existing file types may require updates to Classifier software (e.g. a new DLL) and / or changes to this XML file.

The initial contents of this XML file are generated when the first [Classifier Configuration](#) is generated and the file is propagated as part of the Classifier Configuration.

The following general sequence should be followed to modify and propagate changes to **DocLabeller2** :

- Ensure any Classifier Client, Administration and Server software changes are applied and deployed.
- Get the current master configuration using [Get Server Configuration](#) . The retrieved configuration is stored under ...**Boldon James**\Configuration as outlined in [Configuration Archives](#) .
- Make the necessary changes to ...**Label Configurations**\Plugins**DocLabeller2** .
- Publish the updated Configuration using [Publish Configuration](#) .
- The changes will become effective in the applications in due course.

Appendix - Example of Best Matching Rule

The following example illustrates the effects of Rule Overlap Handling where a relatively complex set of <Label condition> rules have been defined.

Consider a label structure supporting the following three Selectors with their associated values:

| Designation | Department | Region |
|-------------|------------|--------|
| Public | Sales | Asia |
| Internal | Finance | Europe |

Now consider a number of instances of the same basic Rule (e.g. Outlook FLOT) each with its own Label match criteria:

| Rules | Designation | Department | Region | Notes |
|--------|----------------|------------|----------------|---|
| Rule 1 | No Label | | | Will only (and always) match if no label value is selected. |
| Rule 2 | Always | | | Will only apply if none of the other rules match the label condition criteria |
| Rule 3 | <Not Relevant> | Finance | Europe | |
| Rule 4 | <Any> | <Any> | Europe | |
| Rule 5 | Public | Finance | <Not Relevant> | |
| Rule 6 | <Any> | Finance | Europe | |
| Rule 7 | Public | <Any> | Europe | |
| Rule 8 | Public | Finance | Europe | |

Creating the rules above results in the following rule tree structure:

Overlap Policy

Selectors and rules assigned to this policy.

Set Selectors | **Set Rules** | Review Rules | Test Rules

Select a rule or label node to show rule details. Select a node and then Add

- Always
 - Rule 2 - Always
 - No Label
 - Rule 1 - No label
 - Any Label
 - Classification
 - Rule 6 - Any, Finance, Europe
 - Public
 - Department
 - Finance
 - Rule 5 - Public, Finance, Not relevant
 - Region
 - Europe
 - Rule 8 - Public, Finance, Europe
 - Region
 - Europe
 - Rule 7 - Public, Any, Europe
 - Internal
 - Department
 - Region
 - Europe
 - Rule 4 - Any, Any, Europe
 - Department
 - Sales
 - Finance
 - Region
 - Europe
 - Rule 3 - Not Relevant, Finance, Europe
 - Region
 - Europe
 - Asia

Figure: Rule overlap tree.

The rule overlap algorithm operates on the basic premise that the more specific the label matching criteria, the higher the weighting of the rule (higher weighting wins). Selector ordering is taken into account (the second selector in the policy has a higher weighting than the first selector etc.).

The table below shows all the possible values of the selectors defined above, and which rule each possible combination triggers. Rule 2 is the catch all rule that applies if there is no more specific match.

| | | | |
|----------|---------|---------|--------|
| <Blank> | <Blank> | <Blank> | Rule 1 |
| <Blank> | <Blank> | Europe | Rule 2 |
| <Blank> | <Blank> | Asia | Rule 2 |
| <Blank> | Sales | <Blank> | Rule 2 |
| <Blank> | Sales | Europe | Rule 2 |
| <Blank> | Sales | Asia | Rule 2 |
| <Blank> | Finance | <Blank> | Rule 2 |
| <Blank> | Finance | Europe | Rule 3 |
| <Blank> | Finance | Asia | Rule 2 |
| Public | <Blank> | <Blank> | Rule 2 |
| Public | <Blank> | Europe | Rule 2 |
| Public | <Blank> | Asia | Rule 2 |
| Public | Sales | <Blank> | Rule 2 |
| Public | Sales | Europe | Rule 7 |
| Public | Sales | Asia | Rule 2 |
| Public | Finance | <Blank> | Rule 5 |
| Public | Finance | Europe | Rule 8 |
| Public | Finance | Asia | Rule 5 |
| Internal | <Blank> | <Blank> | Rule 2 |
| Internal | <Blank> | Europe | Rule 2 |
| Internal | <Blank> | Asia | Rule 2 |
| Internal | Sales | <Blank> | Rule 2 |
| Internal | Sales | Europe | Rule 4 |
| Internal | Sales | Asia | Rule 2 |
| | | | Rule 2 |

| | | | |
|----------|---------|---------|--------|
| Internal | Finance | <Blank> | Rule 6 |
| Internal | Finance | Europe | Rule 2 |
| Internal | Finance | Asia | |

Now consider a Label value of “**Public; Finance; Europe**” – it matches every single rule defined above with the exception of Rule 1 (No Label) will only match if no label value is selected.

Classifier must pick the ‘best’ match. This appears fairly easy because Rule 8 is an exact match for all three elements. However, if Rule 8 was **not** defined the answer is less obvious.

So ignoring Rules 1 and 8 in this instance, the algorithm can be summarised as follows:

Any Rule that has a specific match for the Region (most significant selector) is ‘better’ than any Rule that only has an <Any> or <Not Relevant> or <Always> match for Region. Hence Rules 3, 4, 6 and 7 are immediately ‘better’ matches than Rules 2 and 5 can be ignored in the next refinement.

Now considering the preceding Selector (Department) in the policy, any rule that specifically matches the Department value is ‘better’ than a Rule that has only an <Any> or <Not Relevant> or <Always> match. Hence Rules 3 and 6 are ‘better’ than Rules 4 and 7.

Finally considering the first Selector (Designation) the <Any> is ‘better’ than a <Not Relevant> or <Always> match which means that Rule 6 is ‘better’ than Rule 3, hence Rule 6 is the ‘best’ match. If Rule 6 is subsequently deleted, then Rule 3 would be the ‘best’ match for this example label value.

Appendix - BJTrace Logging Facility

Note: Classifier components log major incidents to the Windows Event Log. The features in this section are intended only for use under the guidance of Classifier Customer Services.

Office and Email Classifier, and [Classifier Administration](#) also include a Trace Viewer diagnostic tool that may be used under guidance from Classifier support.

The Boldon James tracing tool allows tracing options to be set for Email and Office Classifier. BJTrace is installed during the Email and Office Classifier installation procedure. It is also installed with Classifier Administration and Clearance Service. To run the tool BJTrace is located at: C:\Program Files\Common Files\Boldon James\Logging\BJTrace.exe. Click the BJTrace.exe icon to start the application.

Note: There are two versions of the bjlogger (32 and 64-bit). Logging from 32-bit applications may be displayed in viewer windows in the 64-bit bjtrace, and vice-versa. Whilst this may not in itself be an issue, it can be confusing because (for example) changes made to the logging settings from the 64-bit bjtrace environment will have no effect on logging from a 32-bit application seen in a viewer window in that environment (and vice-versa).

Note: It is important that the size of the memory-mapped file (used to hold logging output) is the same in both 32 and 64 bit environments. This is the default, and the default size is usually sufficient. Having different sizes defined in the 32 and 64 bit environments is likely to lead to a crash if the file is initially created using the smaller size. Alternatively, the other way round, you may see the following messagebox displayed: "MapViewOfFile failed: error=5" if you attempt to open a viewer window in bjtrace. The memory map file size setting is accessed from bjtrace, Tools/options menu item, select the Advanced tab, and there is a textbox for configuring the shared memory size.

To enable logging of any of the Classifier component products:

1. Run the **BJTrace tool**.
2. Select **File /Application Information** , then select the application to be traced.
3. Select **Edit Settings** . The following dialog is displayed:

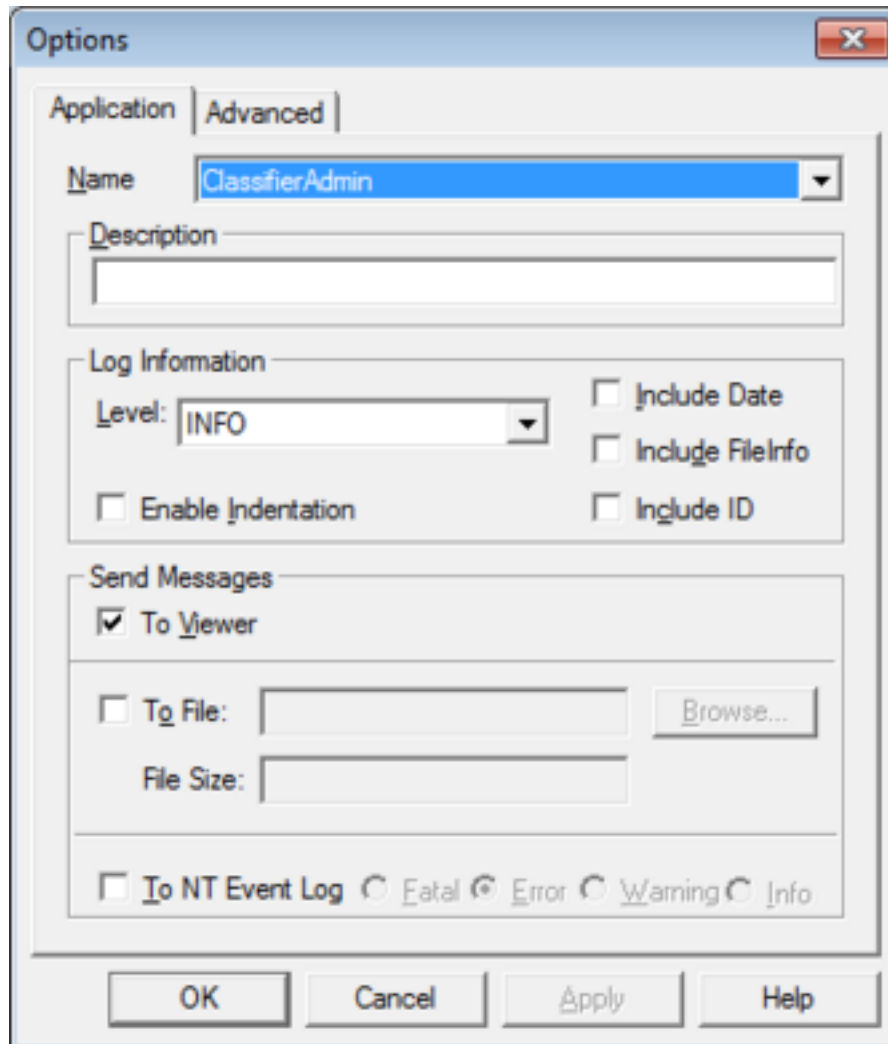


Figure: Trace Viewer Configuration.

4. Choose the appropriate application component name and set the logging level and destination.
5. Click **OK** and all logging that meets or exceeds the chosen log level will be sent to the viewer or file as configured.

Note: End user environments do not usually have the necessary permissions to configure logging levels etc, and therefore the administrator may have to logon to establish the diagnostic environment in preparation for an actual diagnostic session.

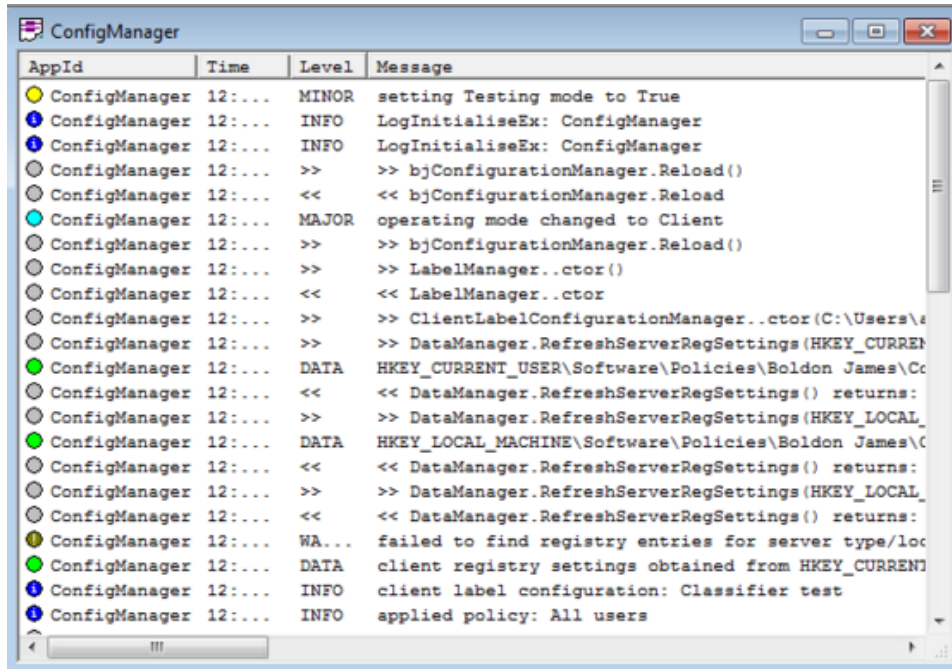
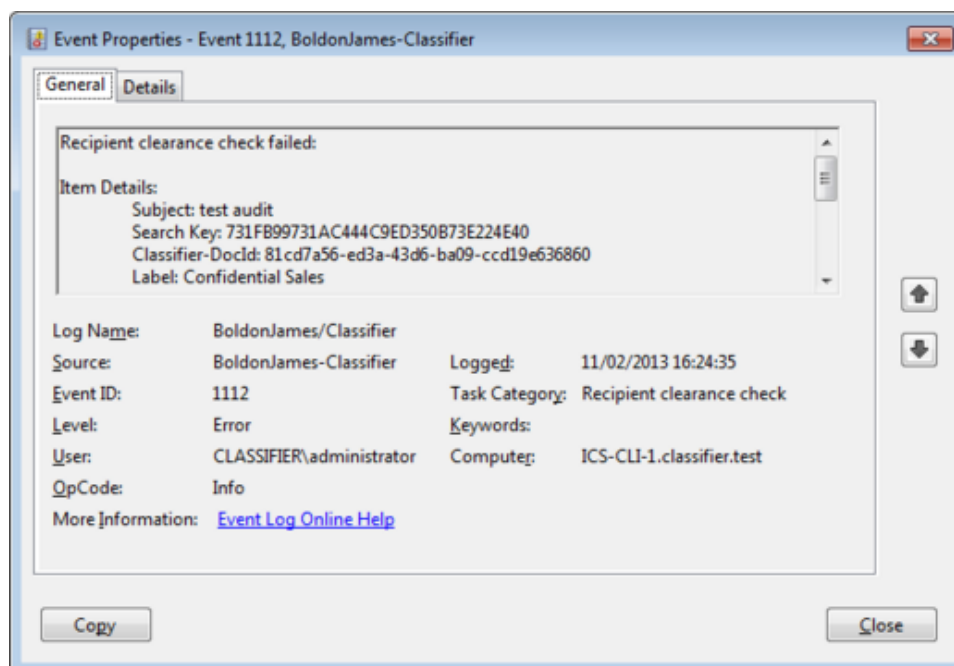


Figure: Classifier logging to viewer.

Appendix - Auditing Event Messages

Admin: [Global Settings](#) / Auditing



Event Details:

To: another@abc.xyz

Cc: -

Bcc: -

From: Administrator@classifier.test

Attachments: -

Rule: Recipient Clearance Check

Failed Recipients: another@abc.xyz

The table below summarises the events that may appear depending upon the Audit settings and the conditions that arise.

Note: Not all events may appear for each application. For example OWA does not support [Portion Marking](#), so it will never generate event 1125.

Note: Warning entries can be produced either when a rule fires and causes the user to be involved, or if a rule fires but is configured as Audit only.

Audit Event Field Tables

| Event ID Category values | Severity | Description |
|-----------------------------|----------|--|
| 1 | | Classifier Auditing |
| 2 | | Classifier Outlook Auditing |
| 3 | | Classifier Word Auditing |
| 4 | | Classifier Excel Auditing |
| 5 | | Classifier PowerPoint Auditing |
| 6 | | Reclassification Tool Auditing (not used) |
| 7 | | Recipient clearance check |
| 8 | | High-water mark check |
| 9 | | Originator clearance check |
| 10 | | Label downgrade check |
| 11 | | Label validity check |
| 12 | | Label change check |
| 13 | | Label upgrade check |
| 14 | | Warning failure override |
| 15 | | Label auto upgrade |
| 16 | | Classifier initialised |
| 17 | | Classifier Project Auditing |
| 18 | | Classifier Visio Auditing |
| 19 | | OWA auditing |
| 20 | | Rule |
| 21 | | Policy |
| 22 | | User Clearance |
| 23 | | Domain Clearance |
| 24 | | User Defined Messages |
| 25 | | Selector Library |
| 26 | | Marking Format Library |
| 27 | | Settings |
| 28 | | Auditor |
| 29 | | User Clearance |
| 30 | | Default Label Check |
| 31 | | User warning check |
| 32 | | Admin: Marking Library |
| 33 | | Admin Global Settings |
| 34 | | Admin: User Message Library |
| 35 | | Admin: Configuration Settings |
| 36 | | Admin Policy Selector |
| 37 | | Admin Policy Rule |
| 38 | | Admin SMTP Domain Clearance |
| 39 | | Admin Configuration Transfer |
| 40 | | Content Inspection Check |
| 41 | | Admin: Content Library |

| Event ID | Severity | Description |
|-----------------|----------|--|
| Category values | | |
| 42 | | SharePoint Classifier Auditing |
| 43 | | Admin UI Definitions |
| 44 | | Maximum Subject length check |
| 45 | | Minimum Subject length check |
| 46 | | Recipient type check |
| 47 | | Recipient count check |
| 48 | | Message size check |
| 49 | | Notes Classifier Auditing |
| 50 | | S/MIME Auditing |
| 51 | | RMS Auditing |
| 52 | | Author label change check |
| 53 | | Document Author property set |
| 54 | | Reply to all check |
| 55 | | Mandatory Selector check |
| 56 | | Document Content Inspection check |
| 57 | | Exchange Classifier Auditing |
| 58 | | File Classifier Auditing |
| 59 | | Response Recipients check |
| 60 | | Label Expiration Check |
| 61 | | Exchange Classifier Administration Auditing |
| 62 | | Mobile Classifier Auditing |
| 63 | | McAfee HDLP Check |
| 64 | | Classifier CAD Auditing |
| 65 | | Administration of Condition Library |
| 66 | | Unlabelled attachment check |
| 67 | | Suggested classification check |
| 68 | | Box Classifier auditing |
| 69 | | Admin: Clearance Library |
| 70 | | SealPath |
| 71 | | Attachment Clearance Check |
| 72 | | Seclore Auditing |
| 73 | | Document RMS Protection Check |

| Event ID | Severity | Description |
|-----------------------------|----------|---|
| Event Definitions | | |
| 1000 | Success | Office Classifier initialised in application. |
| 1001 | Success | Classifier running in Test Mode. |
| 1002 | Warning | Classifier Configuration not found. |
| Classifier Licensing | | |
| 1005 | Error | Office Classifier licence error. |

| Emails and Web Emails (Outlook / OWA / Notes) | | | Categories Applicable | | |
|---|---------|--|-----------------------|-----|-------|
| | | | O/L | OWA | Notes |
| 1101 | Success | A message has been sent | 2 | 19 | 49 |
| 1102 | Success | A message has been saved | 2 | N/A | N/A |
| 1103 | Success | A message has been opened | 2 | N/A | N/A |
| 1104 | Success | A message has been closed | 2 | N/A | N/A |
| 1105 | Success | A message has been printed | 2 | N/A | N/A |
| 1106 | Warning | Failed to apply RMS policy to a message | 2 | N/A | N/A |
| 1107 | Warning | Failed to apply Outlook S/MIME security to a message | 2 | 19 | N/A |
| 1108 | Warning | Failed to access a file (e.g. Check for high-water mark) | 2 | 19 | 49 |
| 1109 | Warning | Originator clearance check failed | 9 | 19 | N/A |
| 1110 | Success | Originator clearance check succeeded (Not Notes) | 9 | 19 | N/A |
| 1112 | Error | Recipient clearance check failed | 7 | 19 | 49 |
| 1113 | Success | Recipient clearance check succeeded | 7 | 19 | 49 |
| 1114 | Warning | Label validation failed | 2 | 19 | 49 |
| 1115 | Success | Label validation succeeded | 2 | 19 | 49 |
| 1116 | Error | Attachment check failed | 8 | 19 | 49 |
| 1117 | Success | Attachment check succeeded | 8 | 19 | 49 |
| 1118 | Warning | Upgrade check failed | 13 | 19 | 49 |
| 1119 | Success | Upgrade check succeeded | 13 | 19 | 49 |
| 1120 | Warning | Downgrade check failed | 8 | 19 | 49 |
| 1121 | Success | Downgrade check succeeded | 8 | 19 | 49 |
| 1123 | Warning | Change check failed | 12 | 19 | 49 |
| 1124 | Success | Change check succeeded | 12 | 19 | 49 |
| 1125 | Success | Portion marking Auto upgrade succeeded | 15 | N/A | N/A |
| 1126 | Warning | Warning failure override | 14 | 19 | 49 |
| 1127 | Success | An item security label has been auto upgraded due to an attachment containing a higher label than the outlook item. | 15 | N/A | N/A |
| 1128 | Success | An existing label value has been changed using the Folder View labelling feature (this audits the original label). | 2 | N/A | N/A |
| 1129 | Success | A label has been applied using the Folder View labelling feature (this audits the new label) | 2 | N/A | N/A |
| 1130 | Success | Default label check succeeded | 30 | 49 | N/A |
| 1131 | Warning | Default label check failed | 30 | 49 | N/A |
| 1132 | Success | Warn user check succeeded | 31 | 49 | N/A |
| 1133 | Warning | Warn user check failed | 31 | 49 | N/A |
| 1134 | Success | Content inspection check succeeded | 40 | N/A | N/A |
| 1135 | Warning | Content inspection check failed | 40 | N/A | N/A |
| 1136 | Success | SharePoint Classifier item added | 42 | N/A | N/A |
| 1137 | Success | SharePoint Classifier item updated | 42 | N/A | N/A |
| 1138 | Success | SMIME successfully applied on Send | 50 | 50 | N/A |
| 1139 | Success | Maximum Subject length check succeeded | 44 | 44 | N/A |

| Emails and Web Emails (Outlook / OWA / Notes) | | | Categories Applicable | | |
|---|---------|--|-----------------------|-----|-----|
| 1140 | Warning | Maximum Subject length check failed | 44 | 44 | N/A |
| 1141 | Success | Minimum Subject length check succeeded | 45 | 44 | N/A |
| 1142 | Warning | Minimum Subject length check failed | 45 | 44 | N/A |
| 1143 | Success | Recipient type check succeeded | 46 | 44 | N/A |
| 1144 | Warning | Recipient type check failed | 46 | 44 | N/A |
| 1145 | Success | Recipient count check succeeded | 47 | 44 | N/A |
| 1146 | Warning | Recipient count check failed | 47 | 44 | N/A |
| 1147 | Success | Message size check succeeded | 48 | 44 | N/A |
| 1148 | Warning | Message size check failed | 48 | 44 | N/A |
| 1149 | Warning | Message RMS failed | 51 | N/A | N/A |
| 1150 | Success | Message RMS succeeded | 51 | N/A | N/A |
| 1151 | Warning | Reply to all check failed | 54 | 54 | N/A |
| 1152 | Warning | Message mandatory selector check failed | 55 | 55 | N/A |
| 1153 | Success | Message mandatory selector check succeeded | 55 | 55 | N/A |
| 1154 | Warning | Message response recipients check Failed | 59 | 59 | N/A |
| 1155 | Warning | Message label expiration check Failed | 60 | 60 | N/A |
| 1156 | Warning | McAfee check failed | 63 | N/A | N/A |
| 1157 | Success | McAfee check succeeded | 63 | N/A | N/A |
| 1158 | Error | Unlabelled attachment check failed | 66 | N/A | N/A |
| 1159 | Warning | Unlabelled attachment check passed | 66 | N/A | N/A |
| 1160 | Success | Message Suggested classification nothing to apply | 67 | N/A | N/A |
| 1161 | Success | Message Suggested classification applied automatically | 67 | N/A | N/A |
| 1162 | Warning | Message Suggested classification calculated | 67 | N/A | N/A |
| 1163 | Success | Message Suggested classification applied manually | 67 | N/A | N/A |
| 1164 | Warning | Message Suggested classification failed to calculate | 67 | N/A | N/A |
| 1165 | Warning | Sealpath protection failed to apply | 70 | N/A | N/A |
| 1166 | Success | Sealpath protection successfully applied | 70 | N/A | N/A |
| 1167 | Error | Attachment clearance check failed | 71 | N/A | N/A |
| 1168 | Success | Attachment clearance check | 71 | N/A | N/A |

| | | | Categories applicable |
|------|--------------------------|--|-----------------------|
| 2000 | Info Warning Error | Used for unexpected conditions often related to limitations. The text logged describes the condition). | |

| File Classifier | | | Categories Applicable |
|-----------------|---------|--------------------------|-----------------------|
| 2100 | Success | File Classifier Labelled | 58 |

| Documents (Excel, PowerPoint, Project, Visio and Word and CAD) | | | Categories Applicable (E,P, P, V,W,C) |
|--|---------|--|--|
| 3000 | Success | A document has been saved | 4,5,17,18,3,64 |
| 3001 | Success | A document has been opened | 4,5,17,18,3,64 |
| 3002 | Success | A document has been closed | 4,5,17,18,3,64 |
| 3003 | Success | A document has been printed | 4,5,17,18,3,64 |
| 3004 | Warning | Document label validation has failed | 11 |
| 3005 | Success | Document label validation has succeeded | 11 |
| 3006 | Warning | Document upgrade check failed | Not used |
| 3007 | Success | Document upgrade check succeeded | Not used |
| 3008 | Warning | Document downgrade check failed | Not used |
| 3009 | Success | Document downgrade check succeeded | Not used |
| 3010 | Warning | Document change check failed | 12 |
| 3011 | Success | Document change check succeeded | 12 |
| 3012 | Warning | Document warning failure override | 14 |
| 3013 | Success | Default label check succeeded | 30 |
| 3014 | Warning | Default label check failed | 30 |
| 3015 | Success | Warn user check succeeded | 31 |
| 3016 | Warning | Warn user check failed | 31 |
| 3017 | Warning | Document RMS failed | 51 |
| 3018 | Success | Document RMS succeeded | 51 |
| 3019 | Warning | Document Author change check failed | 52 |
| 3020 | Success | Document Author change check succeeded | 52 |
| 3021 | Success | Document Author property set | 53 |
| 3022 | Warning | Document mandatory selector check failed | 55 |
| 3023 | Success | Document mandatory selector check succeeded | 55 |
| 3024 | Success | Document content inspection succeeded | 56 |
| 3025 | Warning | Document content inspection failed | 56 |
| 3026 | Warning | Document label expiration check failed | 60 |
| 3030 | Success | Document Suggested classification nothing to apply | 67 |
| 3031 | Success | Document Suggested classification applied automatically | 67 |
| 3032 | Warning | Document Suggested classification calculated | 67 |
| 3033 | Success | Document Suggested classification applied manually | 67 |
| 3034 | Warning | Document Suggested classification failed to calculate | 67 |
| 3035 | Warning | Document Sealpath protection failed to apply (not currently used) | 70 |
| 3036 | Success | Document Sealpath protection successfully applied (not currently used) | 70 |

| Exchange Classifier Administration | | | Categories Applicable |
|------------------------------------|---------|--------------------|-----------------------|
| 4000 | Warning | Item checks failed | 57 |

| Classifier Administration | | | Categories Applicable |
|---------------------------|---------|--|-----------------------|
| 5007 | Success | Successfully retrieved label configuration from server | 28 |
| 5008 | Success | Successfully published label configuration | 28 |
| 5009 | Error | Failed to publish label configuration | 28 |
| 5010 | Success | Clearance default value changed | 22 |
| 5011 | Success | Settings changed | 27 |
| 5012 | Success | User defined message added | Not used |
| 5013 | Success | All audit settings enabled | Not used |
| 5014 | Success | Audit settings changed | 24 |
| 5015 | Success | User defined message has been saved | 23 |
| 5016 | Success | Save SMTP template | 22 |
| 5017 | Success | Save clearance template | Not used |
| 5018 | Success | Saved new marking format | 26 |
| 5019 | Success | Copied marking format | 26 |
| 5020 | Success | Copied policy | 21 |
| 5021 | Success | Deleted policy | 21 |
| 5022 | Success | Edited policy | Not used |
| 5023 | Success | Added new policy | 21 |
| 5024 | Success | Added new label format | Not used |
| 5025 | Success | Added new labelling configuration based on template | Not used |
| 5026 | Success | Selector library changed | 25 |
| 5027 | Success | Marking format changed | 26 |
| 5028 | Success | Policy control library changed | 21 |
| 5029 | Success | Rule changed | 20 |
| 5030 | Success | Delete Label Configuration | 28 |
| 5031 | Success | Rename Label configuration | 28 |
| 5032 | Success | Selector operation | 25 |
| 5033 | Success | Configuration settings changed | 33,35 |
| 5034 | Success | Content library changed | 41 |
| 5035 | Success | Classifier Administration initialised | 28 |
| 5036 | Success | Classifier Administration closing | 28 |
| 5037 | Success | UI definitions changed | 43 |
| 5038 | Success | Delete Marking Format | 26 |
| 5039 | Success | Condition Library changed | 65 |
| 5040 | Success | Save Clearance library template | 69 |

| Active Directory Clearance | | | Categories Applicable |
|----------------------------|---------|-------------------------------------|-----------------------|
| 6000 | Success | User Clearance successfully updated | 29 |

| Box Classifier | | | Categories Applicable |
|----------------|---------|-----------------------------|-----------------------|
| 7000 | Success | Box label added | 68 |
| 7001 | Success | Box label updated | 68 |
| 7002 | Success | Box item deleted | 68 |
| 7003 | Success | Box item quarantined | 68 |
| 7004 | Success | Box item released | 68 |
| 7005 | Warning | Box item release failure | 68 |
| 7006 | Warning | Box item quarantine failure | 68 |
| 7007 | Warning | Box item delete failure | 68 |
| 7008 | Warning | Box label change failure | 68 |

| SharePoint Classifier (3.10 or later) | | | Categories Applicable |
|---------------------------------------|---------|--|-----------------------|
| 8000 | Success | SharePoint Classifier document library changed | 42 |
| 8001 | Error | SharePoint Classifier document library change fail | 42 |
| 8002 | Success | SharePoint Classifier client files installation | 42 |
| 8003 | Error | SharePoint Classifier client files installation fail | 42 |
| 8004 | Success | SharePoint Classifier item change | 42 |
| 8005 | Error | SharePoint Classifier item change fail | 42 |
| 8006 | Success | SharePoint Classifier apply default label | 42 |
| 8007 | Error | SharePoint Classifier apply default label fail | 42 |
| 8008 | Success | SharePoint Classifier insufficient permissions | 42 |
| 8009 | Error | SharePoint Classifier insufficient permissions fail | 42 |
| 8010 | Success | SharePoint Classifier quarantine list move | 42 |
| 8011 | Error | SharePoint Classifier quarantine list move fail | 42 |
| 8012 | Success | SharePoint Classifier quarantine list restore | 42 |
| 8013 | Error | SharePoint Classifier quarantine list restore fail | 42 |
| 8014 | Success | SharePoint Classifier quarantine permissions modified | 42 |
| 8015 | Error | SharePoint Classifier quarantine permissions modified fail | 42 |
| 8016 | Success | SharePoint Classifier quarantine permissions restored | 42 |
| 8017 | Error | SharePoint Classifier quarantine permissions restored fail | 42 |

Appendix - Content Checking File Types Supported

Admin: [Labelling Configurations](#) ⇒ (configuration) ⇒ [Content Library](#)

The following file types are recognised and processed by the Email Classifier Content Checking.

- Adobe Acrobat (*.pdf)
- Adobe Framemaker MIF (*.mif)
- Ami Pro (*.sam)
- Ansi Text (*.txt)
- ASCII Text
- ASF media files (metadata only) (*.asf)
- CSV (Comma-separated values) (*.csv)
- DBF (*.dbf)
- EBCDIC
- EML files (emails saved by Outlook Express) (*.eml)
- Enhanced Metafile Format (*.emf)
- Eudora MBX message files (*.mbx)
- Flash (*.swf)
- GZIP (*.gz)
- HTML (*.htm, *.html)
- JPEG (*.jpg)
- Lotus 1-2-3 (*.123, *.wk?)
- MBOX email archives (including Thunderbird) (*.mbx)
- MHT archives (HTML archives saved by Internet Explorer) (*.mht)
- MIME messages
- MSG files (emails saved by Outlook) (*.msg)
- Microsoft Access MDB files (*.mdb, *.accdb, including Access 2007 and Access 2010)
- Microsoft Document Imaging (*.mdi)
- Microsoft Excel (*.xls), EXCEL 2003 XML (*.xml), EXCEL 2007 and 2010 (*.xlsx)
- Microsoft Outlook data files (*.PST) (added in version 7.67)
- Microsoft Outlook/Exchange Messages, Notes, Contacts, Appointments, and Tasks (See note 2)
- Microsoft Outlook Express 5 and 6 (*.dbx) message stores
- Microsoft PowerPoint (*.ppt), PowerPoint 2007 and 2010 (*.pptx)
- Microsoft Rich Text Format (*.rtf)
- Microsoft Searchable Tiff (*.tiff)
- Microsoft Word for DOS (*.doc), Word for Windows (*.doc), Word 2003 XML (*.xml), Word 2007 and 2010 (*.docx)

- Microsoft Works (*.wks)
- MP3 (metadata only) (*.mp3)
- Multimate Advantage II (*.dox)
- Multimate version 4 (*.doc)
- OpenOffice versions 1, 2, and 3 documents, spreadsheets, and presentations (*.sxc, *.sxd, *.sxi, *.sxw, *.sxcg, *.stc, *.sti, *.stw, *.stm, *.odt, *.ott, *.odg, *.otg, *.odp, *.otp, *.ods, *.ots, *.odf) (includes OASIS Open Document Format for Office Applications)
- Quattro Pro (*.wb1, *.wb2, *.wb3, *.qpw)
- QuickTime (*.mov, *.m4a, *.m4v)
- RAR (*.rar) (See note 4)
- TAR (*.tar)
- TIFF (*.tif)
- TNEF (winmail.dat files)
- Treepad HJT files (*.hjt)
- Unicode (UCS16, Mac or Windows byte order, or UTF-8)
- Visio XML files (*.vdx)
- Windows Metafile Format (*.wmf)
- WMA media files (metadata only) (*.wma)
- WMV video files (metadata only) (*.wmv)
- WordPerfect 4.2 (*.wpd, *.wpf). WordPerfect (5.0 and later) (*.wpd, *.wpf)
- WordStar version 1, 2, 3 (*.ws), WordStar versions 4, 5, 6 (*.ws), WordStar 2000
- Write (*.wri)
- XBase (including FoxPro, dBase, and other XBase-compatible formats) (*.dbf)
- XML (*.xml), XML Paper Specification (*.xps)
- XSL
- XyWrite
- ZIP (*.zip)

Appendix - Address Book to AD Attribute Mapping

The following table shows the mapping of Address Book properties to AD attributes used by Classifier.

| Address Book Property | A/D User Attribute |
|-------------------------------------|------------------------------------|
| Account | SamAccountName |
| City | City |
| Common Name | CN |
| Company | Company |
| Country/Region | Country |
| Department | Department |
| Description | Description |
| Display Name | DisplayName |
| Email Address | legacyExchangeDN |
| Extension attribute n (n = 1 to 15) | extensionAttribute n (n = 1 to 15) |
| Fax number | facsimileTelephoneNumber |
| Given Name | GivenName |
| Home telephone number | HomePhone |
| Initials | Initials |
| Mobile telephone number | Mobile |
| Office | physicalDeliveryOfficeName |
| Pager number | Pager |
| Printable display name | displayNamePrintable |
| Proxy address | ProxyAddresses |
| SMTP address | mail |
| State/Province | St |
| Street | StreetAddress |
| Surname | Sn |
| Telephone notes | info |
| Telephone number | telephoneNumber |
| Title | title |
| URL | url |
| User culture | msEXCHuserCulture |
| Zip/Postal Code | PostalCode |

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