

Boldon James

A QINETIQ company

Classifier Administration Transition Guide

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Gold
Microsoft Partner



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Customer Documentation

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1 INTRODUCTION

This document provides guidance for customers transitioning from **Classifier Administration Console** to **Classifier Administration Server**. The document details:

- Key differences between the two products.
- How to transition from configurations created using Classifier Administration Console.

2 WHY CLASSIFIER ADMINISTRATION SERVER?

Classifier Administration Server provides greater flexibility over configuration options in an organisation. For larger organisations, Classifier configuration is often delegated to a number of specialists with differing permission requirements. One configuration specialist may just need to audit information in the configuration without a need to change it. Another specialist may need to adjust configuration appropriate to a subset of users without needing to change configuration to all users. Classifier Administration Server allows the allocation of administrative roles to cater for such differing permission requirements.

Similarly, when multiple specialists need access to the configuration there is a potential synchronisation problem of differing versions of the configuration. Classifier Administration Server addresses this issue by providing a central location for all administrative configuration. Specialists that need to access Classifier configuration can do so through assigned Classifier roles. They do not need any specialist software other than a Web browser, and they can lock parts of the configuration to prevent multiple incompatible edits.

Classifier Administration Server promotes least privilege principles to ensure infrastructure administrators do not need to grant unnecessary administrative permissions to Classifier configuration specialists.

In addition, Classifier Administration Server provides a comprehensive PowerShell interface to all aspects of Classifier configuration. As a Classifier configuration evolves some customers have indicated a need to automate the maintenance of a Classifier configuration through scripts. With Classifier Administration Server, PowerShell scripts can be written to help integrate different business areas. For example, an organisation may choose to represent internal projects using Classifier Selectors. To help maintain these Classifier Selectors as new projects are started, a PowerShell script can be created. Such a script could extract the full list of internal projects from a central database and then use Classifier Administration PowerShell modules to update the Classifier configuration.

It should be noted that a key design requirement for the Classifier Administration Server was to provide a similar, if not identical, interface to that provided by the Classifier Administration Console. This means that a customer can easily transition between the two products. An existing Classifier configuration created using Classifier Administration Console can be maintained using the newer Classifier Administration Server product.

3 KEY DIFFERENCES

3.1 Architecture

Classifier Administration Console is an MMC Snap-in that provides Classifier configuration. The resulting Classifier configuration is a set of files or entries in Active Directory.

Classifier Administration Server is a server-based product that includes a set of web pages hosted on Microsoft's Internet Information Services. The web site communicates with a Classifier Administration Service to provide Classifier configuration. Similarly, an optional Classifier PowerShell module is provided that communicates with the same Classifier Administration Service. The resulting Classifier configuration is a set of files or entries in Active Directory.

Classifier Administration Server can use the configuration produced by Classifier Administration Console. Once you have transitioned from Classifier Administration Console to Classifier Administration Server, you should stop using Classifier Administration Console to maintain your configuration.

3.2 Product Deliverables

Classifier Administration Server is delivered in the Base Bundle beneath the folder *Classifier Administration Server*. Some files that were delivered as part of the **Classifier Administration Console** set-up are now delivered separately.

Sub-folders of the *Classifier Administration Server* folder contain associated files as follows:

1. **Classifier Group Policy Templates** - ADM and ADMX/ADML files for use in extending the group policy settings.
2. **Classifier Schema Extension** – installation files for extending the Active Directory Schema to hold Classifier configuration
3. **Test Mode Administrator** – installation files for managing test configurations and making them available to Classifier Client applications

Alongside the *Classifier Administration Server* folder is a *Classifier Documentation* folder that contains all documentation appropriate to the Classifier suite of products.

The **Classifier Administration Server** installation includes an optional **PowerShell Module** feature. Customers that do not wish to use PowerShell to access the Classifier configuration need not install this feature.

3.3 Licences

Neither the **Classifier Administration Server** nor the **Classifier Administration Console** are licensed products. Licensing applies to the Classifier configuration; licenses must be added to the configuration before it can be used by Classifier applications.

The new **PowerShell Module** feature of the Classifier Administration Server **does require** a licence before it can be used to create or modify Classifier configuration. PowerShell cmdlets for viewing Classifier configuration can be used without a licence, but if you intend to create or modify the Classifier configuration then a read / write licence is required. For further details on the licence required, speak with Boldon James Sales or Support.

The PowerShell licence can be applied to Classifier configuration in the same way as other application licences. Alternatively, the licence can be used in session variables so that the resulting Classifier configuration does not contain the ability to use the PowerShell cmdlets. This second option is probably how most customers will use the licences.

3.4 Administrative Roles

Classifier Administration Server allows delegation of configuration to specific roles and users.

Two Windows accounts are required for the installation and operation of Classifier Administration Server. First is the account used to install the software, second is the account used to run the Classifier Administration Service, a Windows service that manipulates the Classifier configuration in Active Directory or the file store.

The installation account requires permissions to install software on the target server and is granted the **Full Administrator** role within Classifier Administration Server. This account cannot be removed from that role.


The Windows service account requires permissions to log on as a service, read, and write permissions on the configuration publish location. Consult the **Classifier Administration Server Installation Guide** for the exact permissions required by both accounts.

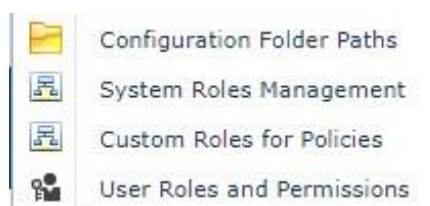
At installation, the installing user is prompted to supply credentials for the Classifier Administration Service. This Windows service actually generates the Classifier configuration in the file store or Active Directory. The permissions required for software installation and the Windows service's ability to write to file store and Active Directory are usually administrator level permissions. Such high-level permissions should not be given to users that have responsibility for maintaining the Classifier configuration.

After installation, one of your first tasks should be to identify the user that has responsibility for the Classifier configuration. For many customers, the user that installed the software is responsible for the Classifier configuration. In this circumstance, there are no further tasks regarding Classifier Roles.

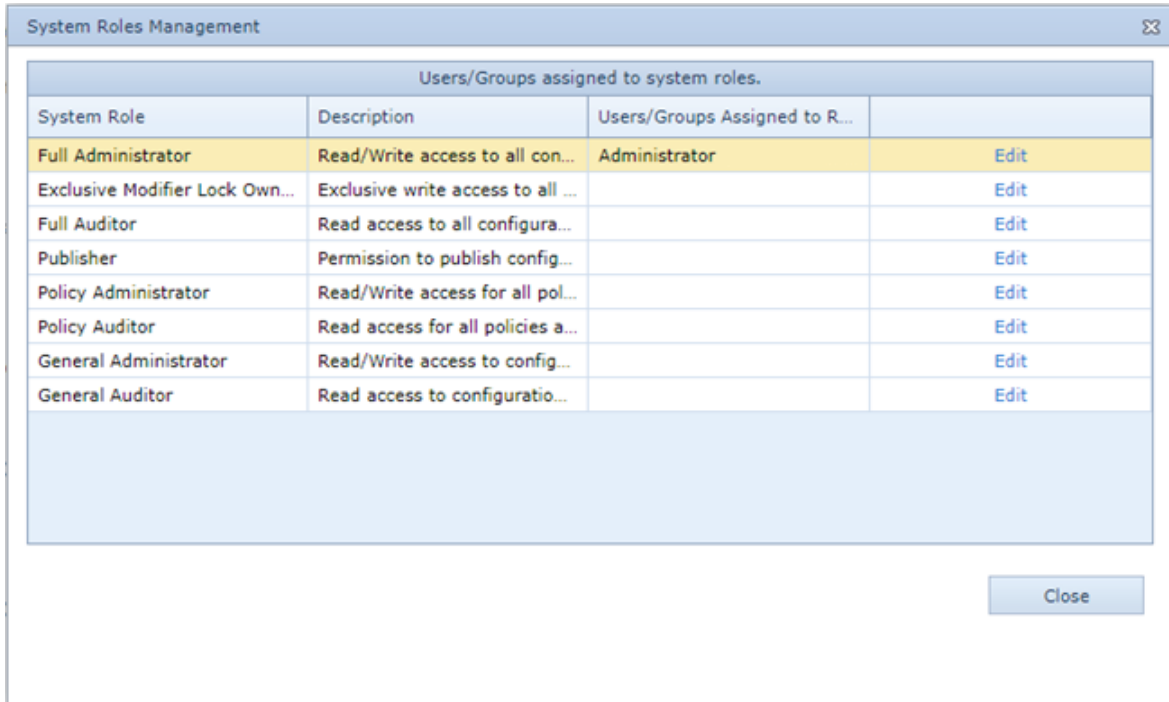
For large organisations, the user that installed the software may not be responsible for maintaining Classifier configuration. Having identified the individual or Windows group of users responsible for Classifier Configuration, the person that installed the software should connect to the Classifier Administration web site to adjust the **System Roles Management** list.

1. Select **Boldon James → Classifier Administration Server** from the start menu to open the web browser at the Classifier Administration site.

2. Navigate to the **Administrator Management Menu**. This menu  is available at the top right of the Classifier Administration window. It provides access to the following features:



3. Select the **System Roles Management** option. This will display a dialog box showing all the roles defined in the Classifier Administration Server



- To change the users/groups assigned to a role, select the role and click **Edit**. There is a **Find** option to supply a value and search for a user/group - select an entry from the results and then click **Add User / Group**.

The system roles available are:

Full Administrator	Read and write access to all elements of the configuration. In addition, members have the ability to manage Custom Roles for Policies . This role Includes the Publisher capability.
Exclusive Modifier Lock Owner	Exclusive write access to all configuration elements; members can apply “write locks” on all configuration elements to prevent other users from over writing a setting while a user is configuring that setting
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	Read and write access to configuration for all policies. Can lock / unlock policies. Includes Policy Auditor Role and General Auditor capabilities. Can publish test configurations. Further delineation between users’ capabilities regarding policies is possible by configuring Custom Roles for Policies allowing you to assign specific policy capabilities to specific users/groups.
Policy Auditor	Read access to configuration for all policies.
General Administrator	Read and write access to configuration libraries and settings, but NOT policy configuration. Can lock / unlock publication of the configuration. Includes General Auditor Role capabilities.
General Auditor	Read access to configuration libraries and settings, but no policy configuration capability.

For a comprehensive guide to Classifier roles consult the **Classifier Administration Server Guide**. The guide can be accessed as a PDF document in the *Classifier Documentation* sub-folder as described in [3.2](#) Product Deliverables or as web page help from the **Help** action.

3.5 Classifier PowerShell

The Classifier Administration Server product includes an optional installation feature called **PowerShell Module**. This module supports the configuration of every Classifier feature with PowerShell cmdlets. There are over two hundred cmdlets to fetch, create, modify or remove any aspect of the Classifier configuration.

Boldon James recommend the use of **Microsoft Visual Studio Code** (VSC), including the **PowerShell** plug-in when getting started with the Classifier Administration Server cmdlets. The VSC adds syntax colouring, tab completion, IntelliSense, visual debugging, and context sensitive help.

Classifier PowerShell is licensed; to set a licence on a per-session basis use the following cmdlet

```
Set-SessionLicence -LicenceFile 'C:\LicenceFiles\impCPA.lic'
```

Where the parameter 'C:\LicenceFiles\impCPA.lic' represents your PowerShell licence file.

Comprehensive help is provided through the **Get-Help** cmdlet.

For instance, to see the examples for **Get-ServerConfiguration**, issue the command

```
Get-Help Get-ServerConfiguration -examples
```

For more information, issue the command

```
Get-Help Get-ServerConfiguration -detailed
```


For technical information, issue the command

```
Get-Help Get-ServerConfiguration -full
```

In addition to this comprehensive help, the **Classifier Getting Started Guide for PowerShell**, available in the *Classifier Documentation* sub-folder as described in [3.2](#) Product Deliverables, provides an excellent starting point for constructing scripts.

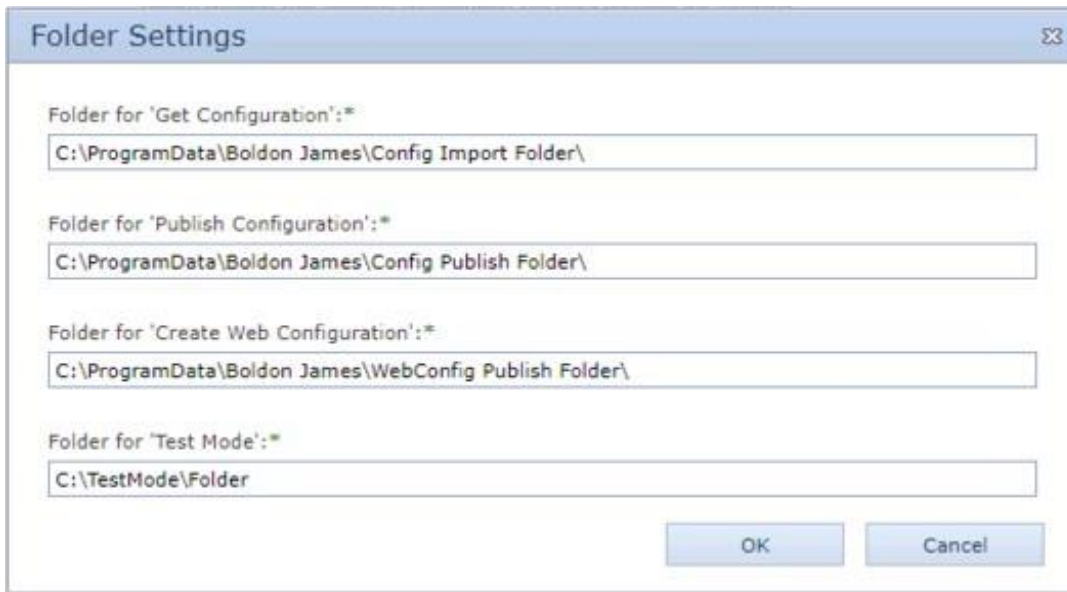
3.6 Managing Classifier Configurations

Similar to the Classifier Administration Console, the working Classifier configuration that is shown through Classifier Administration Server is held as a series of files on disk. A difference between the two products lies with the Classifier Administration Server being a centrally located resource. This means the file locations that a new configuration is obtained from and where the configuration is published must be configured relative to the server where the product is installed. Note that the option to publish and retrieve configuration from the Active Directory is unchanged. When an administrator chooses to **Get Configuration** from file store, the Classifier Administration Server will search a specific folder location; the administrator does not specify a folder location at the time of the request. The folder locations that are used when obtaining a Classifier configuration and when publishing a Classifier configuration can be set through the **Administrator Management Menu**.

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



The **Configuration Folder Paths** option lets an administrator define the folder locations pertinent to **Get Configuration**, **Publish Configuration**, **Create Web Configuration** and **Test Mode**.



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

Item	Initial value	Relates to:
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

3.7 Testing a Configuration before Deploying

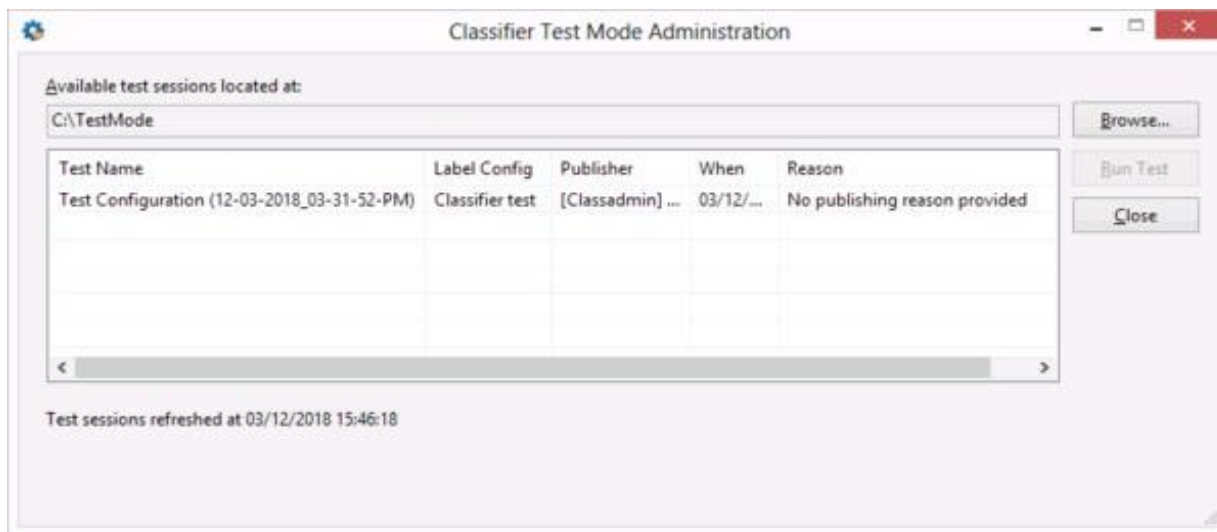
The Classifier Administration Server is designed for use on a central server that does not include any Classifier client applications. This means that testing a Classifier configuration prior to deployment involves a two-step process: publishing a test configuration and using a test tool on the client desktop.

A test configuration is published using the **Publish Test Configuration** action when the Classifier Administration node is selected. A dialog box will request the name and publish reason for the test configuration and the configuration files will be saved beneath the **Folder for “Test Mode”** as defined in [Managing Classifier Configurations](#). The default location is `%programdata%\Boldon James\TestMode Folder`

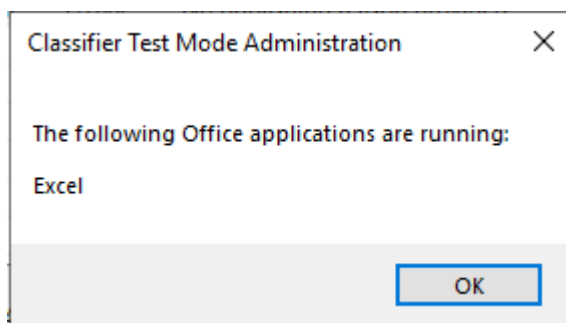
The administrator should make sure the **Folder for “Test Mode”** is accessible to the test users.

The Test Mode Administration software is located in the Base Bundle beneath the folder *Classifier Administration Server* in the sub-folder *Test Mode Administrator* and should be installed on the Test Client. Once the product is installed start it from the **Start Menu** using Boldon James → Classifier Test Mode Administration.

1. You can now **Browse...** to the **Folder for “Test Mode”** that was shared earlier in this section.

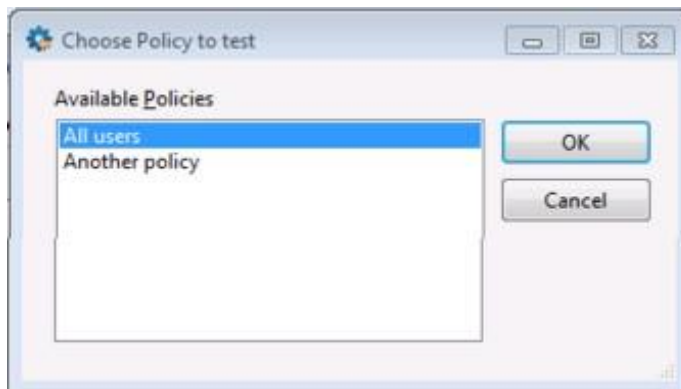


2. Before selecting a test configuration ensure all Microsoft Office applications have been closed. If an application is running when you click **Run Test**, a message box will prevent you from continuing.

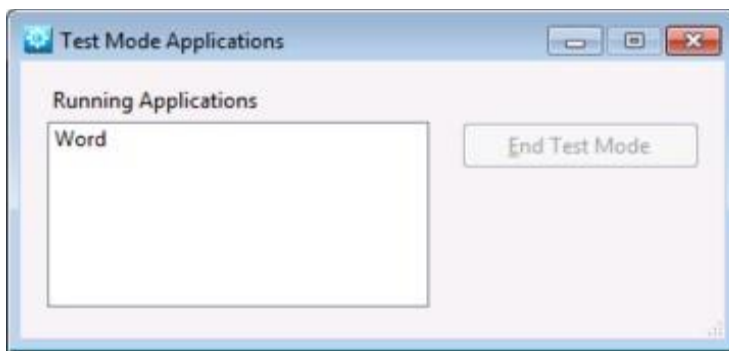


3. Select the required test configuration and click **Run Test**.

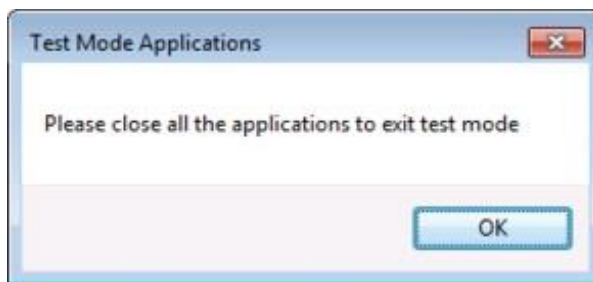
- If the configuration contains multiple policies, you are prompted to select the policy to be used:



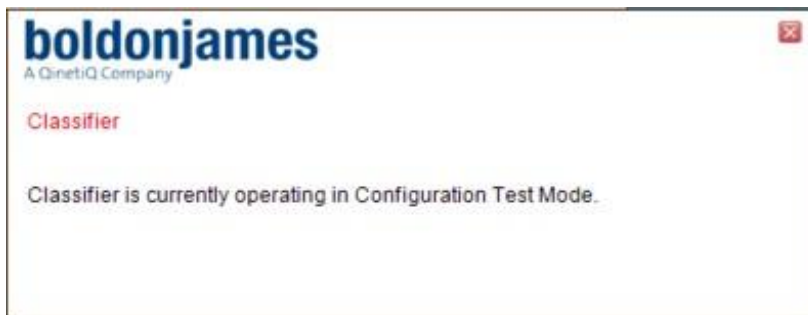
- This test sequence will temporarily set specific registry settings that direct Classifier applications to use the chosen test configuration and Policy, rather than any deployed configuration.
- Start the Classifier host application(s) to be tested. A dialog shows the currently active applications



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



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



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

When you have finished testing the Test Configuration, close **all** open Classifier host applications (e.g. Word and Outlook) and then click **End Test Mode** on the Test Mode Administration dialog. When the Applications are restarted, they revert to standard operation.

3.8 Locking and Unlocking Configuration

When multiple administrators have responsibility for different aspects of the Classifier configuration, there is a possibility that one administrator can publish incomplete configuration changes that were made by another administrator. Classifier Administration Server helps prevent this situation by providing the ability to lock and unlock parts of the configuration. The **Lock Configuration** action can be used to indicate to other Classifier administrators that the configuration should not be published (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 are similar **Lock / Unlock Policy** actions. Note, however, that **Unlock Configuration** will NOT affect any policy locks - they will remain in effect. Additionally, when a policy is locked, the **Publish Configuration** action is inhibited (greyed)

4 MIGRATING AN EXISTING CONFIGURATION

In summary, once you have installed Classifier Administration Server, you will need to specify who will be looking after the Classifier configuration. Refer to [Administrative Roles](#) for instructions.

If you are not using Active Directory for holding your Classifier configuration then you will also need to identify the folder locations for retrieving and publishing configuration. Refer to [Managing Classifier Configurations](#) for instructions.

4.1 Importing a configuration

Once you have installed the Classifier Administration Server software and have defined the administrators and their roles, you will be ready to import your existing Classifier Configuration.

1. Ensure that you are working with the latest published version of your Classifier Configuration and that you have created a backup.
2. Copy the configuration folders (Label Configuration, Management and Messages) to the **Folder for 'Get Configuration'** location as defined in [Managing Classifier Configurations](#). (The default location is *%programdata%\Boldon James\Config Import Folder*)
3. Connect to the Classifier Administration Server with a web browser and authenticate as a user who granted the **Full Administrator** role.
4. Use the **Get Server Configuration** action from the main Classifier Administration page to load your existing configuration into Classifier Administration Server.

4.2 Configuring the configuration publish location

You will need to consider how you will make configurations available to Classifier Clients (end-points) from Classifier Administration Server. The choice you make here may require modification to the Classifier registry entries of your end-points.

If you are using Active Directory to publish your configuration, you do not need to make any changes to the end-point registry entries.

If you configure the **Folder for 'Publish Configuration'** on the **Configuration Folder Paths** page, as defined in [Managing Classifier Configurations](#), to be the same location where you are publishing, you do not need to make any changes to the end-point registry entries.

If you publish your configuration as a Web Configuration archive, you will need to copy the Web Configuration archive and the version.txt files to the web server that serves the configuration. You do not need to make any changes to the end-point registry entries.

You can use the **Folder for 'Publish Configuration'** on the Classifier Administration Server. This will require that you open that location as a network file share, set the permissions so that all end users can read from that location and then ensure that the UNC path for that share is set in the registry entry for the end-points.