boldonjames
by HelpSystems

Getting Started Guide
Classifier Administration Server

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Table of Contents

About the Classifier Administration Server

The Boldon James Classifier Administration Server package is a management toolset providing the ability to create a Labelling policy and define clearance values for users and remote email domains that can be stored in Active Directory, as a set of XML files stored on the file system or a downloadable file hosted on a website. The policy and clearances can then be used to control the operation of features within Boldon James Classifier applications such as Email Classifier and Office Classifier.

The Classifier Administration applications consist of:

- Classifier Administration Server
- PowerShell Administration

Once you have installed Classifier, you can refer to the Classifier Administration Server User Guide deploy it.

PowerShell Administration

PowerShell Administration allows you to install and use the Administration Server via PowerShell commands. For more information, see the *PowerShell Getting Started Guide.*

> **NOTE:** The PowerShell feature is licensed separately. Contact Boldon James Sales or Support for more information.

About this guide

This guide contains information about how to install and deploy the Classifier Administration Server in your environment. This document is for users who wish to quickly gain an initial understanding of the Classifier administration interface and the end-user experience. For information on how to install the other components in the Classifier Suite, go to those components' guides.

Before you start

- Ensure all system requirements are met. See *Prerequisites*.

- Decide on a file store location under which the Classifier Administration Service runs, and under which the Application Test Environment will operate. Ensure you have write-access to this file store.

- Install the Classifier Test Mode Administrator if you are testing your configurations before publishing. You can find the Test Mode Administrator tool in the Classifier Administration Server folder located in the Base Bundle folder. The Test Mode Administrator allows you to browse to a central shared location containing multiple test configurations. Upon selecting a specific test configuration, the Test Mode Administrator deploys that configuration to the local machine and Classifier Applications enter Test Mode. For more information on Classifier Test Mode Administration, see the *Classifier Administration Server User Guide.*

- Install the Email and Office Classifier to extend your Microsoft Office applications (depending upon the Classifier Licenses applied). From the Email and Office Classifier folder located in the Base Bundle folder, install the x64 or x86 version depending on your Microsoft Office version. For information on how to install Email and Office Classifier, go to the *Classifier Administration Server User Guide.*

- If you are upgrading or transitioning from the Administration Console to the Administration Server, ensure your existing configuration is backed up. See *Prerequisites*.

Prerequisites

To enable all the prerequisites for your platform using PowerShell commands, see the PowerShell Getting Started Guide.

Requirement	Description
Hardware	64-bit PC
Software	.NET Framework 4.7.2 or higher
	PowerShell 5.0 or higher
Web Browsers	Google Chrome
	Microsoft Edge
	Internet Explorer 11
	Firefox Safari
	Opera
User accounts	The account must have Full Administrator privileges on the machine running the installer, this is necessary to allow for special service, registry and folder access during the installation.
	The user account entered during installation account requires minimal permissions for which a standard local or domain user would suffice. If you intend to publish data to Active Directory or network shares, the account must also have permissions to read and write to those locations.
	The account used for running the Classifier Administration Server can only be changed by uninstalling and reinstalling the Classifier Administration Server. When reinstalling the Classifier Administration Server, enter the user account when requested during the installation process.

Requirement	Description
Operating System	Windows 7
	Windows 8.1
	Windows 10
	Windows Server 2008 R2
	Windows Server 2012
	Windows Server 2012 R2
	Windows Server 2016
	Windows Server 2019

IIS Windows Features and Web Server Roles

Depending on your operating system, ensure you have the following Features and Roles enabled.

Operating System	Windows Feature	Web Server Role
Windows 7	ASP .NET 3.5	IIS Management Role
Windows 2008 R2		.NET Extensibility 3.5
		Default Document
		HTTP Errors
		Dynamic Content Compression
		Static Content Compression
		ISAPI Extensions
		ISAPI Filters
		Logging Tools
		Request Filtering
		Static Content
		Windows Authentication

Operating System	Windows Feature	Web Server Role
Windows 8.1	ASP .NET 4.6	IIS Management Role
Windows 10		.NET Extensibility 4.6
Windows Server 2012		Default Document
Windows Server 2012 R2		HTTP Errors
Windows Server 2016		Dynamic Content Compression
		Static Content Compression
		ISAPI Extensions
		ISAPI Filters
		Logging Tools
		Request Filtering
		Static Content
		Windows Authentication
Windows Server 2019	ASP .NET 4.7	IIS Management Role
		.NET Extensibility 4.7
		Default Document
		HTTP Errors
		Dynamic Content Compression
		Static Content Compression
		ISAPI Extensions
		ISAPI Filters
		Logging Tools
		Request Filtering
		Static Content
		Windows Authentication

Install the Classifier Administration Server Software

1. From the Classifier Base Bundle folder, run the ClassifierAdministrationServer.msi or Setup.exe.
2. Click **Next**.
3. Read and accept the license agreement.
4. Select:
   - **Custom** if you want to install the Website and the PowerShell features at separate times or in separate locations.
   - **Complete** if you want to install the Website and PowerShell features at the same time in the same location.
5. Enter the User Account name, domain (if not local user), and password. Verify the account, then click **Next**.
6. Click **Install**, then click **Finish**.
7. Restart your machine.
8. Verify the **Boldon James Classifier Administration Service** is running.

Start Classifier

The Classifier Administration Service is installed as the default IIS service on the default HTTP port.

To start Classifier from your web browser, if you are on your local machine, enter http://localhost; if you are using a remote machine, enter http://systemname.

License

The Classifier Administration only enables configuration of features for which the site is licensed. The available features for each license are found in the Classifier Administration Server User Guide.

There are three license types: evaluation, subscription, and full.

> **NOTE:** Depending upon your license, some features may not appear or be greyed out. For example, if you do not have a license for OWA Classifier, then OWA Classifier features will be unavailable.

The name of the license files are in the form IMP xxx .LIC, where xxx is the feature or option (for example, IMPCEM - Email Classifier; IMPCOF - Office Classifier; IMPCOW - OWA Classifier; IMPCLN - Notes Classifier).

When you first install Classifier, no license files are applied to the configuration. A license is not required to run the Classifier Administration Server or to use PowerShell cmdlets to view the Classifier configuration. It is required to create or modify the Classifier configuration before it can be used by Classifier applications.

To install a license file:

1. Run Classifier Administration.
2. Select **Global Settings.**
3. Choose **License**.
4. Under **Actions**, select **Properties**.
5. Click **Add / Update**.
6. Browse to the location of the new license file, select the file, and click **Open** .

Test your Configuration

Classifier Test Mode Administration is a utility for applying a test configuration to the local machine.

You can browse to a central shared location containing multiple test configurations. Upon selecting a specific test configuration, the Test Mode Administration utility deploys that configuration to the local machine and Classifier Applications enter Test Mode.

The Test Mode feature temporarily sets a local switch that directs the Classifier Application software to use a 'test configuration' rather the normal run time (deployed) configuration. Test Mode creates a folder and associated registry keys that the Classifier Applications detect and use in preference to any corporate defined settings.

1. From the Classifier Base Bundle, select Classifier Administration Server > Test Mode Administration. Double-click ClassifierTestModeAdministration.msi to start installing it.

   > **NOTE:** Ensure that no Microsoft Office applications, Word, Excel, Outlook and PowerPoint, are running.

2. Start the Classifier Administration Server.
3. From the Administration Management menu, select Configuration Folder Paths to ensure your configuration is pointing to folders that are readable and writable for the test application environment.
4. Create your configuration.
5. In the Actions Pane, select **Classifier Administration** and click **Publish Test Configuration**.
6. Name the test configuration. The Publish Reason field allows further qualification of the test configuration; the Test Mode Administration utility displays this information when asking you to select a test configuration. By default, the configuration is saved in **C:\ProgramData\Boldon James\TestMode Folder**.
7. Click **OK**.
8. Open the Classifier Test Mode Administration.
9. Browse to the Test Mode Folder location where you published the test configuration.
10. Select the test configuration and click **Run Test**.

    A dialog is displayed which indicates which, if any, classifier applications are still running. Leave this dialog open.
11. Start an application. A dialog appears indicating that Classifier is operating in Configuration Test Mode.

Send an Email to Test your Configuration

1. Start **Outlook**.
2. Select **New message**. This will display a Classifier-enabled Outlook new message form. How it appears depends on the version of Office installed.

3. If configured, a Classifier Label displays.

4. In the ribbon, change the classification.

5. Write and send an email as a test.

6. Open the received message. You will see the effects of the rules to add a Marking, based on the label value into the message Subject and as a first line of text (FLOT).

7. Close Outlook, and click **End Test Mode** when you are finished your test.

Remove the Test Configuration

1. Select **Labelling Configurations**.

2. Choose **Delete**.

3. Check the **Delete licenses in use in this configuration** option.

4. Click **Yes**.

5. Close the Classifier Administration Server.

Upgrade to a newer version of Administration Server

If you are upgrading to a newer version of Administration Server:

- When new rules are added, the old versions can no longer be created. Existing instances of the old rules will still operate but can no longer be edited. If you need to edit the rule then a new rule must be added to the configuration, and the old one deleted.
- When new rules are added, they may have associated default User Defined Messages when the rule is created. The new User Defined Messages are only available if you create a new configuration. Therefore, if you upgrade your Classifier Administration version and add a newly introduced rule, the existing configuration will have no default message for this rule. In this case, you will need to choose an existing User Defined Message, or create a new one to associate with the rule.

1. Back up your current configuration.
2. Uninstall your previous version.
3. Install the new version. See *Install the Classifier Administration Server Software.*

Migrate from Administration Console to Administration Server

If you are now using Administration Server, you can migrate your configurations created in Administration Console.

The key benefits of the Server compared to the Classifier Administration Console are:

- Centralized administration
- Delegated administration
- Multi-User Access

Configure 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 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, 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.

Import an Existing Classifier Administration Console Configuration

1. Ensure that you are working with the latest published version of your Classifier Configuration and that you have made a backup of your configuration.

2. Copy the Label Configuration, Management, and Messages folders to the **Config Import Folder**. (By default, this folder is located at **%programdata%\Boldon James**).

3. Connect to the Classifier Administration Server.

4. From the Navigation pane on the left, select **Classifier Administration**.

5. From the Actions pane on the right, select **Get Server Configuration**.

6. Click **Yes** to confirm you want to get the server configuration.

7. Select **File share**, and click **Yes**.

   A message appears stating that the server location has been successfully retrieved.

Feature and Template settings

Some Classifier Administration settings have default values that you can readily use when developing your configuration.

Feature	Template Settings
User Message Library	Messages that can be displayed to the user.
Selector Library	A single selection Selector Type is defined with associated values: [Public / Business / Confidential / Internal]
Marking Library	Various marking formats are pre-configured.
Policies	A single policy presented to all users offering the same user experience (e.g. the same label choices).
	Includes the Classification Selector and various values
	Defines various rules including
	Always add a FLOT to Outlook emails.
	Add a particular LLOT if Classification is Confidential
	Various other rules are included that will only become active when a suitable license (e.g. Office Classifier) is applied, or other options (e.g. Clearance Check email domains) are Enabled and configured.