

User Guide
Classifier Administration
Server

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About the Classifier Administration Server User Guide

Classifier Administration lets administrators:

- establish a Classifier configuration for the first time
- administer an existing local configuration
- set/view Classifier administration (audit control) properties
- retrieve an existing master configuration to your local File Store
- publish the current configuration
- publish a test configuration. See the Administration Server Getting Started Guide for more information.
- lock / unlock the configuration
- generate configuration information suitable for retrieval from a URL
- define and publish the Classifier Configuration, including the Policies based on that Configuration, to groups of users
- define SMTP domain clearances

If you are new to Classifier, we recommend that you read the Administration Server Getting Started Guide before you start to understand system requirements.

NOTE: The Classifier Administration's target environment assumes screen resolutions of 1280 * 800 or better. The application can run at smaller resolutions, but some 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 some buttons at the bottom of some dialogs can be hidden behind the taskbar (Windows 7). You may need to auto hide the taskbar.

About this guide

This guide provides a reference for Administrators planning to use Classifier Administration.

Common Label Handling Features

This section describes the Label handling features that are common to the various applications (Email Classifier, Office Classifier, OWA, Notes and Mobile Classifier), and usually available if a Classifier product (Microsoft Excel, PowerPoint, Project, Visio, Word, Outlook, OWA, Mail Add-in, Mobile or Lotus Notes) is installed and enabled.

Propagating Labels

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 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
- 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 dominates all labels associated with any Classifier labelled attachments (documents or messages; or for emails only, Portion Mark).

NOTE: For more information of how a Classifier application handles label values assigned by another Classifier application, see [Label Propagation Mechanisms on page 207](#).

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

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 unlabelled.

Recognizable 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 recognizable label values in the defined Label Locations (for example, 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 (for example, 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 value to use. The most significant value is then used as the document or message label value.

NOTE: For more information details of how a Classifier application handles label values assigned by another Classifier application, see [Label Propagation Mechanisms on page 207](#). This appendix also covers files labelled by File or Power Classifier products.

Mandatory Selectors

Each Selector may be designated as Mandatory through application specific rules. See [Policies on page 134](#).

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

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 specifies a default value for that selector. Then the default value will appear as the initial value.

Insert Marking Label As Field Code (Word Only)

NOTE: If a Word document is opened via an Office Web App, all field codes are displayed as [Field] rather than the actual value when viewing in 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 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.

If you save a document as another type, the Classifier label information can be lost. 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, for example, the bjDocumentSecurityLabel. Email, OWA and Notes Classifier will check defined label locations for recognizable 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.

For Office Excel, PowerPoint and Word 2010:

1. Click the Office button, then choose Prepare and Properties.
2. On the task pane, click Document Properties > Advanced Properties.
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.

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 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 (for example, Subject), but others are not readily visible (for example, 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: To cause the x-bjprotectivemarking to be transmitted across an SMTP connection in a Lotus environment, bjprotectivemarking must be included in the Domino server list of x-headers (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

Label Selection Interfaces

Classifier applications allow the user to select labels from Selectors and Values from the Ribbon. The Selectors, Selector Values, and associated options are defined in the Classifier policy configured for the current user. See [Policies on page 134](#).

If the Ribbon is not available, the user can select a label value in the 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. You can enable Display selector values as buttons for single selection list selectors within the policy.

Ribbon

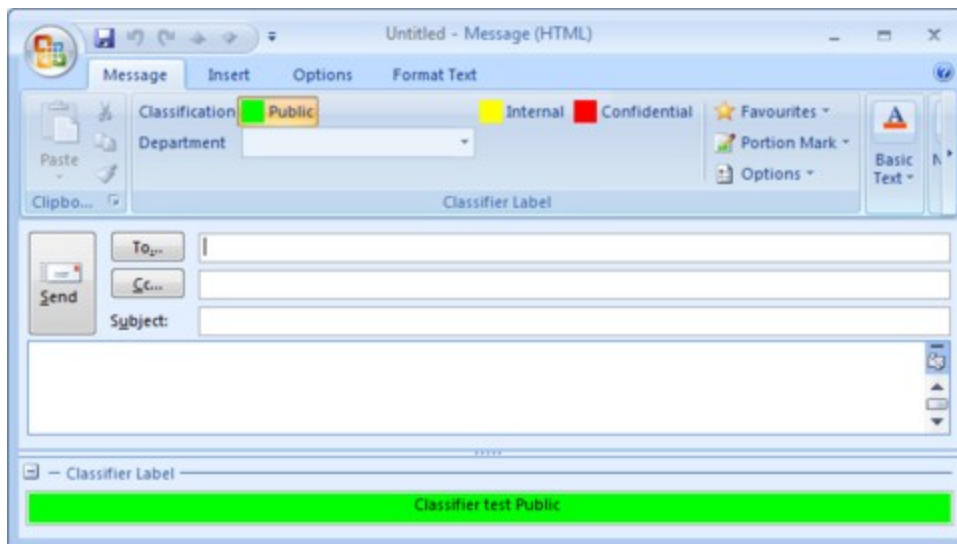
You can enable/disable and set how various Ribbon settings are displayed.

To configure your Ribbon:

1. Select Labelling Configurations > Configuration Settings > General Settings.
2. To set how the ribbon is displayed, select a mode from Classifier ribbon layout mode.
3. To set where the Classifier label item will be within the ribbon, select an option from Classifier ribbon group location.
4. If you want to remove Classifier options from the ribbon, enable the Remove Classifier options from the ribbon bar.

NOTE:

In some circumstances (for example, Office 2013) the ribbon will not appear when a read only document is opened until you choose Edit. For Outlook, you can use the **Show Classifier on ribbon when reading** to hide the Classifier Ribbon entry when reading a message.



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, the second selector has the option disabled, and that selector appears as a drop down selection list. 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. To display these selector captions:

1. Select Labelling Configurations > <configuration name> Policies > <policy name>.
2. From the Actions pane, select **Properties**.
3. Select **Show selector captions on the ribbon**.

The Favourites button in the example above will only appear if **Display of Favourites button** is enabled. Favourites are not supported under OWA Classifier or the Mail Add-in.

The Portion Mark button shown in the example above will only appear if the option is enabled for the current application. Portion Mark is not supported under OWA Classifier or Notes Classifier.

The Office ribbon limits 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 some 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.

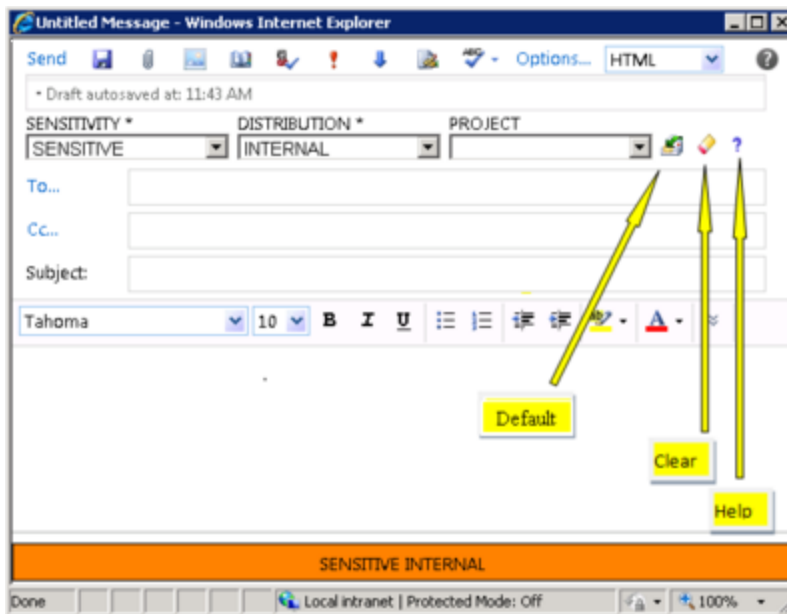
In such situations, Classifier applications show the Classifier Label Selection dialog which will show the selectors and values pertinent to the current user. This dialog is also used to choose values for selectors that cannot be displayed in the ribbon; for example, more than three selectors or multiple 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 [Labelling Configurations on page 66](#) for more information.

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

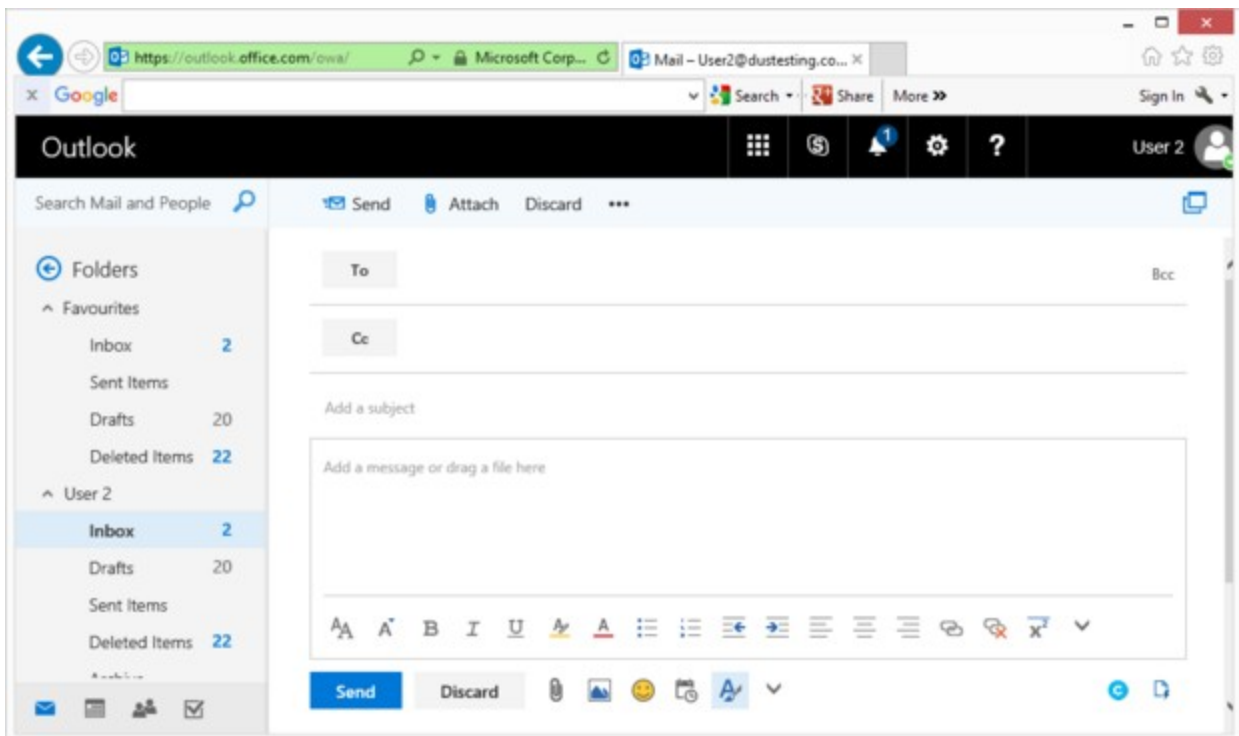
OWA


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



Mail Add-in

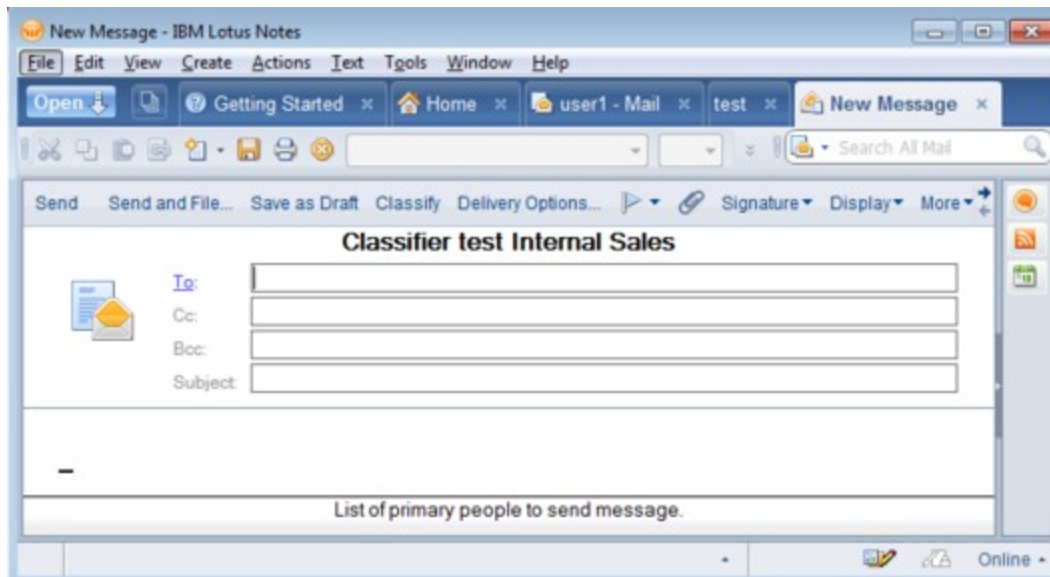
In a Mail add-In environment, label selection and the standard label actions appear on an extended message compose form.



The Classifier label interface is invoked using the Classifier button . The example below does NOT have single click enabled.

The image shows a 'Classifier' dialog box with a close button (X) in the top right corner. It contains three sections: 'SENSITIVITY' with buttons for 'UNMARKED', 'SENSITIVE' (highlighted in green), and 'COMMERCIAL-IN-CONFIDENCE'; 'DISTRIBUTION' with buttons for 'INTERNAL' and 'EXTERNAL' (highlighted in green); and 'PROJECT' with a dropdown menu. Below these sections is an orange bar displaying 'SENSITIVE EXTERNAL'. At the bottom are buttons for 'Clear', 'Default', 'OK', and 'Cancel'.

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.



Favourites

NOTE: This feature is not supported by OWA Classifier. Classifier Mail Add-in, Notes 8 and Mobile Classifier.

You 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.

If applicable, the date/time stamp is updated to the current date/time every time you use the Favourite.

To display Favourites:

1. Select Labelling Configurations > Configuration Settings > General Settings.
2. Enable Display of Favourites button.

If the Recently Used feature is also enabled (when you configure your Policy), then the Favourites menu of actions will appear as:



NOTE: The Favourites and recently used values that appear in the menus are initially shown using the marking format associated with the Custom format for Summary Markings.

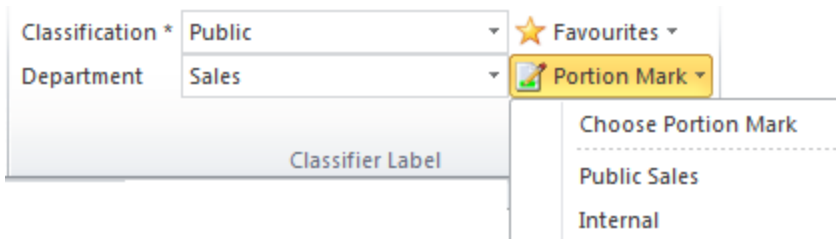
You can:

- add current label to favourites
- organise and rename Favourites
- set current label as default rather than using any policy defined default. Default Classification must be enabled. See [Policies on page 134](#).
- 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

Portion Mark

NOTE: This feature is not available under OWA Classifier, Notes Classifier, or Mobile Classifier, and is not applicable to Visio and Project.

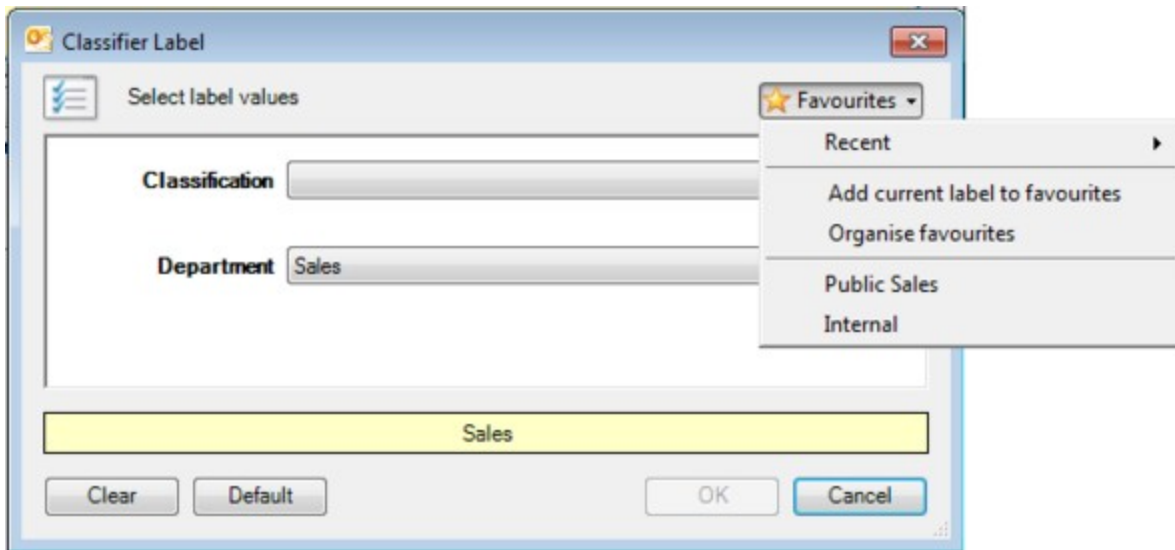
A Portion Mark is an abbreviated marking derived from a label value. For example, [P] for Public. Availability of the feature is controlled by application specific options. If the Portion Marking setting is enabled and has a valid Marking Format configured, then Portion Mark appears in the Classifier label ribbon.



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.

You can:

- select a Recent Portion Mark from the sub-list.
- choose Portion Mark allowing the user to select a specific label, or choose a favourite label, or a recent portion mark subject to their availability:



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.

The feature is unavailable unless Display of Favourites button is Enabled, as this is how recently used labels are accessed.

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.

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.

Single Click Operation

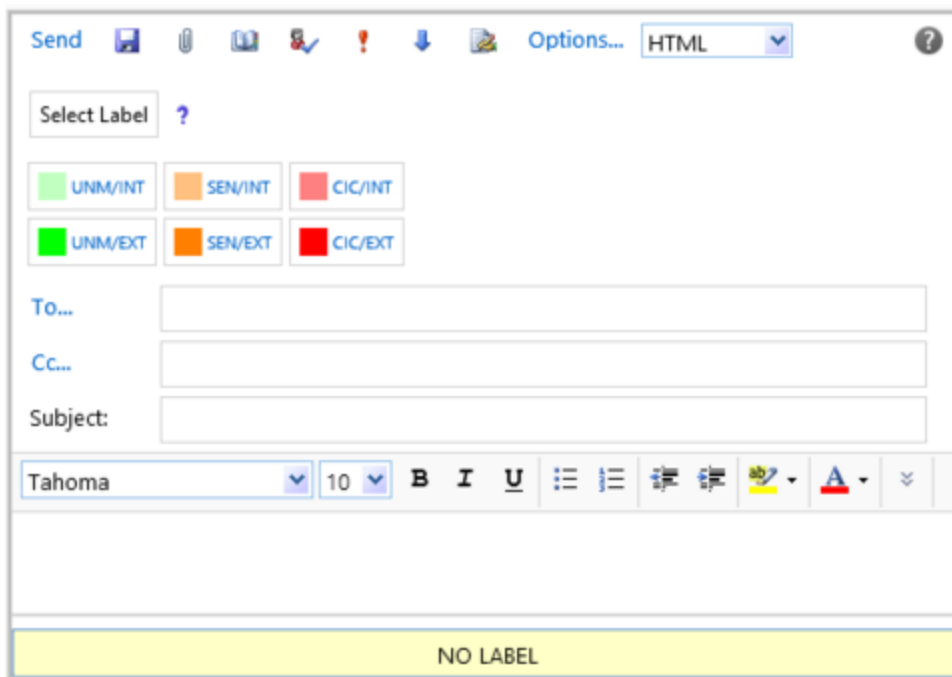
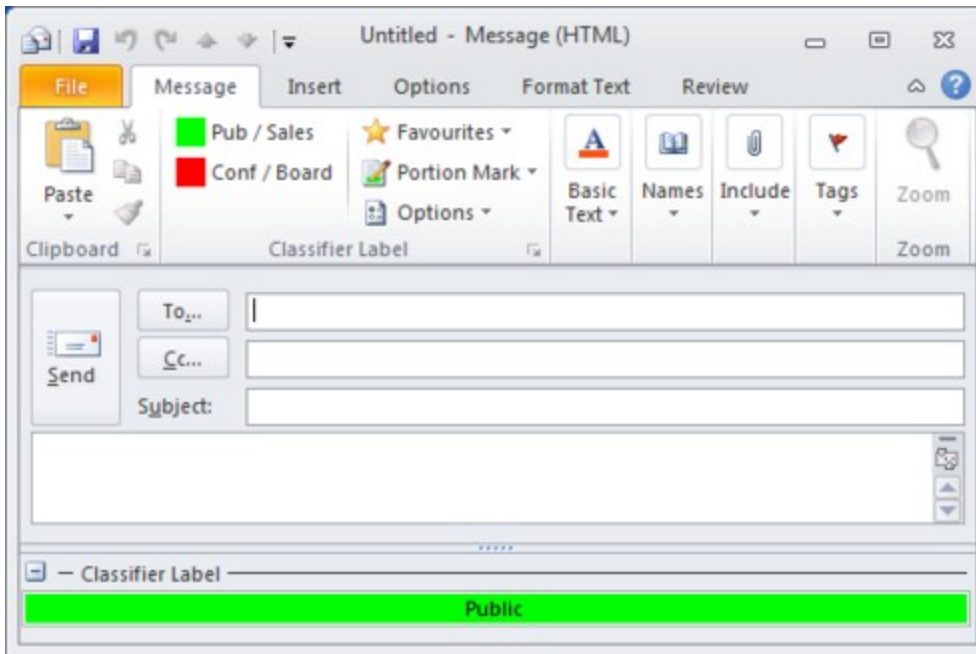
NOTE: This mode of operation is only available if the current policy has Use Single Click with pre-defined labels configured.


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, 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 appearance will be modified according to whether other features such as Favourites or Recently Used Labels and Portion Marks are in use. The matrix of single click buttons displayed is affected by a windows re-size operation, so short captions are advisable.

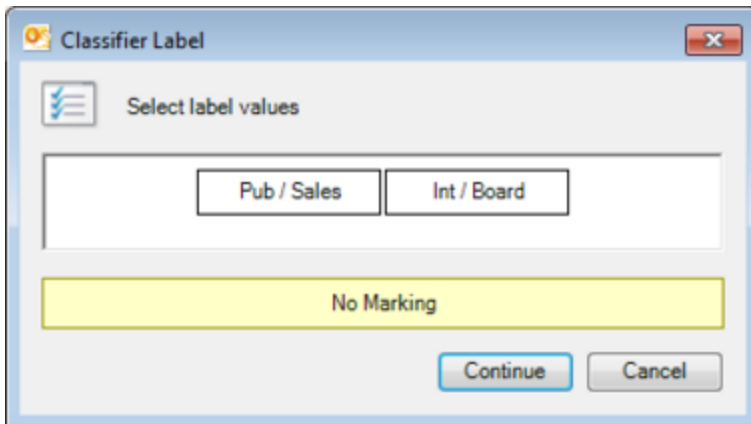
The user sees the buttons configured, and selects the associated label by clicking the appropriate button (Pub / Sales or Conf / Board in the Outlook example below, or Non-Business etc. in the OWA example).



The user can select individual Selector values by clicking the Classifier label dialog box launcher  in Outlook, the Select Label button in OWA, to launch the 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 the user must select a Classification from the label selection dialog, then an intermediate dialog may appear allowing a Single Click button to be clicked, or the full label selection dialog to be invoked by clicking the 'Current Marking' button (No Marking in the example below).



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

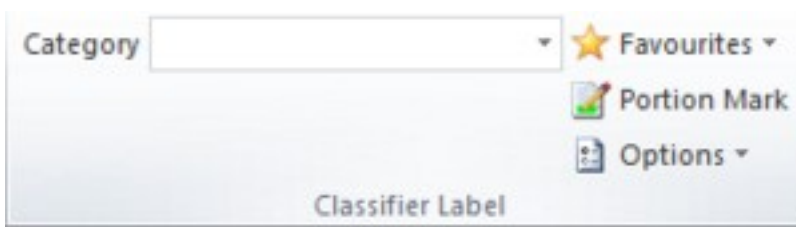
NOTE: These features are not supported by Mobile Classifier.

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.

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.

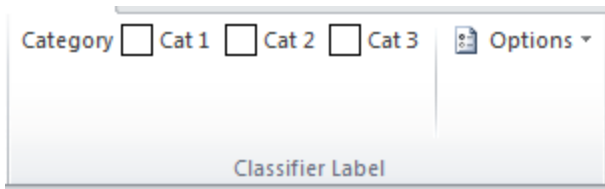
Office Classifier

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

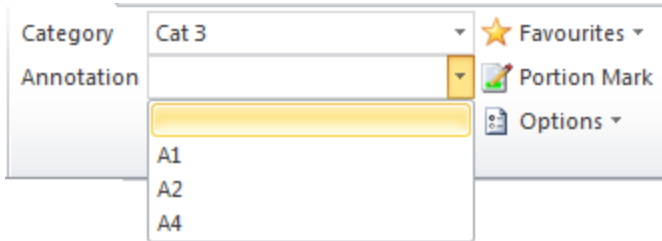


The presentation may vary if favourites or portion mark are configured to be available.

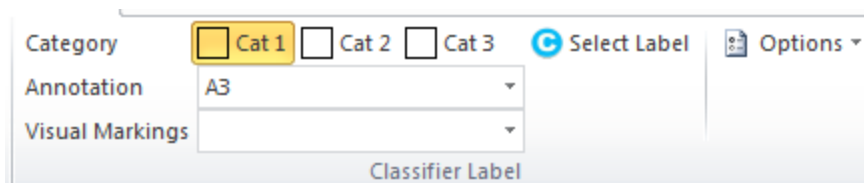
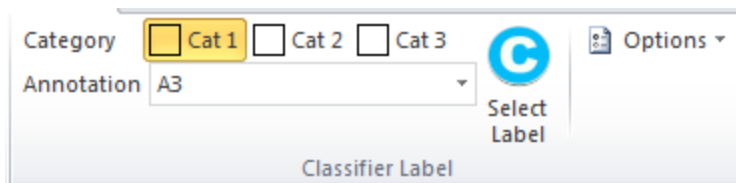
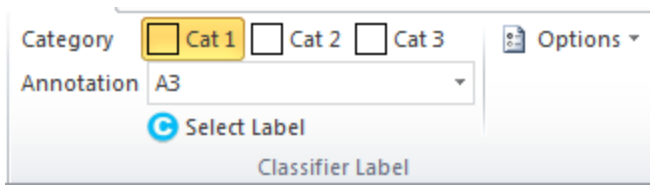
If Display selector values as buttons is enabled, this dialog might appear as:



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

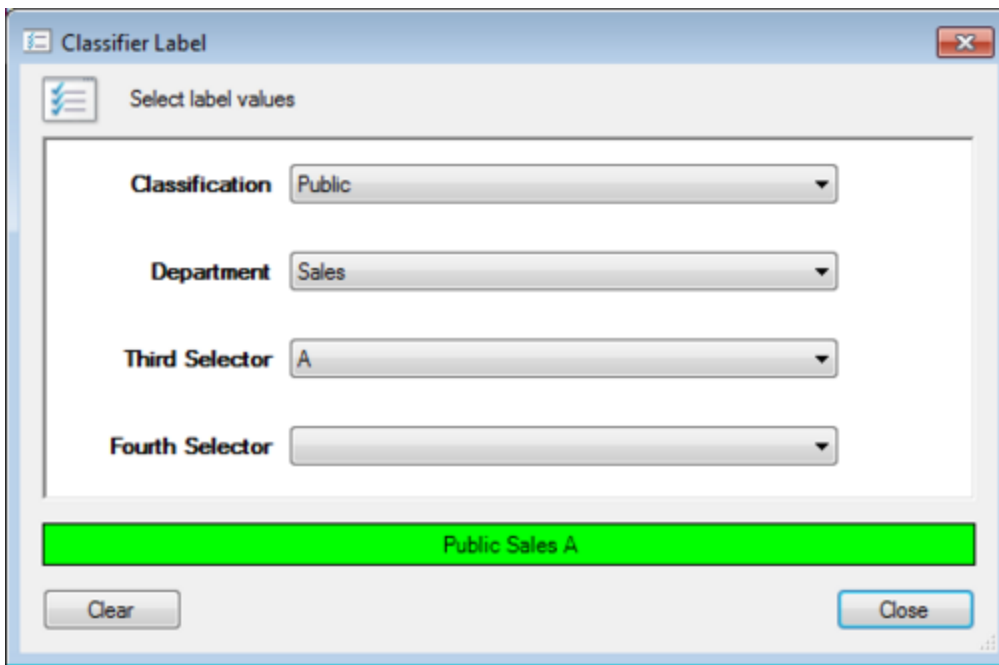


If there are more than three selectors or selector types that cannot be shown in the ribbon, then the label selection button may appear as per the examples below depending upon space utilisation within the window:



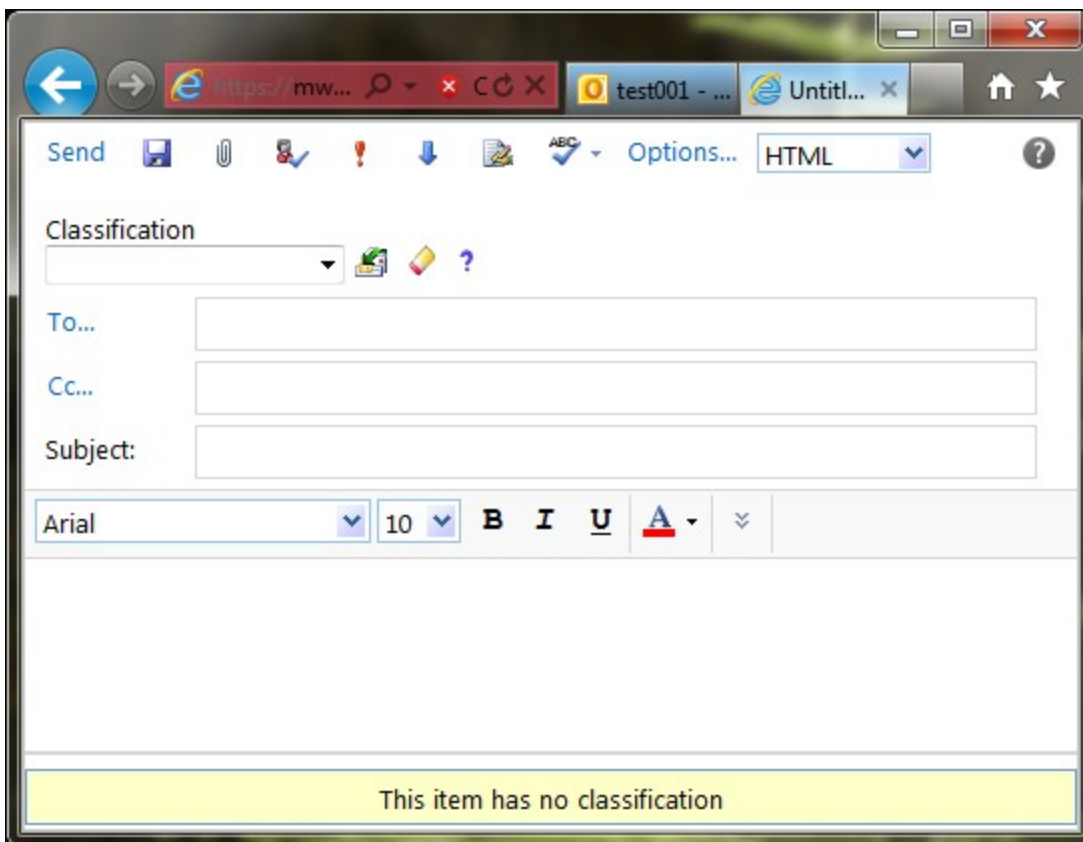
Label Selection Dialog - Assisted Labelling

The Label Selection dialog may sometimes appear 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 .

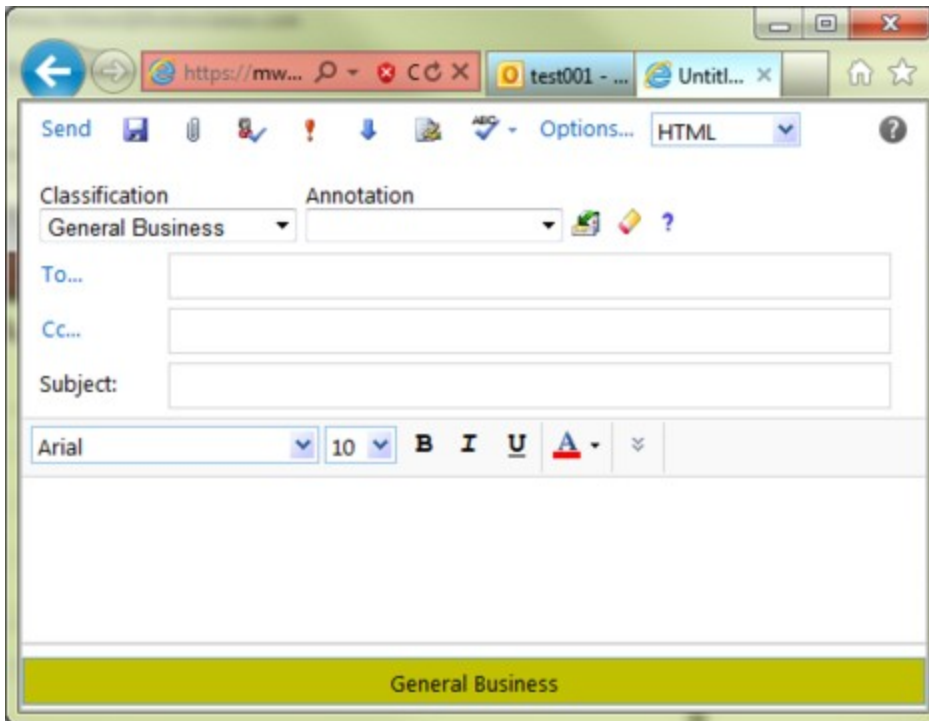


The dialog will be populated with appropriate defaults.

Initially only the first selector is shown (in this example Classification):



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



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.

This is an 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.

Set Selectors Connect Selectors **Decision Tree** Set Rules Suggested Classification Default Label

Decision Tree

- ▼ Which department owns this data?
 - ▼ Human Resources
 - ▼ Does this contain personal information?
 - Employee
 - Candidate
 - ▼ No personal HR information
 - ▼ What type of Human Resources information does this document contain?
 - Corporate policy
 - Corporate organisation
 - Recruitment
 - ▼ Finance
 - ▼ What type of Financial Data does this document contain?
 - Financial Customer Data
 - Financial Vendor Information
 - ▼ Financial Reporting Data
 - ▼ Releasable To
 - USA
 - GBR
 - Australia
 - Canada
 - New Zealand
 - Financial Other
 - ▼ Sales, Marketing
 - ▼ What type of Sales information is in this document?
 - Sales Price Quote
 - Sales Report
 - Sales Forecast
 - Sales Customer Touch
 - Sales Marketing
 - ▼ Production
 - > What type of Production information is contained in this document?
 - ▼ Infrastructure
 - > What type of Infrastructure information is contained in this document?
 - ▼ General
 - > Does this information need to be shared outside the company?
 - Personal

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

Configuring 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.

A user interface area for the Decision Tree dialog allows customisation of the dialog that appears on the client. See the [User Interface Library on page 60](#).

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 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. 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.

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, appears on a new Decision Tree tab in the admin tool.

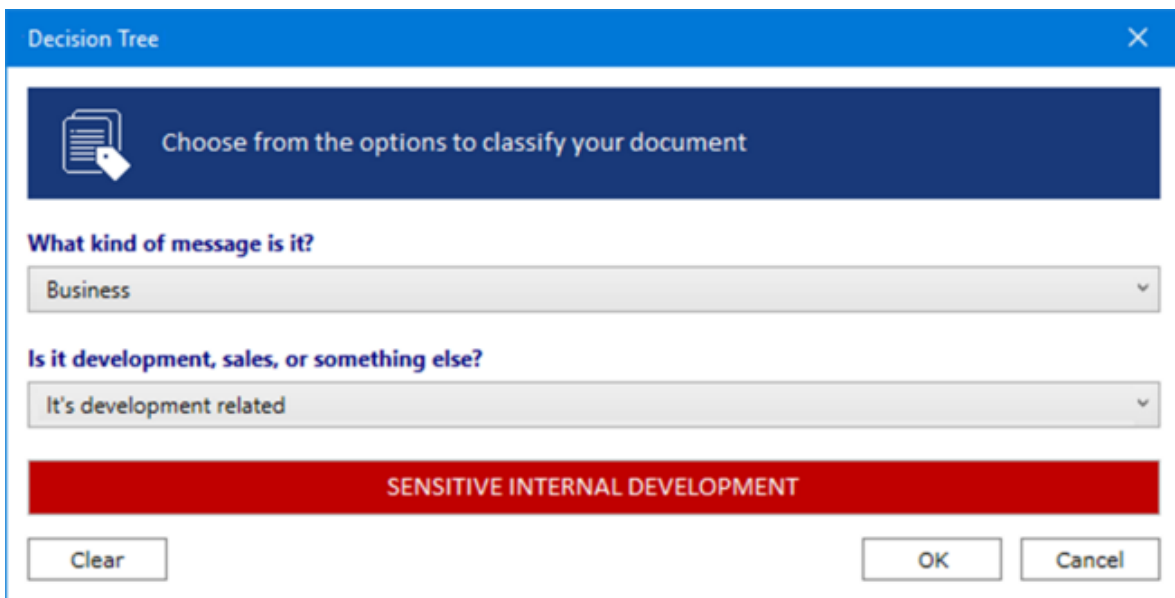
Renaming selectors and selector values will be applied to any in use in the Decision Tree. Therefore, renaming then switching back to the Decision Tree will show the new names in the configured labels.

Changing 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.

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.




The screenshot shows a dialog box titled "Decision Tree" with a close button (X) in the top right corner. The dialog has a dark blue header bar with a document icon and the text "Choose from the options to classify your document". Below the header, there are two dropdown menus. The first dropdown is labeled "What kind of message is it?" and has "Business" selected. The second dropdown is labeled "Is it development, sales, or something else?" and has "It's development related" selected. Below the dropdowns, there is a red bar with the text "SENSITIVE INTERNAL DEVELOPMENT". At the bottom of the dialog, there are three buttons: "Clear", "OK", and "Cancel".

Decision Tree Option in Outlook

NOTE: Note: Check that the Decision Tree has been enabled in the Classifier Administration User Interface.

To see the Decision Tree Feature in Outlook:

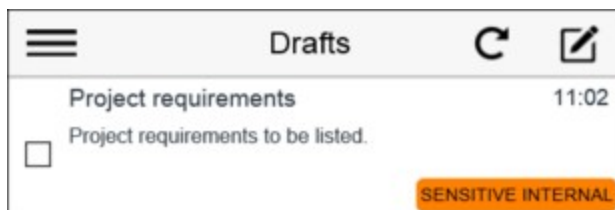
1. In the Message menu, select the Use Guidance  icon. A Classification Guidance window will appear.
2. The description will ask, What kind of message is it? Select an option in the list. Once the option is selected a label will appear.
3. Click the OK button. The resulting label will be applied to the email.

Mobile Classifier User Interface

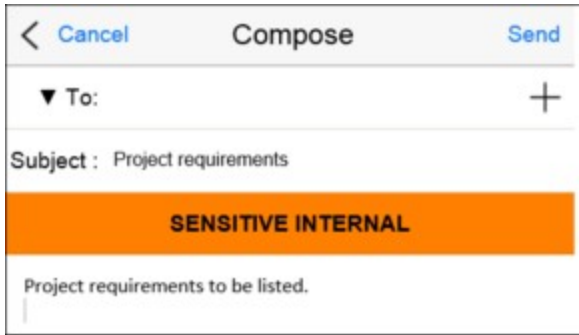
Mobile Classifier is an email App that can be installed on a supported mobile device. The App will appear as an entry in the App list either as an icon, or as an icon with associated text:



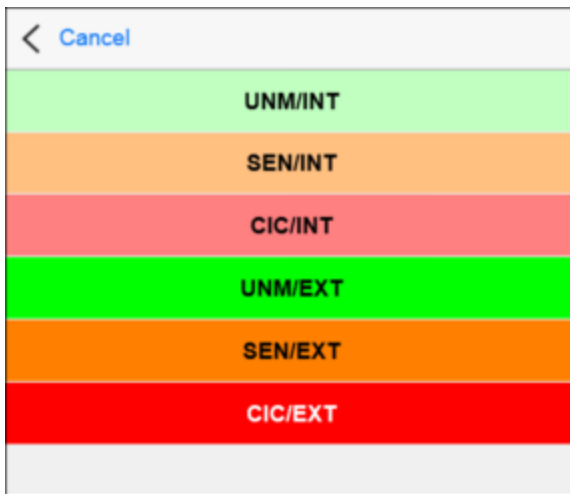
When viewing messages in a folder, the classification value (if any) appears as follows:



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



Clicking the classification value displays the single click selection list:



Label Options

Email, Office and OWA Classifier present the standard label options menu.

There are some differences between Outlook and OWA as per the examples in 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. 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.

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.

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
- 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 license state for that client, and configuration location etc.

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:

- A Label selected message(s) button when viewing a folder summary in Outlook (not available under OWA)
- A Set Label... button when viewing an open message.

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 show the current settings.

To label one or more messages in a folder:

1. Select the required messages and click Label selected message(s) . To change the label on a message that is open, click Set Label.

In either case, the usual label selection dialog (Single Click if enabled) will appear allowing choice of the label to be applied to the messages. The dialog will show the existing label of the messages except if at least one message has a different label in which case the label values are blank.

2. Select the required selector values and click OK to apply the change.
3. If you label a message AND a label change rule is triggered, then a standard policy check dialog appears. If you use Label selected messages with multiple messages selected AND more than one message triggers a label change rule, then a dialog appears enabling user to select a message and then click Label selected message.


Manage Classifier Administration Settings

Configure Classifier Administration Settings to set up roles, permissions, and folder paths for your Configurations.

Configuring Folder Paths

You can set the folder paths to store the test, published, and web configuration.

To set the folder paths:

1. Select  > Configuration Folder Paths.
2. Enter the locations for the following:
 - Get Configuration - where a copy of your existing configuration is stored on your local machine
 - Publish Configuration - where your published configuration is stored to deploy to your users
 - Create Web Configuration - where a copy of your configuration is stored in a web-supported format
 - Test Mode - where a copy of your Test configuration is stored

Getting an Existing Configuration

If you want to make changes to your existing 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 [Deploying Configuration on page 175](#).

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

1. Select Classifier Administration and select Get Server Configuration .
2. Click Yes to ensure you want to get a server configuration. Doing so will overwrite any existing local configuration.
3. Select the Active Directory or File Store option as required. Click Yes.
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.
4. Acknowledge the retrieval complete dialog.

NOTE: Getting the server configuration has no effect on any local Configuration Archives.

Publishing the 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 [Deploying Configuration on page 175](#).

Every time you publish a configuration, an archive copy is stored locally as described in Configuration Archives. The configuration space requirements are outlined in [Estimating Configuration Size on page 39](#).

NOTE: If you wish to publish the Classifier configuration via Active Directory then the Active Directory Schema must be updated (see [Extending the Active Directory Schema on page 205](#)). A 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.
2. Select the Active Directory or File Store option as required.
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.
3. Enter a Publish reason and click OK. 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.
4.

NOTE: You may receive an error if the Single Click is enabled but does not contain button definitions, and if no connected selectors are configured in Connect Selectors - Assisted Labelling.
5. Click OK.

NOTE: Each time you publish a configuration, an archive copy is stored locally. See [Configuration Archives on page 36](#) for full details.
6. Click OK on the confirmation dialog.

NOTE:

- 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 Publishing to AD on page 37](#) 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.

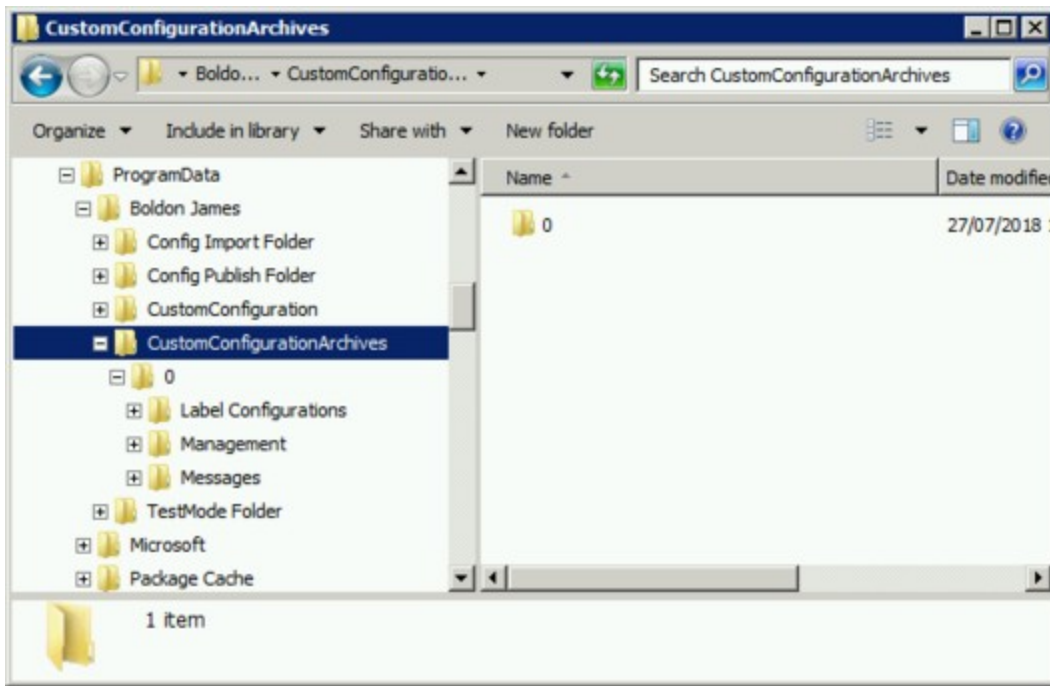
Configuration Archives

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\Baldon 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):



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\nLabel 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. 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 Publishing 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 .

4. Expand the Configuration and right-click CN=Services/CN=Boldon James node.
5. Select Properties, then click the Security tab.
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. Click Edit .
9. Ensure all permissions are allowed except for Full control and Modify permissions.

IMPORTANT: Apply to: must be set to This object and all child objects .

10. Click OK and then ensure Include inheritable permissions from this object's parent is checked on the previous dialog.
11. Click OK on subsequent 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.

For Group Policy Management Editor MMC snap-in users

1. Select Computer Configuration > Policies > Windows Settings> Security Settings > Local Policies > Audit Policy.
2. Select Audit directory service access and edit the properties.
3. From the Security Setting tab, select both Success and Failure. Click OK.
4. Select Audit object access and edit the properties.
5. From the Security Setting tab, select both Success and Failure. Click OK.

For ADSIEdit users

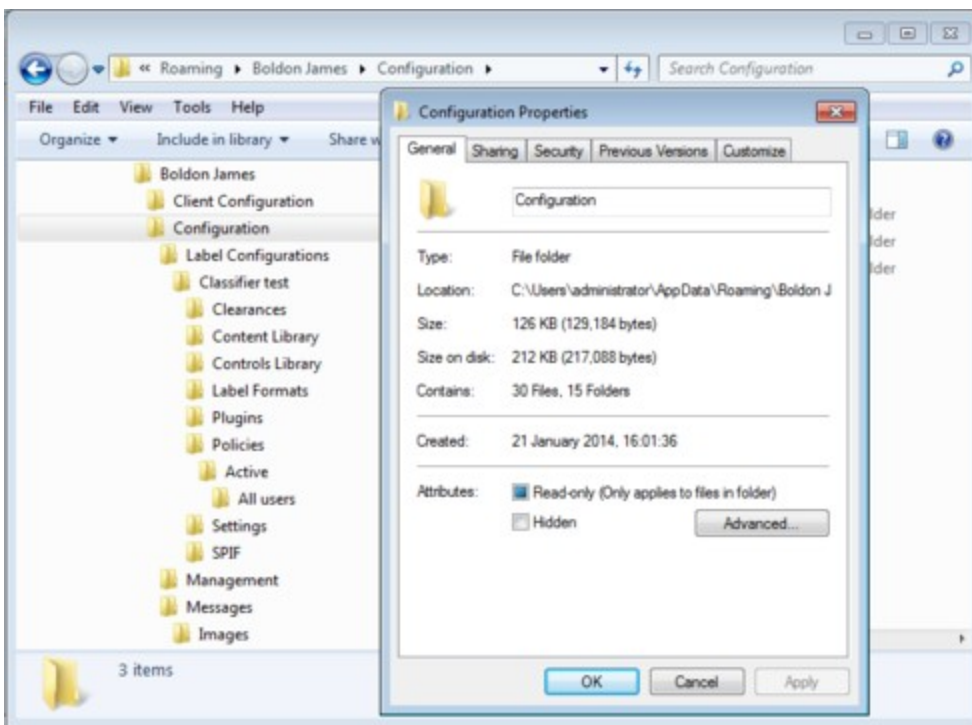
1. Navigate to Configuration > CN=Configuration,DC=classifier,DC=test > CN=Services > CN=Boldon James.
2. Right-click the node and choose Properties .
3. Select the Security Tab and click Advanced .
4. Select the Auditing tab and click Add.
5. Enter Everyone and click OK.
6. In the Auditing Entry for Boldon James presented for Everyone, select 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

Estimating Configuration Size

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\Baldon James\ConfigurationNote: These folders may be hidden:



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
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.


Publishing a 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. There is a Test mode auditing setting that can be used to stop the capture of audit information when Publish Test Configuration is invoked.

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. \\CS-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 users who will use Test Mode Administration.
3. Select  > Configuration Folder Paths, and enter the folder locations. Click OK.
4. Select Classifier Administration > Publish Test Configuration and provide a name for the sub-folder that will hold the test configuration, and a reason for the publication.
5. Click OK.
5. See [Test Mode Administration on page 40](#) for details of how to use the test configuration.

Test Mode Administration

End Test Mode is only enabled if there are no Classifier applications running. When a Classifier application runs, it will operate in Test Mode.

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. Run Classifier Test Mode Administration.
6. Define the location containing the test configurations (e.g. \\ICS-DC-1\TestMode). The dialog is updated to show the available test configurations.
6. Select the required Test Configuration and click Run Test .
7. If the configuration contains multiple policies, 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.
8. Start the applications to be tested.
A dialog shows the currently active (Classifier) applications.
9. Once you have checked the Classifier functionality, close all open affected applications (for example, Word and Outlook).
10. Click End Test Mode on the Classifier Administration Policy Test dialog. When the applications are restarted, they revert to standard operation.

Locking/Unlocking Configuration

Use the Lock Configuration action to indicate to other Classifier administrators that the configuration should not be published at the moment (for example, because configuration changes are incomplete). If the configuration is locked, the Unlock Configuration action is displayed and the Publish Configuration action is inhibited.

Creating a Web Configuration

NOTE: If the action is unavailable, a policy could be 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.

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

Before you start, ensure you 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, (that is, you have established the relevant registry entries described in the Classifier Management Agent Guide.

To retrieve a configuration from a URL by Classifier Management Agent:

1. Encrypt the master configuration and associated version.txt file.
 - a. Select the Classifier Administration node and choose Create Web Configuration.
 - b. Supply a password and click Save. The configuration (config) and version file are saved to the folder defined by Folder for 'Create Web Configuration'. The dialog shows the encrypted form of the password. The value shown is required to populate the WebConfigKey registry entry that allows the Classifier Clients or the Classifier Management Agent to decrypt the configuration from the configured URL. See [Web Host Settings on page 194](#).
 - c. Click Copy to Clipboard, then click Close.

Whether the same password is used to encrypt subsequent iterations depends on your site policy, but if the plain text password value changes, the WebConfigKey registry entry must be updated accordingly. If the plain text password value does not 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\BaldonJames\WebConfig Publish Folder.
 - d. Check that the target (Zipped Configuration) folder contains both zip and version.txt files.
 - e. Copy and paste both .zip and .txt files to your intended location.

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.
 - f. Ensure that the relevant Web Host Settings are established, specifically the encrypted password value is stored in WebConfigKey.
 - g. Maintain the URL configuration by repeating the steps above every time a new master configuration is published.
2. Zip 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.

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 two 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 two files.
3. Use a secure connection (HTTPS) for client access to this virtual directory.

Applying Global Settings

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 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.

Application Settings

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) that you can select from a drop down list available when 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	Description
AutoDesk CAD Dassault DraftSight	(These options only appears if the relevant component license has been applied). Allows you to Enable / Disable CAD Classifier operation for the specific application post installation.
Clearance check Email Domains	If enabled, the Email Domain Clearance features of Classifier Administration are available. Email Domain Clearance is supported by Email, OWA and Notes Classifier. See Clearance Checks and Settings on page 166 for details. If Disabled, the Email Domain Clearance features are NOT available within Classifier Administration
Clearance Library	Enabled - The Clearance Library features of Classifier Administration are available. Clearance Library entries are used by SharePoint Classifier. See Clearance Checks and Settings on page 166 for details. Disabled - The Clearance Library features are NOT available within Classifier Administration

Dynamic Clearances	<p>Enabled - The Dynamic Clearance features of Classifier Administration are available. See Dynamic Clearances for details.</p> <p>Disabled - The Dynamic Clearance features are NOT available within Classifier Administration.</p>
<p>NOTE: 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 Microsoft Excel for Mac Microsoft Outlook Microsoft Outlook for Mac Microsoft PowerPoint Microsoft PowerPoint for Mac Microsoft Project (2010 onwards only) Microsoft Visio (2010 onwards only) Microsoft Word 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 license 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 license.

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.

Classifier Actions and Events

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	<p>Audit when the file labels are added.</p> <p>NOTE: Only available if File Classifier is licensed.</p> <p>Enabling this option audits if File Classifier adds a label to an item.</p>
File label change	<p>Audit when file labels are changed.</p> <p>NOTE: Only available if File Classifier is licensed.</p> <p>Enabling this option audits if File Classifier changes the label on an item.</p>
File label removal	<p>Audit when file labels are removed.</p> <p>NOTE: Only available if File Classifier is licensed.</p> <p>Enabling this option audits if File Classifier removes a label from an item.</p>

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	Audit the Print action in Classifier-enabled Office applications. Enabling this option audits if a request is made to print an object. (This setting is not supported by Visio, Outlook, nor OWA).
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

Setting	Description
Attachment Check	<p>Audit the outcome of checking the labels of attachments against that of the containing message.</p> <p>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.</p>
Author label change check	<p>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.</p>
Content check	<p>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'.</p>

Default label 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 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

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	<p>When auditing email addresses always try to obtain an SMTP address. Note: This setting applies to Email Classifier, OWA Classifier and Notes Classifier.</p> <p>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.</p> <p>Disabled - Classifier auditing will use the email address it has available.</p>
Test mode auditing	<p>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.</p>

Privacy Settings

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). Disabled - The item is included in the audit entry.
Mask document title	Obscure the document title on save.	
Mask message attachment names	Obscure the message attachment names on submission.	
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 on page 221](#) .

Languages

Classifier Administration allows you to configure all the text presented to users through the various Classifier features. 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.

The Languages to be supported are defined by selecting the Languages node. Initially the list only includes the Configuration default language entry.

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.

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.)

There is no defined value 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,
- 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
- If the item of interest has a value defined for the Configuration Default Language , then use that 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.

For 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.</p> <p>You can select which Language settings the User Message List presents.</p>
User Interface Library	You can define per language values for each of the configurable text items.

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. 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.</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).</p>
Policy / Single Click	Per language values for the Caption and Tooltip can be defined for each Single Click button.
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> <p>Sites can make their Markings multi-language (e.g. include both German and English in a LLOT disclaimer).</p> <p>(Not recommended) Sites may assign separate policies (applying different Markings) to different groups (languages) of users.</p>

"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 Administrators on-line Help	The product as shipped provides English only.
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.

License

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.

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

NOTE: This document describes all features supported by Classifier. Depending upon the licenses you have, 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.

Initial installation will supply one or more Classifier license files in the License sub-folder. Each license 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 license files applied to the configuration. Each license is applied using the sequence described below. If a site purchases additional options, an additional license file is supplied which can be merged into the existing license settings.

NOTE: For Citrix environments, Classifier licenses 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 license.

License Filenames

The following are applicable license files:

- 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

License Codes

These are the license codes associated with each licensed Classifier product. The license 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 license 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 license for v1.4 onwards.

- Classifier Reporting Tool CRP
- Classifier API CPI

Installing a License

To install a license file:

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

For an initial installation, the default location to find License files is in folders (one per license) below the License sub-folder on the Classifier Base bundle. The selected file is merged into the existing license file and the License Management dialog will be updated to reflect the changes. License consistency will be checked when you click OK . When upgrading an existing license, you may have to update all current licenses before clicking OK.

Selecting an entry in the list and clicking Details will show further information about the license.

NOTE: If you have difficulty merging a new license on to an existing system, you are likely breaking the restrictions. Do not exit the license dialog until all product licenses have been updated.

Restrictions

There are certain limitations applied by the license management software:

- All licenses must be at the same level (3 or 4). For example, you cannot use an (historic) Email Classifier Standard Edition license (Level 3) and an Enterprise Edition (Level 4) Office Classifier license. Therefore, to add the Enterprise Edition Level 4 license for the Office Classifier to a configuration that contains Email and Office Classifier, you need to obtain and apply an Enterprise Edition (Level 4) license for Email Classifier at the same time.
- You can update Evaluation licenses to a Full licenses, but not revert from a Full to an Evaluation license. You can have a configuration that includes a mixture of Full and Evaluation licenses. If an Evaluation license expires, the features it licenses 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 licenses now required, or request assistance from Classifier support.
- For historic licenses, you must use at least a Standard Edition (Level 3) license if you have an existing configuration created with Classifier Administration Console Version 1.0.

Viewing Client License Information

The current Classifier License status can be inspected from Email and Office Classifier (e.g. Outlook, Word etc.) applications. You can see such information as license type and licensed components.

1. From the Options menu on the Classifier Label interface, select About Classifier.

NOTE: Not available under Classifier Mail Add-in or Mobile Classifier.

Image Library

NOTE:

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

The Image Library allows you to define site specific images to be displayed 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.

Adding a new Image

1. Select the Image Library and choose Add a new image.
2. select Browse to locate an image.
3. Enter a description.
4. Click OK.

Editing an Image

1. Select the Image Library, select an image, and choose Properties.
2. If desired, change the image and/or description.
3. Click OK.

Deleting an Image

Ensure the image is not in use before deleting. 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 see a list of the rules that use the image.

1. Select the Image Library, select an image, and choose Delete.
2. Click Yes to confirm deletion.

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 can define alternative texts for use in different policies.

If you intend to configure a Rule that shows a User Message configuration option, 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. The set of rules that require User Messages is defined in [Use Of User Messages on page 57](#).

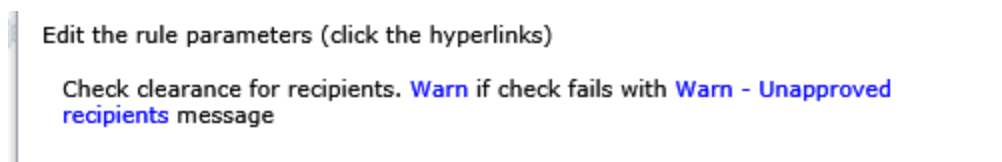
Selecting the User Message Library node displays a list of the currently defined messages. This list initially contains pre-defined messages which you can use as you wish.

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 shown 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 appears with a value (Warn - Unapproved recipients) supplied as a placeholder as in the example below:



Click the current value (placeholder) and a list appears showing the set of configured messages from which you can select.

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

Adding a New Message to the User Message Library

To add a new message:

1. Select the User Message Library and choose Add a new message.
2. Enter a unique name for the message. This is the value that will appear in a list of messages available to you when defining various rules.
3. Select a Language. For information on defining Language specific values, see [Languages](#).
4. Enter a Title that will appear on the dialog that appears to the end user when this message is to be displayed.
5. Enter Message Text. The display area in the run time dialog only shows the first three lines of the message text. The user can click for more information to see the rest of the text. You can use the following tags to format the text:
 - {B}{/B} for bold
 - {I}{/I} for italics
 - {U}{/U} for underline
 - {C value="colour"}{/C} for colour. You can use a predefined colour from <https://wpf.2000things.com/2011/02/17/220-using-the-predefined-colors> or a # hex RGB value
 - {#href=" <URL> " #text="Text for Link"} for hyperlinks
 - For example, if you want your message to display as This function will cause an error. Go to Microsoft help, then enter This function {B}{U} will{/B}{/U} cause an {C value="Firebrick"} error{/C}. Got to {#href=" https://support.microsoft.com/ #text="Microsoft help"}
6. If you want, enter a Help URL that you can use to provide users with access to further information. If this is not configured, the value defined in URL for your labelling help (in General Settings) displays. If this is populated, the message will provide a Help button, otherwise the Help button will be disabled.
7. Click OK.

Viewing Message Language

By default, the User Messages list shows the messages and associated text for the Configuration default language.

Select the Language action to see a drop down list of the currently configured languages.

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

Viewing 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.

3. Change the relevant details.
4. Click OK.

Copying Messages

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 "<Message name> - Copy<#>".
3. Select the copied message and click Properties to change the relevant details.
4. Click OK.

Deleting Message

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 to confirm you want to delete the message.

User Interface Library

Some text in Classifier is 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 into 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) to use. There is a fixed default 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.

Pre-configured UI Elements

The User Interface Library contains the following preconfigured UI elements that you can customize:

UI element	Description
Challenge	Displays choices when a rule definition is configured to use the Challenge Options. See Policies on page 134 .
Classification History	Displays the stored label history for the document. 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 setting.
Content Inspection Check	<p>Displays any matches when a content check occurs. These items are only relevant to Email Classifier (Outlook) and Office Classifier.</p> <p>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 .</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>NOTE: The text presented to the user in the initial Policy Check dialog is configured either via the User Message Library or through the Policy Check item.</p> </div>
Decision Tree	Helps the user with label selection using question and answer combinations. A user can view and modify user interface definitions that are available for configuration.
File Classifier	Displays the reasons and available options if errors or policy failures occur when labelling files. These items are only relevant to File Classifier license has been applied.

Folder View Labelling	<p>Displays failures on label change checks when performing Folder View Labelling. See Labelling Configurations on page 66. This feature is only relevant to Email Classifier (Outlook).</p> <p>NOTE: The text presented to the user in the initial Policy Check dialog is configured either via the User MessageLibrary or through the Policy Check item.</p>
General Messages	<p>Displays messages configured by the client. There are miscellaneous values that do not relate to any other item in a UI Definition and are grouped under this General Messages item. See General message options on page 63.</p>
Label Selection	<p>Contains all available selectors.</p>
Management Agent	<p>Displays status information and alerts relating to Classifier applications monitored by the Management Agent. These items are only relevant if you are using the Classifier Management Agent which is configured to Show the System Tray Icon. See the Classifier Management Agent Guide for more information.</p>
Menus	<p>Displays pop-up menus used in dialogs and the ribbon as per Label Selection Interfaces, Label Options, Favourites and Portion Mark .</p> <p>NOTE: Some of these items will only appear if an Enterprise license is applied and/or a feature is Enabled.</p>
Organise Favourites	<p>Accessed from the Favourites menu.</p>
Policy Check	<p>Displays reasons and options If policy checks fail when sending an email or saving a document. The Back button may be unavailable in some circumstances. See Labelling Configurations on page 66 and Labelling Configurations on page 66. The subordinate box titles (for example, Unapproved recipients) are taken from the 'Title' of the user message associated with the rule, not the Name of the message (for example, Name = Warn - Unapproved recipients / Title =Unapproved recipients).</p>

Ribbon	<p>Holds the selectors in a Classifier application and some associated options. The menus can be configured in the Menus section. Definitions for the button text are:</p> <ul style="list-style-type: none"> • 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.
RMS Apply Template	Enables the user to choose an RMS template. Allows you to change the text displayed to the user as a result of an Apply RMS policy or option rule.
RMS Apply User Permissions	Allows the user to create custom RMS permissions. Allows you to change the text displayed 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.

Adding 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.
2. Provide a unique Name and optional Description .
3. Click OK.

Viewing and Changing Properties of a UI Definition

You can view and make changes to the UI definitions you created and to the ones that are pre-configured. 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. If you have created the UI elements, you can view and change only the name and description. If you are viewing and changing the pre-configured UI elements:
 - a. Select a Language - [Only visible if Allow multiple languages is enabled]. You only need to define Language specific values if the algorithm defined in [Languages on page 49](#) would not yield a suitable value from another configured Language.
 - b. Make changes to the other options in each element as desired.
 - c. Click OK.

Copying a UI definition

You can copy 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>(#).
3. Select the new copy UI definition and make changes as required.

Deleting a UI Definition

You cannot delete a UI Definition if it is in use in a policy. You can delete only those definitions you created.

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 Yes to confirm you want to delete the definition.
4. Click OK.

General message options

General message	Relevance
Classifier is currently operating in Configuration Test Mode.	See Publishing a Test Configuration on page 40
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.	See Policies on page 134

Failed to calculate high watermark - leaving message label at original value.	See Policies on page 134
It is not possible to downgrade the label. The item contains a label with a higher value than the overall label.	See Labelling Configurations on page 66 and Labelling Configurations on page 66
This cell is not empty. A portion mark cannot be inserted here.	See Labelling Configurations on page 66
Unable to insert the label into the document since it is marked as protected.	An attempt to set the label on an item.
Unable to insert a portion marking since the document is protected.	See Labelling Configurations on page 66
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.	See Labelling Configurations on page 66
Your labelling policy requires you to save this document before you send it.	See Microsoft Project only
Your labelling policy requires you to save this document before you send it. Would you like to save the document now?	This is obsolete for Office 2003
Your labelling policy requires you to save this presentation before you send it. Would you like to save the presentation now?	This is obsolete for Office 2003
Your labelling policy requires you to save this workbook before you send it. Would you like to save the workbook now?	This is obsolete for Office 2003
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
Updating workbook footers...	No longer used
Updating workbook headers...	No longer used

Completing update of workbook...	Indicates Classifier is applying policy rules
New Default Label applied successfully. You must restart Office for your change to take effect	See Policies on page 134
Classifier Attachment List	Allows you to enter general email content

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, retrieve the master configuration, operate on it locally, and then publish the update.

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

NOTE: Pay attention if more than one person is making changes to the configuration, See [Configuration Deployment](#).

After installation, you must define and publish a Label Configuration to access the features.

Add a Label Configuration

NOTE: Configuration features are made available according to the features licensed. Before creating a configuration, you must apply at least one license using the features described under

NOTE: If you try to create a configuration before you apply a license, Classifier Administration will direct you to supply a license.

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

To add a new label configuration:

1. Select Labelling Configurations and choose 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.
4. If there is no license currently applied (e.g. immediately after installation) when you select Add a new Label Configuration, apply a license file.
 - a. Click the Browse button, and navigate to the location of the license file to be applied (e.g. below Base Bundle\License).
 - b. Select a .LIC file and click Open . This will populate the License File field. [These license files are limited period evaluation licenses).
5. Click OK.

Renaming a Label

Classifier maintains the unique identifier originally assigned, and so pre-existing Label values are still valid.

To rename a label:

1. Select Labelling Configurations and select the relevant configuration .
2. Choose Properties.
3. Enter a new name 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.

Deleting a Label

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.
3. By default, any licenses applied are retained and available in a Label Configuration you then create. If you need to remove the existing licenses, check the Delete licenses in use by this configuration option. You will then have to apply licenses to any new configurations.
4. Click Yes to confirm you want to delete the 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, defining qualities such as 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 and the Values defined for the currently selected Selector.

NOTE: The Select Library is initially empty if you are using the Empty Configuration Template.

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 [Policies on page 134](#).

By default, a Selector is not Mandatory - that is a Label may be valid if it has no Value chosen for this Selector. To make a Selector mandatory, configure Check these mandatory selectors rules when you add a rule. Selector values are relevant to any Check for the high-water mark rules (Email, OWA and Notes).

Active, Obsolete, and Retained Selectors and Values

Selectors and Selector Values can be referred to as Active / Obsolete or Retained. Selector values available in the current policy are available to the user when setting the label value.

For information Obsolete Values, see [Making Selectors Obsolete/Restoring Selectors on page 77](#).

Selector	Description
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 (for example, forward an email).
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 them to forward an email containing the restricted selector value - that is, 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 are 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.

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	Description
Single Selection List	<p>(If Include this selector in clearance and attachment checks is unchecked the selector takes no part in label dominance operations)</p> <p>The operation depends on the Hierarchy setting for a Single selection list:</p> <ul style="list-style-type: none"> • Hierarchic: The message label value is set to the 'highest' value from the message and attachment labels. • No Hierarchy: The user will have to be involved in resolving any incompatible label issues*.
Multi-Selection List	<p>(If Include this selector in clearance and attachment checks is not 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 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 (for example, modify the attachments, or use the override check option if available).

Adding a Single Selection List

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 displayed in the Ribbon Bar.

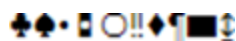
To add a selector:

1. Select the Selector Library, choose Add a new selector, and choose Single selection list.
2. Enter a name for the selector, and, if you are configuring Titus interoperability, enter a Titus field name - the name that will map the Titus field to a Classifier selector. If this is empty, then the Classifier selector name is used.
3. Select the Language.

By default, the Selector Library list displays the selector Captions and Tooltips defined for the Configuration default language. 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 on page 49](#).

4. Enter a caption. This is the name displayed to the end user. The value may be overridden by a Caption setting at the Policy level. The value should be short enough to fit into the ribbon bar area that displays the label selection interface. Check that the effects are reasonable in all relevant environments (for example, Outlook / OWA / Notes / Office etc.). If you do not set this explicitly, then the Selector Name is used as the caption.
5. Enter a 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). 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.

Due to the nature of the environment, some unusual characters within a tooltip



6. Click New to insert a row.
 - a. Enter a value name. The name must be unique for this selector and in the Configuration to avoid confusion and miss parsing of text markings.
 - b. If you are configuring Titus interoperability, enter a Titus Field Value Name. If you do not enter a name, the Selector Name or Alternate Name is used.
 - c. Select a colour.
 - d. Select an image. The images are stored in the Image Library. See [Image Library on page 56](#).
 - e. Enter a 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). 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.

- f. Enter a Portion Marking. This is a text string that 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 "Confidential" or "Public", the short form (or 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. See [Portion Mark on page 20](#) for further details.
 - g. Enter alternate names 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 displays the selected values in full and use that format in Headers and Footers; but for Subject Prefix in email messages, you may require shortened forms (for example, 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.
 - h. Click Update.
7. Select a 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. Selecting No Hierarchy in conjunction with Include this selector in clearance and attachment checks will cause the user to have issues such as High-water mark checks detecting differences between message label and attachment labels 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 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 by assigning different values.

8. Select the Include this selector in clearance, attachmen and portion marking checks if you want the selectors to be included in high water mark and clearance checks.
9. Click OK.

Adding a Multi-Selection List

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

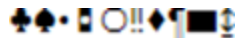
To add a selector:

1. Select the Selector Library and choose Add a new selector and choose Single selection list.
2. Enter a name for the selector, and, if you are configuring Titus interoperability, enter a Titus field name - the name that will map the Titus field to a Classifier selector. If this is empty, then the Classifier selector name is used.
3. Select the Language.

By default, the Selector Library list displays the selector Captions and Tooltips defined for the Configuration default language. 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 on page 49](#).

4. Enter a caption. This is the name displayed to the end user. The value may be overridden by a Caption setting at the Policy level. The value should be short enough to fit into the ribbon bar area that displays the label selection interface. Check that the effects are reasonable in all relevant environments (for example, Outlook / OWA / Notes / Office etc.). If you do not set this explicitly, then the Selector Name is used as the caption.
5. Enter a 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). 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.

Due to the nature of the environment, some unusual characters within a tooltip



6. Click New to insert a row.
 - a. Enter a value name. The name must be unique for this selector and in the Configuration to avoid confusion and miss parsing of text markings.
 - b. If you are configuring Titus interoperability, enter a Titus Field Value Name. If you do not enter a name, the Selector Name or Alternate Name is used.
 - c. Select a colour.
 - d. Select an image. The images are stored in the Image Library. See [Image Library on page 56](#).
 - e. Enter a 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). 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.
 - f. Enter a Portion Marking. This is a text string that 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 "Confidential" or "Public", the short form (or 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. See [Portion Mark on page 20](#) for further details.
 - g. Enter alternate names 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 displays the selected values in full and use that format in Headers and Footers; but for Subject Prefix in email messages, you may require

shortened forms (for example, 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.

- h. Click Update.
7. Set the minimum and maximum numbers of values to be selected. 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.
8. If the user has too many or too few values, then select a message This allows you to choose which message is displayed to the user if they have chosen either less than minimum or more than maximum number of values for this selector. You can create a new user message. See [Adding a New Message to the User Message Library on page 57](#).
9. In the Clearance section, select if a Domain or User must be Cleared for one of (Permissive) or all (Restrictive) the selected values. These radio buttons are only available if Include this selector in clearance and attachment checks is set and only applicable if Clearance Checks are configured. You can also choose to ignore this selector in clearance, attachment and policy marking checks.
10. Select the Include this selector in clearance and attachment checks if you want the selectors to be included in high water mark and clearance checks.
11. Click OK.

Adding a Text Entry Selector

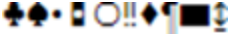
Freeform text selectors do not take part in Clearance checks or high-water mark checks (LabelDominance); but can be included in Check for Label Change.

Text entry selectors cannot be displayed in the Ribbon Bar.

To add a selector:

1. Select the Selector Library and choose Add a new selector and choose Single selection list.
2. Enter a name for the selector, and, if you are configuring Titus interoperability, enter a Titus field name - the name that will map the Titus field to a Classifier selector. If this is empty, then the Classifier selector name is used.
3. Select the Language.

By default, the Selector Library list displays the selector Captions and Tooltips defined for the Configuration default language. 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 on page 49](#).
4. Enter a caption. This is the name displayed to the end user. The value may be overridden by a Caption setting at the Policy level. The value should be short enough to fit into the ribbon bar area that displays the label selection interface. Check that the effects are reasonable in all relevant environments (for example, Outlook / OWA / Notes / Office etc.). If you do not set this explicitly, then the Selector Name is used as the caption.

5. Enter a 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). 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.
Due to the nature of the environment, some unusual characters within a tooltip

6. Select Allow any text if you want all text included.
7. Select Restrict User Input to allow only certain 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. The following characters are always restricted even if all the subordinate options are checked: ~"£\$%^&* _+={}@~#|<>.
8. Select Define a custom format using a regular expression if you want only custom text included. 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).
9. If the user enters invalid text, then select a message to display. In many cases Classifier inhibits user input of 'invalid' text, but circumstances will arise where this is not possible (for example, forwarding a message containing invalid value for this selector). You can create a new user message. See [Adding a New Message to the User Message Library on page 57](#).
10. Select the Include this selector in clearance, attachment and policy marking checks if you want the selectors to be included in high water mark and clearance checks.
11. Click OK.

Adding a Date Picker Selector

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

Date picker selectors cannot be displayed in the Ribbon Bar.

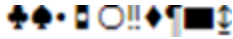
To add a selector:

1. Select the Selector Library and choose Add a new selector and choose Single selection list.
2. Enter a name for the selector, and, if you are configuring Titus interoperability, enter a Titus field name - the name that will map the Titus field to a Classifier selector. If this is empty, then the Classifier selector name is used.
3. Select the Language.
By default, the Selector Library list displays the selector Captions and Tooltips defined for the Configuration default language. 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 on page 49](#).
4. Enter a caption. This is the name displayed to the end user. The value may be overridden by a Caption setting at the Policy level. The value should be short enough to fit into the ribbon bar area that displays the label selection interface. Check that the effects are

reasonable in all relevant environments (for example, Outlook / OWA / Notes / Office etc.). If you do not set this explicitly, then the Selector Name is used as the caption.

5. Enter a 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). 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.

Due to the nature of the environment, some unusual characters within a tooltip



6. Select Allow any date if you want all dates included.
7. Select Restrict to a time period if the dates available for selection will be limited according to the time period allowed. Select a number of days/weeks/months/years from the current date either in the future or the past.
8. If the user enters an invalid date, then select a message to display. In many cases Classifier inhibits user input of 'invalid' dates, but circumstances will arise where this is not possible (for example, forwarding a message containing invalid value for this selector). You can create a new user message. See [Adding a New Message to the User Message Library on page 57](#).
9. Click OK.

Adding a Date Offset List Selector

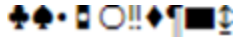
Date offset selectors take no part in Clearance checking, but are included in high-water mark checks (see [Label Dominance on page 69](#)), and Check for Label Change . Date offset list selectors can be displayed in the Ribbon Bar.

To add a selector:

1. Select the Selector Library and choose Add a new selector and choose Single selection list.
2. Enter a name for the selector, and, if you are configuring Titus interoperability, enter a Titus field name - the name that will map the Titus field to a Classifier selector. If this is empty, then the Classifier selector name is used.
3. Select the Language.

By default, the Selector Library list displays the selector Captions and Tooltips defined for the Configuration default language. 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 on page 49](#).
4. Enter a caption. This is the name displayed to the end user. The value may be overridden by a Caption setting at the Policy level. The value should be short enough to fit into the ribbon bar area that displays the label selection interface. Check that the effects are reasonable in all relevant environments (for example, Outlook / OWA / Notes / Office etc.). If you do not set this explicitly, then the Selector Name is used as the caption.
5. Enter a 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). 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.

Due to the nature of the environment, some unusual characters within a tooltip



6. Click New to insert a row.
 - a. Enter a value name. The name must be unique for this selector and in the Configuration to avoid confusion and miss parsing of text markings.
 - b. If you are configuring Titus interoperability, enter a Titus Field Value Name. If you do not enter a name, the Selector Name or Alternate Name is used.
 - c. Select a colour.
 - d. Enter a number for the number of days / weeks / months / years to be added to the current date to produce the actual date value to be stored in any applied Markings.
 - e. Enter a Period to define how the number is to be used to provide the offset to today's date to produce a marking value.
 - f. Enter a 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). 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.
 - g. Enter a Portion Marking. This is a text string that 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 "Confidential" or "Public", the short form (or 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. See [Portion Mark on page 20](#) for further details.
 - h. Enter alternate names 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 displays the selected values in full and use that format in Headers and Footers; but for Subject Prefix in email messages, you may require shortened forms (for example, 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.
 - i. Click Update.
7. Click OK.

Editing Selectors

To edit a selector:

1. Choose a selector in the Selector Library.
2. Click Edit Selector.
3. Make necessary changes and click OK.

Changing the Order of Selectors

The order values appear in the order in which they are displayed to end users. You can change the order of Selectors in the Selector Library.

To change the order:

1. Choose a selector in the Selector Library.
2. Click Move Up or Move Down.

Making Selectors Obsolete/Restoring Selectors

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 displayed when it is found in an existing object (for example, 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.

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 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 - that is, displayed if found, but not propagated.

To make a selector obsolete:

1. Select the relevant selector.
2. Click Obsolete.
3. Click Yes to confirm the obsolete action.

To restore an obsolete Selector:

1. Select the relevant (obsolete) selector.
2. Choose Restore.
3. Click Yes to confirm the Restore action.

NOTE: You cannot make a selector obsolete until all Rules referencing the Selector have been deleted or modified to avoid any reference to that Selector. Warning appear if there are outstanding rules when you attempt an Obsolete action, and the action is not allowed.

Deleting a Selector

Deleting a Selector should only be used if you are sure that there are no existing documents or emails 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 Selector.
2. Select Delete.
3. Click Yes to confirm the Delete action.
4. If the selector is still in use in a policy, you are prompted and the action is disallowed.

Marking Library

A Marking Format defines how selected labels are displayed to end users. Each Marking Format defines how to construct a Marking using the features below in the 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 (for example, Word --> TXT or EXCEL --> CSV) may lose the Classifier label and marking information.

When configuring a Marking Format, keep in mind the following:

- 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 issues 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.

Adding a New Marking Format

To add a new marking format:

1. Select the Marking Library node and select Add a new marking format.
2. Enter a name for the Marking Format.
3. Select the Use selector colour values checkbox, if you want the colour value associated with a Selector value to be used by the Marking Format even in a sequence that has the font colour set. Clear this checkbox so that any colour associated with a selector value is ignored when producing the Marking value.
4. Select the Use plain text style option if you want your text to have formatting. 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 influences the operation of Add a textbox on the header / footer (Word only).

NOTE: In some circumstances, the formatting defined for inserted marking may interfere with formatting your site. 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 selected or not. Plain text style is not supported in Mail Add-In.

5. If you want to add a Selector element, go to [Adding a Selector on page 80](#).
6. If you want to add a Hyperlink, go to [Adding a Hyperlink on page 80](#).
7. If you want to add an Environment Property, go to [Adding an Environment Property on page 81](#).
8. If you want to add a Document Property, go to [Adding a Document or Email Property on page 81](#).
9. If you want to add a Directory Attribute, go to [Adding a Directory Attribute on page 82](#).
10. Set the font and font styles.

NOTE: Using the Marking Format / Font options, you can include Rich Text Formatting, Font, Colour, Size, Style (Bold, Italics and Underline). 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. A Marking Format that includes Rich Text features can 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.

11. Set the text alignment.
12. If you want to see a preview of your Marking formats, click Preview.

NOTE: Not all elements are available in all environments. Check the actual Marking that appears in all circumstances, especially if it is assigned as the Custom Format for Summary Markings.

13. If you are happy with your configuration, click OK.

The appearance of any marking should be checked in the target applications 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.

V:*?"<>| should not be used in a Marking Format either in Selector value names or as part of the Marking Format text supplied. Using these characters may result in unexpected presentation effects in the current or future versions of Classifier, For example all formatting is lost (colour, font, and alignment) (Office applications), The Selector value does not appear in the applied marking (Outlook), and run-time errors.

Adding a Selector

If Text / Date picker / Date offset selectors are to be included a Marking format that will be used to parse a text label (for example, 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.

1. Click Selector.
2. Select a label.
3. Select a text display to control how the selector appears in the marking. For non-date type selectors, the list will include Portion Marking or Alternate name / Alternate 2/ Alternate 3 values when you configured the Selector. The ID entry represents the unique identifier allocated to the Selector. Date type selectors can be Long / Short date values represent the formats defined for the system under Control Panel / Regional Settings. 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'. The selector token in the Marking Format is annotated accordingly (If Long Date is chosen, it is not shown as it is the default). Date items appear in local time.
4. Define prefix and suffix text and indicate that position they will appear in the marking. They only appear 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 (for example, Externally defined label, FLOT, LLOT, Portion Marking or Subject).

5. Click OK.

Adding a Hyperlink

It is recommended that you only insert Hyperlinks in Marking Formats intended for use in Email FLOT and LLOT rules. You can use a Marking Format containing a Hyperlink elsewhere (for example, a Word Header), but the link may not operate correctly.

1. Click Hyperlink.
2. Enter text to display in the marking.
3. Enter the URL address.
4. Click OK.

Adding an Environment Property

Some Environment values may not be available in all environments (for example, 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 Environment Property.
2. Select a property from the Family list.
3. Select a Property Name. The Property Name depends on your selection from the Family list.
4. If you select DateTime, enter a custom date.
5. In the Sample field, check the formatting of your selections.

Adding a Document or Email Property

Not all the properties listed are supported by all applications. Properties supported by an application can be found in your documents' or emails' properties.

Document or email 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.

Email properties is not supported in Mail Add-in.

To insert a Document or Email Property into a format:

1. Select Document Property.
2. Select a Property Type - Document or Email

NOTE: The supported properties are grouped for convenience, but Classifier just checks the current object for a property with that name. Selecting Subject from the list of document properties will be meaningful if the marking format is applied to an email and vice versa.

3. Select the required Property Name.
4. Click OK.

NOTE: Adding an email property to include, for example, Ccrecipients, inserts a place holder into the Marking Format.

Adding a Directory Attribute

To insert a Directory Attribute into a format:

1. Select Directory Attribute.
2. Select the Family Type you require (Computer or User).
3. Select an Attribute Name.
4. Click OK.

Copying a Marking Format

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. Select Copy. This adds a new entry to the list called <Marking Format Name> 1.
3. Double-click the copied Marking Format to open it and make any changes.
4. Click OK.

Deleting a Marking Format

To delete any marking format:

1. Select the Marking Library node and select the relevant Marking Format entry.
2. Choose Delete.
3. Click Yes to confirm the deletion.

A warning dialog is displayed if you attempt to delete a Marking Format that is in use in the configuration

Content Library

The Content Library consists of (Search) Expressions which can be associated with Matchers. Each Expression has a unique (Expression) Name, and an 'expression' defining the how content will be checked. See [Defining Expressions on page 83](#) for further details.

NOTE: Expressions can also be referenced from Conditions.

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 [Supported Content Checking File Types on page 238](#).

The operation of the search performed can be modified using a registry key setting described under Matching algorithm control.

NOTE:

Content Checking is supported by Email Classifier and Office Classifier (Word, Excel, and PowerPoint). Content checking of RMS protected items never yields a match as the content is not accessible.

Matchers

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 "permitted" to be defined by the selector values, or this content is never permitted regardless of the label value.

You can specify the Matchers relevant to the check, and the action to be taken if 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 the Expressions match).

For more information, see [Adding a Matcher on page 86](#)

Defining Expressions

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 "##" ... for example, 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]"
- Regular Expressions 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.
- Care must be exercised including "And" or "Or" as text in an expression as these are 'operators' 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.
- 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).
	Date formats: The following are all recognised as the same date
	January 15, 2013
	15 Jan 13
	2013/01/15
	1/15/13
	1-15-13
	The fifteenth of January two thousand thirteen

Expression	Meaning
mail (*@abcxyz.com)	Matches email addresses including wild-card * or ? inside the ().
creditcard(*)	<p>Matches credit cards in any of the formats below. Matches creditcard(1234*) credit cards starting with n234.</p> <p>The following are recognised as credit card number formats:</p> <ul style="list-style-type: none"> • n234-5678-1234-5678 • n234567812345678 • n2345678 1234 5678 <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 the credit card number recognition feature may pick up some numbers that are not really credit card 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</p>
=== ==	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
"##[a-ceghj-pr-tw-z]{1}[a-ceghj-npr-tw-z]{1}[0-9]{6} [a-d]{1}"	UK National Insurance number with no spaces.
"##([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

Adding a New Expression

To add a new expression:

1. Select the Content Library and select the Expressions tab.
2. Select Add a new expression.
3. Supply the Name and Expression.
4. Click OK.

The expressions established can be used when defining Content Matchers and when defining Conditions.

Changing the Expression

To change the expression:

1. Select the expression and select Properties.
2. Make the necessary changes.
3. Click OK.

Deleting an Expression

You cannot delete an Expression that would result in a Matcher with no associated expressions.

To delete an Expression from a Matcher:

1. Select an Expression and click Delete.
2. Click Yes to confirm deletion.

Copying an Expression

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 an Expression and click Copy.
A new entry name <Expression Name> 1 appears in the list.
2. Select the copied expression and click Properties.
3. Make the necessary changes.
4. Click OK.

Adding a Matcher

You can select a name for the content matcher and match any or all expressions within the 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. Select Add a new matcher.
3. Enter a Name. This Name is used when defining Content Checking rules.
4. Enter a description - this is for information purposes only.
5. Select Match any or Match all. This indicates if the expressions match any or all for the Content Checking rule to consider the content as matching (and trigger the defined action).
6. Click Next.
7. Select an expressions for the content matcher, and click Next.
8. Choose label values that will allow or block content when used with the Content Check rule.
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.
9. Select one or all of the selector values.
10. Click Finish. The newly created Matcher will appear in the summary.

Modifying a Matcher

To view and change the properties of a Matcher:

1. Select the Matcher and click Properties.
2. Make the necessary changes.
3. Click OK.

Deleting a Matcher

To delete a Matcher from the Content Library:

1. Select the Matcher and click Delete.
2. Click Yes to confirm deletion.

A warning dialog will be displayed if you attempt to delete a Matcher that is in use in a Rule.

Content Checking User View

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 to take an action.

To check the policy content:

1. If the Show highlighted content matches option is checked in the rule, then the user also canscan the actual matches by clicking View.
2. Clicking View will show more 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 matches in PDF files is only possible if Adobe Reader / Adobe Acrobat if Enable search highlights from external server is selected.

Matching Algorithm Control

By default, the matcher checks various aspects of the message (for example, 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

More aspects of the algorithm can be controlled by setting an enumeration registry entry in one of the following locations (which are searched in the order shown):

- HKEY_CURRENT_USER\SOFTWARE\Policies\Baldon James\Classifier
- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\Classifier
- HKEY_CURRENT_USER\SOFTWARE\Baldon James\Classifier
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon James\Classifier
- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Baldon 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

Entry	\ContentCheckFieldFlags Only applicable if Classifier Content Checking is enabled.
Data	Not configured - The default operation applies. Any value defined will modify the search algorithm according to the bit-wise values described in the dtsearch FieldFlags support web page (for example, 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

The Configuration can define conditions that can be associated with Rules so that the Rule is only triggered if the Conditions are met. For example, a rule that applied a LLOT only if an external recipient was defined. Prerequisite conditions are associated with a rule as part of Rules Wizard operation.

Each Condition defined includes one or more compatible (Document or Message) Condition type definitions. See [Supported Condition Types on page 91](#).

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

To add a new condition:

1. Select the Condition Library, and select Add a new condition.
The Add Condition dialog opens.
2. Enter a Name and Description if required.
3. Select Add a new condition type.
The New Condition Type dialog opens.
4. Select a condition type and select an operator to combine condition entries.

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.

5. Click Add a new condition entry.
The New Condition Entry dialog opens.
 - a. Select a name and a check, and enter a value.
 - b. Click OK to return to the New Condition Type dialog.
6. Click OK to return to the Add Condition dialog.
7. Click OK.

Editing Conditions

To view or change the properties of a Condition:

1. Select a Condition and select Properties.
2. Edit the condition as necessary.
3. Click OK.

Editing Condition Types

To edit condition types:

1. Select a Condition and select Properties.
2. Click Edit next to a condition type.
3. Edit the condition type as necessary. You can click Edit or Delete next to the Condition Entry
4. Click OK.
5. Click OK again.

Copying Conditions

To copy a Condition to use as a base for another condition:

1. Select a Condition and select Copy. The new condition has the name <Condition Name> 1.
2. Select the copied Condition and select Properties.
3. Make the necessary changes.
4. Click OK.

Deleting Conditions

To delete a Condition:

1. Select a Condition and select Delete.
2. Click Yes to confirm the deletion.

Deleting Condition Types

To delete condition types:

1. Select a Condition and select Properties.
2. Click Delete next to a condition type.

Changing the Order of Condition Types

You can change the order of condition types to change its order of execution.

1. Select a Condition and select Properties.
2. Click the Condition Type button.

Supported Condition Types

Each Condition type supports one or more Condition entries with specific options as per the table below. Expression matching in the options below is case insensitive.

Condition Types	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 attribute: Common name, Country/Region, Company, Department, Description, Display name, Printable display name, DN, Extension Attribute 1 - 10, 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, State/Province, Street, Telephone number, Title, URL - [Contains value] [Does not contain value] [has value] [has value matching regular expression] [has a value not matching regular expression].
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	Select date from a calendar
Day of the Week	Values are Monday through Sunday

Condition Types	Options Supported
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) PropertyName. • Check (appropriate value or existence check type). • Value if applicable.
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 Property	If document has these properties: Author, Category, Comments, Company, Filename, Keywords, Manager, Status, Subject, Title [Contains value] [Does not contain value] [has value] [does not have value] [has a value that matches regEx] [has a value that does not match regEx]
Document Protection Type (Word only)	Document [is] [is not] protected with protection type Comments / FillingInForms / NoChanges / TrackedChanges.

Condition Types	Options Supported
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	<p>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].</p> <p>Not all attributes in the Active Directory are available via an (Offline) Address Book. See Dynamic Clearance Conditions for further information.</p>
Host Product Locale	Host Product Locale [is] [is not] Language.
IP Address	Computer's IP address [is] [is not] in Network (values IP address and Subnet mask)
Item Has a Label	Item [has] [does not have] a label.
Mac Address	Computer [has] [does not have Mac address] [matches regular expression] [does not match regular expression].
Message Body	Has Message Body [that equals value] [that does not equal value] [that starts with value] [that ends with value] [that contains value] [that does not contain value] [with value that matches RegEx] [that does not match RegEx]
Message Body Length	<p>Has message body length that [equals][does not equal][which is less than][which is greater than] value.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>NOTE: HTML tags are included in the message body length character count.</p> </div>
Message Class	Message Class [equals] [does not equal] [starts with] [ends with] [contains] [does not contain]
Message Content Message Content Count	<p>Combinations (AND or OR) that Do or Do Not match existing Expressions defined in the Content Library . For example:</p> <p>Expressions finds a match with (Expression) ApplesANDExpression does not find a match with (Expression) Bananas .</p>

Condition Types	Options Supported
Message Has Attachment with Extension	<p>Message [has] [does not] have attachment with an extension that equals Value.</p> <p>Embedded images may be excluded using the Include embedded images when performing attachment checks setting.</p>
Message Has Attachment with Name	<p>Attachment name [equals] [starts with] [ends with] [contains] [matches regular expression]</p> <p>Does not have attachment name that [equals] [contains] [matches regular expression].</p> <p>Embedded images may be excluded using the Include embedded images when performing attachment checks setting</p>
Message Has Number of Attachments	<p>Message Contains [more attachments] [less attachments] [Attachments present] [No attachments].</p> <p>Embedded images may be excluded using the Include embedded images when performing attachment checks setting</p>
Message Has Unclassified Attachments	<p>Message [has] [does not] have Unclassified attachments.</p> <p>Embedded images may be excluded using the Include embedded images when performing attachment checks setting</p>
Message Originator Attribute Values	<p>Originator attribute value [contains], [does not contain], [has], [does not have], [has a value that matches RegEx], [has a value that does not match RegEx].</p> <p>This condition only applies if the “Use From field for Originator Clearance” is enabled. It obtains information from the Originator’s address book, not from Active Directory.</p>
Message Originator Domain	<p>Originator domain [equals] [does not equal] [starts with] [ends with] [contains] [does not contain].</p>
Message Originator Email Address	<p>Originator email address [equals] [does not equal].</p>
Message Recipient Attribute values	<p>Check for recipient whose address book properties match the specified value</p>

Condition Types	Options Supported
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 Has New Recipients	Response message [contains][does not contain] new recipients.
Message Response Has Number of New Recipients	Response message [has this number][has less than this number] [has greater than this number] of new recipients.
Message Response Type	Message [is] [is not] of type Reply / ReplyToAll / Forward
Message Subject	Has message subject that [equals value][does not equal value][that starts with value][that ends with value][that contains value][that does not contain value][with value that matches RegEx][that does not match RegEx]
Message Subject Length	Has message subject length that [equals][does not equal][which is less than][which is greater than] value.
Message Total Attachment Size	Has total attachments size that [equals][which is less than][which is greater than] value.
Message Type	Message Type [equals] [does not equal] Message / Meeting / Task.
OS Locale	Operating system locale [is][is not] language.
Product Type	Running application is or is not one of the Classifier supported products (Outlook, Word, Excel, PowerPoint, Project or Visio).
Time	Time is [after][before]

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 Type	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
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 Size	[Is][Is Greater than] [Is Less than]
File Type	[Is][Is not]
Last Accessed	[Is][Is not] [Is after] [Is before]
Last Modified	[Is][Is not] [Is after] [Is before]

Question Library

The Question Library is a repository that stores questions and answers that are used to create Decision Trees for various scenarios. From these questions and answers, the Decision Tree guides the user to select which label to apply.

For information on configuring the Decision Tree in a policy, see [Configuring the Decision Tree on page 146](#)

This Question Library that is located with the other libraries and available to the configured policies.

NOTE:

There will be language variations when the admin tool's Allow multiple languages option is enabled. This feature will only support plain text.

Adding a Question and Answer

To add a question and answer:

1. Select the Question Library node, and select Add a new question.
2. Enter a name that refers to the questions in the Administration Server and description for the question.
The name must be unique and be limited to 1000 characters. The question is truncated to a single line.
3. Select a Language.
Multiple languages are supported within the configuration. If there is nothing defined, then the editor will show blank. If the Allow Multiple Languages option is disabled, then the language option will be hidden.
4. Enter a question.
5. Enter a tooltip for the question.
6. Click New Answer.
 - a. Enter a unique name and description for the answer.
 - b. Select a Language.
 - c. Enter the answer.
 - d. Enter a tooltip for the answer.
 - e. Click OK.
7. Choose a Selection Style.
8. Click OK.

Editing a Question and Answer

To edit questions and answers:

1. Select a question in the Question Library, and click Properties.
2. Make the necessary changes.
3. To change an answer:
 - a. Click Edit in the row of the answer you want to change.
 - b. Make the necessary changes.
 - c. Click OK.
4. Click OK.

Deleting a Question and Answer

To delete questions:

1. Select a question in the Question Library, and click Delete.
2. Click Yes to confirm the deletion.

If you confirm the deletion of the Question, the administration service provides a warning if the Question is being used in a Decision Tree.

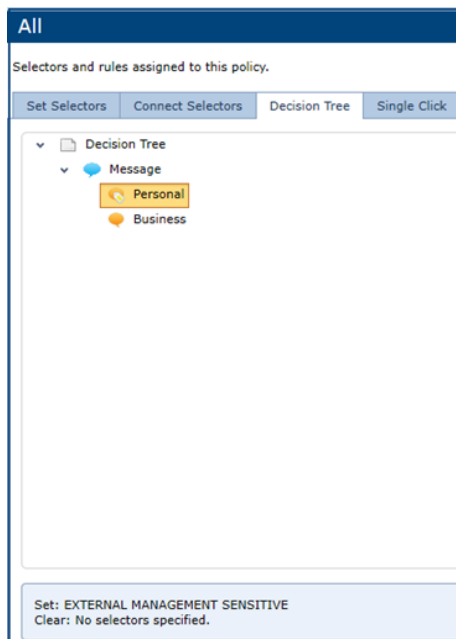
To delete an answer:

1. Select a question in the Question Library, and click Properties.
2. Click Delete in the row of the answer you want to remove.
3. Click OK.

Copying a Question and Answer

To copy a question:

1. Select a question in the Question Library, and click Copy.
The Question dialog appears with the name of the question as <Question Name> - Copy.
2. Make any necessary changes.
3. Click OK.



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. Users operating under different policies

will see no difference about these settings.

Classifier Application Settings

Each application has its own settings which are viewed by selecting the appropriate tab.

NOTE: Options are omitted or 'greyed' if the application / feature is not licensed.

Allow Classification of Meeting Requests and Appointments

NOTE:

- This setting is only applicable to Microsoft Outlook.
- This setting is not supported in Mail Add-In.
- OWA Classifier supports classification of meeting requests and appointments, but the support is not configurable.
- Visual markings (Subject, FLOT/LLOT and Attachment lists) are not supported on appointments.

Enable this setting to define whether the Classifier label selection features will be displayed when the user is drafting a meeting request or appointment.

Allow Classification of Tasks

NOTE:

- This setting is only applicable to Microsoft Outlook.
- Folder view labelling of tasks is not supported.
- 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.

Enable this setting to define whether the Classifier label selection features will be displayed when the user is drafting a task.

NOTE: The label summary bar may not be shown when choosing to assign a task to someone.

Allow Folder View Labelling

NOTE: This setting is only applicable to Email Classifier and OWA Classifier.

Enable this setting to define if users will be able to label items in Outlook folders, and/or modify labels on items in Outlook folders.

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.

Labelling a document using the Folder View mechanism may fail (for example, permissions). The text displayed in this circumstance is configurable using the Text displayed when Folder View labelling fails.

Allow Label Change on Protected Documents

NOTE: This setting is only applicable to Word (Office Classifier).

Enable this setting to define 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 the label value can be changed, but any Headers / Footers / Watermarks will not be changed. Setting Editing Restrictions to Tracked changes has no impact on Classifier operation - the label and markings can be updated.

For supported Editing restrictions types, Classifier must register 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 (for example, [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

NOTE: This setting is only applicable to Microsoft Outlook. 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 display 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 displayed.

Allow Use of OWA Basic/Light Mode

NOTE: This setting is only applicable to OWA Classifier.

Enable this setting to allow a site to disable OWA Basic/Light Mode if it has only installed the OWA Classifier Premium Mode. If disabled, OWA Classifier will intercept any requests to operate in OWA Basic/Light Mode.

Allow Visual Markings on a Meeting Request Response

NOTE: This setting is only applicable to Microsoft Outlook. 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

NOTE: : This setting is only applicable to Microsoft Outlook, OWA, and Mail Add-In.

A clearance may be assigned to an Active Directory Distribution Group - 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

NOTE: This setting is only applicable to Microsoft Excel.

Applying headers and footers in Excel via Classifier rules can have a performance impact. 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.

When this setting is enabled, all Headers and Footers are updated, every time the Label is changed. If disabled, the workbook can have inconsistent markings 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

NOTE: This setting is only applicable to Microsoft Excel.

Applying headers and footers in Excel via Classifier rules can have a performance impact. 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.

When this setting is enabled, all Headers and Footers are updated, every time the document is saved. If disabled, the workbook can have inconsistent markings 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

NOTE: This setting is only applicable to Microsoft Outlook.

Enabled this setting to direct Classifier (when attaching a document) to automatically raise the label on an email to encompass that document's label. If that automatic action cannot complete (for example, 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.

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 [Policies on page 134](#) .

If this setting is enabled, then the setting Allow manual upgrade when sending messages has no effect.

Automatically Update Label Fields

NOTE: This setting is only applicable to Microsoft Word.

Enable this setting so Classifier will automatically search for fields containing Classifier markings whenever the Classification is changed.

NOTE: Certain content (for example, 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'

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. See [General Settings on page 116](#).

Custom Format for 'Label' Column

NOTE: : This setting is only applicable to Microsoft Outlook.

The name of the Marking Format to be used if displaying a Classifier label in a column in an Outlook folder summary as described in [Folder View Column Name on page 104](#).

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

NOTE: This setting is only applicable to File Classifier.

Enable this setting to provide additional control over the context menu display as described in the File Classifier Guide. File Classifier context menu will display relevant selector values and the current classification.

Enable Back Button on Save As

NOTE: This setting is only applicable to Microsoft Visio.

Enable this setting to show the Back button 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

NOTE: This setting is only relevant if you have installed and used Power Classifier or File Classifier. This setting is only applicable to Email, OWA and Notes Classifier. This setting affects the checks made when a message is sent.

When this setting is 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.

Ensure Label Dominates All Portion Markings

NOTE: This setting is only applicable to Microsoft Outlook.

Enable this setting so Classifier can 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 (for example, [RES] for Restricted) displayed 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

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 (for example, Classifier) as the Folder View column name.
2. Deploy the configuration change. You can then add the named column into the Inbox folder.
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 / Add columns (or Position the cursor over the headings for the Inbox and choose Field Chooser from the context menu).
8. Select User-defined fields in Inbox from the drop down.

The 'Column' name you assign does appear if you have chosen a value that already appears in one of the other lists available under Field Chooser (for example, Label appears under All Appointment fields). You can check this by using the Manual definition of column name mechanism described below.

9. Select the required field and drag this into the required position in the folder column headings.
10. Replicate that Folder View to all other folders. Consider selecting the parent nodes and using the Apply view to sub-folders setting.

Manually defining 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.
2. Click New and enter your configured Column name (for example, Classifier Label). If you enter a name that is already in use in one the other lists, you will be notified.
3. 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

NOTE: This setting is only applicable to Microsoft Outlook.

This setting may be useful in avoiding problems when performing operations such as follow up or apply a category on messages when the Folder View column name option is enabled.

Such problems can arise when running in on-line mode (rather than cache mode) for messages delivered to the Inbox when Classifier is not running (for example, overnight).

When this setting is 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.

Force Summary Marking in Task Pane

NOTE: This setting is only applicable to Microsoft Word, Excel, PowerPoint and Project.

Enable this setting to determine whether users are allowed to close the task pane that displays the Summary Marking.

Include Embedded Images When Performing Attachment Checks

NOTE: This setting is only applicable to Microsoft Outlook.

Enable this setting to determine how embedded images are handled by Check for the high-water mark, Check clearance for attachments, and Check for unlabelled attachments rules. See [Policies on page 134](#).

NOTE: If the message is in RTF format, attachment checks cannot be performed on embedded attachments.

Maximum File Size for Icon Overlay (In KB)

NOTE: This 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

NOTE: This setting is only applicable to Microsoft Outlook. This setting is only relevant if the associated setting McAfee Host DLP scan is enabled.

Enabling this setting 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 include the selected label values.

McAfee Host DLP Scan

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.

When enabled, Classifier is directed 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, and can include the selected label values (classification). The DLP API is invoked just before the message is sent.

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.

Portion Marking

NOTE: This setting is only applicable to Classifier Mail-in, Microsoft Outlook, Word, Excel, and PowerPoint.

A portion mark is an abbreviated marking derived from a label value (for example, [P] for Public).

This Portion Marking application setting controls whether users can insert a Portion Marking into the content of a message, document, spreadsheet, or presentation.

This Portion Marking action is only available if the relevant application Portion Marking setting is enabled, AND Configuration Settings 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.

A Portion Marking may only be inserted into an empty cell in an Excel spreadsheet. (Outlook and Mail Add-in) 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, Mail Add-in, 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 or Insert Portion Marking action from the Word or Excel context menu.

The standard label selection dialog appears:

3. 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).

The label value will appear at the current insertion point formatted according to the configured Custom Format for Portion Marking.

To remove a Portion Mark:

1. Select the Portion Mark text (including any delimiters).
2. 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 on page 69](#).

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 (for example, on Label change or document Save).

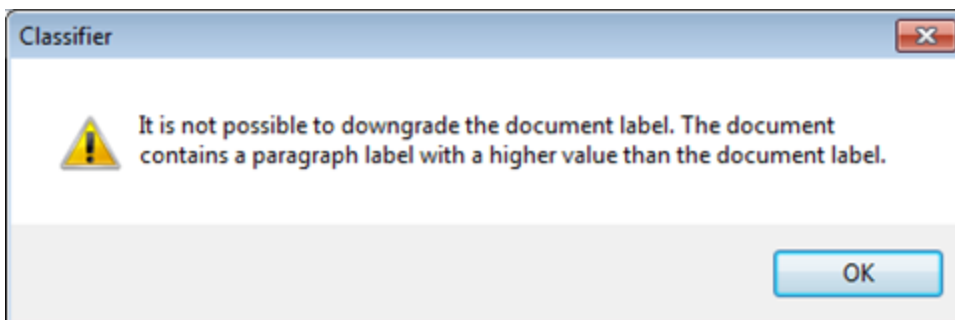
Office Classifier will make no change during dominance checking where the current label value contains a value for a non-hierarchic element that is different to the value for that element in the Portion Mark. For example: Label = Internal / Sales and Portion Mark = Internal / Support, then label would 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.
- Email Classifier will correctly identify Portion Markings ONLY if the associated Marking Format has delimiters around the entire marking format (for example, {{Classification (Portion Mark)}}). See Properties (Marking Format) for details on how to do this.

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 (for example, 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.



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.

The Mail Add-in supports label dominance checking through the rule processing. See "[Policies on page 134](#)". Automatic Label Upgrade is not supported on the Mail Add-in. "

Process Rules When Exporting

NOTE: This setting is only applicable to Microsoft Word, Excel, PowerPoint and Project. If a policy check dialog appears for PowerPoint or Project, the user must Fix the issue or Continue, they cannot go Back.

Enable this setting to allow you to enforce rules such as Check these mandatory selectors 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.

Process Rules When Printing

NOTE: This setting is only applicable to Microsoft Word, Excel, PowerPoint, and Project. If a policy check dialog appears for PowerPoint or Project, the user must Fix the issue or Continue, they cannot go Back.

Enable this setting to allow you to enforce rules such as Check these mandatory selectors 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.

Process Rules When Saving

NOTE: This setting is only applicable to Microsoft Word, Excel and PowerPoint, Project and Visio. If a policy check dialog appears for Visio, the user must Fix the issue or Continue, they cannot go Back.

Enable this setting to allow you to enforce rules 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.

Search for Outlook Item Properties That Match Email Label Locations

NOTE: This setting is only applicable to Outlook.

When enabled and 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. When disabled, standard processing of Label Locations applies.

Set Property to Refresh Markings

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 User Guides.

Show Classifier 'C' on Icon Overlay

NOTE: This setting is only applicable to File Classifier.

When enabled (Default): File Classifier icon overlays will include the Classifier symbol .

Show Classifier on Ribbon When Reading

NOTE: This setting is only applicable to Outlook.

Enable this setting to display the Classifier ribbon entry when reading a message.

Show 'Insert Label' Context Menu

NOTE: This setting is only applicable to Microsoft Word.

Enable this setting so the Insert Label Context is available in Word.

Show Label Dialog on Save Or Print

NOTE: This setting is only applicable to Microsoft Word, Excel, PowerPoint Project. and Visio. Further control over the style of the label dialog displayed is provided by Show label dialog style. Regardless of the value of this setting, Classifier will always process the configured rules (for example, Check these mandatory selectors) which in some circumstances may result in a further label dialog appearing.

This setting supports three values:

- **Default:** The user experience saving or printing a document is controlled by any rules defined (for example, 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 displayed 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 displayed. The user can modify the label, or continue the operation.

Show Label Dialog on Send

NOTE: : This setting is only applicable to Microsoft Outlook and Lotus Notes. Further control over the style of the label dialog displayed is provided by Show label dialog style. Regardless of the value of this setting, Classifier will always process the configured rules (for example, Check these mandatory selectors) which in some circumstances may result in a further label dialog appearing.

This setting supports three values:

- **Default:** The user experience sending a message is controlled by any rules defined (for example, Check these mandatory selectors and Check for use of default label).
- **Always:** The Label selection dialog will be displayed 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 displayed. The user can modify the label or continue the operation.

Show Label Dialog Style

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 (for example, Mandatory selector required). By default, if Use Single Click with pre-defined labels is configured, then a Single Click format is displayed; otherwise the Full label selection dialog appears.

This per-application setting provides control over the style of dialog displayed 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:

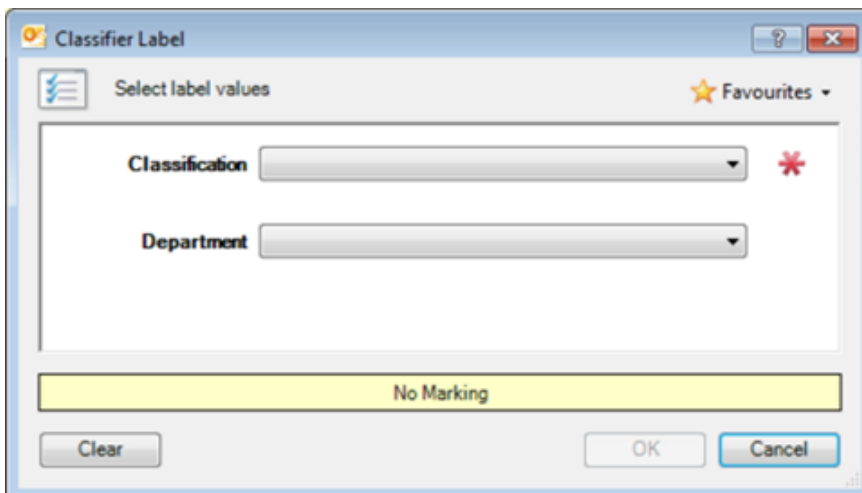
- Single Click when configured (Default): A Single Click label selection dialog is displayed if Use Single Click with pre-defined labels is configured, otherwise the Full label selection dialog appears.
- Full Classification Dialog: The Full label selection dialog is displayed even though Use Single Click with pre- defined labels is configured.

Show Label Dialog When Mandatory Label

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).

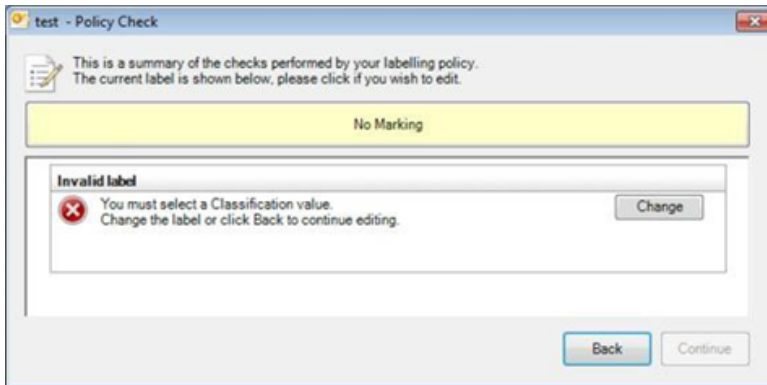
If this setting is Enabled when a Mandatory Selector check fails (there is no value for the Mandatory Selector), AND Warn/Prevent in the rule is set to Prevent, then the label dialog shown is displayed rather than the general Rule exception dialog, allowing the user to set the label directly.



Further control over the style of the label dialog displayed is provided by Show label dialog style.

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.



Show Summary Marking in Task Pane

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.

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

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.

When enabled, the Summary Marking value is inserted into the Window title bar. It is appended to the document name.

Suppress Classifier Alerts When Running Macros

NOTE: This setting is only applicable to Word, Excel, and PowerPoint.

You must enable the Trust access to the VBA project object model. To find this option:

1. From your application, select File > Options > Trust Center.
2. In the Microsoft <Word/Excel/PowerPoint> Trust Center section, select Trust Center Settings.
3. From the Macro Settings tab, select Trust access to the VBA project object model.

When Suppress Classifier Alerts When Running Macros is enabled, Classifier alerts are triggered while running macros will not be displayed.

Text Displayed When an Item Without A Label Cannot be Checked into SharePoint

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

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

NOTE: This setting is only applicable to Microsoft Word, Excel, PowerPoint, Project, and Visio. 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 a document custom property. It is still left to Email and Office Classifier to implement it.

When enabled and 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.

When 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

NOTE: This setting is only applicable to File Classifier. For Visio files, the General setting Use Alternate Data Stream (ADS) for Visio files takes precedence.

This setting provides additional control over whether File Classifier writes label information to the Alternate Data Stream for file types that are not supported (that is, NOT configured in DocLabeller2 - for example, TXT files).

When enabled, File Classifier will store the label in the Alternate Data Stream.

Use Default Label When Replying to Unmarked Emails

NOTE: This setting is only applicable to Email, OWA, Mail Add-in and Notes Classifier. 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.

Enable this setting so the Reply message can adopt the default label value (if configured) as the initial label value for the reply message.

Use from Field for Originator Clearance

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 can 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).

Classifier Mail Add-in always uses from field for originator clearance.

Enable this setting if you want Email / OWA Classifier to use the From value to perform Originator Clearance Checks.

Disable this setting if you want Email / OWA Classifier to always use the Primary mailbox identity to perform Originator Clearance Checks.

Warn if File Contents cannot be Accessed

NOTE: This setting is only applicable to Microsoft Outlook, OWA, and Notes Classifier. This setting is not supported in Mail Add-In.

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 (for example, an old PDF format).

Further details can be found under [Policies on page 134](#).

Watermarks Use Marking Format Font

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.

Titus Interoperability

When you have enabled Titus Interoperation, you must configure Titus Interoperability so Titus and Boldon James can work together.

To configure Titus Interoperability:

1. Select the Titus Interoperability Settings tab.
2. Enter the Namespace URI. This is used to generate a Titus-40 label. This must match the URI defined in the Titus Configuration file exactly.
3. If you are using:
 - Microsoft Outlook, enable Support interoperation for Email
 - Google Mail, enable Support interoperation for Google Gmail.
 - Microsoft Office, enable Support interoperation for Office
4. If you want to include a Titus-30 label when sending an email using Microsoft Outlook, you must:
 - a. enter the separator characters for multi-select selector values exactly as in the Titus Configuration file
 - b. enter the Property Name as used for the TLPropertyRoot value to decode Titus-30 labels. For example, for Outlook, TLPropertyRoot=TitusCorp, Classification=TITUS Internal, ContainsPersonalData=False; for Office, the value is used as a prefix to the custom properties (for example, TitusCorpClassification=Internal). The Property Name must match exactly as in the Titus Configuration under the Metadata Handlers. Ensure the Do not use Schema Mapping for metadata with this 'Property Name' (all others require Schema Mapping) checkbox is selected in the Titus Configuration.

General Settings

These settings are common to multiple applications, although a feature may only be applicable to a subset of applications.

Automatically Expand Policy Warning Messages

NOTE: Not applicable to Classifier Mail Add-in.

When disabled, the text displayed in policy check dialogs will not be automatically expanded when the dialog is first displayed, and will include the button "Click for more information", allowing the user to view any additional text.

If enabled, Classifier automatically expands the text the first time the Policy Check Dialog is displayed, and includes the button "Click for less information"

Azure RMS Document Tracking

NOTE: Only applicable to Word, Excel, and PowerPoint.

This setting is only effective if RMS Client 2.1 has been installed.

Enable this setting to provide the user with the means to invoke RMS Tracking from the Classifier Options menu.

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

NOTE: Only applicable to Word, Excel, and PowerPoint. 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

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.

When disabled, Classifier will only cache Active Directory attributes when first referenced.

When enabled, Classifier will cache Active Directory attributes when the application starts.

Check Label Location First

NOTE: This setting is usually only relevant in certain specialised environments.

When enabled, Classifier will check Label Locations for a label value before checking for an internal Classifier label.

Classification History

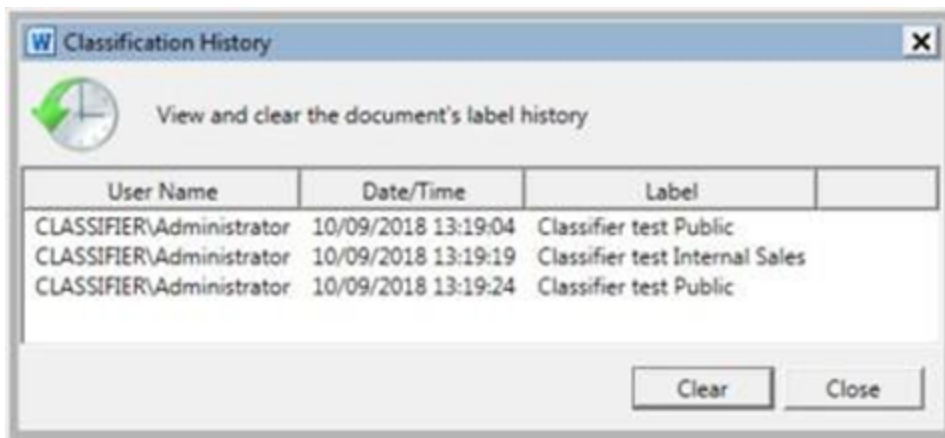
NOTE: This setting is only applicable to Word, Excel and PowerPoint.

When 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. Date items appear in local time.

Classification History Display

When enabled, the user will be able to view any stored Classification History. The Classification History is available via a separate File > Classifier > Classification History option on the backstage view which will display the following dialog:



The user may clear all the history.

The text displayed to the user may be configured using the User Interface Definition mechanisms.

Classification Ribbon Single Click as a Gallery

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.
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:

- Disabled: the normal display of Classifier icons is displayed on the Office Ribbon bar in the three different modes.
- Enabled: the smaller real estate display of Classifier icons is applied to the Office Ribbon.

Classifier Ribbon Group Location

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 display the Classifier Label selection group as a 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

NOTE: This setting is only applicable to Microsoft Outlook, Word, Excel, and PowerPoint.

The Classifier ribbon layout has the following options:

- Default mode: As it currently exists.
- 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

NOTE: This setting is only applicable to Microsoft Outlook, Word, Excel and PowerPoint.

When enabled, case sensitive matching is preformed.

Content Checking - Include Document Properties

NOTE: This setting is only applicable to Microsoft Outlook, Word and Excel.

When disabled, document properties are skipped when performing content checks.

When enabled, document properties are also checked when performing content checks.

Custom Format For 'Classifier Auditing'

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. 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.

Enabling this setting uses the name of the Marking Format 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

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

NOTE: This feature only applies to Word, Excel, PowerPoint, Outlook, and Mail Add-in.

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.

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 on page 107](#).

NOTE: This setting must be configured before the Portion Mark action will appear in the application ribbon bar. 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

NOTE: 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:

- when displaying 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. Under OWA Classifier, Classifier Mail Add-in, Notes Classifier and Mobile Classifier the summary marking is always displayed (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 displaying a list of Favourites.
- When displaying a list of Portion Mark values.
- When displaying 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 (for example, omit the Label Configuration name).
- 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

NOTE: Only applicable to Microsoft Outlook, Word, Excel, PowerPoint, Project and Visio.

The label selection dialog displayed 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.

When enabled, 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). When disabled, the OK button is available to the user even if the rule is configured as Prevent .

Display of Favourites Button

NOTE: The feature is not applicable to OWA Classifier, Classifier Mail Add-in, Notes 8, or Mobile Classifier.

When enabled, this setting allows the Favourites button to appear and the features are available to the user.

Display of Label Dialog Launch Button

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 (for example, Text entry etc.).

If either of the above applies, then either a Label dialog button or a dialog launcher glyph is displayed according to this setting.

The single click label dialog changes to display a Label Dialog button.

Indicate Mandatory Selector Check Failures

NOTE: The setting is not applicable to OWA Classifier, Classifier Mail Add-in, Notes Classifier, Mobile Classifier, or SharePoint Classifier.

When enabled, an asterisk appears alongside missing mandatory selectors in the label dialog.

Label Integrity Check Failure Error Message

NOTE: This item is only significant in very specific circumstances configured under Classifier Support guidance.

Masking of Selectors Against Clearance

NOTE: Not applicable to Notes Classifier or Mobile Classifier.

When disabled, the selector values available will comprise all the Selector values available in the policy.

When enabled, the selector values available will comprise only those values marked available in the policy for which the user is cleared.

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 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

NOTE: Checkboxes in the ribbon still appear in columns. This setting is only applicable to Email and Office Classifier.

When disabled, selector value buttons are placed at intervals determined by the longest item in a column.

When enabled, selector value buttons are placed next to each other on ribbon bar row to minimise space between them.

Remove Classifier Options from the Ribbon Bar

NOTE:

- This setting has no effect under versions of Microsoft Office prior to 2010.
- Only applicable to Email and Office Classifier.
- In some circumstances the label dialog is not available (for example, there are three or less ribbon bar selectors) and the user will not have access to the Clear and Default actions.
- You can force Help to be displayed using the Show 'Help' button on ribbon bar.

When enabled, the Label Options menu no longer appears in the Ribbon Bar. The Clear, Default and Help actions are available if the user invokes the Label Selection dialog.

When disabled, Classifier Label Options appear in their usual location on the Ribbon Bar.

About Classifier can be found in the Office Backstage View (Select the File tab and click Classifier).

Select Value for Masked Selector

NOTE:

- This setting is only relevant if Masking of Selectors against Clearance is Enabled.
- Only applicable to 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.

See description of [Masking of Selectors Against Clearance on page 121](#) for the effects.

Show 'Help' Button on Ribbon Bar

NOTE: Not applicable to OWA Classifier, Classifier Mail Add-in, Notes Classifier, or Mobile Classifier.

This setting defines how to access any site-defined Help displayed to the user. When enabled, a Help button appears as a separate button above Options within the Classifier Ribbon Bar. When disabled, a Help action appears under the Options menu in the Classifier Ribbon Bar.

Show Labeller 'Clear' Button

NOTE: Not applicable to Mobile Classifier.

This setting defines whether the Classifier Clear action appears under Classifier Label Options (outlook only) and / or on the Label selection dialog.

When enabled, the Clear label action is available.

When disabled, the Clear label action does not appear under Classifier Label Options.

Show Labeller 'Default' Button

NOTE: Not applicable to Mobile Classifier.

This setting defines whether the Classifier Default action appears under Classifier Label Options (outlook only) and / or on the Label selection dialog.

When enabled, the Default action is available. When disabled, the Default action does not appear under Classifier Label Options.

Single Click Best Match

NOTE: This setting is only relevant if the current policy has Use Single Click with pre-defined labels enabled. Not applicable to Mobile Classifier.

When disabled, the action is that a Single Click button is only highlighted if its associated label value exactly matches the currently selected label value.

When enabled, the button with the best match (if any) to the current label value will be highlighted. This best match is determined using the best match algorithm.

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).
- 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:

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

NOTE: Only applicable to Office documents.

When 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.

When enabled, 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

NOTE: Not applicable to OWA Classifier, Notes Classifier, or Mobile Classifier.

This setting operates in conjunction with the Custom format for Summary Markings.

When disabled, the Marking format and Selector value colour settings are used when displaying a Summary Marking.

When enabled, all Marking format and Selector value colour settings are ignored, and the Summary Marking displayed will appear as Black text on a White background.

Text Displayed When A Distribution List Fails to Expand

NOTE: This setting is only relevant to Email and OWA Classifier, and Mail Add-in.

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.

When disabled, selecting the blank entry Disables the setting (the default text is displayed).

When enabled, selecting a User Message from the list displayed 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

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:

- The following attachments have a higher label than that of this message.
- Click Remove to delete these attachments or Back to return to the message.

If the Rule is set to Warning:

- The following attachments have a higher label than that of this message.
- 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.

When disabled, selecting the blank entry disables the setting (the default text is displayed).

When enabled, selecting a User Message from the list displayed enables the setting and will replace the default text with the text defined by the User Message.

Text Displayed when Folder View Labelling Fails

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 (for example, because the user does not have the necessary permissions to the item).

Text Displayed when Originator Check Failed to Complete

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.

When disabled, selecting the blank entry Disables the setting (the default text is displayed).

When enabled, selecting a User Message from the list 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

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

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.

When disabled, selecting the blank entry Disables the setting (the default text is displayed).

When enabled, selecting a User Message from the list 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

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.

When disabled, selecting the blank entry Disables the setting (the default text is displayed).

When enabled, selecting a User Message from the list 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

NOTE: This setting is only relevant to Email and OWA Classifier.

Classifier may be unable to complete configured Apply S/MIME security rules (See [Setting Rules on page 149](#)). 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.

When disabled, selecting the blank entry Disables the setting (the default text is displayed).

When enabled, selecting a User Message from the list 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

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 displayed 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 (for example, Send / Save) does not require any further user involvement.

This setting defined the User Message shown in the dialog displayed after successful resolution (for example, Remove) of Policy Check issues.

Selecting the blank entry disables the setting. Selecting a User Message from the list enables the setting.

Text to Display if Attachment Markings are Inconsistent

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 displayed to the user if an attachment is detected with an inconsistent marking. The check performed is as described in [Ensure Attachment Markings are Consistent on page 104](#) are consistent .

Text to Display if No Marking is Available

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 (for example, 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

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.

NOTE: Currently 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: While 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 (for example, additional authentication requirements).

Use Alternate Data Stream (ADS) for Visio Files

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.

Enabled this setting to direct File Classifier and Classifier API to maintain labels for Visio files in the Alternate Data Stream.

NOTE: 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

This setting is used to control whether an Apply Ad Hoc protection option (or just the Apply Template option) is displayed when a Check for RMS protection rule fires.

When disabled, only the Apply Template option is displayed.

When enabled, both the Apply Template and Apply Ad Hoc protection options are displayed.

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 (for example, 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'.

Adding an Email Label Location

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.

To add an Email Label Location:

1. From Configuration Settings, select Label Locations, and select Properties.
The Label Locations dialog opens.
2. In the Emails section, click Add Email Label Location.
The Edit Label Location Values dialog opens.
3. Select one of the following Location Types:
 - X-Header: You may define multiple X-Header entries each having its own property name (supplied as the Parameter value - that is, 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. If you select X-Header, enter an X-Header name.
 - 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.
 - 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.
 - Subject: Classifier will assess the Subject (prefix and suffix) of the message to see whether it contains a Label value.

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.
4. Select Marking Format.
5. Click OK.
6. Click OK again.

Editing an Email Label Location

To edit an Email Label Location:

1. Open Label Locations, and in the Emails section, select Edit in the row of the Location Type you want to edit.
2. Make any changes.
3. Click OK.

Deleting an Email Label Location

To delete an Email Label Location:

1. Open Label Locations, and in the Emails section, select Delete in the row of the Location Type you want to remove.

Adding a Document Label Location

To add a Document Label Location:

1. From Configuration Settings, select Label Locations, then click Properties.
The Label Locations dialog opens.
2. In the Documents section, click Add Document Label Location.
The Edit Label Location Values dialog opens.

3. Select one of the following Location Types:
 - 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 (for example, 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 (for example, 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. Not all locations displayed are supported by all applications. Check the product Release Note for further information (for example, AUTOCAD Classifier).
4. Select a Property Name.
5. Select a Marking Format.
6. Click OK.
7. Click OK again.

Editing a Document Label Location

To edit a Document Label Location:

1. Open Label Locations, and in the Document section, select Edit in the row of the Location Type you want to edit.
2. Make any changes.
3. Click OK.

Deleting a Document Label Location

To delete a Document Label Location:

1. Open Label Locations, and in the Document section, select Delete in the row of the Location Type you want to remove.

Recognising and Parsing Label Markings

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.

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 (for example), Classifier will check any Label Locations defined to see whether there is a Marking 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 (for example, [marking]). In addition, string based selectors (Text entry, Date picker and Date offset) need to have Prefix and Suffix defined.

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 (for example, 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

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 (for example, 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 cannot be derived, Classifier will then move onto the next 'Combined Label Location', and so on. If a label cannot be derived from any 'Combined Label Location', Classifier will process the standard Label Locations to see if it can derive a label.

Adding a Combined Email Label Location

To add a Combined Email Label Location:

1. From Configuration Settings, select Combined Label Locations, and select Properties. The Label Locations dialog opens.
2. In the Email Combined Label Locations section, click Add Email Combined Locations.
3. Enter a name and description for the Label Location.
4. Click Add Email Label Location.
5. Select one of the following Location Types:
 - X-Header: You may define multiple X-Header entries each having its own property name (supplied as the Parameter value - that is, 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. If you select X-Header, enter an X-Header name.
 - 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.
 - 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.
 - Subject: Classifier will assess the Subject (prefix and suffix) of the message to see whether it contains a Label value.

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.

6. Select Marking Format.
7. Click OK.
8. Click OK again.

Editing a Combined Email Label Location

To edit a Combined Email Label Location:

1. Open Combined Label Locations, and in the Email Combined Label Locations section, select Edit in the row of the Name you want to edit.
2. Make any changes. To edit the Email Label Location, see [Editing an Email Label Location on page 130](#).
3. Click OK.
4. Click OK again.

Deleting a Combined Email Label Location

To delete a Combined Email Label Location:

1. Open Combined Label Locations, and in the Email Combined Label Locations section, select Delete in the row of the Name you want to remove.
2. Click Yes to confirm you want to remove it.
3. If you want to delete the Email Label Location, click Edit in the row of the Name you want to edit, then in the Email section, click Delete in the row of the Email Label Location you want to remove. Click OK.

Policies

Policies are containers for rules and actions. They determine what actions occur when a particular event happens and the specified conditions in the rule are met.

Adding a New Policy

To add a new policy:

1. From Labelling Configuration, select Policies .
2. From the Actions area, select Add a new policy.
3. Enter a Policy Name and optional description. The Policy name must be unique in the Configuration, and cannot contain *, ? : and .
4. In the Maximum number of labels to show field, enter a value for the number of label values to remember for each of Recently used Labels and Recently used Portion Marks.

NOTE:

- If the Maximum number of labels to show is zero, then the Recently used Labels and Portion Marks features are disabled. The user never sees 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 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.
- The Display of Favourites button must be enabled for this setting to be available. See [Display of Favourites Button on page 121](#)

5. Choose how you want the default classifications to be generated. Select:
 - User Selectable Default Classification if you wish users to be able to choose their own default label rather than using the policy-defined default. If selected, 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 if you want the default label that is applicable to a new document or email combined with 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. 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.

6. Select how the user can choose a label:

- Use Assisted Labelling - see [Label Selection Dialog - Assisted Labelling on page 24](#). If you do not select this check box, label selection is standard. The user sees individual drop-down lists for each selector.

IMPORTANT: The Use Assisted Labelling setting can never be undone on a policy once it has been set. The user interface for Assisted Labelling operates differently between Office and OWA environments.

- Use Decision Tree - adds an extra tab to the associated policy editor and make it available to the client. See [Question Library on page 96](#).
 - Use Single Click with pre-defined labels - adds an extra tab in the central frame that gives access to the Single Click configuration features. The standard label selection interface displays 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 can select individual selector values via the Classifier Label dialog box launcher arrow. See [Single Click Operation on page 21](#).
7. If you want to selector captions to appear, select the Show selector captions on the ribbon bar check box. This setting is not applicable to Notes, Mail Add-in, or Mobile Classifier.
 8. Because the values of some selector types can be displayed as buttons, set a value on when to wrap the buttons. 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 to appear in the Ribbon Bar (after wrapping), Classifier reverts to the default (single row per selector), and the Classifier label

button displays providing access to the Label selection dialog. Standard Ribbon Bar re-sizing actions apply, so ensure that the settings configured are appropriate for the number of selectors and values to be displayed.

9. Select a User Interface definition as configured in the [User Interface Library on page 60](#).
10. Select a 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 display to a user. See [Algorithm for finding the text to display on page 50](#).

NOTE: Only visible if Allow multiple languages is enabled.

11. Click OK.

Editing a Policy

To edit a policy:

1. From Labelling Configuration, select Policies, and select a Policy.
2. Select Properties.
3. Make any necessary changes.
4. Click OK.

Copying a Policy

You can use an existing Classifier Policy as the basis for a new policy. All the existing settings will be carried forward.

To copy a policy:

1. From Labelling Configuration, select Policies, and select a Policy.
2. Select Copy.
The copied policy appears as "copy of <policy name>".
3. Select the copied policy and click Properties.
4. Make any necessary changes.
5. Click OK.

Deleting a Policy

NOTE: Ensure that all users are mapped (for example, through Group Policy configuration) to a different policy before deletion.

To delete a policy:

1. From Labelling Configuration, select Policies, and select a Policy.
2. Select Delete.
3. Click Yes to confirm deletion.

Locking/Unlocking a Policy

You can lock policies to indicate to other Classifier administrators that the Configuration cannot be published at the moment (for example, because policy changes are incomplete).

To lock a policy:

1. From Labelling Configuration, select Policies, and select a Policy.
2. Select Lock Policy.

To unlock a policy:

1. From Labelling Configuration, select Policies, and select a Policy.
2. Select Unlock Policy.

Configuring Policy User Interface 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. The Caption Placement and Tab Placement only apply to the main Label dialog.

To configure the Policy User Interface Settings:

1. Select a Policy Name, click Settings, and select the Policy User Interface Settings tab.
2. Select a base colour for the header section of the user interface when using the Custom Theme. The Base colour and Title colour only applies in the Custom Theme.
3. Select a caption placement - either left of top of the selector.
4. If displaying a custom image on the UI, select one from the Custom Image dropdown. These images are stored in the Image Library. See [Image Library on page 56](#).
5. Select an Image to apply to select which image you want to apply - Default (Classifier Image), No image, or Custom Image (from step 4).
6. Select an image to display for selector warnings in the label dialog. If you do not select an image, an asterisk is used. These images are stored in the Image Library. See [Image Library on page 56](#).
7. Enable the Show top three favourites so you can add your top three favourites as selectable buttons on the ribbon. Use the Organise Favourites feature to put your favourites in order.
8. Select a Style to apply to have a theme for your application. You can select a Microsoft Office Theme, a Classifier Theme, a Custom Theme, or a Titus theme.

NOTE: The Microsoft Office theme uses a colour scheme based on the active Office Theme from active Office application. This only applies when using Microsoft Office Applications.

9. Select a tab placement - either on the top or on the left on the tab pages.
10. From the Time before tooltip is displayed dropdown, if you are using speech recognition software, you can indicate how much time lapses in seconds when you hover your mouse over an item and when the tooltip displays. This allows the software to read the details of the active control before displaying its tooltip.

11. Select a Title colour for the description text in the header section of the user interface when using the Custom Theme.
12. From the Tooltip display duration time, indicate how long a tooltip remains on screen, in seconds, unless you move your mouse.
13. Click OK.

Configuring Suggested Classification Settings

This tab allows you to configure the ability to run a suggested classification on demand. More information can be found in [Suggested Classification on page 158](#).

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.
- 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 possible outcomes.
- If a suggested classification check is performed manually, the result of the check will be displayed in the standard Classifier Policy Check dialog with the appropriate configured message.
- 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.

To configure the Suggested Classification Settings:

1. Select a Policy Name, click Settings, and select the Suggested Classification Settings tab.
2. Enable Allow user driven classification to allow the user to trigger a suggested classification check.
3. Select a Text to display when a suggestion cannot be found.
4. Select a Text to display when a suggestion cannot be resolved. This can happen when multiple clashing suggestions are applicable.
5. Select a Text to display when a suggestion can be found.
6. Click OK.

Defining Selectors and Values for Policies

You can define and manage Selectors and Values for policies. You can also:

- View or change the properties of a Selector in a policy such as replacing the Caption or Tooltip defined in the Selector library for this policy, and (Selector) Values

- 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 display the selectors across a number of Tabs.
- Control the Selector Values available in the policy and the default values.
- 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.
- Switch the view to show the settings associated with a particular Language

Setting a Selector

When a new Policy is created, it will have no Selectors assigned (unless it was established using the Copy Policy action). Ensure you have selectors added in the Selector Library. See [Selector Library on page 67](#). When configuring a policy, you need to control the selectors that are relevant to the policy. Setting a selector 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 display 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.

To set a selector to a policy:

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Ensure the Set Selectors tab is open.
3. In the Actions pane, select Selectors in policy.
4. Pick a Selector Name and click Add >>.

The Selector name moves to the Selectors in policy section.
5. In the Selectors in policy section, pick a tab. See [Adding Tabs on page 140](#).
6. If you want the selector to appear in the Ribbon, select the Ribbon checkbox.

NOTE: If your selector type is Text Entry or Date Picker, the checkbox does not appear.

7. If you have a label value that is part of a different policy, but you want the value retained, click the Retained checkbox. For example, if an email message or document is received containing a Selector value that is recognised in the selector library, the value is displayed 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 (for example, Reply to a received email message) the label value will be dropped from the new label. Another scenario is if a selector is no longer active, but the selector settings are to be retained in rules in the policy.

NOTE: 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.

8. Click OK.

Adding Tabs

By default, the general Label selection dialog shows all selectors configured for the current policy. You may wish to group the selectors to reflect their usage by defining one or more tabs, and configuring which selectors appear on each tab.

To add a tab:

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Ensure the Set Selectors tab is open.
3. In the Actions pane, select Selectors in policy.
4. Click Tabs.
5. Click New.
6. Enter a tab name and click OK.

Editing Captions and Tooltips

To edit captions and tooltips:

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Ensure the Set Selectors tab is open, and click a selector.
3. In the Actions pane, select Edit Properties.
4. In the General tab, select a 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. See [Languages on page 49](#) for more information.
5. Either enter caption text or select Use caption from Selector Library checkbox.
6. Either enter tooltip text or select Use ToolTip from Selector Library checkbox..
7. Click OK.

Editing Selector Options

The options displayed depend upon the selector type.

To edit selector options:

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Ensure the Set Selectors tab is open, and click a selector.
3. In the Actions pane, select Edit Properties.
4. Select the Options tab.

If you are editing options for: then:

Single Selection List

5. Select one or more values as defined in the Selector Library that are available in the current policy.
6. Specify a default value.
7. In the Use names from dropdown, pick a name to display to the user for this policy. Classifier applications will then display 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.
8. From the Show value as dropdown, choose how the selector appears if Use Single Click with pre-defined labels is disabled - either Text, Colour and text, and Image and text. If Single click with pre-defined labels is enabled, this setting is ignored.
9. From the Display style dropdown, select how the values will appear in the Ribbon (if a Single selection list selector or multiple selection list is configured to appear in the Ribbon).
10. Select the Allow users to filter selector values checkbox to allow users to type in text to filter selector values in a list.
11. Click OK.

Multi Selection List

5. Specify which of the values defined for the selector are available in the current policy. The Default column allows you to specify none, one, or more default values.
6. In the Use names from dropdown, pick a name to display to the user for this policy. Classifier applications will then display 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.
7. From the Show value as dropdown, choose how the selector appears - either Text, Colour and text, and Image and text.
8. From the Display style dropdown, select how the values will appear in the Ribbon (if a Multiple selection list selector is configured to appear in the Ribbon).
9. Select the Allow users to filter selector values checkbox to allow users to type in text to filter selector values in a list.
10. Click OK.

If you are editing options for:	then:
Date Picker	<ol style="list-style-type: none"> 5. Select either no default or pick a default date for the policy either using a time period or a specific date. 6. When a Favourite or Recent label is applied that contains this selector, then select which date to use. 7. Click OK.
Text Entry	<ol style="list-style-type: none"> 5. Enter the default text. 6. Click the Enable auto-complete checkbox if you want Classifier to display previously-used values that match what the user types to assist completing the value. 7. Click OK.
Data Offset List	<ol style="list-style-type: none"> 5. Specify which of the values defined for the selector are actually available in the current policy. 6. Select a Default Date Period. 7. From the Use Names from dropdown, select which of the names configured for a selector will be displayed to the user in this policy. Classifier applications will then display 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. 8. Click OK.

Connecting 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.

All the standard policy management features apply, including defining the selectors and values that are available in the policy (for example, 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 displayed, default values and rule operation.

You start to build the Selector Sequence tree by adding a Selector at the root. This selector is the user's first choice.

Keep in mind the following:

- the Selector Order defined in the Configuration is strictly enforced. Therefore, if one branch of the tree adds a 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, 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.

Adding a Selector to Selector Sequence

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Open the Connect Selectors tab.
3. In the Actions pane, select Add a selector.
4. Pick a selector and click Add.

NOTE: If you want to add more nodes, either select Selector Sequence or click a node and select Add a selector.

Removing a Selector from the Selector Sequence

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Open the Connect Selectors tab.
3. Select a selector.
4. In the Actions pane, select Remove selector.
5. Click Yes to confirm the deletion. Any nested selectors are also removed.

Editing Selector Property Options

For information on setting captions and tooltips, see [Editing Captions and Tooltips on page 140](#).

1. From the Navigation tree, select Labelling Configuration > Policies > policy name.
2. Open the Connect Selectors tab.
3. Select a selector.
4. In the Actions pane, select Edit selector options.
5. Click the Options tab.

If you are editing options for:**Single Selection List**

- then:**
6. Select one or more values as defined in the Selector Library that are available in the current policy.
 7. Specify a default value.
 8. In the Use names from dropdown, pick a name to display to the user for this policy. Classifier applications will then display 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.
 9. From the Show value as dropdown, choose how the selector appears if Use Single Click with pre-defined labels is disabled - either Text, Colour and text, and Image and text. If Single click with pre-defined labels is enabled, this setting is ignored.
 10. From the Display style dropdown, select how the values will appear in the Ribbon (if a Single selection list selector or multiple selection list is configured to appear in the Ribbon).
 11. Click the Retain selection if valid when parent selection changes checkbox if the user changes the choice of a parent selector value, any currently selected subordinate values that are available under the new parent choice will be retained.
 12. Select the Allow users to filter selector values checkbox to allow users to type in text to filter selector values in a list.
 13. Click OK.

If you are editing options for:

Multi Selection List

6. Specify which of the values defined for the selector are available in the current policy. The Default column allows you to specify none, one, or more default values.
7. In the Use names from dropdown, pick a name to display to the user for this policy. Classifier applications will then display 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.
8. From the Show value as dropdown, choose how the selector appears - either Text, Colour and text, and Image and text.
9. From the Display style dropdown, select how the values will appear in the Ribbon (if a Multiple selection list selector is configured to appear in the Ribbon).
10. Click the Retain selection if valid when parent selection changes checkbox if the user changes the choice of a parent selector value, any currently selected subordinate values that are available under the new parent choice will be retained.
11. Click the Always include this selector's values when the parent has multiple selections checkbox if you want the label to always include the values when the parent has multiple selections.
12. Select the Allow users to filter selector values checkbox to allow users to type in text to filter selector values in a list.
13. Click OK.

Date Picker

6. Select either no default or pick a default date for the policy either using a time period or a specific date.
7. When a Favourite or Recent label is applied that contains this selector, then select which date to use.
8. Click OK.

If you are editing options for:	then:
Text Entry	<ol style="list-style-type: none"> 6. Enter the default text. 7. Click the Enable auto-complete checkbox if you want Classifier to display previously-used values that match what the user types to assist completing the value. 8. Click the Retain selection if valid when parent selection changes checkbox if the user changes the choice of a parent selector value, any currently selected subordinate values that are available under the new parent choice will be retained. 9. Click OK.
Data Offset List	<ol style="list-style-type: none"> 6. Specify which of the values defined for the selector are actually available in the current policy. 7. Select a Default Date Period. 8. From the Use Names from dropdown, select which of the names configured for a selector will be displayed to the user in this policy. Classifier applications will then display 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. 9. Click the Retain selection if valid when parent selection changes checkbox if the user changes the choice of a parent selector value, any currently selected subordinate values that are available under the new parent choice will be retained. 10. Click OK.

Configuring the Decision Tree

The Decision Tree Editor 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. You can enable the Decision Tree Functionality under the Labelling Configuration Policies area. When a user selects this option, then it will add a Decision Tree tab to the policy editor.

NOTE:

- Depending on a per-policy option, this new tab is displayed or hidden.
- The Administrator must define a list of questions in the 'Question Library.' For more information, see [Question Library on page 96](#).
- A different Decision Tree may be defined for each configured Policy.
- The following events related to the Decision Tree are recorded in the Windows Event Log:
 - User Guidance Dialog - Active
 - User Guidance Dialog - Classification cleared
 - User Guidance Dialog - Classification changed
 - User Guidance Dialog - Classification selection accepted
 - User Guidance Dialog - Classification selection cancelled

Enabling the Decision Tree Functionality

To enable the Decision Tree:

1. Go to Labelling Configuration > Configuration Name > Policies > Policy name.
2. In the Action Pane, select Properties.
3. Under Help the user chooses a label, select Use Decision Tree.
4. Click OK.

NOTE: The availability of menu items depends on the selected tree node. 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.

Adding a Question to the Decision Tree

To add a node:

1. From your policy, select the Decision Tree tab.
2. Right-click Decision Tree, and click Add.
3. Select a question, and click OK.

You can add a question as a child node to another question. To do so:

1. Right-click a question, and click Add.
2. Select a question, and click OK.

Removing a Question or Answer from the Decision Tree

To remove a question or answer node:

1. From your policy, select the Decision Tree tab.
2. Right-click a question or answer from the Decision Tree, and click Remove.
3. Click Yes to confirm you want to remove this node.

If the node you are removing has child nodes, those child nodes are also deleted.

Editing 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.

NOTE: The display style will depend on whether the question has been defined in the Question Library as single or multi-select.

To edit a question in the Decision Tree:

1. Right-click a question node, and click Edit.
2. Select the answers that will be available in the policy.
3. In the dropdown list, select the display style.
4. Click OK.

Setting a Label

A label can be set for an Answer Node is selected in the Decision Tree.

NOTE: You can only change labels to multi-select answers that are processed from the first answer until the last.

To set a label:

1. From the Decision Tree, right-click an answer, then click Edit.
The actual content of the Classification window that appears will depend on your configuration.
2. Select options as needed.
3. Click OK.

Configuring Single Click

Single Click enables you to associate pre-defined labels with buttons on the client.

You must have the Single click with pre-defined label enabled to see the Single Click tab in the Policy.

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. 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.

The standard label selection interface displays 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 can select individual selector values via the Classifier Label dialog box launcher arrow.

Enabling the Single Click Functionality

To enable the Decision Tree:

1. Go to Labelling Configuration > Configuration Name > Policies > Policy name.
2. In the Action Pane, select Properties.
3. Under Help the user chooses a label, select Use Single Click with pre-defined labels.
4. Click OK.

Editing pre-defined labels

To enable the Decision Tree:

1. Go to Labelling Configuration > Configuration Name > Policies > Policy name.
2. Click the Single Click tab.
3. Select a label and click Edit pre-defined labels.
4. On the Pre-Defined Labels dialog, select a Not visible button and select the Show this button on the client checkbox.
5. Click the Label button.
6. Pick and configure a tab as configured in [Adding Tabs on page 140](#). Click OK.

NOTE: If you want to clear the settings, click the Clear button.

7. In the drop-down box, select the language. See [Languages on page 49](#).
8. Enter the caption text that will appear on the button.
9. Enter the text for the tooltip on the button.
10. Select a Button display option:
 - Caption only: only the configured caption is displayed.
 - Show colour: 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: 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.

NOTE: Click the Clear button to clear the values.

11. Click OK.

Setting Rules

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 is defined by 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.

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.

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 displays 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.

Rules that perform policy checks 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. For example,

- 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 (that is, regardless of the current label value); when there is specifically NoLabel selected; to Any label (that is, 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).

Adding a 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.

Any Marking defined through these mechanisms overwrites any existing value in the same location defined by any other means (for example, the user).

NOTE:

Any rich text formatting specified in a Format is ignored when used in a location that does not support such features (for example, Subject field).

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.

To add a rule:

1. Go to Labelling Configuration > Configuration Name > Policies > Policy name.
2. Click the Set Rules tab.
3. 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.
4. Choose Add a Rule.
5. Select an application, and click Next.
The list of applications shown depends on your license.
6. Select a filter rule category (Add, Apply, or Check), and select a rule relevant to your application. Click Next.

NOTE: If you have selected multiple applications, the list of rules shown are those common to the applications.

7. Enter a rule name or leave the default. The name must be unique.
8. Click the hyperlinks in the rule parameters to configure them. See [Setting Rule Parameters on page 151](#)
9. Select the hyperlink in the Edit rule prerequisite conditions to set it or change it.
10. Click OK.

NOTE: Click the Back button any time to change your selections. 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.

Setting Rule Parameters

When you are adding a rule, you can define parameters based on the rule name. When you select a hyperlink, one of the following dialogs display based on your selection.

Dialog	Description
S/MIME Operation	<p>allows you to request that S/MIME security be applied when the message is sent.</p> <p>Any label value included in the body (for example, 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>Not supported by Notes, Mail Add-in, or Mobile Classifier.</p>

Dialog	Description
Message Importance	<p>allows you to request that a specific message Importance property is set when a message is sent.</p> <p>Not supported by Notes, Mail Add-in, or Mobile Classifier.</p>
Message Sensitivity	<p>allows you to request that a specific message Sensitivity is set when a message is sent</p> <p>Not supported by Notes, Mail Add-in, or Mobile Classifier.</p>
Message Expiry	<p>allows you to request that a specific expiry value is set when a message is sent.</p> <p>Not supported by Notes, Mail Add-in, or Mobile Classifier.</p>
Label	<p>allows you to set the selector as <Any> (Selector name appears in the label condition), Present (value is present), Not Present (value is not present) Undefined (any valid selector value or <Blank>), or Value (the specific value defined for the selector. This value appears in the Label).</p> <ul style="list-style-type: none"> • For Text entry and Date Picker selectors, the presence of a value in the rule condition renders the actual value irrelevant. • For Multiple selection list selectors, you can only choose one value from those available. You can 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 displayed in the label condition placeholder. • If you change the Label condition in a rule, the rule position in the rule tree will change to reflect the new settings. • 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.
Marking format	<p>allows you to select an existing marking format from the Marking Library. This is only supported for messages and meeting requests.</p>

Dialog	Description
Position	<p>allows you to set your preferred label position (either Prefix or Suffix) relative to existing text. Only supported for messages and meeting requests. A Reply/Forward operation will check for any existing recognisable Subject marking and strip it if found before applying a Subject marking appropriate to the current label. Email Classifier may truncate the original subject to accommodate the Prefix / Suffix. If the Prefix or Suffix is longer than the maximum subject length, then the Prefix / Suffix is not included in the updated Subject value.</p>
Image	<p>allows you to insert an image. Depending on the application selected in step 5, you can select the page (odd vs even page), position on page, alignment relative to a margin, image placement (in front or behind text), add image as a watermark and enable Smart Selection (where marking is inserted in the first available position when an image is not available).</p>
Watermark Options	<p>allows you to control how the watermark is displayed. You can also set its transparency. 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. Classifier also supports a mutually exclusive 'Add this image as a watermark' rule to apply an image rather than a text watermark.</p>
Text Value	<p>allows you to add text (usually when adding an x-header). In a Lotus Notes environment, for the x-classification 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). 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. You might use the Alternate Value mechanisms to provide a mapping from your selector values (non-Ascii) to 7 bit US-ASCII and back again. See Recognising and Parsing Label Markings on page 131. However, this approach will not work for Text entry selector values.</p> <p>Not supported by Notes, Mail Add-in, or Mobile Classifier.</p>
SMTP Address Entry	<p>allows you to add recipients using an SMTP address.</p>

Dialog	Description
Action	allows you to select an action to take when a check fails. If you select Challenge, click the Options button to select more options to describe the User Defined Action.
User Message	allows you to select a Prevent, Selector, or Warn message in various scenarios.
PowerPoint Text Box Settings	allows you to assign the layout and formatting options to a text box.
Alignment	allows you to fit a header or footer to a Placeholder (so header or footer cannot be resized) or to a Slide (the header or footer is resized to the width of the PowerPoint slide)
Document Property	allows you to select a property to configure the rule.
RMS Policy	<p>allows you to request that a specific RMS policy be applied to a message or document [chosen from the list displayed - 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.OIPermission 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>
Excel Cover Page Settings	allows you to create a text box within a specified range of cells. You can also choose how to size it, where to align it, what direction the text box is displayed, and if the text box contains borders.

Dialog	Description
Text box with Marking in Headers or Footers	<p>When a Text Box has been inserted via the rule, the text is formatted according to the defined Marking Format. The user can manipulate the text box (for example, move it, format it etc). When the rules run, if an existing Classifier 'Text Box' exists in the header/footer, only the text (field code) is updated, and any customisations made by the user to the box will remain. The alignment applied from the original marking format is retained regardless of alignments of marking formats associated with subsequent rules applied (for example, due to label change). This means that any changes made by the user to the text content (for example, font, colour, size, etc.) will be lost the next time the rule fires. For Word, this behaviour is modified if the Marking Format has 'Use Plain Text' specified. In this case, Classifier will replace the text content but leave any surrounding formatting unchanged. Any formatting set by the user within the text will still be replaced.</p>

Dialog	Description
Advise User	<p>to let the user select the permitted changes for each selector. You can allow multiple rules of this type. This means that if there are duplicate rules, Classifier will action all rules including duplicate ones. This can lead to multiple policy check dialogs appearing. 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, and 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). You can select:</p> <ul style="list-style-type: none"> • Any change - the user may make any change to this selector value but the rule is not triggered. Rule success auditing will still occur. • No change - 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 - 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 (for example, from Public to Internal) will trigger 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 (for example, from Internal to Public) will trigger 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.

Dialog	Description
	<ul style="list-style-type: none">• 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. <p>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.</p> <p>This dialog also appears when warning 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.</p>
Fix Option	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.

Dialog	Description
Suggested Classification	<p>used to check aspects of the document/message (as defined by the associated conditions) and to suggest modifications to the current Classification. 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. If one or more Suggested Classifications are applicable, Classifier tries 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 settings.</p> <div data-bbox="553 695 1446 793"><p>NOTE: This rule is applied before the Check mandatory selector rule.</p></div> <p>If the Suggested Classification includes a setting that cannot be applied to the current Classification (for example, 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.</p> <p>You can select one of the following:</p> <ul style="list-style-type: none">• Manually: The user is warned using the 'suggested classification available' message.• Automatically: Any suggested classifications that are designated as Automatically apply will be automatically applied (if possible) with any unprocessed suggested classification being flagged to the user using the 'suggested classification available' message. <p>There is a user-driven 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. Ensure you enable this setting. See Configuring Suggested Classification Settings on page 138.</p>

Dialog	Description
Mandatory Selectors	<p>used to define what checks should be applied to ensure that the label chosen meets label validity criteria, that any Selector set as Mandatory has a value chosen.</p> <p>Different rules can be defined for different applications. So a selector may be Mandatory for documents (for example, an archive annotation), but 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.</p> <div data-bbox="553 562 1446 989" style="border: 1px solid gray; padding: 5px;"> <p>NOTE: For more information when this rule fires for an Outlook Show label dialog, see Show Label Dialog on Send on page 110. A single check these mandatory selectors rule may be defined for SharePoint which will apply to all document types. See SharePoint Classifier Guiden for usage. The operation of this rule is limited under CAD Classifier for DraftSight. If a rule triggers, a warning is displayed to the user, but the action cannot be cancelled regardless of the buttons visible.</p> </div> <p>The rule has the form:</p> <ul style="list-style-type: none"> • Check these mandatory selectors. Warn user if check fails with this message. • Perform the operations common to all rules as described in Check rules (a) (Select policy, Set rules tab, etc). • Select these mandatory selectors, which will display you with a dialog showing all the active Selectors available in the policy. • For each Selector choose Mandatory or Optional as required. • Assign the required Warn user and this message settings as described in Warn / Prevent / Audit / Challenge options for Check rules.
Numerical Value	allows you to enter a value to indicate the number of characters, for such checks as subject length cannot exceed a specified number of characters or message size cannot exceed a specified number of kB.

Dialog	Description
True or False	if you select True, the user can perform a task within the policy, such as removing watermarks or images.
Content Matchers	<p>allows you to select a specified content matcher for the rule and allows the user to review which content was identified by the content matcher. See Matchers on page 83. Embedded images are excluded from Outlook Content Checks.</p> <p>You can allow multiple rules of this type. This means that if there are duplicate rules, Classifier will action all rules including duplicate ones. This can lead to multiple policy check dialogs appearing. You can also show highlighted content matches if the user wants to see details of the matches found. Ensure Enable search highlights from external server is enabled in Adobe Reader or Adobe Acrobat.</p>

Applying RMS Policy Notes

The Apply RMS policy feature is only available if your site has an RMS (Microsoft Windows Rights Management Services) environment configured.

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.

A user may view their RMS permissions through the usual RMS View permissions action.

If the configured RMS template cannot be enabled for some reason, then the current action (for example, email message submission) is blocked.

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.]

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.

Azure RMS Support

Classifier does not currently support Managed (Department) templates.

Classifier Administration and Email and Office Classifier need to know how to locate the Azure RMS templates.

1. Ascertain the required location using the Get-AadrmConfiguration PowerShell administration tool and noting the value associated with LicensingExtranetDistributionPointUrl .
2. Set the following registry entry to enable Classifier Administration to find the policy values to be displayed 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.

Actioning a Rule with Prerequisite Conditions

You can set a rule to action only when a prerequisite condition is met. These conditions are set in the Condition Library. See [Condition Library on page 89](#).

NOTE: You can 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 [Rearranging the Order of Rules on page 161](#)).

To set a rule to have a condition:

1. When creating a rule, click the **There are no prerequisite conditions defined** link.
2. Select **The rule will be actioned only if the following conditions apply**.
3. Select one or more conditions.
4. Click OK.

Rearranging the Order of Rules

You can have multiple rules defined for the same application below the same node in the rule tree. For example, you can have multiple rules defined for Outlook Emails in the Always node. The Rule highest up the tree takes precedence. You can change the order of the rules by moving them up or down.

NOTE: These 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).

1. Select a rule in the rule tree.
2. Select Move rule up or Move rule down to rearrange the rules.

Editing a Rule

To edit a rule:

1. Select a rule in the rule tree.
2. Click Edit Rule.
3. Make the necessary changes.
4. Click OK.

Copying a Rule

You can create a rule using another as a base. To do this, you must first copy the rule you want to use as the base.

To copy a rule:

1. Select a rule in the rule tree.
2. Click Copy Rule.
3. Select one of the nodes: Always, No Label, or Any Label.
4. Click Paste Rule.
The new rule appears with the name: <Application name>.<Rule name: (1)>.
5. Click Edit Rule, and make the necessary changes, including giving it a new name.
6. Click OK.

Deleting a Rule

To delete a rule:

1. Select a rule in the rule tree.
2. Click Delete Rule.
3. Click OK to confirm the deleting of the rule.

Suggested Classification

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 a selector value is to be applied, and/or that a selector should be cleared.

NOTE:

- Suggested Classification are only supported by Outlook, Word, Excel, PowerPoint, Project, and Visio.
- You cannot specify text and date selectors in a Suggested Classification.
- 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 to 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, for example, "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, that is, not the inner labeller UI which can be launched from within the Policy Check dialog.
- A Policy Dialog Summary label button will be disabled when displayed from a Use Suggested manual operation to avoid looping.

Adding a Suggested Classification

Before you can add a Suggested Classification, ensure the Check for a Suggested Classification rule has been configured. See [Suggested Classification on page 158](#) for more information.

To add a Suggested Classification:

1. From Labelling Configuration, select Policies.
2. Select a policy and click the Suggested Classifications tab.
3. From the Actions pane, select Add a New Classification.
4. Enter a name.
5. Click the Classification button to define which selectors are to be included, which selector values should be applied, and the selectors that should be cleared of any values.
6. Select your Classification and values.
7. Click OK.
Set will show your current selectors checked and selected values
Clear will show current selectors checked but no values have been selected.
8. Choose any conditions that must be satisfied for the label to be applied.
9. Select Automatically apply when possible checkbox to apply the Check for a Suggested Classification rule. See [Suggested Classification on page 158](#) for more information.
10. Select a Message to display when this Suggested Classification cannot be applied. This text will be displayed in the Policy Check if (for example) there are two incompatible selector values defined by different Suggested Classifications, or the Suggested

Classification is incompatible with the current Classification.

11. Click OK.

Editing a Suggested Classification

To edit a Suggested Classification:

1. From the Suggested Classifications tab, select a classification name.
2. Click Edit Classification.
3. Make the necessary changes and click OK.

Deleting a Suggested Classification

To delete a Suggested Classification:

1. From the Suggested Classifications tab, select a classification name.
2. Click Delete.
3. Click Yes to confirm deletion.

Suggested Classification Warnings

This is a setting that prevents multiple suggested classification warnings for the same content. 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.' This check only applies to Microsoft Office Documents, it is not applicable for Outlook.

To enable this rule:

1. From Labelling Configuration, select Policies.
2. Select a policy and click the Set Rules tab.
3. Select a rule, then click Edit rule.
4. In the rule parameters, set the Suggested Classification to Warn and the Action to Warn, and set Allow warning to be ignored to True.
5. Click OK.

Adding Default Labels

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.

Default Labels are listed alphabetically.

Adding a Default Label

1. From Labelling Configuration, select Policies.
2. Select a policy and click the Default Label tab.
3. Select Add a New Default Label.
4. Name the label.
5. Click the Classification button and choose selectors and values for the label.
6. If you want to choose conditions to specify, click the Conditions button, choose The default label will be applied only if the following conditions apply radio button, and select a condition.
7. Click OK.
8. Click OK again.

Editing a Default Label

1. From Labelling Configuration, select Policies.
2. Select a policy and click the Default Label tab.
3. Select a label and click Edit Default Label.
4. Make the necessary changes, and click OK.

Deleting a Default Label

1. From Labelling Configuration, select Policies.
2. Select a policy and click the Default Label tab.
3. Select a label and click Delete.
4. Click Yes to confirm deletion.

Changing Priorities

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. See [Adding a New Policy on page 134](#) You can change the priority.

To change the priority:

1. From Labelling Configuration, select Policies.
2. Select a policy and click the Default Label tab.
3. Select a label, and select either Increase Priority or Decrease Priority.

Clearance Checks and Settings

NOTE: Clearance Settings are only relevant if your site has decided to implement the Classifier Clearance handling features.

For a clearance check to work:

- Clearance Check Email Domains, Clearance Library, and/or Dynamic Clearances must be enabled in order to see the nodes in the Classifier Administrator Server GUI. See [Application Settings on page 43](#).
- Check clearance for Attachment / recipient / originator rule must be created in your policy. See [Adding a Rule on page 150](#) for more information.

NOTE: For 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. 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 with Warn/Prevent parameters

When using this rule, keep in mind the following:

- If no Check attachment / recipients / originator rules are defined, then recipient clearances are not checked when submitting an email message.
- 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 is sent but requires no user involvement.
 - If Warn, Prevent or Challenge is set, then email message is interrupted and a warning dialog appears indicating the problem and displaying options as to how to proceed (such as remove unapproved recipients or change unapproved message label).

- 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.
- For 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.

Email Domain Clearance

An Email Domain Clearance defines the clearance that should be assigned to a given email domain address space.

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.

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.

Adding a New Email Domain Clearance

NOTE: Remember to establish one or more email domain clearances to cover all your internal users.

To add a new email domain clearance:

1. Select Labelling Configurations > Clearance Settings > Email Domain Clearance Configuration.
2. From the Actions pane, select Add a new email domain clearance.
3. Enter an Email domain address space for the SMTP domain for which you wish to define a clearance.

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.

4. Check Include subdomains if you want the clearance to apply to all subdomains of that address space. 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. Select the checkboxes for which the Label values that the domain is cleared.
6. Click OK.

The domain clearance entry will appear in the summary list pane.

Editing Email Domain Clearance

To edit the email domain clearance:

1. Select Labelling Configurations > Clearance Settings > Email Domain Clearance Configuration.
2. Select an entry.
3. From the Actions pane, select Edit email domain clearance.
4. Make the necessary changes and click OK.

Deleting Email Domain Clearance

NOTE: Only applicable to SharePoint Classifier (3.10 or later).

To delete an email domain clearance:

1. Select Labelling Configurations > Clearance Settings > Email Domain Clearance Configuration.
2. Select an entry.
3. From the Actions pane, select Delete email domain clearance.
4. Click Yes to confirm the deletion.

Clearance Library

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.

Each defined Clearance has a Clearances Default Labels defined. Clearances are listed alphabetically.

Adding a New Clearance

To add a new clearance:

1. Select Labelling Configurations > Clearance Settings > Clearance Library.
2. From the Actions pane, select Add a New Clearance.
3. Name the Clearance.
4. Select the checkboxes relevant to the Clearance.
5. Click OK.

Editing a Clearance

To edit a clearance:

1. Select Labelling Configurations > Clearance Settings > Clearance Library.
2. Select a clearance.
3. From the Actions pane, select Properties.
4. Make the necessary changes and click OK.

Deleting a Clearance

To delete a clearance:

1. Select Labelling Configurations > Clearance Settings > Clearance Library.
2. Select a clearance.
3. From the Actions pane, select Delete.
4. Click Yes to confirm deletion.

NOTE: SharePoint Classifier 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.

Dynamic Clearances

Dynamic Clearances allow you to define Clearances that will be determined at run time based on User property value conditions.

NOTE: The Classifier Mail add-in only supports user property value conditions based on a user's SMTP address.

Such Clearance values will be used to:

- check Originator, Recipient, or Attachment Clearance
- apply Clearance Filters to the Label dialog if [Masking of Selectors Against Clearance on page 121](#) is enabled.

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. See [Always Use Distribution List Clearances on page 101](#)

Adding a New Dynamic Clearance

NOTE: For new Classifier Configurations, Dynamic Clearances are enabled by default, although no Dynamic Clearances are defined. 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.

To add a Dynamic Clearance:

1. Select Labelling Configurations > Clearance Settings > Dynamic Clearance.
2. From the Actions pane, select Add a New Dynamic Clearance.
3. Enter a name for the Dynamic Clearance.
4. Select the checkboxes relevant to the Clearance.
5. Select one or more existing conditions. These conditions are configured in the [Condition Library on page 89](#).
6. Click OK.

Editing a Dynamic Clearance

To edit a dynamic clearance:

1. Select Labelling Configurations > Clearance Settings > Dynamic Clearance.
2. Select a clearance.
3. From the Actions pane, select Properties.
4. Make the necessary changes and click OK.

Deleting a Clearance

To delete a clearance:

1. Select Labelling Configurations > Clearance Settings > Dynamic Clearance.
2. Select a clearance.
3. From the Actions pane, select Delete.
4. Click Yes to confirm deletion.

- [Dynamic Clearances:](#)

Each client is started and retrieves the updated configuration information.

Clearance Checks When Sending Messages

NOTE: Only Single Selection list and Multiple selection list selectors with **Include this selector in clearance and attachment checks set** are included in Clearance Checking.

The Configuration can use the policy rules:

- Check clearance for attachments (supported in Email Classifier)
 - Check clearance for recipients (supported in Email, OWA, Notes, Mail Add-in, and Mobile Classifier)
 - Check clearance for originator (Email, Mail Add-in, and OWA Classifier)
- 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 permission receive / send information with the current label.
- 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

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 is submitted but requires no user involvement.
- If Warn, Prevent, or Challenge is set, then email message is interrupted and the sender sees a dialog indicating the problem and how to proceed defined by the Rule.

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. For 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.

Email, OWA, Mail Add-in, Notes and Mobile Differences

Differences in Enabling and Disabling

- 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.
- Notes and Mobile Classifier functionality can only be enabled and disabled via install/remove product actions.
- Mail Add-in can be enabled/disabled through the manifest file.

OWA Classifier and Classifier Mail Add-in vs Email Classifier

OWA Classifier and Classifier Mail Add-in support subsets of the features supported by Email Classifier (Outlook) as described in:

- [Classifier Application Settings](#)
- [General Settings](#)
- [Rules supported](#)

Other differences are:

- Portion Marking in a message (nor any related Portion Marking features) is not supported by OWA 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 License.
- 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
- 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.
- 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 License.
- 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 supports a subset of the features supported by Email Classifier (Outlook). The key differences are:

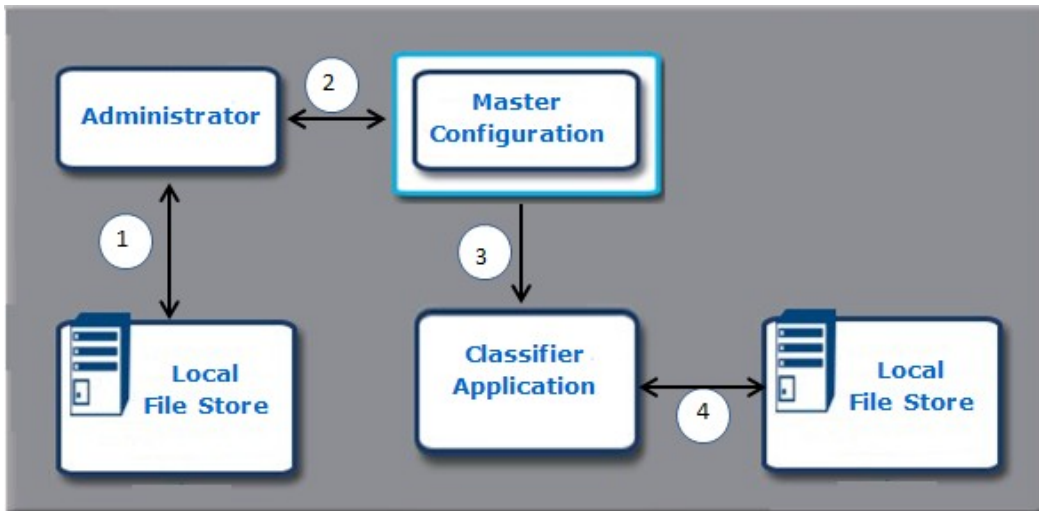
- Label selection presents a Single click interface - as a consequence the policy to be used must define single click settings.
- The label of a message is presented at the top of the message body.
- Images (e.g. in Single Click buttons) are not supported by Mobile Classifier.
- UI Definitions are not 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 the Mobile Classifier via App install/uninstall on the users device, using server based Service Install/uninstall applying License 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 is supported by Mobile Classifier.
- Only a subset of Rules is supported by Mobile Classifier.

Deploying Configuration

NOTE: If you wish to Publish the Classifier Configuration via Active Directory, the Active Directory Schema must be updated (see [Extending the Active Directory Schema on page 205](#)). Schema update is not required if you intend to Publish the configuration via file store.

If you want to use the optional Classifier Management Agent, install and configure it as described in the Management Agent Guide.

The schematic below shows logically how the Classifier configuration is deployed.



Creating and Modifying the Configuration

1. The Administrator creates a configuration on a local machine and deploys it to a user community.
2. Once the configuration is stable, the Administrator will publish the configuration to the Master Configuration location. This can be the Active Directory or a 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.
3. If an Administrator plans to modify the Master Configuration, they must ensure their local machine holds a current copy of the Master Configuration. See [Getting an Existing Configuration on page 34](#) to overwrite any existing local copies. The Administrator can then modify the configuration and re-publish, See [Publishing the Configuration on page 35](#).

NOTE: If you Publish the configuration to File Store, ensure that the target (Master) location has suitable permissions. End users should have the ability to read from that location and Administrators, who are modify the Master configuration, must also have the ability to write to that location using the network path.

Retrieving the Master 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 order. See [Configuration Registry Search Algorithm on page 177](#) These registry settings may be established either directly (see [Setting the Registry Keys Directly on page 184](#)) or using Group Policy Option mechanisms (see [Setting the Registry Keys using Group Policy on page 186](#)).

If Management Agent in use:

- The Management Agent retrieves the Master Configuration and checks for updates according to its own configuration settings and [Web Host Settings on page 194](#), if applicable. The retrieved configuration is stored locally (in CommonConfigFolder).
- The client applications are configured to retrieve their configuration from the location written by the Management Agent.

If the Management Agent not in use and if the applications are not using the Management Agent (OWA Classifier etc.):

- Each Classifier application periodically retrieves the configuration from the Master location, but only if the Master configuration version 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). See [Label Configuration Registry Settings on page 189](#). 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). See [Registry Settings on page 189](#).
- Manually Configurable: [Settings To Auto Enable Microsoft Office Header / Footer Controls on page 199](#).
- 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. See [File Classifier Registry Settings on page 202](#).
- 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.
- 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.
- 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.
- 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.

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.
- Application specific settings can be found in similar locations with ConfigManager replaced by the application name (e.g. HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\File Classifier).
- 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\Baldon 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:

- ClientServerOverride
- LabelConfiguraiton
- Policy
- PolicyFileClassifier
- PolicyOutlook
- ServerFileSystemRoot
- ServerRootType
- UseWebServer
- ValidityPeriod

in the following registry locations in the order shown:

- HKEY_CURRENT_USER\SOFTWARE\Policies\Baldon James\ConfigManager
- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon 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.
- 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\Baldon James\ConfigManager\ServiceMode or HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Baldon 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\Baldon James\ConfigManager\ServiceMode
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon James\ConfigManager\ServiceMode
- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon James\ConfigManager

Exchange Classifier Registry Locations

Exchange Classifier looks for the following configuration registry settings:

- LabelConfiguration
- ServerFileSystemRoot
- ServerRootType

It searches the following locations in the order shown:

- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager\ExchangeServiceMode
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon 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\Baldon 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. 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\Baldon James\ConfigManager*
- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager*
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon 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: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Baldon 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 and Email and Office Classifier will use location.
Note: The HKLM\SOFTWARE\Policies area is shared by both 32 and 64-bit applications.

- HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager
- HKEY_LOCAL_MACHINE\SOFTWARE\Baldon James\ConfigManager
- HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Baldon James\ConfigManager
- HKEY_CURRENT_USER\SOFTWARE\Policies\Baldon James\ConfigManager
- HKEY_CURRENT_USER\SOFTWARE\WOW6432Node\Policies\Baldon 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>Only required if ServerRootType = 0</p> <p>The path to the location that holds the Classifier Configuration folder.</p> <p>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>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> <ol style="list-style-type: none"> 0. The configuration is held in File Store (ServerFileSystemRoot key is then significant). 1. The configuration is held in Active Directory.

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>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 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. 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	<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. http://yourserver/classifier/config.zip</p> <p>or file://\localhost\c\$\classifier\config.zip</p> <p>or</p> <p>file://\yourserver\sharedfolder\config.zip</p>
WebConfigKey	REG_SZ	<p>The string returned by Classifier Administration when the Web Config is published.</p>
WebClientTimeout	DWORD	<p>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.</p> <p>0 (Default): The relevant network default timeout applies (e.g. 20 seconds).</p> <p>>0 The number of milliseconds allowed before the attempt to retrieve the Master Configuration times out.</p>
LabelConfiguration	REG_SZ	<p>The name of the label configuration to use. e.g. Classifier</p> <p>test.</p>
Policy	REG_SZ	<p>The name of the Classifier policy to use in the Label Configuration.</p>

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.

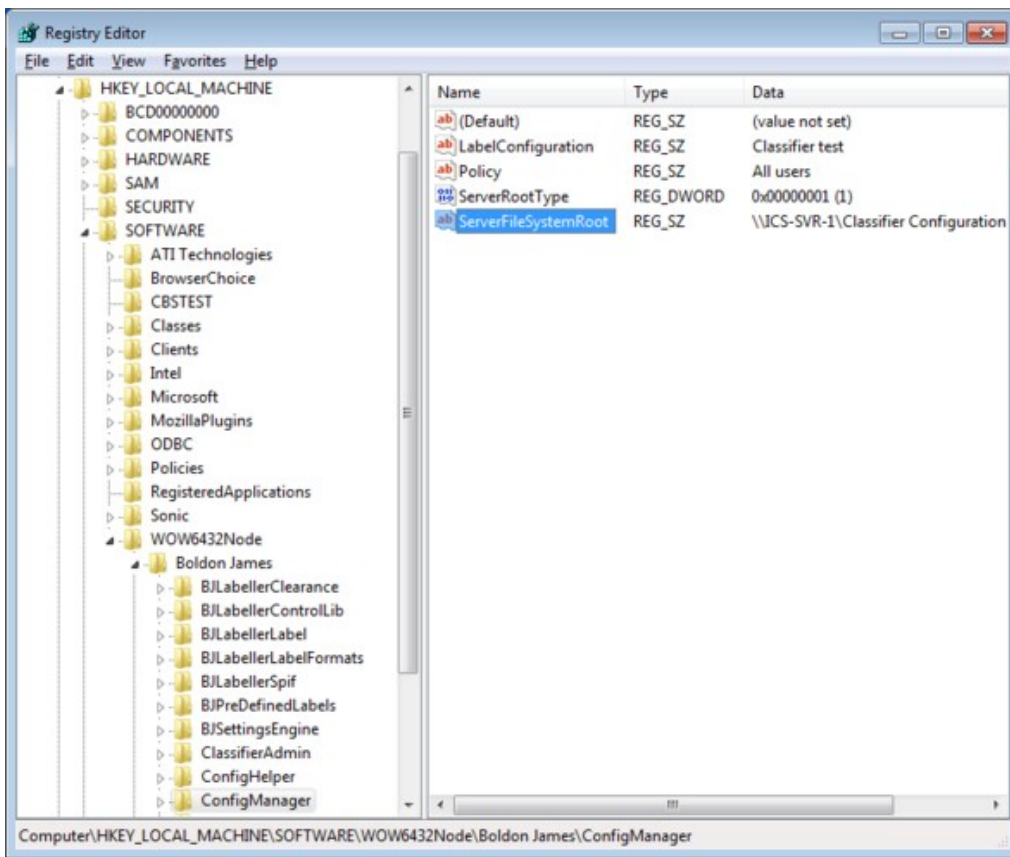
Setting the Registry Keys Directly

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\Baldon James\ConfigManager.

The values will 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 189](#) 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, we recommend that registry entries are established under ServiceMode (see [Label Configuration Registry Settings on page 189](#)).



Adding Classifier Registry Keys

To add Classifier registry keys:

1. Open Registry Editor.
2. In the Registry Editor, go to HKEY_LOCAL_MACHINE>SOFTWARE>Policies>Microsoft .
3. Right-click the registry name and select New>Key .
4. Enter the name you will use, (for example Boldon James).
5. Right-click the registry name and select New>Key .
6. Enter the name ConfigManager.
7. Right-click ConfigManager and select New>Key .
8. Enter the name as LabelConfiguration and the data as Classified.
9. Right-click LabelConfiguration and select New>String Value, and enter Policy.
10. Right-click Policy and select Modify and enter the Value data as Classified.
11. Select Edit>New>String Value, and enter ServerFileSystemRoot.
12. Right-click ServerFileSystemRoot and select Modify. Enter the Value data as \\DC\Config.
13. From Edit, select New>DWORD (32-bit) Value .
14. Enter SystemRootType .

Setting the Registry Keys using Group Policy

This assumes that your Group Policy has been extended as described in [Applying Supplied ADM/ADMX/ADML Files on page 187](#).

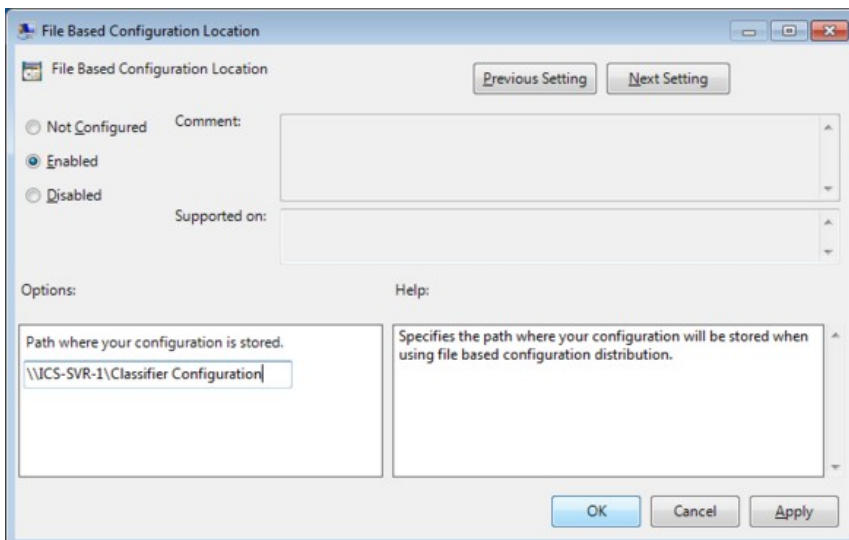
The following types of Group Policy settings are provided for Classifier:

- Label Configuration Settings
- Client Configuration Settings
- File Classifier Settings
- Management Agent Settings

The mechanisms are the same for each of the above. The examples below cover the [Label Configuration Registry Settings on page 189](#) as these are the most likely to be used.

To set the registry keys using Group Policy:

1. Define the settings that are to be common to all users of a PC (i.e. HKEY_Local_Machine).
2. If using Windows Server 2003, from Active Directory Users and Computers, right-click the domain, select Properties, and select the Group Policy tab.
If using Windows Server 2010, use Group Policy Management Editor MMC to get directly to the tree.
3. Select the Default Domain Policy entry and click Edit.
4. Select Computer Configuration > Policies > Administrative Template > Classic Administrative Templates > Boldon James > Label Configuration.
5. Select Configuration Distribution Server Type and choose Properties (2003) or Edit policy setting (2010).
6. Ensure that the setting is enabled, and choose which method you wish to use (File System or Active Directory). Click OK .
7. If you choose File System, define the (shared) location of the configuration files by selecting File Based Configuration Location > Properties and then entering the network path to the location (e.g. \\ICS-SVR-1\Classifier Configuration) as per the example below.



10. Select User Configuration > Administrative Template > Classic Administrative Templates > Boldon James > Label Configuration.
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, 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 Classifier Group Policy Templates 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. The precise steps will depend on your environment.

To apply supplied ADM/ADMX/ADML files:

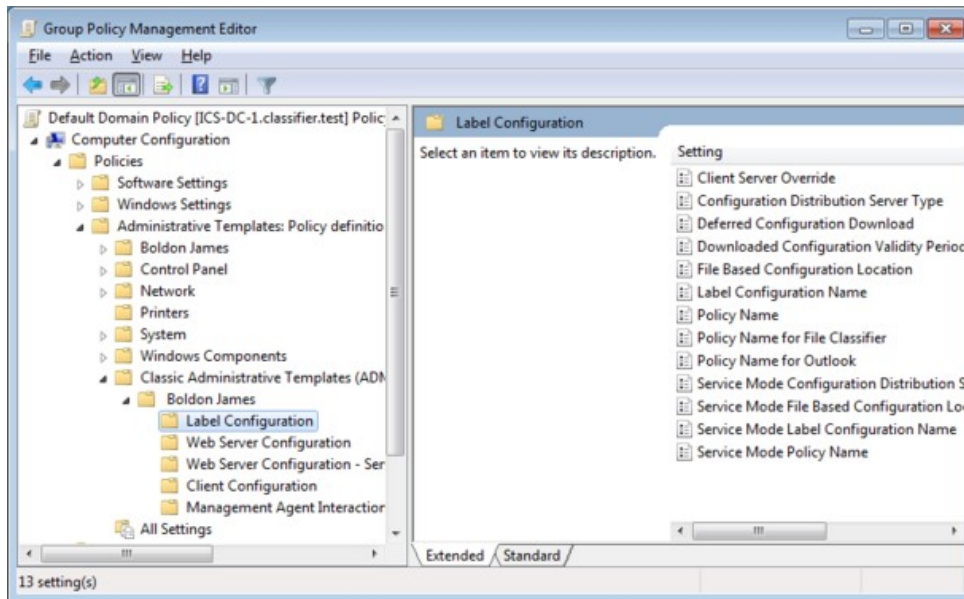
1. Navigate to Computer Configuration.
2. If using Windows Server 2003, go to Active Directory Users and Computers, right-click your domain and select Properties. Select the Group Policy Tab > Default Domain Policy entry > Edit.

If using Windows Server 2010, go to Group Policy Management Editor MMC snap-in to get directly to the target tree. Expand Domains and then expand the domain. Right-click Default Domain Policy and select Edit.

3. Select Computer Configuration> Policies. Right-click Administrative Templates and select Add/Remove Templates.
4. Select Add and then browse to the relevant install location (e.g. Program Files\Baldon James\Classifier Administration).
5. Select the relevant ADM files and click Open, then Close. The files will be added which will add new entries below both the Computer Configuration and User Configuration Administrative Template nodes: ClassifierManagementAgent.admx and ClassifierManagementAgent.adml.
6. 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
7. 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:

8. Right-click a group policy object and choose Edit.
9. Open the relevant branch in the tree e.g. one of:
 - ..\Classic Administration (ADM)\Baldon James\...
 - ..\Administrative Templates: Policy definitions..\Baldon James\ Classifier Management Agent in the screen shot below:



10. 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:

We recommend that registry entries are established under ServiceMode (see [Label Configuration Registry Settings on page 189](#)) for Management Agent, OWA Classifier, SharePoint Classifier.

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\Baldon James\ConfigManager. You can generally set up relevant entries under any of the supported registry locations and the precedence if entries appear in more than one sub-tree. See [Configuration Registry Search Algorithm on page 177](#). However, the algorithm expects to find the following as 'pairs' under a sub-tree:

- Label Configuration + Policy
- ServerRootType + ServerFileSystemRoot (if relevant)

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 on page 189](#).

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 on page 193](#).

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 on page 177](#).

The settings can be established either directly, or using Group Policy mechanisms as described in:

- [Setting the Registry Keys Directly on page 184](#)
- [Setting the Registry Keys using Group Policy on page 186](#)

Registry Settings

The Entries (and Policy setting name) listed below are established under ...Baldon James\ConfigManager. For more detailed information see the Classifier Registry Keys Deployment and Troubleshooting Guide.

Name	Type	Value
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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".

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:</p> <ul style="list-style-type: none"> • HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager • HKEY_CURRENT_USER\SOFTWARE\Policies\Baldon James\ConfigManager • HKEY_LOCAL_MACHINE\SOFTWARE\Baldon James\ConfigManager • HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Baldon James\ConfigManager (for 32-bit apps on a 64-bit OS). <p>This is 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>Only required if ServerRootType = 0</p> <p>The path to the location that holds the Classifier Configuration folder.</p> <p>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> <ol style="list-style-type: none"> 0. The configuration is held in File Store (ServerFileSystemRoot key is then significant). 1. The configuration is held in Active Directory.
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> <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> <ol style="list-style-type: none"> 0. (Disabled - the default if not configured). Classifier Client applications will continue to retrieve configuration directly and will not register with the Management Agent. 1. (Enabled) Classifier Client applications will use the Management Agent: <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>
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Service Mode Registry Settings

The Keys (and Policy setting name) listed below are established under ...\\Baldon 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
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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 [Configuring Folder Paths on page 34](#).

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

Two groups of settings are defined and established under ...\Baldon James\ConfigManager\ServiceMode for Management Agent use, or under ...\Baldon 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).

If the client UseManagementAgent registry entry is set, then any client related settings are ignored.

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
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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. 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>
WebConfigKey	REG_SZ	<p>The string returned by Classifier Administration when the Web Config is published.</p>
WebClientTimeout	DWORD	<p>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.</p> <p>0 (Default): The relevant network default timeout applies (e.g. 20 seconds).</p> <p>>0 The number of milliseconds allowed before the attempt to retrieve the Master Configuration times out.</p>

WebServerCertificateValidation	DWORD	<p>Determines whether Classifier will attempt to check for a valid SSL cert (HTTPS).</p> <ol style="list-style-type: none"> 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:

- [Setting the Registry Keys Directly on page 184](#)
- [Setting the Registry Keys using Group Policy on page 186](#)

For more information, please see the Classifier Registry Keys Deployment and Troubleshooting Guide.

Client Configuration keys can be used to override Classifier configuration settings, and can be defined under:

HKEY_LOCAL_MACHINE / HKEY_CURRENT_USER\SOFTWARE\Baldon James\Classifier:

Registry Entries Name	Type	Description
AllowClassificationHistoryClear	REG_DWORD	<p>Allow User to clear Classification History</p> <ol style="list-style-type: none"> 0. The user is not allowed to Clear Classification History. 1. (default) The user is allowed to clear Classification History.

<p>DisplayContentCheckProgress</p>	<p>REG_DWORD</p>	<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>
<p>HWMCheckEmbeddedOffice Documents</p>	<p>REG_DWORD</p>	<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>
<p>IgnorePasswordProtectedZips</p>	<p>REG_DWORD</p>	<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.</p> <p>1. Any failures to access zip files (or files in zip files) during high-water mark checking are ignored.</p>

SetOutlookResiliency

REG_
DWO
RD

1. Outlook Resiliency Keys will be enabled.

0. Outlook Resiliency Keys will be disabled/inactive.

The SetOutlookResiliency setting creates a set of Registry keys and values that will configure Outlook Resiliency for the Classifier Add-in.

By default, Outlook will abide by the following performance checking criterion:

Add-ins should not take an average of more than 500 ms to start, over 5 successive occasions.

Outlook will, therefore, disable any Add-in that is deemed not 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.

This setting can be configured under either of the following Registry locations:

HKEY_CURRENT_
USER\SOFTWARE\Baldon James\Classifier
HKEY_LOCAL_
MACHINE\SOFTWARE\Baldon
James\Classifier

If this setting is configured, it will add and configure the following Registry keys under the HKEY_CURRENT_
USER\Software\Microsoft\Office\<version>\O
utlook\Resiliency location:

- DoNotDisableAddinList
- NotificationReminderAddinData

For further information about Office Resiliency see the Classifier Registry Keys Deployment and Troubleshooting Guide.

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>
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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. The Group Policy templates do not include these settings.

The settings can be established under: HKEY_LOCAL_MACHINE/HKEY_CURRENT_USER\SOFTWARE\Baldon 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
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ExcelAutoEnableDifferentFirstPage	REG_DWORD	<ul style="list-style-type: none"> 0. (Default) Feature is disabled. 1. Auto enables 'Different First Page' header/footer on the first worksheet of a workbook. 2. Auto enables 'Different First Page' header/footer on all worksheets of a workbook.
ExcelAutoEnableDifferentOddEvenPages	REG_DWORD	<ul style="list-style-type: none"> 0. (Default) Feature is disabled. 1. Auto enables 'Different Odd/Even Pages' header/footer on the first worksheet of a workbook. 2. Auto enables 'Different Odd/Even Pages' header/footer on all worksheets of a workbook.

PowerPointSlideMarkings

REG_
DWORD

0. (Default) Classifier footer markings will be added to all the slides in the presentation.
1. Classifier markings footer will be added to the First slide only of the presentation.
2. Classifier markings footer will be added to the Title slides only of the presentation.
3. Classifier markings footer will be added to all slides Except the first slide of the presentation.
4. Classifier markings footer will be added to all slides Except title slides of the presentation.
5. Classifier markings footer will be added to None of the slides of the presentation.

WordAutoEnableDifferentFirstPage	REG_ DWORD	<ol style="list-style-type: none"> 0. (Default) Feature is disabled. 1. Auto enables the 'Different First Page' header/footer setting for first section of a document. 2. 2 Auto enables the 'Different First Page' header/footer setting on all sections of a document.
WordAutoEnableDifferentOddEvenPages	REG_ DWORD	<ol style="list-style-type: none"> 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:

- [Setting the Registry Keys Directly on page 184](#)
- [Setting the Registry Keys using Group Policy on page 186](#)

The settings can be established under: HKEY_LOCAL_MACHINE/HKEY_CURRENT_USER\SOFTWARE\Baldon 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	<p data-bbox="747 273 1453 577">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.</p> <p data-bbox="747 598 1071 640">There are four options:</p> <ul data-bbox="795 661 1445 1176" style="list-style-type: none"> • HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Baldon James\ConfigManager • HKEY_CURRENT_USER\SOFTWARE\Policies\Baldon James\ConfigManager • HKEY_LOCAL_MACHINE\SOFTWARE\Baldon James\ConfigManager • HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Baldon James\ConfigManager (for 32-bit apps on a 64-bit OS). <div data-bbox="828 1186 1453 1365" style="border: 1px solid black; padding: 5px;"> <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> </div>

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> <ul style="list-style-type: none"> • HKCU\SOFTWARE\Policies\Baldon James\File Classifier • HKLM\SOFTWARE\Policies\Baldon James\File Classifier • HKLM\SOFTWARE\Baldon James\File Classifier <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> <p>Non-zero: File Classifier will cache the label in an Alternate Data Stream for all file types.</p> <p>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> <ol style="list-style-type: none"> 0. (Default if not defined): An unlimited number of files are selectable by the user. 1. or > The number of files that may be selected for Classification. If this value is exceeded the "Classify" option becomes disabled.

UseSingleColour

REG_
DWORD

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.

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.

For Windows Server 2003, the Windows Server 2003 Administration Tools Pack (ADMINPAK.MSI) must be installed.

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 (AD DS) 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 using either the .msi file or Setup.exe.
2. From the Start menu locate All Programs / Boldon James / Administration Tools.

NOTE: Extending the schema is a non-reversible operation.

3. Run Classifier Schema Extension.
4. Click Start to update the schema
The tool will update the Active Directory schema and show a confirmation dialog.
5. 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 Directory Domain Services tools are installed".
6. Click Exit .

Deploying Software

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 license (distributed as part of the Configuration) controls the applications to which you have access.

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 Licenses applied. The license 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: There is no associated license file for this component - you are granted the rights to use it through the client license you purchase.

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.

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. 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 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	AP I	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

Visio (4)	R/L/M	-	R (4 - not OWA)	-	-	ADS	-	
Project	R/L/M	-	R	R/L	R/L	R/L		R/L R
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
Test/RTF	-	-	-	SPL	ADS	ADS		R/L
Other	-	-	-	SPL	ADS	ADS		ADS

1. (Open Office Documents)

Office applications (for example, 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
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
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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 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. See notes above (2,3) regarding HTML documents.</p>
Email Classifier OWA Classifier Notes Classifier Mobile Classifier Mail Add-in	<p>Open:</p> <ul style="list-style-type: none"> Received messages use the BJ label value if it exists, otherwise check configured locations to determine the current label value. When performing operations on attachments (not Mobile Classifier) relating to high-water mark or Attachment list rules: 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>Save/Send:</p> <ul style="list-style-type: none"> Sets the current BJ label , plus any Markings defined by the configured rules to message properties when the message is Saved or Sent.

SharePoint
Classifier

Uploading a Classifier labelled file:

- 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.

Uploading an unlabelled file:

- 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.
- 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.

File Classifier
Power
Classifier

Read:

- 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.

Write:

- 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.

NOTE:

Note: Visio is not supported by Power Classifier or File Classifier.
That from version 3.8 Power Classifier has a Set Update Markings option which controls this effect as described in the Power Classifier Guide.

- For PDF write the BJ label custom property .
- For ZIP files overwrite the Comment field.
The Comment is visible if the archive is opened using Winzip.
- 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.

CAD 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.
Classifier API (Only supplied to support integration with technology partner products.)	<p>Read:</p> <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 to determine the current label value. <p>Write:</p> <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. <p>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.</p>
Box Classifier	<p>Read:</p> <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 to determine the current label value. <p>(Any information held in the Alternate Data Stream is lost when uploaded.) Write:</p> <ul style="list-style-type: none"> Box Classifier never changes any document.

NOTE: 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

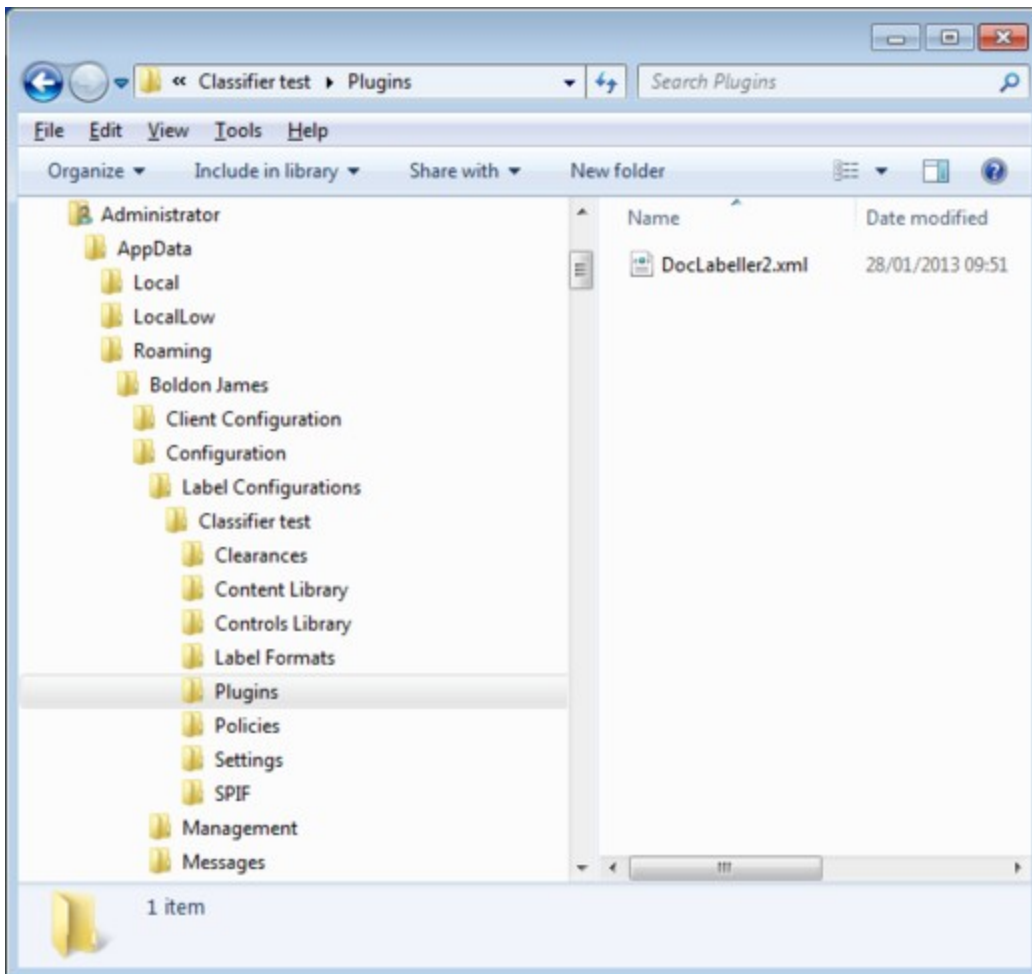
- Any Classifier label assigned to an RMS or S/MIME protected item will only be available when the item is fully opened by a suitable application, so File / Power Classifier, Email /OWA / Notes Classifier and SharePoint Classifier does not have access to labels in these

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:



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>

```

Support for new file types, and extending support for existing file types may require updates to Classifier software (for example, 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 ...\\Baldon 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.

Example of Best Matching Rule

The following example illustrates the effects of Rule Overlap Handling where a complex set of <Label condition> rules have been defined.

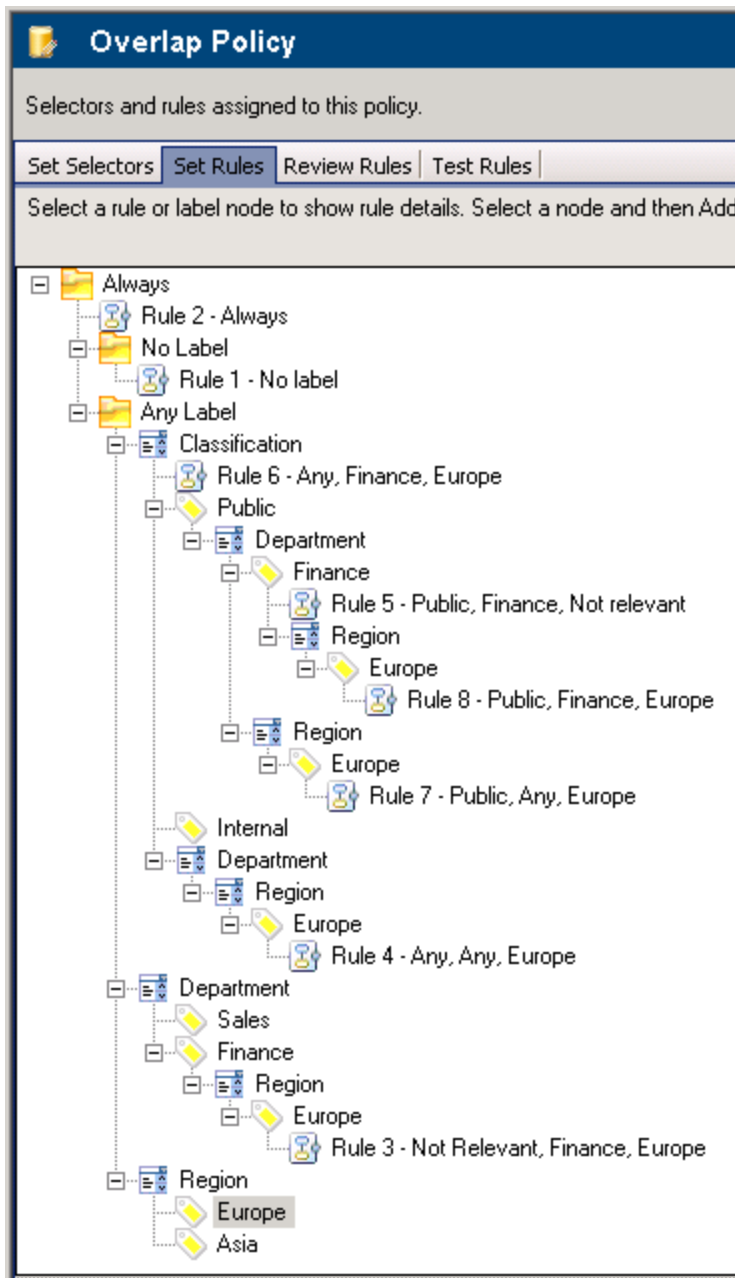
Consider a label structure supporting the following three selectors with their associated values:

Designation	Department	Region
Public	Sales	Asia
Internal	Finance	Europe

Now consider a number of instances of the same basic Rule (for example, 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:



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	Internal	Finance	Finance	<Blank>	Europe	Rule 6
Internal		Finance		Asia		Rule 2

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.

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 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 .
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: Some environments may not have the necessary permissions to configure logging levels, and therefore, the administrator may have to logon to establish the environment for an actual diagnostic session.

Auditing Event Messages

You can enable the Auditing in Global Settings.

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.

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.

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
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 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 license 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
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
2000	Info Warning Error	Used for unexpected conditions often related to limitations. The text logged describes the condition).	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

Supported Content Checking File Types

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, *.sxc, *.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)

Mapping Address Book to AD Attribute

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