

# Mail and Office Add-In Guide Classifier

September 2021



## **Copyright Terms and Conditions**

---

Copyright Help/Systems LLC and its group of companies.

The content in this document is protected by the Copyright Laws of the United States of America and other countries worldwide. The unauthorized use and/or duplication of this material without express and written permission from HelpSystems is strictly prohibited. Excerpts and links may be used, provided that full and clear credit is given to HelpSystems with appropriate and specific direction to the original content. HelpSystems and its trademarks are properties of the HelpSystems group of companies. All other marks are property of their respective owners.

202109130159

# Table of Contents

<b>About Classifier Mail Add-In</b> .....	<b>4</b>
About this guide .....	4
<b>Architecture</b> .....	<b>5</b>
<b>Installing Mail Add-In</b> .....	<b>6</b>
Before you start .....	6
Prerequisites .....	6
Updating the Manifest file .....	7
Enabling Portion Marking .....	7
Installing Mail Add-In .....	8
Adding the Manifest file .....	8
Enabling Mail Add-In On Send .....	8
Uninstalling the Mail Add-in Web Service and Manifest file .....	9
Uninstalling the Web Service .....	9
Uninstalling the Manifest file .....	10

# About Classifier Mail Add-In

The Classifier Mail and Office Add-In extends the Outlook web experience to allow users to apply a Classifier label when composing a message and to present Classifier applied label values while reading an email.

## About this guide

This document outlines the steps for installing and uninstalling Classifier Mail and Office Add-In as well as summarising the classifier functionality supported. For a list of limitations, see the Release Notes.

The Classifier Mail Add-In offers a subset of the features supported by Email Classifier. A summary of the main differences between Email Classifier and Classifier Mail Add-In functionality is found in the Classifier Administration Server User Guide.

# Architecture

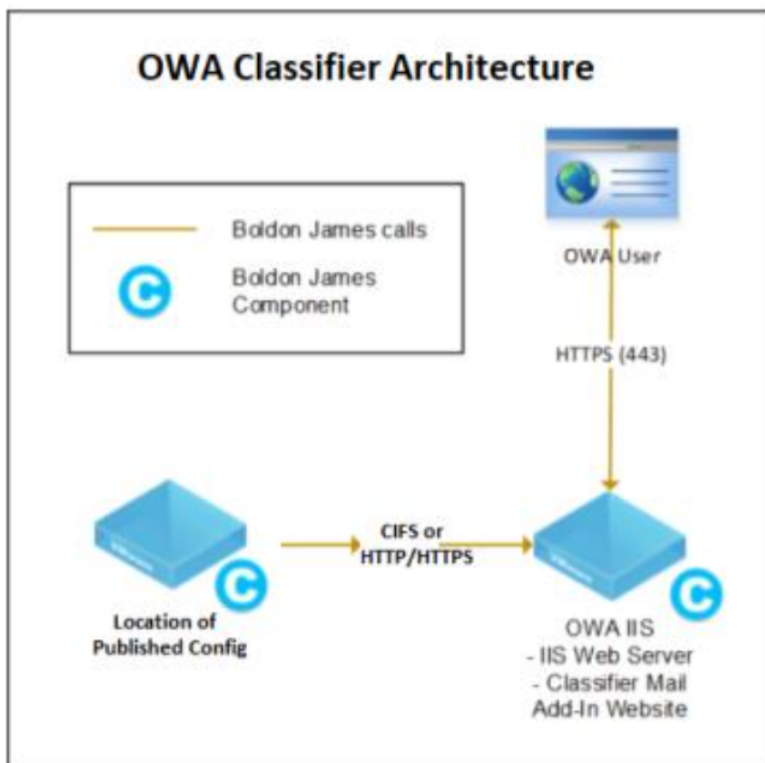
The Classifier Mail and Office Add-in is comprised of the following:

- A mail and office add-in installed via a provided manifest file. A Mail and Office add-in manifest that is applied to the Exchange server or online instance and is replicated across available servers and is configured inline with the underlying server infrastructure. The manifest file provides the OWA extensions and user interface.
- An IIS-hosted RESTful web service installed through the installer package. This loads the Classifier configuration and is responsible for Classifier-specific processing.

**NOTE:** Multiple servers running the Classifier Mail and Office Add-in Website can be used behind load balancing technology. This is a recommended configuration but is not required. These multiple servers must be running the same Classifier configuration and policy.

The following shows the flow of data for the Classifier Add-In for OWA.

**NOTE:** You must be able to connect to Classifier Mail Add-in Website, and the site must have read access to the Classifier configuration (which is published using Classifier Administration). For more information on the Classifier Administration, see the Classifier Administration Server User Guide.



# Installing Mail Add-In

## Before you start

Due to a current issue with Exchange which prevents Mail Add-ins from expanding distribution lists, we recommend that "Always use distribution list clearances" is set to enabled for Outlook Web Access in the Administration Console until this issue is resolved by Microsoft. See the Classifier Administration Console for more information.

## Prerequisites

Classifier Mail Add-In Component	Requirement	Description
Classifier Mail Add-In Web service	Operating systems	Windows Server 2016 Windows Server 2019
	Hardware for Classifier Mail Add-in Server	4 Core, 2 GHz processor 8 GB RAM 10 GB storage (minimum)
	.NET Framework	.NET Framework 4.7.2
	IIS role features	.NET Framework feature ASP.NET 4.5  Static Content, HTTP Errors, Static Compression, Dynamic Compression, IIS Management Console installed from an administrative PowerShell window using the following command:  Install-WindowsFeature NET-Framework-Core, NET-Framework-45-Core, NET-Framework-45-ASPNET, Web-Static-Content, Web-Http-Errors, Web-Stat-Compression, Web-Dyn-Compression, Web-Mgmt-Console -restart.
	Other	A dedicated 64 bit IIS website configured with an https binding using an SSL certificate that needs to be trusted and accessible by the browsers used to access Outlook Web App and Office Online.

Classifier Mail Add-In Component	Requirement	Description
Classifier Mail Add-In Manifest	Exchange	Exchange 2016 (Cumulative Update 6 or later) Exchange Server 2019 Exchange Online in Office 365

**IMPORTANT:** We recommend that the Classifier Mail and Office Add-in Website does not share an IIS Website or Application Pool with any other product, and that a dedicated 64-bit IIS Website is created for this product before installation.

## Updating the Manifest file

Before installation, the ClassifierMail.xml must be edited to include the name of the website hosting the Classifier Mail and Office Add-in Website.

**NOTE:** Classifier Mail and Office Add-in Website and Manifest file must be the same version. When upgrading the Web Service, the corresponding manifest file must also be upgraded.

1. From the Classifier Mail Add-In Manifest folder, open the "ClassifierMail.xml" file.
2. Replace all instances of "REPLACE\_WITH\_YOUR\_SERVERNAME" with your host and, optionally, the port number. You can get the host name and port number from the authority part of your Classifier Mail and Office Add-in Website URL .

For example, for a website of "https://myserver.mydomain.com/", substitute "REPLACE\_WITH\_YOUR\_SERVERNAME" with "myserver.mydomain.com".

## Enabling Portion Marking

By default, portion marking is disabled within the add-in manifest. To enable this, uncomment the following section of the manifest file by removing the "`<!--`" and "`-->`":

```
<!--StartSetPortionMarking-->
```

```
(Remove These Lines) <!--
```

```
<Control xsi:type="Button" id="msgComposePortionMarkingButton">
```

```
.....
```

```
</Control>
```

```
(Remove these lines) -->
```

```
<!--EndSetPortionMarking-->
```

# Installing Mail Add-In

The Classifier Mail and Office Add-in Website installer does not support command line or silent installation.

1. From the Classifier Mail Add-In Website folder, double-click Setup.exe to run it.
2. Select Next.
3. Select the dedicated website created for the Classifier Mail and Office Add-in Website from the list of IIS websites.
4. Click Finish.

When the product is installed, an IIS Application Pool called "Classifier Mail and Office Add-in Website Application Pool" is created. This IIS Application Pool uses the identity "Network Service".

You must also configure registry keys. See the Classifier Administration Server User Guide for more information. If you want to configure a proxy server, see the Release Notes.

## Adding the Manifest file

Once the Mail Add-In is installed, you can add the Manifest file.

1. Open the Exchange Admin Center or Exchange Online.
2. Select **Organisation > Add-ins**.
3. Click the + sign, and select Add from file.
4. Browse to the ClassifierMail.xml file.
5. Click **Next**.
6. Under the Action Items, select **Make this add-in available to users in your organization and Mandatory, always enabled. Users can't disable this add-in**.
7. Save the settings.  
Classifier now appears in the list of add-ins.
8. For the changes to take effect, restart the Classifier Mail and Office Add-in Website or the Classifier Mail and Office Add-in Website Application Pool IIS Application Pool using Internet Information Services Manager or the command line through the Microsoft-provided tool.

## Enabling Mail Add-In On Send

The Mail Add-in On Send functionality must be enabled for the Classifier Mail Add-in to operate correctly. We recommend that On Send is enabled only for test users until testing has been completed.

By default, the Mail Add-ins On Send functionality is disabled.

To enable the Mail Add-ins On Send functionality, apply an OWA Mailbox Policy which is configured using Exchange or Exchange Online PowerShell cmdlets.



If you are using PowerShell, configure the Set-OWAMailboxPolicy cmdlet to \$true on all OWA Mailbox Policies. You can use the Set-CASMailbox powershell cmdlet to apply a OWA Mailbox Policy to users using the OwaMailboxPolicy property.

**NOTE:** It can take several hours or days for changes to OWA Mailbox Polices to be applied to users.

## Enabling Mail Add-In On Send using Exchange Online

An Exchange administrator must execute a PowerShell command directly into Exchange Online using the following script:

```
# Prompt for O365 administrator credentials $UserCredential =
Get-Credential

# Create a new session with Exchange Online
$Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri
https://outlook.office365.com/powershell-liveid/ -Credential $UserCredential -Authentication
Basic -AllowRedirection

# Enter remote session
Import-PSSession $Session

# Get list of mailboxes to verify to be in the proper system
Get-Mailbox

# Enable OnSend event for all mailboxes
Set-OwaMailboxPolicy OwaMailboxPolicy-Default -OnSendAddinsEnabled $true

# Check that setting was enabled
Get-OwaMailboxPolicy | Select OnSendAddinsEnabled

# Results should be:
#OnSendAddinsEnabled
#-----
#           True

# Verify all mailboxes are using Default Policy
Get-Mailbox | Get-CASMailbox | Select Name,OwaMailboxPolicy

# Leave remote session
Remove-PSSession $Session
```

# Uninstalling the Mail Add-in Web Service and Manifest file

## Uninstalling the Web Service

1. Open the Control Panel.
2. Select **Uninstall a program**.
3. Right-click **Boldon James Classifier Mail and Office Add-in Website**.
4. Click **Uninstall**.

## Uninstalling the Manifest file

1. Open the Exchange Admin Center.
2. Select **Organisation > Add-ins**.
3. Click Classifier from the list of add-ins.
4. Click the Bin icon to remove the Classifier add-in.
5. Select **Yes** to confirm you wish to remove the Classifier add-in.