# **Classifier Evaluation Guide**



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### Classifier Evaluation Guide

UM645200

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# 1 INTRODUCTION

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Administrators should read this document to gain an understanding of how to configure and deploy Classifier applications. It assumes the reader is familiar with the terminology introduced in the Suite Overview, reference [3].

This document describes the Classifier Administration Server component that provides manipulation of the Classifier Configuration via a web interface.

To get the most out of this guide, use a dedicated test environment including client desktops.

This evaluation guide describes how to create and configure an environment (CLASSIFIER.TEST AD domain) with a Classifier Configuration (Classifier Test) and a single deployment policy (All users). If you configure your system as described, you will arrive at a working system that you can then use for evaluation or testing. It demonstrates features such as:

- Deployment of configuration via Active Directory
- Starting with an empty Configuration Template rather than a pre-populated Configuration Template as used in the Getting Started Guide.

Note: This Guide only makes use of Email and Office Classifier product licences.

The guide consists of three stages. Each stage yields a working solution with the subsequent stages implementing additional Classifier functionality and/or alternative administration mechanisms. The stages are as follows:

Stage 1 (Sections 2, 3, 4, 5 and 6)

- Establish system environment [Section 2]
- Classifier Configuration of Labelling features [Section 3]
- Deploy (Publish) Configuration via shared File Store [Section 3]
- Client environment Configuration [Section 4]
  - a) Setting Registry keys directly

OR

- b) Use of Group Policy to set Registry Keys
- Demonstrate client operation [Section 5]
- Demonstrate change of configuration to use additional features [Section 6]

Stage 2 (Section 7)

- Implement Domain Clearance Checking for external recipients [Section 7]
- Demonstrate client operation [Section 7]

#### Stage 3 (Sections 8 and 9)

This stage covers features that require Active Directory Schema update

- Extend Active Directory Schema and set permissions [Section 8]
- Deploy (Publish) Configuration via Active Directory. [Section 9]

## 1.1 OWA and Notes Classifier

As stated above, this document describes evaluation in a Microsoft Office desktop environment. However, most of the Classifier Administration features and mechanisms used in this document are the same for OWA Classifier and Notes Classifier; this document can be used an aide to guide you through familiarisation for those products.

Exploring the effects under Lotus Notes requires installation of the Notes Classifier server component, applying a Notes Classifier licence, and enabling the **Global Settings / Application Settings / Lotus Notes** option within the Classifier configuration.

For OWA, read reference [1] in conjunction with section 4. This provides full details on OWA Classifier Administration features.

Section 5 is not relevant to OWA; the OWA test server requires access to the published configuration in order to view the changes to the end user experience.

## **1.2 Classifier Document References**

- [1] Administration Server Guide (UM6351)
- [2] Planning Considerations (UM6354)
- [3] Suite Overview (UM6352)

# 2 STAGE 1 - ESTABLISH AN INITIAL SYSTEM

This stage establishes a minimal operating Classifier system. The steps are:

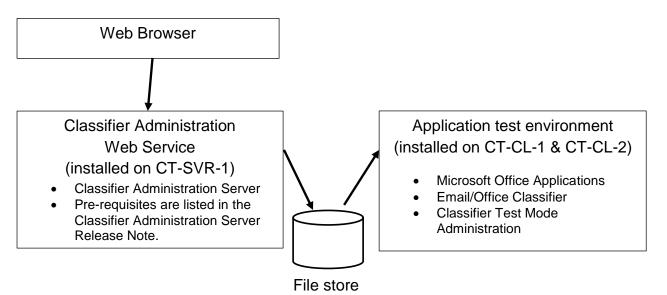
- Configure the system test environment and install Classifier Administration (Section 2)
- Define the Classifier configuration (create Selectors and Values, Marking Format, Policy, Application and Global settings) (Section 3)
- Test the policy locally (Section 3)
- Publish the configuration via file store (Section 3)
- Configure the client environment (Section 4)
- Install Office Classifier and Email Classifier (Section 5)
- Verify client functionality using the published configuration and policy (Section 5)

# 2.1 Configure the Test System Environment

Complete the following tasks to prepare your Classifier test environment. The computers used in this case study are in a domain called **CLASSIFIER.TEST** and assumed to have the following names:

- A domain controller referred to as **CT-DC-1**.
- A server referred to as CT-SVR-1.
- Two client PCs referred to as CT-CL-1 and CT-CL-2.

The following framework is required In order to evaluate Boldon James Classifier:



This case study is applicable to any supported environment: Windows client, Windows server, Office, .NET. You should consult the Classifier Server Administration, and Email and Office Classifier release notes for definitive information with regard to versions and Service Packs supported.

The sub-section below shows an example environment. Use the contents of the tables as a guide whilst configuring the environment, adjusting to suit your local circumstances within the platforms supported by Classifier. The tables outline the computer names, operating system, IP settings and DNS settings, and provide an overview of the baseline setup.

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The evaluation process is unaffected by the environment other than where the Office application interface varies between versions. The vast majority of this document is unaffected by the environment. Documentation clearly indicates where the steps vary according to the base environment.

### 2.1.1 Office 2010 / Windows 2008 R2 / Window 7

Computer Name	Operating System & Software Requirements	IP Settings	Notes
CT-DC-1	Windows Server 2008 R2, Exchange 2010	IP address: 10.0.0.1 Subnet Mask: 255.255.255.0	CLASSIFIER.TEST domain controller – Active Directory.
CT-SVR-1	Windows Server 2008 R2 .NET 4.7.1	IP address: 10.0.0.2 Subnet Mask: 255.255.255.0	Member of CLASSIFIER.TEST domain.
CT-CL-1	Windows 7, Office 2010 .NET 4.7.1	IP address: 10.0.0.3 Subnet Mask: 255.255.255.0	Member of CLASSIFIER.TEST domain.
CT-CL-2	Windows 7, Office 2010 .NET 4.7.1	IP address: 10.0.0.4 Subnet Mask: 255.255.255.0	Member of CLASSIFIER.TEST domain.

# 2.2 Configure your Active Directory Environment

Use the following example structure as a reference to configure Organisational Units, Groups and Users on **CT-DC-1**:

dc=CLASSIFIER, dc=TEST

ou=Departments

ou=Engineering

ou=Sales

cn=Board @ security group

The tables below list the users within each organisational unit and group:

Organisational Unit	User Name
Engineering	EngineeringUser1
	Engineeringuser2
	EngineeringVP
Sales	SalesUser1
	SalesUser2
	SalesVP

Note: Each user requires a Microsoft Exchange mailbox to be set up on CT-SVR-1

Configure the following security group below the 'Departments' organisational unit and add the users to the group:

Group	User Name
Board	SalesVP
	EngineeringVP

Configure Outlook to operate in online (non-cached) mode.

**Note:** You should check that all test users and the Administrator can send and receive e-mail using both client PCs prior to installing and configuring Classifier functionality.

## 2.3 Install Classifier Administration Server

The Classifier Administration Server performs Classifier configuration. A web browser provides access to this through a web service. To install Classifier Administration Server:

- □ Logon to CT-SVR-1 as a user with suitable privileges (e.g. CLASSIFIER.TEST administrator account).
- **General Setablish** an administration user (e.g. ClassAdmin) for the Classifier configuration.

This user will require read/write access to any file locations used for the import/publishing of Classifier Configurations – established later in this document.

- From the Classifier Base Bundle open Classifier Server Administration folder and run ClassifierAdministrationServer.msi (or Setup.exe). Follow the wizard installation steps to complete the install.
- Check that the system intended to host the Classifier Administration Server product has all the pre-requisites installed as defined in the Classifier Administration Server release notes.
- □ Follow the wizard installation steps to complete the install.
- □ Check that the Classifier Administration Service has a status of 'Started'.

🖏 Services								
<u>File Action View H</u> elp								
🤹 Services (Local)	🔅 Services (Local)	_						
	Boldon James Classifier	Name 🔺	Description	Status	Startup Type 🔺			
	Administration Service	🔍 Application Management	Processes i		Manual 📖			
		🖏 ASP.NET State Service	Provides s		Manual			
	Stop the service Restart the service	🌼 Background Intelligent Transfer Service	Transfers f	Started	Automatic (D			
	Restart the service	🌼 Base Filtering Engine	The Base F	Started	Automatic			
		Boldon James Classifier Administration Service	WCF Servi	Started	Automatic			
	Description: WCF Service for BoldonJames Classifier	🧟 Certificate Propagation	Copies use	Started	Manual			
	Administration Server	🎑 CNG Key Isolation	The CNG k		Manual			
		🔍 COM+ Event System	Supports S	Started	Automatic			
		🔍 COM+ System Application	Manages t		Manual 🗨			
		•			▶			
	Extended Standard							

Figure 1: Services

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# **3 DEFINE A CLASSIFIER CONFIGURATION**

## 3.1 The Classifier Administration Web interface

A Web interface that connects to the Classifier Administration Service provides Classifier configuration.

Logon to CT-CL-1 as ClassAdmin.

From the start menu type in <u>http://CT-SVR-1</u> and click **enter** to connect to the Classifier Administration Service. The following dialog appears:

Classifier Administra	ition	CLASSIFIER\ClassAdmin Logout
<ul> <li>✓</li></ul>	Classifier Administration	Actions     Classifier Administration
<ul> <li>Image Library</li> <li>User Message Library</li> <li>User Interface Library</li> <li>Labelling Configuration</li> </ul>	Getting Started         Before creating your labelling configuration you must consider the following:         -Whether to publish the configuration via the Active Directory or shared filestore         -The values that your users will use to label their information         -The way labels will be presented to users.         Please refer to the <u>online help and documentation</u> for recommendations for managing your configuration.	<ul> <li>Properties</li> <li>Get Server Configuration</li> <li>Help</li> </ul>
	Global Settings         Image Library         The Image Library contains images that can be displayed on Single Click buttons and used within various rules.	
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Figure 2: Initial state

### 3.1.1 Operation of the Classifier Administration interface

Throughout this document, the instructions will direct you to select a particular Classifier Administration action from the **Actions Pane**.

At the top of the Actions Pane a list of actions is presented relevant to the item selected in the left hand pane: for example, **User Message Library - Add a new message** in the figure below.

At the bottom of the Actions Pane, a list of actions is presented relevant to the item selected in the middle pane. For example, **Item - Properties**, **Copy** and **Delete** in the figure below.

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Classifier Administration X	+		– 🗆 X			
$\leftrightarrow$ $\rightarrow$ C (i) localhost/# $\Rightarrow$ O (i) localhost/#						
Classifier Administration						
✓	User Message Library	(Configuration Default Language)	Actions			
衛 Global Settings 🔚 Image Library	Create and modify messages that may be display	ed on the client.	User Message Library			
🥟 User Message Library	Message Name	Message Text				
User Interface Library	Prevent - Content search	Certain content within this message i	- Language			
<ul> <li>Labelling Configuration</li> <li>Or Classifier test</li> </ul>	Prevent - Excessive message recipients	The message addresses too many rec	l Help			
Selector Library	Prevent - Invalid label	A required label element has not bee	Item ^			
📝 Marking Library	Prevent - Invalid label (OWA)	A required label element has not bee	🃝 Properties			
🔍 Content Library	Prevent - Label change	An inappropriate change of label has	👎 Сору			
Condition Library	Prevent - Label change (OWA)	An inappropriate change of label has	💻 Delete			
Configuration Setting:	Prevent - Label mismatch	The following attachments have a hig	? Help			
✓ ៛ Policies ☑ All users	Prevent - Label mismatch (OWA)	The following attachments have a hig				
All users	Prevent - Maximum subject length	The subject length for this message is				



## 3.2 Creating a new Classifier Configuration

- □ Starting with the empty Classifier configuration shown in Figure 2.
- □ Select the Labelling Configurations node and select Add a new label configuration action. This displays a dialog.
- □ Enter a configuration name Classifier test
- $\square Select Category \rightarrow Miscellaneous and template Empty Configuration.$

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Set up your labe	elling configuration based	on a pre-defined template.		
NOTE: This will (	overwrite your existing se the chosen template.	ettings and User Messages with settings and Use		
Configuration Name				
		lassifier configuration, e.g. your company name may be used in your markings.		
Configuration name:	Classifier test			
Template Selection				
-	configuration template.			
Category:		Template:		
Corporate		Empty Configuration		
US Federal				
Miscellaneous				
UK Public Sector				
Template description	:			
Template description An empty configurat		^		
		~		
An empty configurat		~ ~		
An empty configurat		new label configuration.		
An empty configurat	tion.	new label configuration.		
An empty configurat	tion.	_		

Figure 4: Template selection

- □ We need to apply a Classifier licence. In this instance, use the limited duration evaluation licences from the **Licence** folder in the **Base Bundle**.
- Click the **Browse** button and navigate to the **Licence** folder in the **Base Bundle**.
- □ Note that each licence appears in its own sub-folder below the parent Licence folder. **Open** the Office Classifier sub-folder and select the **IMPCOF.LIC** file.

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6		Choose File to Upload			×
€ ∋ - 1	🔋 🐌 « Base Bundle 🕨 Lice	ence 🕨 Office Classifier	<b>∨ Ċ</b> Se	arch Office Classifier	Q
Organize 🔻	New folder				
	Classifier Administratic ^	Name		Date modified	Туре
	Classifier API	IMPCOF.LIC		17/08/2017 09:38	License
	Classifier Management			11,00,2011 05150	
	Clearance Provisioning				
	Email and Office Classi				
	File Classifier				
	Licence				
	Box Classifier				
	CAD Classifier				
	🌗 Email Classifier				
	Exchange Classifier				
	File Classifier				
	Mac Classifier				
	Mobile Classifier				
	Notes Classifier				
	Office Classifier				
	🌗 OWA Classifier 🗸 🗸	<			>
	File <u>n</u> ame: IMPCOF.LIC	2	~ C	ustom Files (*.lic) Open	✓ Cancel

Figure 5: Licence folder dialog

### Click **OK**. The Labelling Configuration appears:

Classifier Administration × + – – ×					
← → C (i) localhost/Home/Inde	☆ 📀 🖰 ÷				
Classifier Administrati	CLASSIFIER\Classadmin Logout				
<ul> <li>Classifier Administration</li> <li>Global Settings</li> <li>Image Library</li> <li>User Message Library</li> <li>User Interface Library</li> <li>User Interface Library</li> <li>Classifier test</li> <li>Selector Library</li> <li>Content Library</li> <li>Condition Library</li> <li>Configuration Settings</li> <li>Policies</li> </ul>	Labelling Configuration         Create and edit your label configuration. This configuration determines how your system will operate.         Label Configuration Name         Abel Configuration Name         Classifier test	Actions          Labelling Configuration         Add a new label configuration         Help         Classifier test         Properties         Delete         Help			
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Figure 6: Classifier test Configuration

- □ Now add a licence for Email Classifier.
- □ Select Global Settings.

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Classifier Administration X	+			– 🗆 X	
← → C ③ localhost/Home/Ir	☆ 📀 \varTheta :				
Classifier Administration					
✓	G	lobal Settings		Actions	
💼 Global Settings 🔚 Image Library	Set	tings that apply across y	our Classifier deployment.	Global Settings	
📝 User Message Library	User Interface Library Labelling Configuration	? Help			
Ser Interface Library		Application Settings	Settings that apply t	Licence	
Image: Second		Auditing	The settings applied	Properties	
		Languages	Languages available	? Help	
	0	Licence	Licence details		
Copyright © 2019 Boldon James Ltd.				Version 1.1.90.0	

Figure 7: Apply Licences - Global Settings

□ Open Licence. The dialog allows you to apply one or more licences.

Click Add/Update and add the IMPCEM.lic file (This is the Email Classifier license).

Licences							23
		ilable to your Classific options to import new	-	additional Classifier fu	nctionality.		
	Product	Licence Type	Expiry Date	Users	Serial Number	Details	
	Email Classifier	Evaluation	Aug 10 2018	Site Licence	E32CEM3630296		
	Office Classifier	Evaluation	Aug 10 2018	Site Licence	032C0F3630304	Add/Update	
	Your licence level is:	Enterprise					
						ОК	

Figure 8: Apply Licences – Licences added

□ Click **OK** to apply the licence changes and return to the main dialog.

### 3.3 Creating the Selectors for Labels

This sequence creates two Selectors called Classification and Department

#### 3.3.1 Creating the Classification selector

- □ Select the Selector Library and choose Add a new selector/Single selection list.
- □ This presents you with the following dialog:

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			Edit S	Selector				5
me:* New Selector 1	L							
anguage: Configural Caption: ToolTip:	tion Default Lang	uage						<b>•</b>
/alue Name	Colour	Image	Tooltip	Portion	Alternate	Alternate	Alternate	
			No data to disp	Jav				New
			NO DALA LO DISP	лау				Move Up
								Move Down
								Obsolete
								Restore
								Delete
No hierarchy								•
nclude this selector in	clearance and a	ttachment che	ecks:					
							ОК	Cancel

Figure 9: New single selection list

- □ Fill in the Name field as Classification and ToolTip with "This indicates the sensitivity of the content".
- Now add the selector values.
- Click **New**. An Edit Form is presented:

Edit Form	23
Value Name:	Colour:
Image:	Tooltip:
Portion Marking:	Alternate name:
Alternate 2:	Alternate 3:
	Update Cancel

Figure 10: Edit single select selector value

- □ Replace **New Value 1** with **Public**.
- **Tab** to the Colour cell and set the colour to **Green** using the available drop down.
- Click **Update** and the entry in the main list is updated.
- □ Repeat the sequence to add two **New** selector values:

Value Name	<u>Colour</u>
Internal	Yellow
Confidential	Red

□ The main list should then show:

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			Edit	Selector				
ame:* Classification	n							
Language: Configu Caption: ToolTip: This indica	ration Default Lar		nt					¥
Value Name	Colour	Image	Tooltip	Portion	Alternate	Alternate	Alternate	
Public								New
Internal								Move Up
Confidential								Move Down
								Obsolete
								Restore
								Delete
Hierarchical based o	on item order							-
Include this selector	in clearance and	attachment cl	hecks: 🗹					
							ОК	Cancel

Figure 11: Classification selector values

- Select the **Hierarchical based on item order** setting in the Hierarchy drop down.
- □ Check Include this selector in clearance and attachment checks as this selector is to be included when Clearance checks are performed (sections 7, 10 and 11).
- Click **OK** the list of items will appear in the parent screen

Classifier Administra	tion	ALLEN4\Administrator Logout
✓	Selector Library	Actions
🕤 Global Settings 🚍 Image Library 🌮 User Message Library 🌄 User Interface Library	View and modify selectors that are available in your configuration. These can be assigned to a policy and will appear in Classifier-enabled applications.	Selector Library  Add a new selector Canguage
<ul> <li>W Interface Library</li> <li>Interface Library</li> <li>Interface Library</li> </ul>	Se Selector Name Caption Tooltip	7 Help
<ul> <li>Classifier test</li> </ul>	Classification This indicates	Item
Selector Library		Edit Selector
📴 Marking Library 🔍 Content Library		Move Up
Condition Library		👔 🊺 Move Down
📹 Configuration Setting:	Classification	Obsolete
	Value Name	Delete
	Public Cl	Peloce
	Internal	пер
< >	Confidential	
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### 3.3.2 Creating the Department Selector and values

- Repeat the sequence in 3.3.1 above to create a second Selector with Name = Department and ToolTip = "Choose the Department that produced the content".
- □ For this second Selector establish the following Department values:
  - Sales Leave the colour as default.
  - Engineering Leave the colour as default.
  - **Board** Leave the colour as default.
  - Ensure the hierarchy setting is No hierarchy
- □ Check Include this selector in clearance and attachment checks as this selector is to be included for Clearance checks.
- □ Click **OK** and the values will appear in the parent screen showing the Department selector and values

→ C ① localhost/Home/li	ndex/										Ŷ	0	θ	1
lassifier Administra	tion									CLASSIFI	ER\Classad	min <u>Lo</u>	gout 3	=
🗷 Classifier Administration	Sele	ector Librar	у							Actions	s			
Global Settings	Viewa	nd modify selector	s that a	ve avai	lable in	your co	ofiquat	tion. Th	ese can	Select	or Library			,
Image Library User Message Library		gned to a policy a								ES Ad	id a new se	lector		
🙀 User Interface Library	Sele	Selector Name		Caption	6		Tooltig	<u>,                                    </u>		🤏 La	nguage			
<ul> <li>Labelling Configuration</li> </ul>	HI SL	Classification		Classif	cation		This in	ndicates	the s	E He	qip			
<ul> <li>Classifier test</li> <li>Selector Library</li> </ul>	E si_	Department		Depart	ment		Choos	e the D	epart	Depart	tment			
Harking Library										🛃 Ed	lit Selector			
Content Library	-									M Ma	ove Up			
Condition Library	Depa	rtment								-	we Down			
Y Policies	Value N	lame	Co	Im.	To	Po	Alt.	Alt	Alt	1	store			
	Sales			-						E De	slete.			
	Enginee Board	ening								E He	alp			
	board		-						1	1.1.1				

Figure 13: Department Values List

## 3.4 Defining Marking Formats

Use Marking Formats to configure how labels appear to users, e.g.:

- a) To represent the current label value in various transient places (e.g. Outlook Information Bar).
- b) To insert Headers/Footers/FLOT into documents / emails.

You can use one Marking Format across the whole configuration or different Marking Formats to give different renderings according to your requirements. For example, the Header and Footer could be different.

The **Empty Configuration** template includes a placeholder **Summary Marking** Format used when Summary Label values appear (e.g. Outlook Information Bar). The **Summary Marking** forms a

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basis to configure a separate **Standard Marking** referenced by various rules (e.g. Document Headers).

### 3.4.1 Configure the Summary Marking Format

□ Select Marking Library and select the Summary Marking entry. Click Properties which will present the following:

F	Properties	23
Selector HyperLink Environment Property Property Document Directory Attribute	Times New Roman     B     Bold       12     A     I     Italic       U     Underline       Font	E Left 클 Right 플 Centre Align Text Marking Format
The marking format defines how the marking appears when ad Name: Summary Marking I Use selecto Enter your marking format as free-form text in the box below. Your Marking Format here	Ided to documents and messages.	/le
		OK Cancel

Figure 14: Summary Marking Properties

Delete the text 'Your Marking Format here', and then click Selector (Insert Placeholder) which presents a list of available Elements.

	Choose a Selector ele	ement	53
Label Element: Configuration Name Policy Classification Department	Text Display: Default Alternate 1 Alternate 2 Alternate 3 Portion Mark ID	Prefix:	
		Suffix:	
		OK Cancel	

Figure 15: Choose a Selector element

□ Select Classification and click OK to insert a placeholder in the marking format:

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	ſ	Properties				
	cument Directory Attribute	Times New Roman	I Italic U Underline	E Left Ξ Right Ξ Centre Align Text	Preview Marking Format	
ame: Summary Marking		r colour values 🛛	Use plain text st	yle		•
				ОК	Cancel	•

Figure 16: Classification inserted into Marking

- □ Enter a single "**space**" after the {Classification} placeholder.
- □ Repeat the **Insert Selector** process once to add the **Department** element to leave the following:

	Properties	23
Selector HyperLink Environment Document Directory Property Property Insert Placeholder	Times New Roman <ul> <li>B Bold</li> <li>I2</li> <li>A</li> <li>I Italic</li> <li>U Underline</li> <li>Font</li> </ul>	Image: Left     Image: Preview       Image: Centre     Preview       Align Text     Marking Format
The marking format defines how the marking appears when a Name: Summary Marking I Use select Enter your marking format as free-form text in the box below. {Classification} {Department}	or colour values 🔲 Use plain text st	yle
		OK Cancel

Figure 17: Summary Marking Format configured

- □ In this instance, we are leaving the fonts unchanged. The Selector library defines the colours of Selector values.
- □ You can preview the appearance of the marking format by selecting the **Preview** button.

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Marking Format	Preview 8
Below are examples of how the Marking Form from the label/document.	at may look when populated with properties
Formatted Text	
Public Sales	*
	_
	*
Plain Text	¥
Plain Text Public Sales	•
	•
	•
Plain Text Public Sales	•

Figure 18: Marking Format Preview

- Click **Close** for the Marking Format Preview window.
- **Ok** the Properties window.

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□ The main window will now show the updated Marking Format:

Classifier Administration X	+		- 0 ×
← → C () localhost/Home/i	Index/#		x 😢 🖯 🖯 🗄
Classifier Administra	ation		CLASSIFIER\Classedmin Logout
<ul> <li>Classifier Administration</li> </ul>	Marking Library		Actions
🐑 Global Settings	Create and edit your marking b	ormats. These markings determine how your labels will	Marking Library
🛅 Image Library	be presented to your users.	ormats. These markings determine now your labels will	Add a new marking format
User Message Library	Marking Format Na	Summary	Help
User Interface Library			
<ul> <li>Labelling Configuration</li> </ul>	Summary Marking	{Classification} {Department}	Summary Marking ^
<ul> <li>Classifier test</li> <li>Selector Library</li> </ul>			Properties
Marking Library			E Copy
Content Library			Lelete
Condition Library			Help
Configuration Setting			
<ul> <li>Policies</li> </ul>			
			d
			d
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Figure 19: Marking Format Summary

### 3.4.2 Configure the Standard Marking Format

- Select the Marking Library node.
- □ Select the Summary Marking entry. Choose **Copy**. This adds a new entry as follows:

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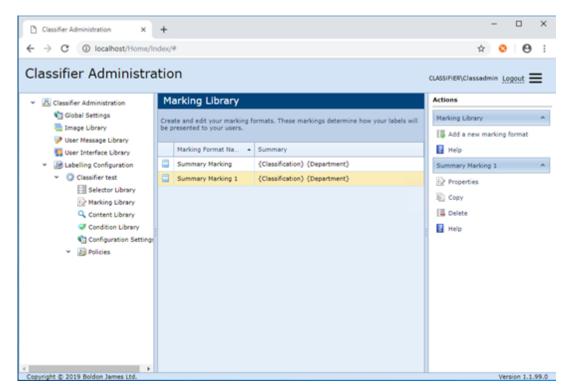


Figure 20: Summary Marking - Copy

□ Select the new entry and choose **Properties**. This presents the following:

	Properties	23
Selector HyperLink Environment Property Document Attribute Insert Placeholder	Times New Roman <ul> <li>B Bold</li> <li>I2</li> <li>A</li> <li>I Italic</li> <li>U Underline</li> <li>Font</li> </ul>	■ Right         ■ Right         ■ Centre         Align Text
The marking format defines how the marking appears when a Name: Summary Marking 1 IV Use select Enter your marking format as free-form text in the box below	or colour values 🔲 Use plain text st	yle
{Classification} {Department}		
		OK Cancel

Figure 21: Summary Marking - Copy Properties

- Change Name to Standard.
- Position the cursor before {Classification} and click Selector. Select Configuration
   Name from the presented list and click OK. Insert a 'Space' to leave the following:

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					Properties					
Selector	ເປັນເປັນ HyperLink ງ	Environment Property Insert Placehold	Document Property der	Directory Attribute	Times New Rom	an 🔹	B Bold I Italic U Underline	E Left ∃ Right ∃ Centre Align Text	Preview Marking Format	
ne markin	g format de	fines how the i	marking app	ears when a	dded to documents	and messa	ges.			
ame: Sta	andard			Use select	tor colour values		lse plain text	style		
		mat as free-for		_			ise plain text	style		
ter your	marking for	mat as free-for	rm text in the	e box below			ise plain text	style		*
iter your	marking for	mat as free-fo ame} {Class	rm text in the	e box below		U	ise plain text	style		
ter your	marking for		rm text in the	e box below			ise plain text	style		
ter your	marking for		rm text in the	e box below			lse plain text	style		*
iter your	marking for		rm text in the	e box below			ise plain text	style		*
iter your	marking for		rm text in the	e box below		U	ise plain text	style		*
ter your	marking for		rm text in the	e box below			ise plain text	style		•
ter your	marking for		rm text in the	e box below		<u> </u>	ise plain text	OK	Cancel	•

Figure 22: Standard Marking Format

**Note:** In this evaluation exercise, the {Configuration Name} appears so that 'externally visible' markings indicate the 'source' of the label. This might include your organisation's name for example rather than Classifier test.

□ Click **OK** to save the changes and leave the summary list as follows:

Classifier Administration X	+	- 🗆 X
← → C ③ localhost/Home/Ir	ndex/#	☆ 📀 😝 :
Classifier Administra	ition	CLASSIFIER\Classadmin
✓	Marking Library	Actions
🌒 Global Settings 🔚 Image Library 🍞 User Message Library	Create and edit your marking formats. These markings determine how your labels will be presented to your users.	Marking Library  A
User Interface Library	Marking Format Na 🔺 Summary	Help
<ul> <li>Labelling Configuration</li> </ul>	Standard {Configuration Name}{Classification}{Department}	Standard ^
<ul> <li>Classifier test</li> <li>Selector Library</li> <li>Marking Library</li> <li>Content Library</li> <li>Condition Library</li> <li>Configuration Setting:</li> <li>Policies</li> </ul>	Summary Marking {Classification} {Department}	<ul> <li>☑ Properties</li> <li>☑ Copy</li> <li>☑ Delete</li> <li>☑ Help</li> </ul>
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Figure 23: Marking Formats

# 3.5 Defining a Policy to deploy to users

Users see the Classifier Configuration through a Policy. Different users may use different policies and thereby see different views. You must define at least one Policy even if all users are to have the same view of the configuration. This section shows how to establish a Policy and configure some of the policy features.

□ Select the **Policies** node and then choose **Add a new policy...**. The following will be displayed:

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Add Policy	23
Choose a name and description for your policy.	
Policy Name:*	
Description:	
	-
The client can keep a record of the more recently used labels for easy selection.	
Maximum number of labels to show: 5	
Choose how default classifications are generated User Selectable Default Classifiation	
Control the display of selectors on the client.	
Use Single Click with pre-defined labels	
Show selector captions on the ribbon bar	
Single-select values may be displayed as buttons.	
User interface definition:	
Default 🔻	
Default Language:	
Configuration Default Language	
OK Cancel	

Figure 24: Defining a Policy

- □ Enter a Policy name of **All users**. The Description field is optional and is only relevant to the Classifier Administrator. Leave the **User interface definition** as default (the only one defined in this scenario).
- Click **OK**. The new policy will appear below the **Policies** node.

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Classifier Administration ×	+				- 0	×
← → C () localhost/Home/In	idex/#				☆ 📀 🔒	:
Classifier Administra	ition				CLASSIFIER\Classadmin Logout	=
✓	All users				Actions	
🍓 Global Settings 들 Image Library	Selectors and rul	es assigned to	this policy.		Policy	^
彦 User Message Library	Set Selectors	Set Rules	Suggested Classification	Default Label	Properties	
<ul><li>User Interface Library</li><li>Labelling Configuration</li></ul>	Selector	Selector Name	Caption	Tooltip	Copy	
<ul> <li>Classifier test</li> <li>Selector Library</li> </ul>		No	data to display	<b>A</b>	Lock Policy	
Marking Library					Eabel Preview	
Condition Library				-	Set Selectors	~
🕥 Configuration Setting: 👻 🗿 Policies					Edit Properties	
🛃 All users					🛃 Selectors in policy	
					💛 Language	
					? Help	
٠						
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Figure 25: All users policy

### 3.5.1 Defining which Selectors are available in the policy

- Select All users from the Policies sub-tree and the middle pane presents four tabs (as per Figure 25 above).
- □ Select the **Set Selectors** tab in the middle section of the window and choose **Selectors** in policy.
- □ This will present a list of Selectors that you can assign to the policy.

		Selector	s i	n Policy			23
the rit Select	e the selectors that you want to b bon bar. Use the Tabs option to d ors which are not used in Connec	ivide your selectors into t Selectors and Suggest	o ca ted	itegories. Classification can be ma		ay be dis	played on
Availa	ble selectors:		ele	ctors in policy:			
	Selector Name			Selector Name	Tab	Ribbon	Retained
<b>B</b>	Classification						
	Department	Add >> << Remove Tabs					
					ОК	Can	icel

Figure 26: Set Selectors in Policy

□ Select Classification and Department in turn and click Add for each one. Click OK.

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Adding a Selector to a policy also adds all of the Selector values. It is possible to remove individual values after adding the Selector.

→ C ③ localhost/Home/Inc	dex/											x O	θ				
lassifier Administra	tion											CLASSIFIER\Classadmin Log	out 🔳	Ξ			
Cassifier Administration	All use	ers										Actions		_			
Clobel Settings	Selectors a	ind rules assig	ned to this ;	policy.								Policy		8			
📝 User Hessage Library	Set Sele	ctors Set 8	Roles So	ggested C	assification	Default L	ibel					Properties					
User Interface Library     Be Labelling Configuration	Selector	Type 5	elector Nam	e Ca	ption	Tooltip						G Delete					
<ul> <li>Classifier test</li> </ul>	Sing	le selec O	lassification	Ci	asification	This indice	tes the	sensitis	rity of	the	-	Lack Policy					
Selector Library	El sing	Single selec Department Department Choose the Department that produ									-	Label Preview					
Content Library												Help					
Condition Library	Class	ification										Set Selectors		2			
Configuration Setting:	The labe	l values select	ted for this p	olicy.								Edit Properties					
Policies     All users	Sele.	Value Name	Default	Colour	Image	ToolTip	P	Alt.	-	2	1	Selectors in policy					
· · · · · · · · · · · · · · · · · · ·	1	Public									1 *	🗢 Language					
	1	Internal									2	Help					
	1	Confidential		-							3						

Figure 27: Classification and Values

- □ Classification should take a default value of **Public**. Select the **Classification** entry in the list of Selectors and choose the **Edit Properties** action.
- □ Select the **Options** tab.
- □ Select **Public** from the **Default value** drop down list.

#### Classifier Evaluation Guide

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Properties	Σ
General Options	
A single selection list may have multiple values defined in the Selector Library. Here you can choose to make available a subset values in your policy;	
<ul> <li>✓ Public</li> <li>✓ Internal</li> <li>✓ Confidential</li> </ul>	
Default value: Public 🔹	
Each value may have alternate names - choose which name to display on the client. 'Name' will be used if your chosen alternative is not defined.	
Use names from: Name	
Show value as: Text only	
Display style: Display values as a list	

Figure 28: Selector options

- □ Note that we are using the Caption and ToolTip settings defined with the Selector in the Selector library. Leave **Use names from** set to Name.
- Click **OK** and the main display is updated to indicate a default is set:

The label	values sele	cted for this	policy.				
Selec	Value	Default	Colour	Image		Π	
-	Public	<b>√</b>					-
-	Internal						:
-	Confid						:

Figure 29: Classification values showing default set

### 3.5.2 Defining Marking Rules

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The next step is to define the Marking rules that apply to documents and messages under this policy. Select the **Set Rules** tab.

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#### 3.5.2.1 Word Header Rule

□ Select the All Users policy and select the Set Rules tab. The initial state is as follows:

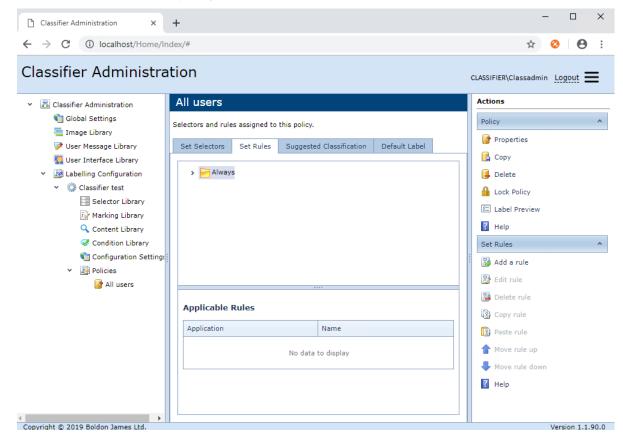


Figure 30: Rules Configuration

Select the Always node and choose Add a rule. This starts the Edit Rule wizard:

Ap	23	
Application Choice Select the application or asset to	o which your rule will apply.	
Each application has a distinct rule	set.	
Excel Spreadsheets	PowerPoint Presentations	
Outlook Emails	Word Documents	

Figure 31: Choosing the Application for the Rule

- Select Word Documents and Click Next. This will present just the list of rule templates applicable to Word.
- □ Select the Add a header here to any existing text in All Pages format.

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Edit Rule	Σ
ction Choice Select the action to complete your rule.	
ilter rule categories:	
All rules	
elect a Rule:	
Add a TextBox on the header in this format	
Add a TextBox on the footer in this format	
Add a header here to any existing text in All Pages format	
Add a footer here to any existing text in All Pages format	
Add this image into header with this text wrapping and this alignment	
Add this image into footer with this text wrapping and this alignment	
Add a watermark in this format	
Add this image as a Watermark	
Add this document property in this format	
Add this custom document property in this format	
Apply this RMS policy. Warn if check fails with this message	
Check these mandatory selectors. Warn if check fails with this message	
Check for author label change and permit alteration. Warn if check fails with this	÷
Check for label change and permit alteration. Warn if check fails with this messa	ge
Check content for Warn, this if check fails with Show message and $\{3\}$ hits	
Check for use of default label. Warn with this message	
Check with the user and Show Fix option. Warn with this message	
Check these selectors for expired dates. Warn with this message	-
Back Next Cancel	
Door Hore Ouriou	

Figure 32: Add Header Marking

□ Click **Next** and location and format settings dialog is presented:

Edit Rule	23
Rule Name:	
Add document header	
Edit the rule parameters (click the hyperlinks)	
Add a header Prefix to any existing text in All Pages format	
Edit the rule prerequisite conditions	
There are no applicable prerequisites conditions.	
Back OK Cancel	



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Select **Prefix** and it will present a choice of position. Choose **Prefix**. Click **OK**.



Figure 34: Choose Header Prefix or Suffix

□ Select All Pages and it will present a drop down list of defined marking formats.

	Μ	larking Position	Σ
		nat for the document. Different ones may and even pages.	be
Insert	-	Standard	-
		Standard	
Differen	t first p	Summary Marking	
Insert	-		-
Differen Odd:	t odd ar	nd even pages	
Insert	Ŧ		-
Even:			
Insert	Ψ.		-
ОК		Cancel	

Figure 35: Use Standard Marking Format

□ Select **Standard** from the drop down list and click **OK**. The **Edit Rule** dialog is updated to show:

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Edit Rule	23
Rule Name:	
Add document header	
Edit the rule parameters (click the hyperlinks)	
Add a header Prefix to any existing text in All pages: Insert, Standard format	
Edit the rule prerequisite conditions	
There are no applicable prerequisites conditions.	
Back OK Cancel	

Figure 36: Configured Rule display

- Leave the **Rule Name** unchanged and click **Next**.
- □ If you now expand the Rules tree you will see the newly created Rule (Add document header see Figure 37 below).

#### 3.5.2.2 Word Footer Rule

□ Repeat the sequence in 3.5.2.1 to establish an Add document footer rule –select the Add a footer here to any existing text in All Pages format rule this time.

#### 3.5.2.3 Email FLOT rule

Repeat a sequence similar to 3.5.2.1

- Select Always and choose Add a Rule to launch the Rule wizard.
- This time select Outlook emails as the application and establish a rule based on the "Add a FLOT in this format"; set this format to Standard and accept the default rule name.
- □ This should leave you a rule summary display as follows:

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Classifier Administration X	+			- • ×
<ul> <li>← → C ① localhost/Home/I</li> <li>Classifier Administration</li> <li>♥ Classifier Administration</li> <li>♥ Global Settings</li> </ul>		to this policy.		☆ ⊘ ⊕ : CLASSIFIER\Classadmin Logout Actions
<ul> <li>Image Library</li> <li>User Message Library</li> <li>Labelling Configuration</li> <li>Classifier test</li> <li>Selector Library</li> <li>Marking Library</li> <li>Content Library</li> <li>Condition Library</li> <li>Configuration Setting</li> <li>Mercias</li> </ul>	Set Selectors Set Rules	Suggested Classification		<ul> <li>Properties</li> <li>Copy</li> <li>Delete</li> <li>Lock Policy</li> <li>Label Preview</li> <li>Help</li> <li>Set Rules</li> <li>Add a rule</li> <li>Edit rule</li> </ul>
🚮 All users	Applicable Rules	Name	Rule Option 1	Delete rule
	Outlook Emails	Outlook Emails, Add F	Standard	<ul> <li>Paste rule</li> <li>Move rule up</li> <li>Move rule down</li> </ul>
Copyright © 2019 Boldon James Ltd.				Help Version 1.1.90.0

Figure 37: FLOT, Footer and Header Rules

## 3.6 Application and Global Settings

This test configuration uses the default Application settings found under **Configuration Settings / Classifier Application Settings** as per the example below:

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Word Settings	Excel Settings	Outlook Settings	PowerPoint Settings	Visio Settings		
Allow label cha	nge on protected do	cuments		Disable	ed	-
Automatically u	pdate label fields			Disable	ed .	-
Custom format	for 'Insert Label'					•
Force Summary	Marking in task pa	ne		Disable	d	•
Portion Marking	I			Disable	ed	•
Process rules w	hen exporting			Enable	d	•
Process rules w	hen printing			Enable	d	•
Process rules w	hen saving			Enable	d	•
Show 'Insert La	bel' context menu			Disable	ed	-
Show label dial	og on Save or Print			Default	:	•
Show label dial	og style			Single	Click when configured	•
Show label dial	og when mandatory	label		Enable	d	•
Show Summary	/ Marking in task pa	ne		Enable	d	•
Show Summary	/ Marking in title ba	r		Disable	ed	•
Update marking	gs when indicated			Enable	d	•
Watermarks us	e marking format fo	nt		Disable	ed	•
nese settings ap	ply to Microsoft Wo	rd.				

Figure 38: Classifier Application Settings

The test configuration uses the default **Global Settings** / **Application Settings**.

□ Select Global Settings and select Application Settings. Choose Properties to show the following:

Clearance Check Email Domains		Disabled	-
Clearance Library		Disabled	-
Dynamic Clearances		Enabled	-
Microsoft Excel		Enabled	-
Microsoft Outlook		Enabled	-
Microsoft PowerPoint		Enabled	-
Microsoft Project		Enabled	-
Microsoft Visio		Enabled	-
Microsoft Word		Enabled	-
hese settings apply throughout your deployment of Classi	fier.		

Figure 39: Global Settings Application Settings

□ The basic configuration for Stage 1 is now complete.

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□ The next steps are to locally test the configuration and then publish the configuration to a Master Configuration location.

## 3.7 Locally testing the policy

Once you have completed all the configuration above you can check the effects on the client by using the **Test Mode** feature. This allows you to publish the configuration, and then run a local Test Mode Administrator application that instantiates the Test Configuration and temporarily sets a local switch that directs the Classifier Application software to utilise a 'test configuration' rather than the normal run time configuration.

#### On the CT-SVR-1 system:

- □ In Classifier Administration, select the Classifier Administration node.
- Choose the **Publish Test Configuration** action.

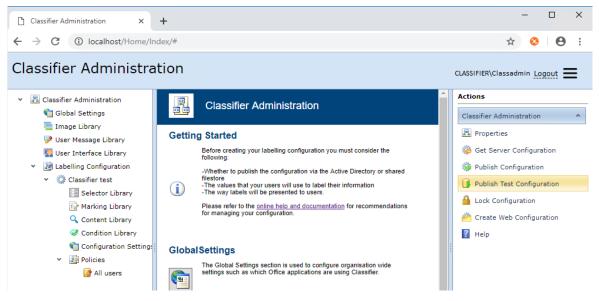


Figure 40: Publish Test Configuration

This will show the following dialog:

Publis	h Test Configuration	23
	Provide a name for the Test Session Configuration:	
	Test Configuration (04-16-2019_03-51-06-PM)	
	Test Mode Publish Reason:	_
	Evaluation configuration	
	The configuration can then be retrieved using the 'Test Mode Adminstrate tool.	r'
	OK Cancel	



- □ Add a reason for the test, e.g. Evaluation configuration
- Click OK
- □ By default, the test configuration will be published beneath %PROGRAMDATA% \ Boldon James \ TestMode Folder. Share this folder with the user that will be logged on to the **CT-CL-1** system.

#### On the CT-CL-1 system:

- Ensure that the relevant affected applications, Word and Outlook, are installed and operational.
- □ Ensure that none of the affected applications, Excel, Outlook, PowerPoint and Word, are running.
- Ensure that Email and Office Classifier is installed. From the Classifier Base Bundle open Email and Office Classifier. Choose the x64 or x86 folder corresponding to your Microsoft Office version and run Setup.exe. Follow the wizard installation steps to complete the install.
- Install the Classifier Test Mode Administration product. From the Classifier Base Bundle open the Classifier Administration Server folder and then the Test Mode Administration sub-folder. Run ClassifierTestModeAdministration.msi.

Test Name	Label Config	Publisher	When (UTC)	Reason		<u>R</u> un Test
						<u>C</u> lose
					>	

□ From the Start Menu open Classifier Test Mode Administration

Figure 42: Test Mode Administration

- Browse to the folder shared from the CT-SVR-1 system; that is the folder containing the published test configuration on the CT-SVR-1 system. All test configurations published from the CT-SVR-1 system will appear in this folder. Click OK
- □ Select the test configuration from those displayed and click **Run Test**

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🍄 Classifier Test Mode Administration		—		$\times$
Available test session 😨 Test Mode Applications —	□ ×			
C:\ProgramData\Bo Running Applications			Browse	
Test Name <u>E</u> nd	Test Mode		Run Test	
Test Configurati			Close	
<		>		
Test sessions refreshe				



- **Start** the Microsoft Office application(s) (Word and Outlook) and check the effects.
- □ Each time you start an application the following warning dialog appears.

boldonjames A QinetiQ Company	×
Classifier	
Classifier is currently operating in Configuration Test Mode.	

Figure 44: Test mode – Application warning

□ You can now test the effects of the test configuration on the Office application. For example, in Microsoft Word with the Email and Office Classifier installed:

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File	Home In	ert	Page Layo	ut R	eferenc	es	Mailing	IS	Reviev	v	View						۵ 🕜
💼 X	Classificatio	n Publ	ic		Ŧ	🗈 Opt	tions *	Calib	ri (Bod	ly)		- 11	Ŧ	≣		∕	<b>#</b>
Paste	Department				*				ΙU				AB	Paragrap			Editing
								A-	aby -			A		÷.		-	*
lipboard 5	i		Classifi	er Label						Font	t		E.		_	_	
																	C.
Classif	fier test Pub	lic															
Classif	fier test <mark>Pu</mark> b	lic															
Classif	fier test Pub	lic															1
Classif	fier test Pub	lic															
Classif	fier test Pub	lic					1										
Classif		lic					1	111									₹
		lic					Public										

Figure 45: Word 2010 Label interface and header

□ Starting Outlook and launching a **New message** will display a Classifier enabled Outlook message. The following screenshots provides examples of this. The window appearance may vary on the version of Office installed.

A state of the	- 0 %
File Message Insert Options Format Text Review	۵ 😮
Image: Second system       Classification       Public       Image: Second system       Image: Second syste	Tags Zoom
Clipboard 🛱 Classifier Label	Zoom
To2         I           Send         Subject:	
- Classifier Label	
Public	

Figure 46: Outlook 2010 – Label interface and summary marking

□ Close Outlook and Word and click End Test Mode on the Classifier Test Mode Administration utility. When the Office Applications, Outlook and Word, restart, they will revert to standard operation and will no longer use the Test Configuration.

## **3.8 Deploying the Configuration**

Classifier Configuration needs to be available in every user environment. The general mechanism is described below followed by the specific actions required for this stage.

### 3.8.1 How the configuration reaches the client environment

#### Note: This section is provided for information - it contains no actions

Once the Classifier configuration is finalised, you will publish that configuration to shared File Store or to Active Directory. The schematic below shows an overview of how the configuration is deployed (full details can be found in **Classifier Administration Guide > Configuration Deployment**).

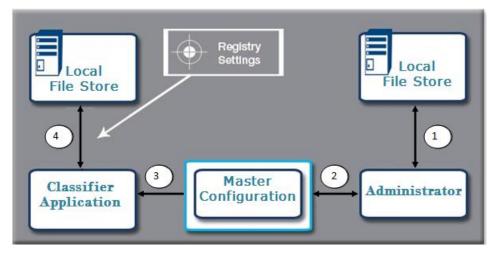


Figure 47: Configuration Deployment

#### **Creating and Modifying the Configuration**

- Step 1 The process starts by the Administrator creating an initial configuration using the Classifier Administration Server and evolving that configuration to the point where it is deemed suitable for deployment to a user community. This might initially be to a pilot group or into a test environment, but might ultimately be the entire user population.
- Step 2 Once the configuration is complete the Administrator will Publish the configuration to a central location. This can be the Active Directory (requires <u>Active Directory Schema</u> <u>update</u>), or a suitable shared File Store location.

When an Administrator wishes to modify the current Master Configuration they must ensure their local machine holds an up to date copy of the current Master Configuration and if necessary perform a <u>Get Server Configuration</u> action to retrieve the current Master - it will overwrite any prior local copy of the configuration. The administrator can then modify the Configuration and re-publish it once the changes are complete. Thus, the administrator Publishes to the Master Configuration location and the Get Server Configuration retrieves from the Master Configuration location.

**Note:** If you **Publish** the configuration to File Store you must ensure that the target (Master) location has suitable permissions. End users should have the ability to Read from that location and Administrators that will modify the Master configuration must have the ability to write to that location using the network path.

#### **Classifier application retrieval of Configuration**

Classifier applications need to know where to find the Master Configuration along with the **Policy** that applies to the user. The application determines this by searching registry key settings in precedence order as described in <u>Setting the Registry Keys for this test environment</u> (explored in section 4 of this document).

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- Step 3 Classifier applications, Office / Email / OWA / SharePoint Classifier / Notes Classifier, periodically retrieve the configuration. An update to the cached Configuration occurs when the Master version is newer than the local version. A **Validity Period** registry setting controls the timing of this check.
- Step 4 Classifier applications will store the retrieved configuration in local file store. Clients (e.g. Email Classifier) can continue to use this local copy when operating in off-line mode.

### **Configuring the Client Environment**

Classifier client applications needs to know the location of the Configuration information (File Store or Active Directory), and which Policy within the Configuration should be used. For further information, review <u>Client Environment Configuration</u>.

## 3.9 Publish Configuration

The next step is to **Publish** the configuration. For Stage 1 you will publish via Shared File Store.

### 3.9.1 Publish Configuration to File Store

- From Classifier Administration, select the top node Classifier Administration node and choose Publish Configuration.
- Select **File Store** on the dialog presented

Publis	h Configuration	23
*	Select where the configuration should be published.  C Active Directory  File store  Publish reason:  First publication	
	OK Cancel	

Figure 48: Publish Configuration to File Store

- □ Enter a reason such as **First publication** for the publication (it appears in the audit log entry). Click **OK** to complete the action.
- Click **OK** on the confirmation dialog that appears.
- □ The configuration is stored, by default, within the "%PROGRAMDATA% \ Boldon James \ Config Publish Folder"

### 3.9.2 Set the permissions to allow clients to read the configuration

- □ In Explorer, select the folder "%PROGRAMDATA% \ Boldon James \ Config Publish Folder" and then:
- □ Windows 2008 server:
  - Choose Share with / Specific people from the context menu.



- Add Everyone with Read permission and ensure that Administrators have Full control over this location so that they can publish Configuration updates.
- Click **OK** / **Share** / **Done** to the open dialogs to apply the changes.

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## 4 CLIENT ENVIRONMENT CONFIGURATION

The Classifier client needs to know:

- The name and location of the configuration it should use
- The policy within the Configuration pertinent to the current user.

The client software looks for the following Registry keys (associated **Group Policy setting name** if used) holding the required information:

Name	\ServerRootType (Configuration Distribution Server Type)
Туре	REG_DWORD
Data	0 Configuration is held in File Store (ServerFileSystemRoot
	key is then significant)
	1 Configuration is held in Active Directory
Name	\ServerFileSystemRoot (File Based Configuration Location)
Туре	REG_SZ
Data	(Only required if ServerRootType = 0)
	Path to the location that holds the Classifier Configuration folder
Key	LabelConfiguration (Label Configuration Name)
Туре	REG_SZ
Data	The name of the label configuration to use. e.g. Classifier test
Key	\Policy (Policy Name)
Туре	REG_SZ
Data	The name of the policy within the configuration that this user
	should use. E.g. All users.

Section 4.1 describes the full set of supported Registry Key locations and their relative precedence. Section 4.2 describes which keys to set depending upon whether or not you are using Group Policy Mechanisms to manage the Registry settings.

This document describes the registry settings essential to Classifier operation. Full details of all registry settings supported can be found in **Classifier Administration > Configuration Deployment > Label Configuration Registry settings**.

## 4.1 Registry Key locations and precedence

[The ...\Policies\.. entries are set by Microsoft Group Policy mechanisms and should not be set directly. HKLM means HEY\_LOCAL\_MACHINE, HKCU means HKEY\_CURRENT\_USER]

- 1. HKLM\SOFTWARE\Policies\Boldon James\ConfigManager\ServiceMode.
- HKLM\SOFTWARE\Boldon James\ConfigManager\ServiceMode (only used by OWA, SharePoint, Management Agent and CPS). [The recommended location for services registry settings - see Note below the Precedence table].
- 3. HKCU\SOFTWARE\Policies\Boldon James\ConfigManager.
- 4. HKLM\SOFTWARE\Policies\Boldon James\ConfigManager.
- 5. HKLM\SOFTWARE\Boldon James\ConfigManager.
- 6. HKCU\SOFTWARE\Boldon James\ConfigManager.

Each application (Classifier Client, Classifier Administration, Notes Classifier etc.) will look for the configuration settings below these registry locations in descending order of precedence as shown in the table below.

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Setting	Client	OWA	Administration Server
ServerRootType	3, 4, 5	1, 2, 4, 5	6
ServerFileSystemRoot	3, 4, 5	1, 2, 4, 5	6
LabelConfiguration	3, 4, 5, 6	1, 2, 4, 5	Not applicable
Policy	3, 4, 5, 6	1, 2, 4, 5	Not applicable

**Note:** Further details can be found in Classifier Administration Server Guide > Configuration Deployment.

**Note**: For 64-bit machines that are to run 32-bit Classifier applications (e.g. Email Classifier and Office Classifier), items 1, 4 and 5 above will need registry keys establishing under ...\SOFTWARE\Wow6432Node\Boldon James\ConfigManager as well as the locations above that will be used by 64-bit applications (e.g. OWA Classifier).

## 4.2 Setting the Registry Keys for this test environment

Two options are available

- a) Set the Registry keys using a site defined mechanism (e.g. directly)
- b) Using standard Group Policy mechanisms.

You should implement the approach (Direct setting or Group Policy) that is most appropriate for your systems before proceeding to the client verification step.

### 4.2.1 Set the Registry keys directly

Set the following keys under HKEY\_LOCAL\_MACHINE\SOFTWARE\<WOW6432Node>\Boldon James\ConfigManager

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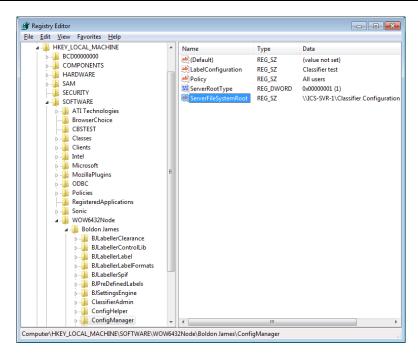


Figure 49: Local Machine Registry Keys

Remember to set the values on the clients of this test system if you wish to use the Classifier features other than through Test Mode.

### 4.2.2 Set the Registry keys using Group Policy

There are various ADM and ADMX files located in the **Classifier Group Policy Templates** subfolder of the **Classifier Administration Server** folder in the Classifier **Base Bundle**. These are for use in extending the group policy settings. The two listed below are relevant to Classifier Client configuration:

ClassifierConfig.ADM

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• ClassifierConfigPerUser.ADM

The precise actions may vary depending upon your local system. The following steps apply to the evaluation scenario, which assumes that all users will use the same Policy (All users).

First, apply the Group Policy extensions. The precise sequence will depend on your specific test environment.

- □ Navigate to Computer Configuration.
- □ Use the Group Policy Management Editor MMC snap-in to get directly to the target **Default Domain Policy** tree and choose **Edit...** from the context menu.
- □ Select Computer Configuration/<Policies>/Administrative Templates and select Add/Remove Templates from the context menu.
- □ Select Add and then browse to the install locations (e.g. **Program files\Boldon** James\Classifier Administration)
- Select the two ADM files and click Open followed by Close. The files add new entries below both the Computer Configuration and User Configuration Administrative Templates nodes.

You are now ready to apply Classifier control settings to ensure that the client products will obtain their configuration from the correct location and that users see the **All Users** Classifier policy. boldonjames.com



Select Computer Configuration / <Policies> / Administrative Template / (Classic Administrative Templates) / Boldon James / Label Configuration which will present the following settings:

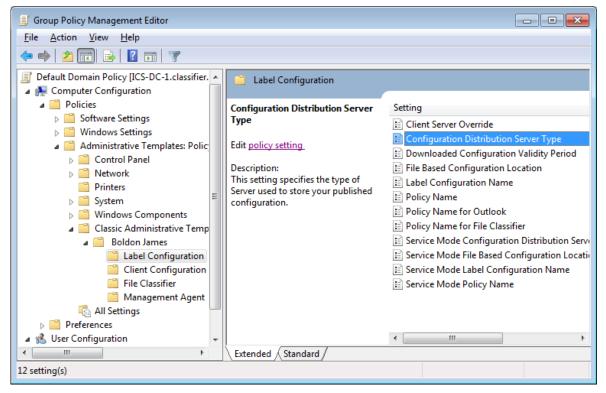


Figure 50: Set Configuration Distribution Server Type

Select Configuration Distribution Server Type and choose Edit Policy setting.

Configuration Dis	tribution Server Type		x
Configuration D	istribution Server Type	Previous Setting	
Not <u>C</u> onfigured	Comment:		*
Enabled			
Disabled	Supported on:		~
	supported on.		*
Options:		Help:	
file server or Active I	publish your configuration to a Directory to publish local Active Directory domain.	This setting specifies the type of Server used to store your published configuration.	•
		OK Cancel Apply	

Figure 51: Enable Configuration via File Store

Select File System from the drop down and click Enabled. Click OK



- □ Select File Based Configuration Location and choose Edit Policy setting
- □ Enter the master configuration folder (\\CT-SVR-1\Classifier Configuration).

File Based Configuration Location     Previous Setting     Not Configured     Comment:     E pabled     Disabled     Supported on:     Options:     Help:     Path where your configuration is stored.     \\ICS-SVR-1\Classifier Configuration     Specifies the path where your configuration will be stored when using file based configuration distribution.      OK      Cancel	🐠 File Based Configuration	Location		~
Not Configured Comment:     Enabled     Disabled     Supported on:     Help:  Path where your configuration is stored. ULICS-SVR-1\Classifier Configuration     Specifies the path where your configuration will be stored when     using file based configuration distribution.				~
Not configured a matrix           Enabled         Disabled         Supported on:           Options:         Help:           Path where your configuration is stored.         (\ICS-SVR-1\Classifier Configuration)         Specifies the path where your configuration will be stored when         using file based configuration distribution.	File Based Configuration	n Location	Previous Setting Next Setting	
Disabled         Supported on:         Options:       Help:         Path where your configuration is stored.         \UCS-SVR-1\Classifier Configuration         Specifies the path where your configuration will be stored when using file based configuration distribution.         *	○ Not <u>C</u> onfigured Com	iment:		n.
Supported on: <ul> <li>Options:</li> <li>Help:</li> </ul> Path where your configuration is stored.              Specifies the path where your configuration will be stored when using file based configuration distribution.             \\LCS-SVR-1\Classifier Configuration  <ul> <li>Image: Specifies the path where your configuration will be stored when using file based configuration distribution.         </li></ul>	Enabled			
Options:       Help:         Path where your configuration is stored.       Specifies the path where your configuration will be stored when using file based configuration distribution.         \\[\[\]\LCS-SVR-1\Classifier Configuration\]       Image: Configuration distribution distribution.			•	~
Path where your configuration is stored.         \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Subl	ported on:		
Path where your configuration is stored.         \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Options:		Help:	
using file based configuration distribution.				
VICS-SVR-1\Classifier Configuration	Path where your configurat	ion is stored.		^
OK Cancel Apply	\\ICS-SVR-1\Classifier Conf	figuration		
OK Cancel Apply				
OK Cancel Apply				
Cancel Apply				
OK Cancel Apply				Ŧ
			OK Cancel Apply	

Figure 52: Set location of Master Configuration (2008)

- Click OK.
- Now for the Current User settings Select User Configuration / <Policies> / Administrative Template / (Classic Administrative Templates) / Boldon James / Label Configuration.

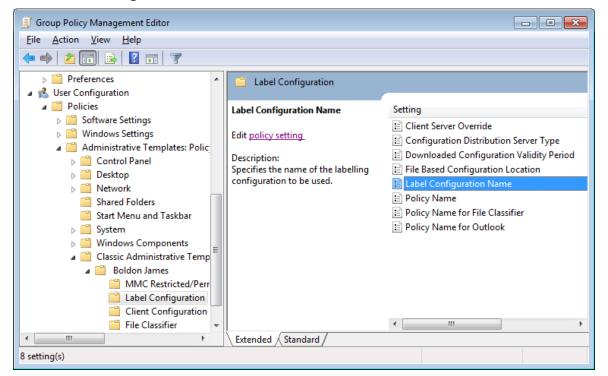


Figure 53: User Policy settings

Select Label Configuration Name and choose Edit Policy setting. boldonjames.com



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Label Configuratio	on Name						
Label Configurat	ion Name	[	Previous Settin	ng	<u>N</u> ext Setting		
Not <u>C</u> onfigured	Comment:						*
Enabled							
Disabled	Supported on:						*
Options:		Help:					Ŧ
Label Configuration	Name.	Specifies the	name of the la	abelling	onfiguration	to be used	. ^
Classifier test							~
				OK	Cance	el 🖉	pply

Figure 54: Label Configuration Name

- □ Enter Classifier test and click OK.
- □ Select Policy Name and choose Edit Policy setting.

Policy Name							
Policy Name			Previous Set	ting	<u>N</u> ext Setting		
<ul> <li>Not <u>C</u>onfigured</li> <li><u>E</u>nabled</li> <li><u>D</u>isabled</li> </ul>	Comment: Supported on:						* *
Options:		Help:					
Policy Name. All users		Specifies th configurati	e name of the	policy wi	hin the selec	ted labelling	
			(	OK	Canc	el <u>A</u> r	oply

Figure 55: Policy Name

### □ Enter All Users and click OK.

Note: This evaluation example does not use the Downloaded Configuration Validity Period.

The next section shows the registry keys created on the client.

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### 4.2.2.1 Client Registry Settings

**Note:** If you are using Group Policy and the relevant keys are not established, then running GPUPDATE /Force may be of assistance.

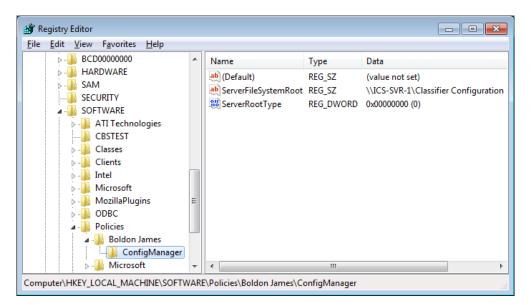


Figure 56: Local Machine settings

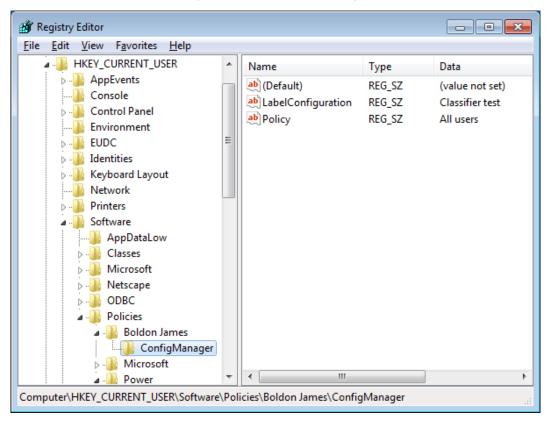


Figure 57: Current User settings

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## 5 VERIFY INITIAL CLIENT FUNCTIONALITY

The following section describes how to install Classifier Client products onto the PCs described in section 2. (CT-CL-1 and CT-CL-2, each with a test user account called **SalesUser1** and **SalesUser2** respectively).

## 5.1 Configure Client PC

To configure each client PC you must:

- □ Configure the client environments for CT-CL-1 / CT-CL-2 as detailed in section 2.
- □ Install the Classifier software (5.2 below)

### 5.2 Install Classifier

To install Classifier onto each client PC:

- □ Log on to the client PC as an administrator.
- □ From the Classifier Base Bundle open **Email and Office Classifier.** Open the **x64** or **x86** folder corresponding to your version of Microsoft Office and run **Setup.exe**.
- □ Follow the Classifier installation wizard steps to complete the installation.

We now need to configure the client environment to obtain the label configuration information. Setting Classifier Registry keys in accordance with section 4.2.1 or 4.2.2 directs clients to the label configuration. Ensure that the clients are re-started to pick up any Group Policy settings defined.

## 5.3 Confirm the installation of Classifier on the client PC

To verify the installation and operation of Classifier Client applications:

- □ Log onto CT-CL-1 as SalesUser1.
- □ Open a Word document and a new Outlook message.
- □ Check that a new document displays a header and footer values, and the Label selection interface.
- □ Check that Outlook shows the label selection interface.
- □ Log onto CT-CL-2 as SalesUser2 and repeat.

## 6 DEMONSTRATE FUNCTIONALITY CHANGES.

This section implements an additional Classifier feature to require users to select a Classification value when sending a message. This makes use of two additional aspects of Classifier configuration:

- Define a message for the user if they contravene the rule defined below.
- Establish mandatory selector rules for Outlook emails.

The section then demonstrates deployment of these changes to the users.

**Note:** Mandatory Label checks are application specific, so it is possible to demand a Classification for a message, but not require a Classification for a Word document for example.

### 6.1.1 Configure User Message

The template configurations include various pre-defined user messages that you can use, or modify to meet your requirements. The sequence below modifies a pre-defined message by way of example. Alternatively, you could use the **Add a new message** action to create a separate message for this purpose.

Select User Message Library to show the list of messages.

Classifier Administration ×	+		- 🗆 X
← → C () localhost/Home/In	ndex/		☆ 📀 😝 :
Classifier Administra	ation		CLASSIFIER\Classadmin Logout
✓  ☐ Classifier Administration	User Message Library (	(Configuration Default Language)	Actions
📹 Global Settings 🔚 Image Library	Create and modify messages that may be display	red on the client.	User Message Library ^
🧭 User Message Library	Message Name	Message Text	
Vser Interface Library	Prevent - Content search	Certain content within this mes	💛 Language
Labelling Configuration	Prevent - Excessive message recipients	The message addresses too ma	? Help
<ul> <li>Classifier test</li> <li>Selector Library</li> </ul>	Prevent - Invalid label	A required label element has n	Item ^
Marking Library	Prevent - Invalid label (OWA)	A required label element has n	Properties
Content Library	Prevent - Label change	An inappropriate change of lab	👎 Сору
Condition Library	Prevent - Label change (OWA)	An inappropriate change of lab	📮 Delete
Configuration Setting:	Prevent - Label mismatch	The following attachments hav	? Help
<ul> <li>Policies</li> </ul>	Prevent - Label mismatch (OWA)	The following attachments hav	
🕼 All users	Prevent - Maximum subject length	The subject length for this mes	
•	Prevent - Message size	The message is too big. Click 'B 👻	
Copyright © 2019 Boldon James Ltd.			Version 1.1.90.0

Figure 58: User Message List

□ Select the **Prevent – Invalid label** entry from the list. Choose **Properties**. This will show the default properties.

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		Properties	Σ							
<b>*</b>		details of the message that will be presented to your users. s used for reference within your configuration.								
	Name:* Prevent - Invalid label									
	You can ent Settings.	er different captions and for each language you have chosen in Global								
	Language:	Configuration Default Language	-							
	Title:	Invalid label								
	Message te	xt:								
		label element has not been selected. e label or click Back to continue editing.								
	Help URL:									

Figure 59: Prevent – Invalid label

- □ Change the first line of the Message text to the more specific "You must select a Classification value." Click OK.
- □ The message will appear in the summary list.

Classifier Administration X	+				– 🗆 X
← → C () localhost/Home/Ir	ndex/#				☆ 📀 😝 :
Classifier Administra	atior	ı			CLASSIFIER\Classadmin Logout
<ul> <li>Classifier Administration</li> </ul>	Use	er Message Library	(Configuration Default Language	e)	Actions
衛 Global Settings 🔚 Image Library	Create	e and modify messages that may be displa	yed on the client.		User Message Library
彦 User Message Library	I	Message Name	Message Text		
<ul> <li>User Interface Library</li> <li>Babelling Configuration</li> <li>Classifier test</li> <li>Selector Library</li> <li>Marking Library</li> <li>Content Library</li> <li>Condition Library</li> <li>Condition Settinge</li> </ul>	🥐 i	Prevent - Content search	Certain content within this mes	-	Language
	🦻 I	Prevent - Excessive message recipients	The message addresses too ma		2 Help
	🐶 F	Prevent - Invalid label	You must select a Classification		Item ^
	. 💓 F	Prevent - Invalid label (OWA)	A required label element has n	-	🦻 Properties
	🦻 F	Prevent - Label change	An inappropriate change of lab	1	🐺 Сору
	🦻 F	Prevent - Label change (OWA)	An inappropriate change of lab		🖳 Delete
	🦻 F	Prevent - Label mismatch	The following attachments hav		? Help
Y 🜆 Policies	🦻 F	Prevent - Label mismatch (OWA)	The following attachments hav		
🎯 All users		Prevent - Maximum subject length	The subject length for this mes		
		Prevent - Message size	The message is too big. Click 'B		
	🦻 F	Prevent - Minimum subject length	The subject length for this mes		
	<b>P</b>	Prevent - Recipient type	Certain recipient types within t	-	
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Figure 60: Classification Mandatory – message summary

### 6.1.2 Define Rule to Perform label validity checks for emails

#### □ Select Policies / All users

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- □ Choose Set Rules Tab and select Always
- Choose Add a rule to launch the Rules wizard. Click Next.
- □ Choose Outlook emails and click Next.
- □ Select Check rules from the Filter rule categories drop down
- □ Choose Check these mandatory selectors. Warn ....

Action Choice Select the action to complete your rule. Filter rule categories: Check  Select a Rule: Check these mandatory selectors. Warn if check fails with this message Check for label change and permit alteration. Warn if check fails with this message Check for the high-water mark of all attachments. Warn if check fails with this message Check clearance for attachments. Warn if check fails with this message Check clearance for recipients. Warn if check fails with this message Check clearance for originator. Warn if check fails with this message Check clearance for originator. Warn if check fails with this message Check subject length does not exceed these characters. Warn if check fails with this mess. Check message size including all attachments does not exceed these kilobytes (k Check number of recipients does not exceed these. Warn if check fails with this Check for these recipients. Warn if check fails with this message and Show hits Check content for this. Warn if check fails with this message and Show hits Check for these recipients. Warn if check fails with this message and Show hits Check for these recipients. Warn if check fails with this message and Show hits Check for these recipients. Warn if check fails with this message and Show hits Check for these recipients. Warn if check fails with this message and Show hits Check for these recipients. Warn if check fails with this message	
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Check number of recipients does not exceed these. Warn if check fails with this	
Check for these recipients. Warn if check fails with this message	-
check for these recipients, warn in check fails with this message	
Check for Reply to All response and Warn with this message	
Check for use of default label. Warn with this message	
Check with the user and Show Fix option. Warn with this message	
Check these selectors for expired dates. Warn with this message	
Check for additional recipients on reply or forward. Warn with this message	
Check for these unlabelled attachments. Warn if check fails with this message	

Figure 61: Classification Mandatory rule

Click Next

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Edit Rule	23
Rule Name:	
Check for mandatory selectors	
Edit the rule parameters (click the hyperlinks)	
Check Undefined mandatory selectors. Warn if check fails with Warn - Invalid label message	
Edit the rule prerequisite conditions	
There are no applicable prerequisites conditions.	
Back OK Cancel	

Figure 62: Check for mandatory selectors

- Click on the hyperlink called **Undefined**.
- □ Set Classification to **Mandatory** and Department to **Optional**.

Mandato	ry Selectors	5	23
Please select the permitted c	hanges for each sele	ector:	
Classification:	Mandatory	•	
📑 Department:	Optional	•	
Allow mutliple rules of th e.g. for more than one		ect selector	
ок		Cancel	

Figure 63: Choose Mandatory selectors

Click OK.

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Click on the Warn hyperlink and select **Prevent**.



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Action		23
Select the action to take if the check fails.		
Warn 🗸	Options	
Warn	Cancel	
Prevent	Cancer	
Audit only		
Challenge		

Figure 64: Advise User - Prevent

- Click OK
- □ Click on the Warn Invalid Label hyperlink and select Prevent Invalid label from the drop down list. Then click OK

	User Message	23
Sel	lect the message to be used.	
Pr	event - Invalid label	-
Pr	revent - Content search	
Pr	revent - Excessive message recipients	
	revent - Invalid label	
e i Pr	revent - Invalid label (OWA)	
e a Pr	revent - Label change	
Pr	revent - Label change (OWA)	
Pr	revent - Label mismatch	-

Figure 65: Message for Classification Mandatory rule

□ The rule definition shows the updated settings.

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Edit Rule	23
Rule Name:	
Check for mandatory selectors	
Edit the rule parameters (click the hyperlinks)	
Check Classification mandatory selectors. Prevent if check fails with Preve Invalid label message	ent -
Edit the rule prerequisite conditions	
Edit the rule prerequisite conditions There are no applicable prerequisites conditions.	
Edit the rule prerequisite conditions There are no applicable prerequisites conditions. Back OK Can	cel

Figure 66: Updated rule definition

- □ Set the rule name to Classification mandatory
- Complete the wizard by clicking **OK**

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### 6.1.3 Disable Show the label dialog when mandatory label

The **Prevent – Invalid label** message used will not appear if the **Show the label dialog when** mandatory label option is set.

- □ Select Configuration Settings.
- □ Open Classifier Application settings.
- □ Select the **Outlook Settings** tab.
- Disable Show the label dialog when mandatory label.

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Custom format for 'Label' column		-
Ensure attachment markings are consistent	Enabled	-
Ensure label dominates all portion markings	Enabled	-
Folder View Column populate on startup	Disabled	-
Include embedded images when performing attachment checks	Enabled	-
McAfee Host DLP marking		-
McAfee Host DLP scan	Disabled	-
Portion Marking	Disabled	-
Search for Outlook Item Properties that match email label locations	Disabled	-
Show Classifier on ribbon when reading	Enabled	-
Show label dialog on Send	Default	-
Show label dialog style	Single Click when configured	-
Show label dialog when mandatory label	Disabled	-
Show Summary Marking in task pane	Enabled	-
Use default label when replying to unmarked emails	Enabled	-
Use From field for Originator Clearance	Disabled	-
Warn if file contents cannot be accessed	Disabled	-
splay the label dialog when mandatory label has not been supplied.		

Figure 67: Disable Show the label dialog when mandatory label

### 6.1.4 Demonstrate the additional features

We must publish the configuration changes and then test the clients to check the effect.

- Select Classifier Administration. Choose Publish Configuration. Choose File Store. Set the publish reason to Classification Mandatory and click OK.
- Click **OK** on the confirmation dialog.
- □ Logon to CT-CL-1 as Salesuser1.
- Start Outlook and compose a new message setting the Classification to **blank**.
- □ Click **Send**. The validity check will trigger and present the following dialog displaying the configured message.

#### UM645200

🢁 test - Policy Check	
This is a summary of the checks performed by your labelling policy. The current label is shown below, please click if you wish to edit.	
No Marking	
Invalid label	
You must select a Classification value. Change the label or click Back to continue editing.	Change
	Back Continue

Figure 68:: You must select a Classification

- □ [The above dialog does not appear if **Show the label dialog when mandatory label** is Enabled].
- □ Click the **Change** button that will present the following dialog allowing the user to supply a value for Classification.

🥂 Classifier Label		×
Select label value	S	
Classification	-	<b>*</b>
Department (		·
	No Marking	
Clear Default	ОК	Cancel

Figure 69: Select a label

- Choose **Public** and click **OK**.
- □ A Policy resolution dialog will then appear.

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💁 test - Policy Check	<b>•••</b>
This is a summary of the checks performed by your labelling policy. The current label is shown below, please click if you wish to edit.	
Public	
Resolved policy issues (SETTINGS)  Policy resolution has completed.	
Don't show confirmation again	Back Continue

Figure 70: Policy resolution

- □ [The above dialog does not appear if **Show the label dialog when mandatory label** is Enabled].
- Click **Continue** and message submission will now proceed.

## 7 EMAIL DOMAIN CLEARANCES

This section shows you how to use Classifier Clearance checking features to limit the label values that external email recipients can receive.

An Email Domain Clearance defines a set of security attributes (label values) and an address space. Addresses that match the address space have permission to receive emails labelled for the designated label values.

The sequence requires the following:

- Ensure Clearance Check Email Domains is enabled
- Configure an Email Domain Clearance for an external domain
- Establish a Rule to perform recipient Clearance Checks when sending emails.
- Locally test the changes
- Publish the configuration changes and test the Client environment

The example creates one new Email Domain Clearance for an email domain called **abc.xyz**. The email domain does not exist, but we can demonstrate the mechanisms to the point of receiving a Non-delivery notification.

### 7.1 Ensuring Clearance Check Email Domains is enabled

**Global Settings/Application Settings/Clearance Check Email Domains** has two effects if enabled:

- It directs the Email Classifier to perform Clearance Checks on external recipients when sending an email.
- It controls use of Clearance Settings/Email Domain Clearance within Classifier Administration.
  - Select Global Settings and select Application Settings.
  - Set Clearance Check Email Domains to the Enabled option.

### 7.2 Configure an Email Domain Clearance

Using Classifier Administration

Select **Email Domain Clearance** in the left hand pane.

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			— П X
Classifier Administration X	+		
← → C ③ localhost/Home/I	ndex/#		☆ 📀 🖯 😁 🗄
Classifier Administra	ation		ALLEN4\Administrator Logout
🗟 Classifier Administration	Email Domain Clearances		Actions
📬 Global Settings 🔄 Image Library	View and modify the Email Domain Clearar	nce entries in your configuration	Email Domain Clearances
🌮 User Message Library 🌄 User Interface Library	Email Domain		Add a new email domain clearance
Jabelling Configuration	No data	to display	
<ul> <li>Classifier test</li> <li>Selector Library</li> </ul>			
📴 Marking Library 🔍 Content Library			=
Condition Library	Elements		
<ul> <li>Zim Policies</li> </ul>	Displays the allowed label elements for the	Clearance currently selected above.	
All users	Selector Names	Clearance Elements	
<ul> <li>Clearance Settings</li> <li>Email Domain Clearances</li> </ul>	No data	to display	
Copyright © 2019 Boldon James Ltd.			Version 1.1.90.0

Figure 71: Email Domain Clearance

### Choose Add a new email domain clearance.

Add Email Domain Clearance	23
Choose the selector values allowed in this clearance.	
Name: 🗖 Include subdomains	
abc.xyz	
Elements:	
✓ □ Classification	-
Public	
Internal	
Confidential	
✓	
Sales	
Engineering	
Board	
Figure 72: Setting Email Domain Clearance	

□ Enter the name of the email domain that you wish to associate a clearance. For example, **abc.xyz**.



- □ Select the default clearance for the domain. In this example, we will choose Classification / Public.
- □ Complete the form and the email domain clearance entry will appear as follows:

Classifier Administration ×	+		- 🗆 X
$\leftrightarrow$ $\rightarrow$ C (i) localhost/Home/Ir	ndex/#		☆ 📀 🛛 🔂 🗄
Classifier Administra	ition		CLASSIFIER\Classadmin Logout
<ul> <li>Classifier Administration</li> <li>Global Settings</li> <li>Image Library</li> <li>User Message Library</li> <li>User Interface Library</li> <li>Labelling Configuration</li> <li>Classifier test</li> <li>Selector Library</li> <li>Content Library</li> <li>Content Library</li> <li>Configuration Settings</li> <li>Configuration Settings</li> <li>Policies</li> <li>All users</li> <li>Clearance Settings</li> <li>Email Domain Clearances</li> </ul>	Email Domain Clearances View and modify the Email Domain Clearan Email Domain abc.xyz (and all subdomains) Elements Displays the allowed label elements for the Selector Names Classification Department	• •	Actions Email Domain Clearances
Copyright © 2019 Boldon James Ltd.		I	Version 1.1.90.0

Figure 73: Email Domain Clearance summary

7.3 Establish Rule to perform recipient clearance checks when sending email

### 7.3.1 Establish a Message for use in the Rule

In this example, we shall use a pre-defined message.

Select User Message Library and select the Warn – Unapproved recipients message. Choose Properties to view the default configuration. Click Cancel.

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¥=		e details of the message that will be presented to your users. is used for reference within your configuration.	
	Name:*	Warn - Unapproved recipients	
	You can ent Settings.	ter different captions and for each language you have chosen in Global	
	Language:	Configuration Default Language	-
	Title:	Unapproved recipients	
	Message te	xt:	
	message te		
	-	ing recipients are not approved to receive a message with this label.	
	-		
	-		
	-		
	-		
	The followi		
	The followi		

Figure 74: Warn - Unapproved recipients message

### 7.3.2 Establish Recipient Clearance Check Rule

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- □ Select Policies / All users / Set rules.
- □ Select Always and choose Add a rule.
- □ In the Rules Wizard choose **Outlook emails** and choose **Check rules** from the **Filter rule categories** drop down.
- □ Select the Check clearance for recipients... rule.
- □ Leave both the Warn user level and the Warn Unapproved recipients placeholder unchanged.

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	Edit Rule	23
Rule Name:		
Check recipient clearan	ce in the second se	
Edit the rule parameters	(click the hyperlinks)	
Check clearance for re recipients message	cipients. Warn if check fails with Warn - Una	pproved
Edit the rule prerequisite	e conditions	
	e conditions e prerequisites conditions.	
Edit the rule prerequisite There are no applicabl		Cancel

Figure 75: Recipient clearance check rule

- Leave the rule name unchanged (Check recipient clearance).
- Click **OK** to complete the Rule wizard

### 7.3.3 Locally test the changes

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Devision Publish the test configuration by following the steps in section 3.7

Publis	h Test Configuration	23
*	Provide a name for the Test Session Configuration: Test Configuration (04-16-2019_03-51-06-PM)	
	Test Mode Publish Reason: Evaluation configuration	
	The configuration can then be retrieved using the 'Test Mode Adminstrato tool.	

Figure 76: Test the changes

- □ Ensure that all Office (Word, Excel, PowerPoint and Outlook) applications are closed.
- □ From the Test Mode Administration tool select the appropriate configuration and click **Run Test**. Leave the Test Mode dialog open.



- Start Outlook and draft a new message addressed to <u>another@abc.xyz</u>.
- Select Classification / Internal and click Send.
- □ The recipient checks will be performed and a Policy Check dialog will appear:

05	💁 test - Policy Check 🧮					
	Thi The	s is a summary of the checks performed by your labelling policy. e current label is shown below, please click if you wish to edit.				
		Internal				
	Unap	proved recipients				
	<u> </u>	The following recipients are not approved to receive a message with this label. Remove another@abc.xyz				
		Click for more information 🔍				
		Back Continue				

Figure 77 Recipient clearance check effect

- □ Click on the **label bar** (showing Internal) and change the Classification to **Public**. Click **OK**.
- □ A policy resolution message will appear. Click **Continue** to submit the message.
- **Close** Outlook.
- □ Click **Exit test** on the Test Mode dialog.

### 7.4 Publish the configuration and test the client environment

- □ Select Classifier Administration. Choose Publish Configuration. Set the Publish Reason to Recipient Check and click OK to publish.
- Acknowledge the confirmation dialog.
- □ Logon to CT-CL-1 as SalesUser1.
- □ Ensure that all Office (Word, Excel, PowerPoint and Outlook) applications are closed.
- □ Start Outlook and draft a new message addressed to <u>another@abc.xyz</u>.
- □ Select Classification / Internal and click the Send button to see figure 77. Proceed as in the previous section.

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## 8 ACTIVE DIRECTORY CHANGES

To publish Configuration via Active Directory as described in the subsequent sections requires an update to the Active Directory schema.

### 8.1 Extend the Active Directory Schema

**Note:** For Windows Server 2003 environments: In order to extend the schema, the user logged on to CT-SVR-1 should have permission to write to the configuration container and the schema using ADSI Edit. Install the Windows Server 2003 Administration Tools Pack (adminpak.msi) on CT-SVR-1. The schema extension also requires LDIFDE.EXE to be available which may only be available by default on a Domain Controller system.

**Note:** For Windows Server 2008 run Server Manager and add role "Active Directory Domain Service" then "Active Directory Lightweight Directory Services".

- From the Classifier Base Bundle open the Classifier Administration Server folder and then the Active Directory Schema Extensions sub-folder. Run BJ Schema Extension.msi (or Setup.exe)
- From the Start menu on CT-SVR-1, Run Classifier Schema Extension from the Boldon James folder.

### Note: Extending the schema is a non-reversible operation.

📴 Boldon James S	Schema Extension	<b>—</b>
Click Start to exter	nd the Schema	Start
Schema Master:	CT-DC-1.classifier.test	
Schema DN:	CN=Schema,CN=Configuration,DC=classifier,DC=test	Edt
Schema Version:	Schema Not Yet Updated	

Figure 78 Schema extension

- Click **Start** to update the schema.
- The tool will update the Active Directory schema and show a confirmation dialog click OK. Click Exit

## 9 DEPLOY CONFIGURATION VIA ACTIVE DIRECTORY

After extending the Active Directory schema, it is possible to Publish Classifier Configuration via Active Directory rather than shared file store. Changing from publication via File Store to publication via Active Directory involves two steps:

- Publish the Configuration to Active Directory
- Changes to direct the client to retrieve configuration information from AD rather than a File Store location.

## 9.1 Publish Configuration to Active Directory

- □ We are changing from Publication via File Store to Publication via AD, so we will first retrieve the current master configuration from its File Store location.
- □ Logged on to CT-SVR-1 as Administrator, from the start menu run **Boldon James /** Classifier Administration Server.
- □ Select Classifier Administration and choose Get Server Configuration.

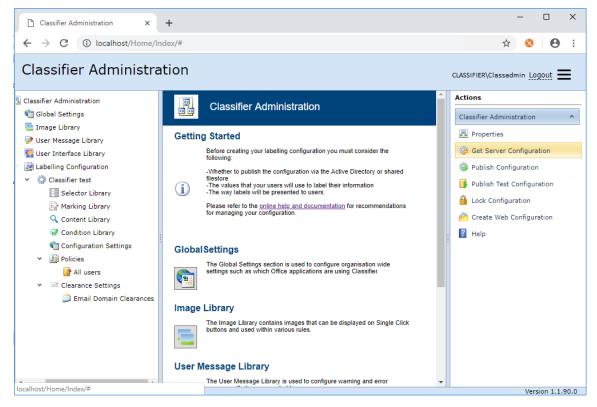


Figure 79: Get Server Configuration

- Click **Yes** on the confirmation dialog
- Choose the File store location
- □ You can now publish the master configuration to Active Directory.
- □ From Classifier Administration, select the Classifier Administration node and choose Publish Configuration.
- □ Change the destination from File Store to Active Directory as shown below, and enter a reason of "Publish to AD".

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Publis	h Configuration	23
*	Select where the configuration should be published.    Active Directory   File store  Publish reason:  Publish to AD	
	OK Cancel	

Figure 80: Publish Configuration to Active Directory

- □ Click **OK** to complete the action.
- Click **OK** on the Publish complete confirmation

### 9.2 Change Registry Settings for Configuration Location

Follow the appropriate sub-section below depending upon whether you are currently setting Registry Keys directly (you followed 4.2.1), or you are using Group Policy (you followed 4.2.2) to set Registry Keys.

### 9.2.1 Change Registry Directly

□ Change the ServerRootType to 1 (This value sets the Configuration via Active Directory)

💣 Registry Editor			_ 🗆 X				
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>H</u> elp							
b Wow6432Node ▲	Name ab (Default)	Type REG_SZ	Data (value not set)				
Image: Classifier Admin         Image:	LabelConfiguration	REG_SZ REG_SZ REG_DWORD	Classifier test All users 0x00000001 (1)				
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Boldon James\ConfigManager							

Delete the **ServerFileSystemRoot** entry to avoid confusion.



### 9.2.2 Setting Registry using Group Policy

The precise sequence will depend on your environment. The actions below assume that you have already applied the ADM files supplied with the product (see <u>Set the Registry</u> <u>using Group Policy</u>).

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- You can use the Group Policy Management Editor MMC snap-in to get directly to the target tree.
- Select Computer Configuration / <Policies> / Administrative Template / Boldon James / Label Configuration which will present the following settings:

Group Policy Management Editor		
<u>File Action View H</u> elp		
🗢 🔿 🖄 🖬 🗟 🖬 🝸		
<ul> <li>Default Domain Policy [CT-DC-1.classif:</li> <li>Computer Configuration         <ul> <li>Policies</li> <li>Software Settings</li> <li>Mindows Settings</li> <li>Administrative Templates: Policie</li> <li>Control Panel</li> <li>Network</li> <li>Printers</li> <li>System</li> <li>Classic Administrative Templ</li> <li>Classic Administrative Templ</li> <li>Classic Administrative Templ</li> <li>Classic Administrative Temp</li> <li>All Settings</li> <li>Vere Configuration</li> </ul> </li> </ul>		Setting Client Server Override Configuration Distribution Server Type Downloaded Configuration Validity Period Email Policy Name File Based Configuration Location Label Configuration Name Policy Name
✓ III → 7 setting(s)	Extended Standard /	
, second(s)		

Figure 82: Set Configuration Distribution Server Type

Note: This evaluation scenario does not utilise the Downloaded Configuration Validity Period setting.

- □ Select Configuration Distribution Server Type and choose Edit Policy setting (or Properties under 2003).
- Select Active Directory from the drop down and check the Enabled option is set. Click OK

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Configuration Dis	tribution Server Type	
Configuration D	stribution Server Type	Previous Setting
Not <u>C</u> onfigured	Comment:	A
<ul> <li><u>Enabled</u></li> <li><u>D</u>isabled</li> </ul>		*
	Supported on:	A 7
Options:		Help:
file server or Active [	publish your configuration t Directory to publish local Active Directory domai	published configuration.
		OK Cancel Apply

Figure 83: Enable Configuration from Active Directory

□ Select File Based Configuration Location and check the Not Configured option is set. Click OK.

🍜 File Based Configu	ration Location					_ 🗆 🗙
File Based Config	uration Location			Previous Setting	Next Setting	
In Not <u>Configured</u> ○ <u>Enabled</u> ○ <u>Disabled</u>	Comment: Supported on:					4 V 4
Options:			Help:			
Path where your conf	iguration is stored	L		e path where your co ased configuration di	nfiguration will be store stribution.	d when
				ОК	Cancel	Apply

Figure 84: Disable File store location

After a policy update, check the following registry keys have changed on the client:



#### 9.2.2.1 Changed Client Registry Settings

**Note:** If you are using Group Policy and the relevant keys are not established, then running **GPUPDATE /Force** may be of assistance. In addition, check that the domain recognises the client machine - removing and re-introducing the client can resolve this issue.

💣 Registry Editor				
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites <u>H</u> elp				
<ul> <li>HKEY_LOCAL_MACHINE</li> <li>BCD0000000</li> <li>HARDWARE</li> <li>SAM</li> <li>SECURITY</li> <li>SOFTWARE</li> <li>SOFTWARE</li> <li>Boldon James</li> <li>BrowserChoice</li> <li>CBSTEST</li> <li>Classes</li> <li>Clients</li> <li>Intel</li> <li>Microsoft</li> </ul>	A E	Name (Default) ServerRootType	Type REG_SZ REG_DWORD	Data (value not set) 0x00000001 (1)
<ul> <li>MozillaPlugins</li> <li>ODBC</li> <li>Policies</li> <li>Boldon James</li> <li>ConfigManager</li> </ul>	Ŧ	< III		•
Computer\HKEY_LOCAL_MACHINE\SOFTWAR	RE/P	olicies\Boldon James\Co	nfigManager	.d

Figure 85: Changed Local Machine Settings