



User Guide
File Classifier

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About File Classifier

File Classifier extends the capability of Windows Explorer to allow users to assign Classifications to files. File Classifier uses the Classifier Policy defined for the current user. The Policy includes rules and constraints on how the users use the product. See the Classifier Administration Server User Guide on how to configure a Policy.

About this Guide

This guide summarises the features supported by File Classifier.

Installing File Classifier

The product can be deployed across a system using the usual Group Policy mechanisms. From release 3.10, File Classifier can retrieve its configuration information via Classifier Management Agent. See the Classifier Administration Server User Guide for more information. File Classifier is a separate product within the Classifier Family and requires that a File Classifier licence be applied to the Classifier Configuration.

To install File Classifier:

1. Open the File Classifier folder, and from the folder of your operating system type, run **Setup.exe**.
2. Follow the installation prompts.
3. Restart your machine to make your features available.

NOTE:

Explorer.exe stays running in the background (using the Classifier Configuration available at the start) even if the user closes the Explorer window. As a consequence:

- Changes made to the published Classifier Configuration will only be picked up by File Classifier at the next login.
- Test Mode / Test Publications cannot be used with File Classifier.

Enabling Labelling for Office Applications

1. From Classifier Administration, select Global Settings.
2. From the Actions pane, select Properties under Applications Settings.
3. Set any Office application to **Enabled**, and click **OK**.

Using File Classifier

For many file types, File Classifier uses the Classifier Plugins to update the actual object in a consistent manner. For files not supported by plug-ins (for example, text files), the label can only be stored in an Alternate Data Stream (ADS). See [Working with Classifier Applications](#).


You can classify one or more file types subject to the following limitations:

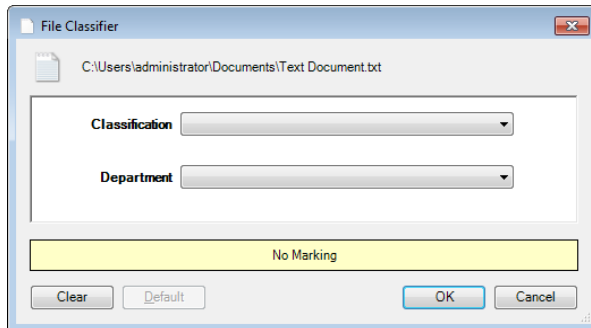
- Attempts to label Visio files fail unless “Use Alternate Data Stream (ADS) for Visio files” is enabled.
- CAD files cannot be labelled using File Classifier.
- You cannot classify a file that:
 - is Read-Only.
 - is currently open.
 - is a zero-length Word document established using New / Microsoft Office Word document in Explorer. This can also apply to New / Microsoft PowerPoint presentations created via Explorer in some environments.
 - is an empty New / Microsoft PowerPoint presentation or New/ Microsoft Excel Worksheet created via Explorer that appears to have been classified correctly using File Classifier; but when the file is opened with its relevant application, no Classification value appears. This can occur in environments such as Vista with Office 2007.
 - is an image file that has a ‘custom document property’ defined in doclabeller2, or the Label location contains ‘white space’ (this is a limitation of the plug-in that supports these operations).
 - is a PDF file that is configured to protect metadata from programmatic access.
 - has a ‘full lock’ set on the file by a PDF viewer (for example, within a mail of Explorer preview pane). In such circumstances, File Classifier will be unable to label the file until the preview is closed.

Selecting a label

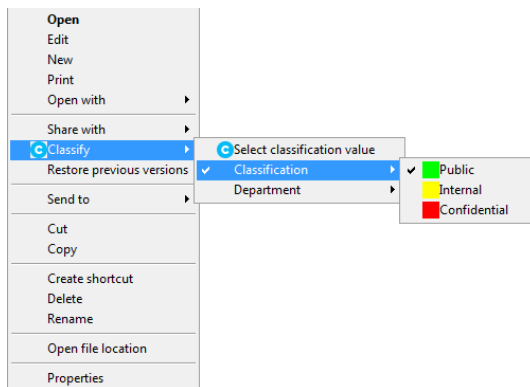
NOTE: On operating systems prior to Windows 7 (and Server 2008 R2), the Classify context menu action will become the default action for file types that don't have their own default menu action. This effect is outside the control of File Classifier on those operating systems. Similarly, the position of the Classify action within the context menu varies between operating systems and may appear without the Classifier icon at the start.

To select a label:



1. Right-click a file and select  **Classify**.
2. Select the Classification and any other options as defined by your Classifier Policy.
The way you select the Classification is defined in your Policy, by either using the File Classifier dialog box that appears:



or using the context menu:



See the Classifier Administration Server User Guide for more information on how to configure selectors in a Policy.

File Classifier can apply an Icon Overlay  in Explorer to indicate that the file has been 'Classified'. File Classifier can also vary the Overlay used (Colour ) to reflect the value of the first 'Classification' element by using the colour associated with the relevant 'Classification' element value. Thus, File Classifier may require one Overlay Icon per 'Classification' value configured plus one for the default Overlay.

Limiting Icon Overlays

The number of Icon Overlays supported by the system is strictly limited (but no warnings are generated if the limit is exceeded), and other installed applications may also have registered one or more overlays.

If more Overlays are registered than the system supports, File Classifier Icon Overlays may not operate as expected, or the operation of other applications with overlays registered may be disrupted.


By default, Classifier instantiates six Overlays (5 + 1 for the default). The Icon Overlays currently registered can be found under:

HKLM\Software\Microsoft\Windows\CurrentVersion\Explorer\ShellIconOverlayIdentifiers

And for 64-bit environments:

HKLM\Software\Wow6432Node\Microsoft\Windows\CurrentVersion\Explorer\ShellIconOverlayIdentifiers


An install time option (OVERLAYCOUNT) is provided to set the number of additional overlays (0, N, or NONE) to be registered, where:

0	Only the default overlay () is registered which will be displayed for any file classified by File Classifier.
N	The number of additional Overlays (1 - 9) to be registered. If the OVERLAYCOUNT option is omitted, then the default value is 5.
NONE	No overlay icons are registered or used (not even the default overlay).

For example, if your policy only has three values for the first selector, then set the OVERLAYCOUNT to 3:

```
msiexec /i FileClassifier<32/64>.msi OVERLAYCOUNT=3
```

NOTE: You can manage the Icon Overlays registered for other applications using the policy mechanisms described in <http://technet.microsoft.com/en-gb/library/cc753092.aspx>

A Registry setting UseSingleColour can be used to cause File Classifier to only use a single colour (the default ) of the overlay. This option will leave the relevant number of Overlays registered, but it can be used as an interim change prior to using the OVERLAYCOUNT installation option. The default (if the setting is not defined) is that File Classifier will attempt to use all multiple overlays to reflect the colours associated with the first selector value.

The UseSingleColour setting is defined within the FileClassifierConfig.ADM and FileClassifierConfigPerUser.ADM files installed as part of the Classifier Administration product. See the Classifier Administration Server User Guide for more information.

Limiting the number of files that can be classified

The number of files that a user may classify at once can be controlled by a Registry setting (SelectableFilesLimit). If the setting is not defined, then no limit is applied.

This registry setting is defined within the FileClassifierConfig.ADM and FileClassifierConfigPerUser.ADM files installed as part of the Classifier Administration (Server) product. See the Classifier Administration Server User Guide for more information.

File errors

If one or more files fail a Policy check while classifying them, an error dialog appears indicating what the issues are. Select one or more files from the list and click **Fix**. Fixed items are removed from the list.

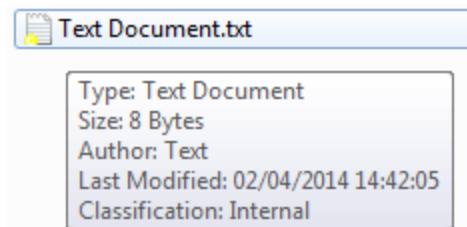
Changing and Removing the Label

You can change a label at any time, subject to any check for label change rules. If you change the label using the primary application (e.g. Microsoft Word), the icon overlay and 'infotip' will be updated automatically by Explorer.

If configured for no label, you can remove a label by right-clicking a file, then selecting Clear from the File Classifier dialog box.

Infotips

You can hover over a labelled item to display a popup that includes information about the file, including its classification.



NOTE: Infotips are not supported for Visio files unless “Use Alternate Data Stream (ADS) marking” setting is Enabled. Infotips do not appear for CAD .DWG files as an application specific shell extension takes precedence.

Auditing Options

File Classifier auditing is controlled via the following settings:

- File label addition
- File label removal
- File label change

See the Classifier Administration Server User Guide for more information.

Working with Classifier Applications

File Classifier uses the same label information as Office Classifier and CAD Classifier (Classifier 'private' label property and Label Locations) when reading labels from supported file types (such as, Microsoft Word, Excel, PowerPoint, and Project).

NOTE: More information on the use of labels by and propagation of labels between Classifier applications can be found in Classifier Administration Server User Guide.

Using File Classifier to apply a label value to, for example, a Word document will update the Classifier 'private' label property, but effects on Classifier Markings will only be applied the next time the document is opened using the relevant Microsoft Office application.

By default, File Classifier will set a property indicating to Office Classifier that the current markings may not match the label value. This will cause Office Classifier to automatically update the markings the next time the document is opened. You can change the default File Classifier settings. See the Classifier Administration Server User Guide for more information.

NOTE: Markings may be refreshed using the label applied by File Classifier if the document is printed or saved.

File Classifier applies a Boldon James Label value to PDF and ZIP files (PDF as a custom property / ZIP as the comment). These label values can be accessed by Email Classifier to perform High Water Mark checks for instance.

NOTE: When File Classifier stores a label on a PDF file, it modifies the file. The effects may vary depending on when and how the PDF was originally written. As a minimum, a Classifier defined custom property is added. For older files, this might indirectly cause insertion of a whole PDF Metadata block, and effectively update the PDF structure to a newer standard. Note that the PDF version and Producer properties are not modified by File Classifier.

For JPG files, HTML files, and Open Office documents (or other types supported subject to the additional configuration of Classifier plug-ins under guidance from Classifier support), File Classifier applies a Boldon James Label value as a custom property to the file. These label values can subsequently be accessed by Email Classifier to perform High Water Mark checks for instance.

NOTE: Support for these file types requires additional configuration of Classifier plug-ins under guidance from Classifier support. Be aware that the plugin for DXF/DWG files only supports reading of Boldon James Label values.

Classifier only supports Microsoft Project and Visio 2010 and later versions.

Setting the Alternate Data Stream (ADS) for Visio

VISIO files cannot be labelled using File Classifier, although you can set the “Use Alternate Data Stream for Visio files” if required.

For other file types (for example, TXT), File Classifier stores label information in an NTFS Alternate Stream which is not used by Office, Email Classifier, OWA Classifier, or SharePoint Classifier.

NOTE: You can disable the use of the Alternate Date Stream for unsupported files types using the Use Alternate Data Stream (ADS) marking setting. If the option is disabled, the Classify action will not appear when a single (unsupported) file is selected. If multiple files are selected (mixed supported and unsupported), the unsupported files will be skipped.

Alternate Data Stream Limitations:

- Moving a file labelled by Power or File Classifier (but not supported by Office Classifier) to a non-NTFS location (such as a memory stick) will lose the additional ADS information. The file will then be unlabelled.
- Email Classifier will not perform High Water Mark checking on Power and File Classifier labelled files that use the Alternate Stream mechanism, nor include such files in Attachment Lists as the Alternate Stream information is unavailable in that environment.
- Office Classifier will only detect label values stored in standard Office Classifier locations. For example, opening a .TXT file using Word will not detect any File Classifier Alternate Stream Label and the file will be treated as unlabelled.

Operational Notes

1. Outlook cannot access an alternate data stream label (because it has no route to the source file). So Outlook will not perform high-water mark checking on File Classifier labelled files unless there is also a standard Classifier label value available, and Outlook will not include File Classifier labelled files when constructing Attachment Lists.
2. There is no way of displaying the label value in an Explorer column, but the [Infotips](#) feature will display any classification value.
3. Office Classifier will only detect label values stored in standard Classifier locations. For example, opening a .TXT file using Word will not detect any File Classifier Alternate Data Stream (ADS) Label and it will treat the file as unlabelled. Office Classifier will detect File Classifier-applied labels for Excel, PowerPoint, Project, and Word files because File Classifier will apply a Classifier Label.
4. Moving a file labelled by File Classifier (but not supported by Office Classifier) to a non-NTFS location (for example, a memory stick) will lose additional ADS information. The file will then be unlabelled.
5. If the File Classifier licence expires, the Classify action will result in a licence expired dialog. Any existing Label icons applied will remain visible.
6. The overlay icon added by File Classifier may remain visible after File Classifier has been uninstalled. A session re-start or even a re-boot may be required to correct the situation.
7. In XP environments, the overlay icon added by File Classifier may persist after the label value has been removed (all selectors set to blank). Pressing F5 will usually correct the display.
8. The File Classifier may display the overlay icon in Explorer (indicating that a file is labelled) but present no label (all selectors are blank). This is because the stored label value cannot be interpreted using the current configuration. This might arise after you have changed the Classifier Configuration and deleted a selector value.
9. When File Classifier labels a ZIP file, it labels the ZIP container file, not any files within the .ZIP. Similarly, viewing a label of a .ZIP file using File Classifier takes no notice of any encapsulated documents labelled by the Classifier Client.
10. If you change the label of a document (for example, a Word document) using File Classifier, and then open the document under Office Classifier, the label in various fields (for example, Header/Footer) will not reflect the changes until you perform an action that will trigger an appropriate refresh of the various fields (for example, Save).
11. The overlay icon may not be visible for files with very long (path) names.
12. Installing updates of applications may re-establish additional overlay icons after you have 'managed' your [overlay icons](#) to achieve an acceptable operational state.
13. When File Classifier is opened in Windows Explorer to present Icon Overlays indicating the label, File Classifier has to open each item to determine the label. This can take a long time if large files are involved.

Set the Maximum file size for icon overlay (in KB) setting can be used to limit the effects. See the Administration Console Guide for more information.

Use the EnableFileLabelCaching option so the File Classifier can store a copy of the label in an Alternate Data Stream (for All file types) facilitating faster access the next time. File Classifier will not change the 'last modified time' when caching label values. See the Administration Console Guide for more information.

NOTE: However, in some non-NTFS environments (for example, 'NetApp ONTAP'), the action to preserve 'last modified time' does not work and all files accessed have a modified time set to the current date/time.

14. Applying headers and/or footers in Excel via Classifier rules can have a performance impact. This is because each time the header/footer is changed for each Worksheet, Excel communicates with the default printer. Updating of headers/footers can be enabled or disabled via the Apply Headers/Footers when label is changed and Apply Headers/Footers when workbook is saved. When printing a workbook, the headers/footers will always be updated (according to any applicable rules); you cannot disable this.
15. When you have multiple workbooks open in Excel 2013 or later, the ribbon for any inactive workbooks displays the label of the active workbook. When you select one of these non-active workbooks, the ribbon will update itself to show the correct label.