

# Classifier Getting Started Guide

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Gold  
Microsoft Partner



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Customer Documentation

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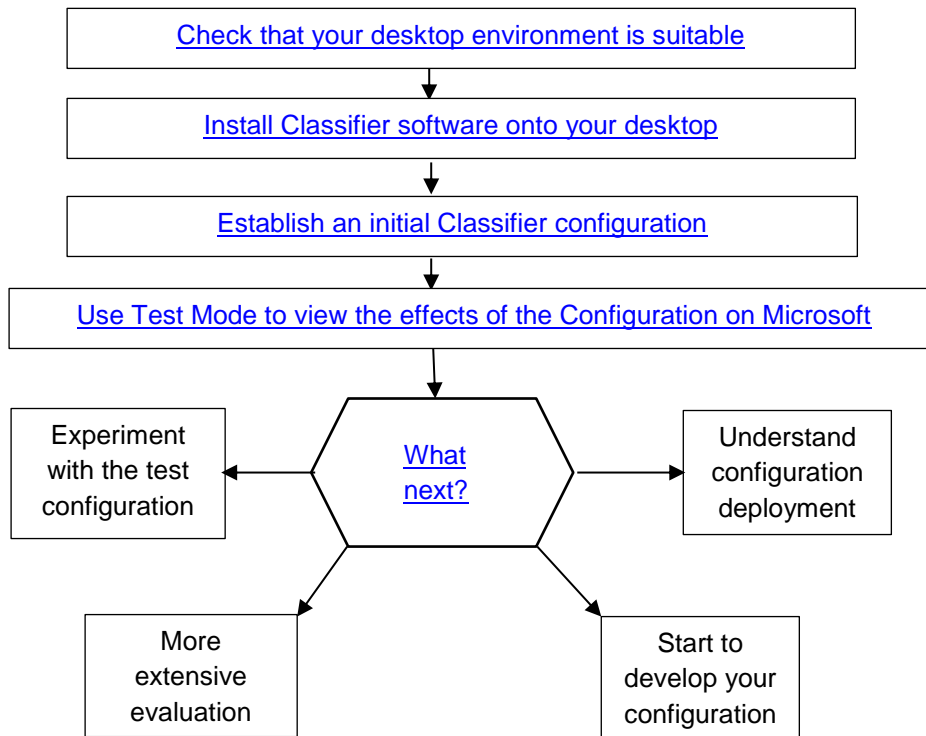
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# 1 INTRODUCTION

This document is intended for those who wish to quickly gain an initial understanding of the Classifier administration interface and the end user experience. Only a Windows® desktop environment is required.

A description of Classifier terminology and an overview of the various Classifier Products and components can be found in the **Suite Overview** document.

This guide has the following steps:



# 2 GETTING STARTED

## 2.1 Check that your desktop environment is suitable.

A suitable Microsoft Windows environment is required, along with the following:

- Microsoft .Net framework 3.5 and 4.0
- MMC 3.0 on Windows (Classifier Administration)

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Note: You should consult the Classifier Administration and Email and Office Classifier Release Notes for definitive information with regard to windows and Microsoft Office versions supported.

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## 2.2 Install Classifier software onto your desktop

### 2.2.1 Install Classifier Administration

(Classifier Administration is supplied as a 32-bit MMC Snap-in)

- From the Classifier **Base Bundle** open the **Classifier Administration** folder and run **ClassifierAdministration.msi** (or Setup.exe).
- Follow the wizard installation steps to complete the install.

## 2.2.2 Install Email/Office Administration

(Assuming that Microsoft Office is installed)

Email and Office Classifier software extends the relevant Microsoft Office applications (depending upon the Classifier Licences applied).

- ❑ From the **Base Bundle** open the **Email and Office Classifier\**x64 or **x86** folder corresponding to the version of Microsoft Office (x64 or x86) installed and run **Setup.exe**.

Follow the wizard installation steps to complete the install.

## 2.3 Establish an Initial Classifier Configuration

All Classifier configuration is performed using the Classifier Administration Console.

- ❑ From the Start menu choose **Boldon James / Administration Tools / Classifier Administration Console**.
- ❑ The first time you start this it will appear as shown below when you select the Labelling Configurations node:

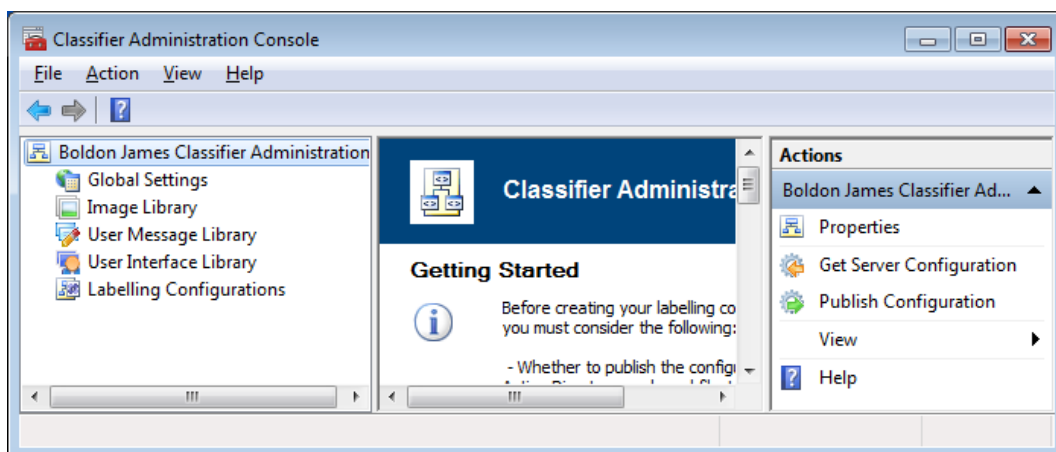


Figure 1 Initial Screen

No labelling configurations are defined initially. An example configuration needs to be established as described in the next section.

### 2.3.1 Establish a Configuration

- ❑ Select the **Labelling Configurations** node and choose the **Add a new Label Configuration** action. This starts a wizard – Press **Next**.
- ❑ A licence is required and the following dialog appears:

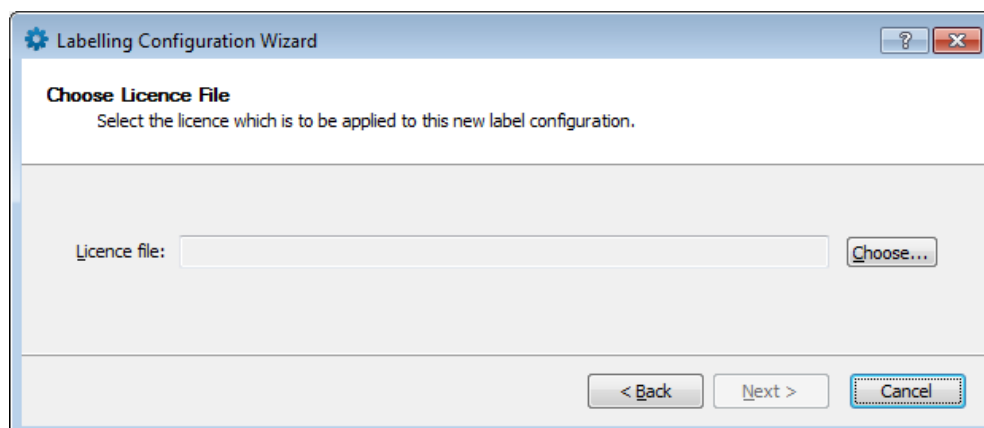


Figure 2 Choose Licence

- ❑ Press **Choose** which will present an Open dialog. Navigate to **Base Bundle\Licence** and open a suitable folder (e.g. **Email Classifier**).
- ❑ Select the .LIC file presented (e.g. **IMPCEM.LIC**) and press **Open**. This will populate the Licence File field. [These licence files are limited period evaluation licences].
- ❑ Press **Next** – this will present a dialog allowing you to choose which template to use as the basis of your configuration.

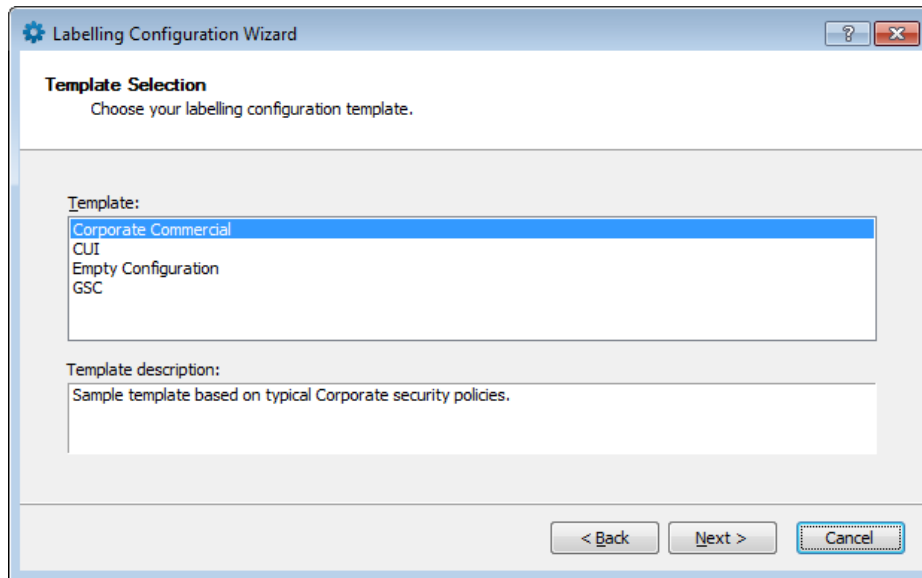


Figure 3 Choose Corporate Template

- ❑ For the purposes of this exercise, select **Corporate Commercial** and press **Next**.
- ❑ You will be prompted to provide a name for the Configuration. Type in “**Quick Start**” and press **Next** and then **Finish** on the next screen. The newly created Configuration appears as follows (after you have expanded Labelling Configurations):

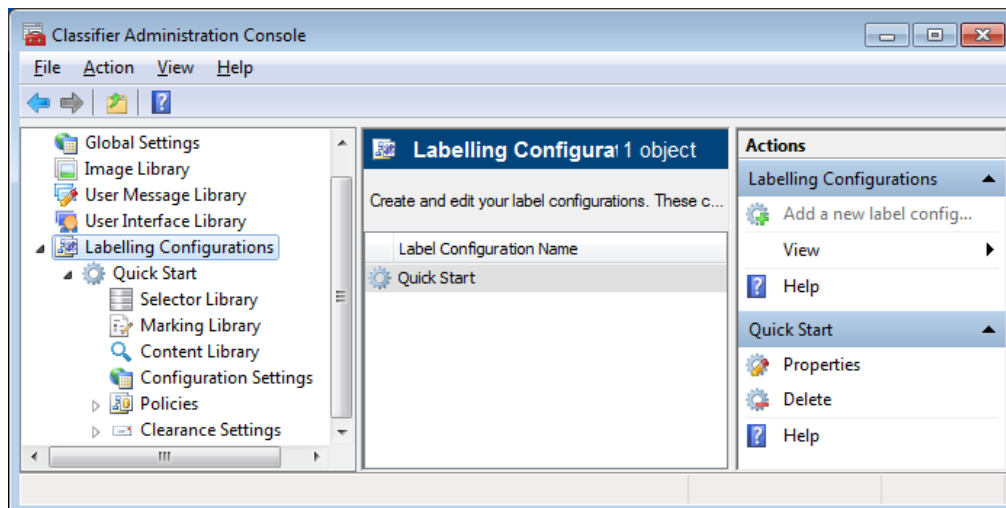


Figure 4 Quick Start Configuration

You now have a complete configuration that can be explored or modified, and may also be used locally to demonstrate some of the end user experience as described later in this document.

### 2.3.2 Label Preview

You can see how the Classification selection interface will look like to users as follows:

- ❑ Select Policies and then select MyCompanyClassification.

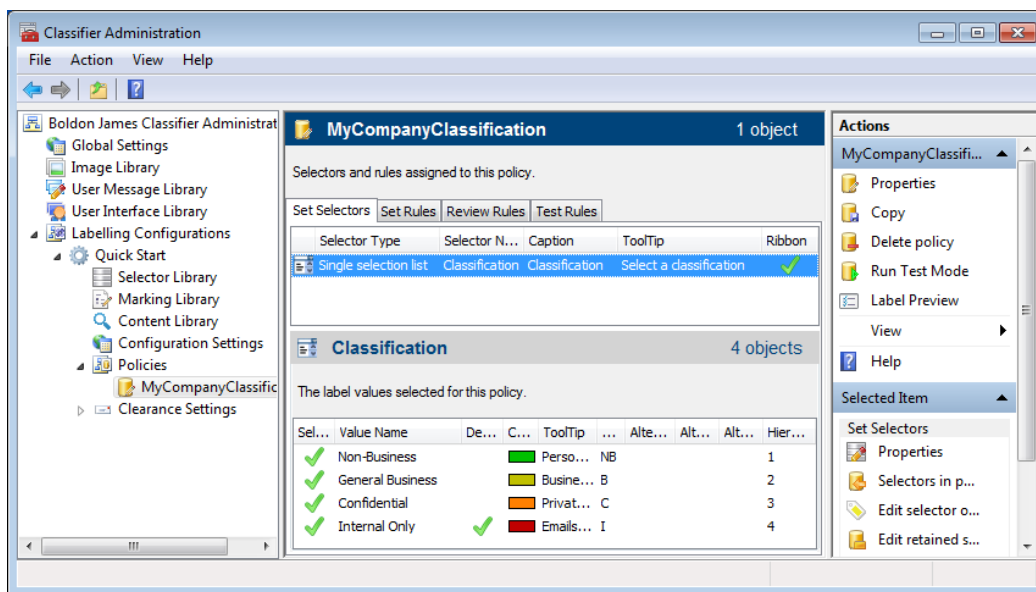


Figure 5 View Policy

- ❑ Select Label Preview (under Actions in the top right hand pane).

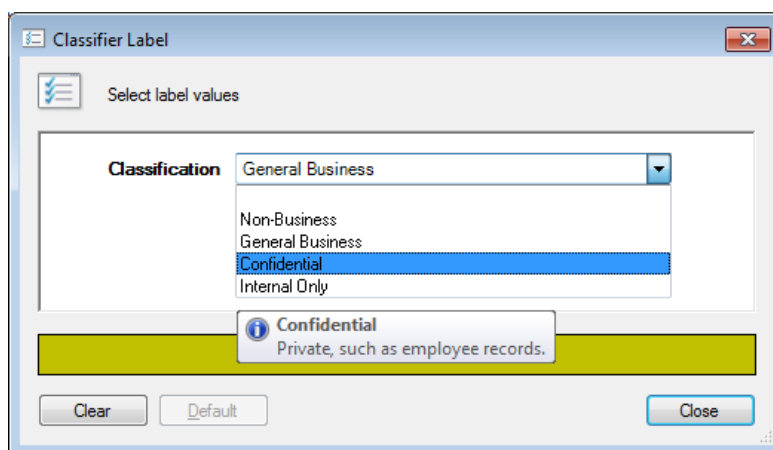


Figure 6 Label Preview

### 2.3.3 Classifier Administration Operational Guidance

Classifier Administration provides comprehensive on-line Help (also available as a PDF document). General operational guidance can be found under the topic **Operation of the Classifier snap-in** (Select the **Classifier Administration** node; press **Help**; expand the sub-tree, and the required topic appears immediately below).

Context sensitive Help is available on all main topics through the **Help** button in the **Actions** pane, with further information in sub-topics.

## 3 USE TEST MODE TO VIEW THE EFFECTS OF THE CONFIGURATION ON MICROSOFT OUTLOOK

This section demonstrates how to locally review the end user experience of the configuration.

Classifier Administration provides a **Run Test Mode** feature. This allows you to preview the effects of the configuration on the end-user experience prior to publication of the configuration to a user community.

In the sequence below you will see the label interface and how domain clearance checks operate.

### 3.1 Invoke Test Mode

The **Run Test Mode** feature temporarily sets a local switch which directs the Classifier Application software to utilise a 'test configuration' rather the normal run time (deployed) configuration.

- ❑ Ensure that none of the Microsoft Office application(s) (Word, Excel, Outlook, PowerPoint etc.) are running; then in Classifier Administration select (Policies) **MyCompanyClassification**.
- ❑ Choose **Run Test Mode**.

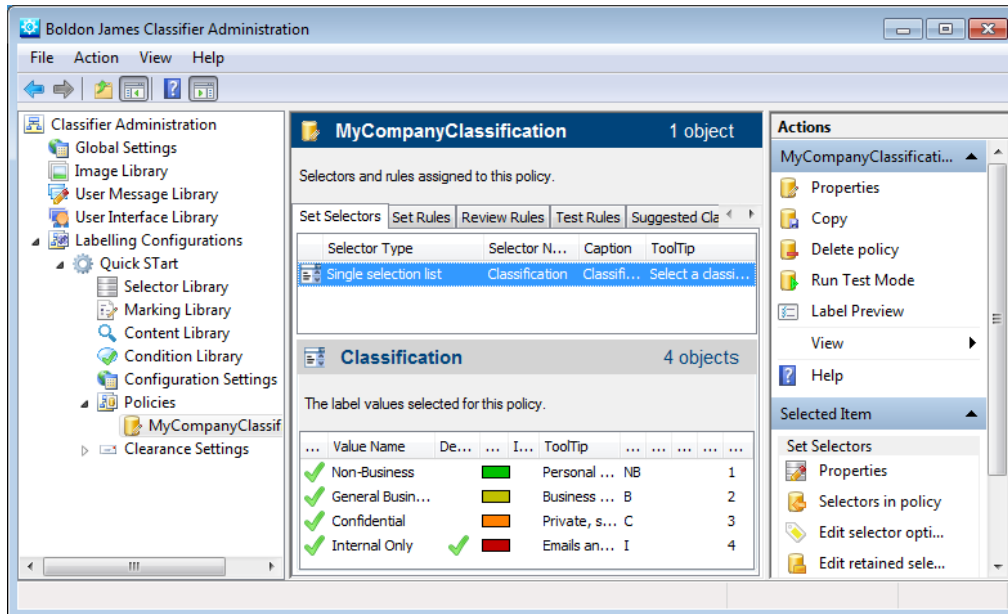


Figure 7 Run Test Mode

- ❑ This will show a Policy Test Mode dialog. Leave this dialog in place. Proceed to the next step which shows the effects within Microsoft Outlook.

### 3.2 Explore User Effects in Microsoft Outlook

This section explores some of the effects within Outlook, and the effects of clearance checking.

- ❑ Start **Outlook**. This will present a warning dialog. **Acknowledge** this and proceed.
- ❑ Select **New message**. This will display a Classifier enabled Outlook new message form. The window appearance will depend on the version of Office installed.

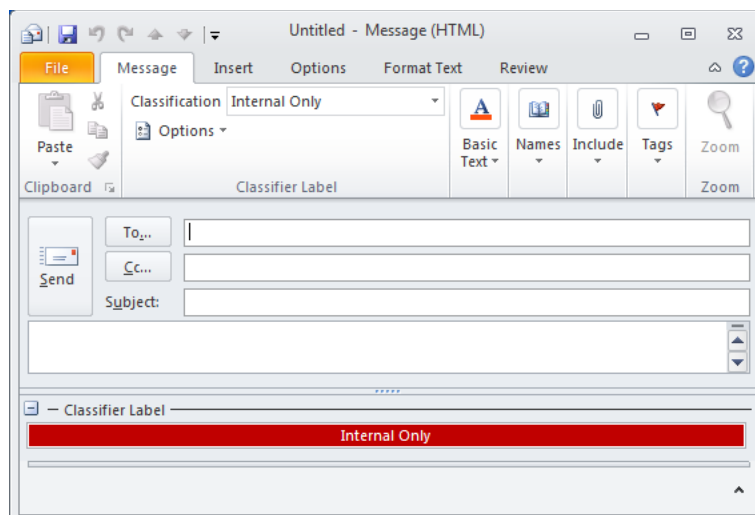


Figure 8 Outlook 2010 – New message

- The policy has a default label value, so the information bar shows **Internal Only**.
- Set the label to **Confidential**. Enter **Subject etc.** and **yourself** as a recipient. Press **Send**. The message should arrive in your Inbox in due course
- Open** the received message. You will see the effects of the rules to add a **Marking**, based on the label value into the message **Subject** and as a first line of text (**FLOT**).

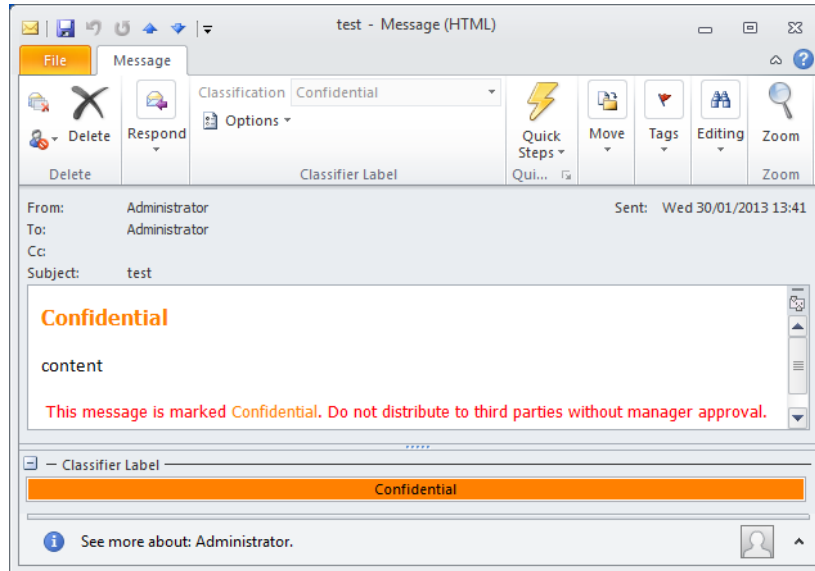


Figure 9 Received message – Outlook 2010

- Because the label is **Confidential**, a **LLOT rule** takes effect and you see warning text added at the end of the message.

### 3.3 Terminate Test Mode

- Ensure that all the Classifier enabled applications are closed (in the general case Word, Excel, PowerPoint and Outlook). Press **Exit Test Mode**.

### 3.4 Tidy up

You can explore further features as outlined in the next section, but it is recommended that at some point you clear down this example configuration before proceeding to develop a configuration for your environment.

- Select Labelling Configurations / **Quick Start**. Choose **Delete**. Check **Delete licences in use in this configuration**. Press **OK**.
- Close **Classifier Administration**.



## 4 WHAT NEXT

You may find it informative to explore the various nodes shown by the Classifier Administration interface, and to look at some of the key items within this example configuration. For example:

Node / Feature	Template Settings
Selector Library	<ul style="list-style-type: none"> <li>One Selector <b>Classification</b> is defined with associated Values: [Non-business / Business / Confidential / Internal Only (Default)]</li> </ul>
Marking Library	<ul style="list-style-type: none"> <li>Various Marking formats are pre-configured.</li> </ul>
Policies (MyCompanyClassification)	<ul style="list-style-type: none"> <li>A single policy is defined, so all users would be presented with the same user experience (e.g. the same label choices).</li> <li>Includes the Classification Selector and various Values</li> <li>Defines various rules including</li> <li>Always add a FLOT to Outlook emails.</li> <li>Add a particular LLOT if Classification is Confidential</li> <li>Various other rules are included that will only become active when a suitable licence (e.g. Office Classifier) is applied, or other options (e.g. Clearance Check email domains) are Enabled and configured.</li> </ul>

**Experiment with the test configuration e.g.:**

Add a second Selector and values – Classifier Administration / Selector Library to create the selector and then **<MyCompanyClassification> / Selectors in policy** to make it available within the policy.

Add extra products (licence) etc. For example, add a Licence for Office Classifier (Word etc.) using **Global Settings / Licence** and use Test Mode to explore how headers appear.

Enable Clearance Check email domains – your domain address information will have to be configured.

**Understand how configuration is deployed.**

From within Classifier Administration, select the top level node (Boldon James Classifier Administration). Press Help, and view the information under Configuration Deployment.

**Explore a full test system** including deployment options by following the Advanced Evaluation Guide.

**Develop a configuration** suitable for your organisation based on one of the supplied templates.