



# User Guide Management Agent

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# Table of Contents

<b>About this guide</b> .....	<b>4</b>
<b>Installation</b> .....	<b>5</b>
Before you start .....	5
Uninstallation .....	7
<b>Features</b> .....	<b>8</b>
Configuration update - single point of contact .....	8
Configuration update frequency control .....	8
Client Application Monitoring .....	8
Management Agent System Tray Icon .....	9
<b>Management Console Run-In Agent</b> .....	<b>10</b>
<b>Windows Event Logging</b> .....	<b>16</b>

# About this guide

This document describes the features provided by the Classifier Management Agent. The agent runs as a service on the local machine to provide the configurable features to relevant Classifier applications. It allows you to:

- Manage Classifier Configuration update using a single point of contact rather than having each separate Classifier Application check for Configuration updates. This feature also improves security because the client no longer requires write access to the local configuration location.
- Provide control over the frequency of Classifier Configuration update checks.
- Monitor Email and Office Classifier applications to ensure that the Classifier extensions have not been disabled. If this happens, ensure you record them in the event log. Optionally, you can display application monitoring status information.

**NOTE:** Other Classifier applications (such as File Classifier) are not monitored at this time.

These features are only available if:

- The installed version of an application supports the features (Email and Office Classifier version 3.8 or later and File Classifier 3.10 or later are required to make use of Classifier Management Agent features).
- Classifier Management Agent is installed and suitably configured as described in this document.
- UseManagementAgent is enabled.

When these are met, the Classifier Application will receive its configuration from the Configuration Download folder and will NOT cache the configuration to a separate location. Other Classifier applications (e.g. CAD Classifier, Power Classifier for Files and previous versions of File Classifier) will receive configuration from the location identified by the ServerRootType and ServerFileSystemRoot registry entries. Furthermore, it will cache the configuration to %AppData%\Roaming\Baldon James\Client Configuration if the ClientServerOverride registry setting is not enabled.

# Installation

## Before you start

Ensure:

- Email and Office Classifier (version 3.8 or later) and File Classifier (3.10 or later) are installed and working with an operational Classifier Configuration published to a suitable location (Active Directory or file store).
- The Management Agent is configured using Registry entries.
- Because the use of Group Policy mechanisms is recommended, ensure the Classifier Administration (3.8 or later) is installed and the latest versions of the Group Policy files relating to client operation are applied. No features relating to the Management Agent should be enabled at this time.
- See the Release Note for details of the supported environments.

To install the Management Agent using the setup.exe file:

1. From the Classifier Base Bundle, open the Management Agent folder and run Setup.exe.
2. Follow the wizard installation instruction steps.
3. Enter the Service name and description the Management Agent will appear as (by default, the Service name is Boldon James Classifier Management Agent).

If installing using Command line, you can override the default installed values for the following:

Item	Default	Means of changing
MA_DISPNAME (Display Name of the service)	Boldon James Classifier Management Agent	<ul style="list-style-type: none"> <li>• Command Line</li> <li>• Transform file</li> </ul>
MA_DESC (Description of the service)	Provides monitoring and support services to Classifier Clients	<ul style="list-style-type: none"> <li>• Command Line</li> <li>• Transform file</li> </ul>

**NOTE:**

- Command Line – standard msiexec options apply.
- Transform file - you can create a Transform file using an appropriate tool to specify values for the MA\_DISPNAME and MA\_DESC properties (in the msi property table). The transform file can then be applied as part of the installation process or applied to the ClassifierManagementAgent.msi file to produce a new msi file.
- The Boldon James Classifier Management Agent service runs as local system.

Once installed the Management Agent service will run automatically.

Classifier Management Agent operates as per the various configured settings described in Management Agent Run-time Controls. The defaults adopted after installation mean that:

- Classifier Client Applications will perform Configuration update checks .
- The Management Agent will not monitor Classifier Applications.

To start using the Management Agent:

- Use Group Policy mechanisms to manage the various configuration Registry settings. The ClassifierManagementAgent.ADMX / ADML files, supplied with Classifier Administration, should be applied.
- Ensure that Classifier Configuration Settings are configured for the Management Agent so that it knows the location of the Published Classifier Configuration. (By default, the Management Agent will use the same settings as the Classifier Clients.)
- Enable the following Management Agent settings:
  - Applications to be monitored
  - Management Agent General Settings
  - Management Agent System Tray Icon Settings

**NOTE:**

Ensure you enable Show System Tray Icon. If you are planning to use the Configuration update – single point of contact feature, then configure the CommonConfigFolder (Classifier Management Agent group policy - Configuration Download Settings/Configuration download folder).

If you are planning to use a web page as the location from which to retrieve the Master Configuration, then establish and maintain a suitable Web based configuration. See the Administration Guide.

- Establish the associated registry settings as described in Administration Guide.
- Configure Classifier Clients to use Management Agent as described in Administration Guide.

The settings will take effect the next time the system is restarted (after Group Policy update has taken place for example).

# Uninstallation

Uninstallation will usually automatically close any Management Agent processes running – that is the Classifier Management Agent Service (e.g. Boldon James Classifier Management Agent) and the ManagementAgentClient (Management Agent System Tray Icon).

# Features

## Configuration update - single point of contact

**NOTE:** This feature requires that relevant Classifier Clients are configured to Use Management Agent as described in Administration Guide > Configuration Deployment > Client Configuration Registry settings > Use Management Agent.

By default, each Classifier application checks to ensure it is using the most current Classifier Configuration. Whilst this overhead is small, many users starting several applications at start of day may cause a noticeable impact on the network or Active Directory depending upon the configuration deployment method in use.

Deploying Classifier Management Agent allows you to ensure that these checks for Configuration updates are only performed once (across the network) by the Management Agent, per station regardless of how many Classifier Client Application starts occur. If the master configuration has changed, the Classifier Management Agent will store the updated configuration into the CommonConfigFolder.

The Management Agent will retrieve the Master Configuration according to Classifier Configuration Settings.

Once the Classifier Clients have been configured to Use Management Agent, they will retrieve their configuration from the CommonConfigFolder location, rather than using the ServerFileSystemRoot and ServerRootType registry entries.

## Configuration update frequency control

The Management Agent will check for changes to the master configuration immediately upon starting, and every 'x' minutes as defined by Management Agent General Settings / Configuration Refresh Poll Interval.

## Client Application Monitoring

**NOTE:** This feature requires that Classifier Clients are configured to Use Management Agent as described in Administration Guide.

The Management Agent can check regularly that all currently running local instances of licensed Email and Office Classifier include the required Classifier software. By default, no



applications are monitored. You have to explicitly configure the applications to be monitored (Outlook, Word, Excel, PowerPoint, Project and Visio) using Applications to be monitored.

The frequency of check is configurable using Management Agent General Settings / Client Monitor Poll Interval to define the number of seconds between checks.

If any application instance is found that does not include the expected Classifier software, then a Windows Event log entry is raised.

The Management Agent may detect a new instance of an application to be monitored before that application has time to register with the Management Agent. A 'Grace period' can be configured.

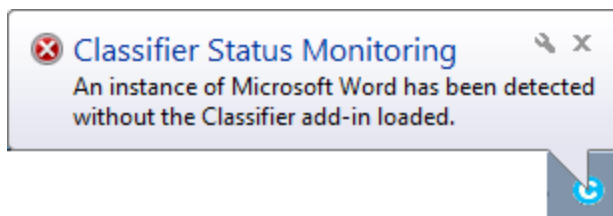
An alert can occur if the Classifier Add-in is disabled by the parent Microsoft application due to an unrelated hang or crash in the parent application. Load time delays can also lead the Microsoft application to disable the add-in. See the Frequently Asked Questions section in the Administration Guide.

## Management Agent System Tray Icon

When you Install the Management Agent, a system tray application (Baldon James Management Agent Client) with a shortcut is established. This ensures that the task is always started in future sessions. Only one instance of the Management Agent Client can be active at one time.

By default, this feature is enabled to provide the features described below. This default operation can be changed using the Show System Tray Icon setting to 'Hide' the Systray icon.

Management Agent Client allows you to check Management Agent status information (such as last Classifier configuration update) and to inform you of unregistered Classifier applications. An example of the default 'unregistered application notification' dialog is as follows:



You can also view alerts, status, last configuration update, and history information. See the User Interface Library section in the Administration Guide for more information.

# Management Console Run-In Agent

Various aspects of Management Agent operation are controlled by Registry settings. You can deploy registry settings using Group Policy mechanisms using the ADML and ADMX files supplied with Classifier Administration.

These files can be used as follows:

1. Copy the following two files from the Classifier Group Policy Templates folder:
  - ClassifierManagementAgent.admx to Windows\PolicyDefinitions
  - ClassifierManagementAgent.adml to Windows\PolicyDefinitions\en-US.
2. Start the Group Policy Management tool.
3. Right-click a group policy object and choose **Edit**.
4. Open Computer Configuration > Policies > Administrative Templates> Boldon James > Classifier Management Agent.
5. Configure the following Group Policy settings.

Setting	Description
Applications to be monitored	<p>Applications to be monitored is a Key below which individual application executable names are configured. The application names supported are EXCEL, OUTLOOK, POWERPOINT, VISIO, WINPROJ and WINWORD.</p> <p>Each application entry is a REG_DWORD configured as:</p> <ol style="list-style-type: none"> <li>0. (Default if the application entry does not exist) The Management Agent will not monitor the application.</li> <li>1. The Management Agent will monitor the application.</li> </ol>

Setting	Description
Classifier Configuration Settings	<p>By default, the Management Agent will use the same ServerRootType and ServerFileSystemRoot settings described below as Classifier Clients. However, it is strongly recommended that ServiceMode entries are established which the Management Agent will use. This will avoid confusion with the settings used by Classifier Client applications on the same station.</p> <p><b>ServerFileSystemRoot</b></p> <ul style="list-style-type: none"><li>• Type - REG_SZ type.</li><li>• Data - [Only required if ServerRootType indicates the master configuration is stored on the File System.] Should contain a network path to the folder into which your master Classifier configuration has been published, e.g. \\ICS-SVR-1\Classifier Configuration.</li></ul> <p><b>ServerRootType</b></p> <ul style="list-style-type: none"><li>• Type - REG_DWORD</li><li>• Data - Indicates whether the master Classifier configuration is held in Active Directory (1) or File Store (0).</li></ul> <p><b>Classifier Configuration Web Host Settings</b> - These settings are only relevant if wish Management Agent to retrieve the Master Configuration from a Web Page. See the Administration Guide for more information.</p>

Setting	Description
Configuration Download Settings	<p><b>Configuration Download Folder</b> - Controls the location where the Management Agent stores its retrieved master Classifier Configuration information which is then read by relevant Classifier applications (Email and Office Classifier and File Classifier (3.10 or later)).</p> <p>By default, this registry entry does not exist and the Management Agent will store the configuration below C:\ProgramData. This location can be changed by establishing the registry entry below:</p> <ul style="list-style-type: none"><li>• Name - \CommonConfigFolder (Configuration download folder)</li><li>• Type - REG_SZ</li><li>• Data - Undefined (default) The Classifier Configuration is stored below ProgramData. A valid path to a folder to be used rather than ProgramData (e.g. C:\ClassifierConfig). This location must be writeable by the Management Agent Service and readable by all Classifier Clients.</li></ul>

Setting	Description
Management Agent General Settings	<p data-bbox="548 226 946 258"><b>Client Monitor Poll Interval</b></p> <ul data-bbox="597 279 1471 716" style="list-style-type: none"> <li data-bbox="597 279 1382 352">• Name \ClientMonitorPollInterval (Client Monitor Poll Interval)</li> <li data-bbox="597 373 927 405">• Type - REG_DWORD</li> <li data-bbox="597 426 1471 716">• Data - Specifies the period between the Management Agent service checking if any Classifier client applications configured under Applications to be monitored are running that are not registered with the Management Agent. &gt;0 is the number of seconds between Client application monitoring checks. The default is 10 seconds (if not configured or an invalid value).</li> </ul> <p data-bbox="548 737 1052 768"><b>Configuration Refresh Poll Interval</b></p> <ul data-bbox="597 789 1446 1514" style="list-style-type: none"> <li data-bbox="597 789 1446 863">• Name - \ConfigRefreshPollInterval (Configuration Refresh Poll Interval)</li> <li data-bbox="597 884 927 915">• Type - REG_DWORD</li> <li data-bbox="597 936 1446 1514">• Data - The Management Agent service will check for a newer configuration (in the location configured via Classifier Configuration Settings) when the service starts and thereafter every "Configuration Refresh Poll Interval". If a newer configuration is available, the service will download that new configuration to the local CommonConfigFolder area. New instances of Classifier Client applications that start will then use that new configuration. &gt;0 is the number of minutes between the Management Agent checking for newer configurations. The default (if not configured) is 60 minutes. Any unsupported value (e.g. 0 or excessively large) will result in the default value being assumed.</li> </ul> <p data-bbox="548 1535 870 1566"><b>Historic Events Period</b></p> <ul data-bbox="597 1587 1446 1808" style="list-style-type: none"> <li data-bbox="597 1587 1390 1619">• Name - \HistoricEventsPeriod (Historic Events Period)</li> <li data-bbox="597 1640 927 1671">• Type - REG_DWORD</li> <li data-bbox="597 1692 1446 1808">• Data - Specifies how many days of event log failure entries will be displayed in the Systray icon application 'History' tab.</li> </ul> <p data-bbox="626 1829 1414 1902">0 The History tab will contain no information. Current status information is still visible.</p>

Setting	Description
	<p data-bbox="626 226 1442 344">&gt;0 The number of days of event log failure entries to be displayed in the Systray icon application 'History' tab. The default if not configured is 7 days.</p> <p data-bbox="548 363 1101 394"><b>New Process Monitoring Grace Period</b></p> <ul data-bbox="597 415 1463 674" style="list-style-type: none"> <li data-bbox="597 415 1409 489">• Name- \NewProcessMonitorGracePeriod (New Process Monitoring Grace period)</li> <li data-bbox="597 510 927 541">• Type - REG_DWORD</li> <li data-bbox="597 562 1463 674">• Data - Specifies how long (in seconds) the Management Agent will allow a Classifier process to remain unregistered before recording the incident.</li> </ul> <p data-bbox="548 695 995 726">The default value is 15 seconds.</p> <p data-bbox="548 747 1471 905">The smaller the value, the more likely the Management Agent will detect a new process before that process has had a chance to register (e.g. whilst Outlook is waiting for the user to choose an email profile).</p> <p data-bbox="548 926 1097 957"><b>Report Errors to the System Tray Icon</b></p> <ul data-bbox="597 978 1463 1503" style="list-style-type: none"> <li data-bbox="597 978 1446 1052">• Name - \ReportErrorsToSystemTrayIcon (Report errors to the System Tray Icon)</li> <li data-bbox="597 1073 927 1104">• Type - REG_DWORD</li> <li data-bbox="597 1125 1463 1503">• Data - Specifies whether application monitoring errors are reported directly to the user via the system tray icon. This is only meaningful if ShowSystemTrayIcon is set to Show. <ul data-bbox="662 1251 1463 1503" style="list-style-type: none"> <li data-bbox="662 1251 1463 1377">0. (Disabled - the default if not configured). The Management Agent will not notify the user directly of unregistered Classifier applications.</li> <li data-bbox="662 1398 1425 1503">1. (Enabled) The user will be notified immediately (via pop-up) if an unregistered Classifier application is detected.</li> </ul> </li> </ul> <p data-bbox="548 1524 1414 1640">Errors are always reported to the windows event log. Current status information is always reported to the Systray icon and presented in the status table.</p>

Setting	Description
Management Agent System Tray Icons Settings	<p>Name - \ShowSystemTrayIcon (Show System Tray Icon)</p> <p>Type - REG_DWORD</p> <p>Data - determines whether the Management Agent's system tray icon will be displayed.</p> <ol style="list-style-type: none"> <li>0. (Hide). The System Tray Icon will not run and users will not be notified of unregistered Classifier applications.</li> <li>1. (Show - the default if not configured). The Management Agent System Tray icon will appear.</li> </ol>

You can use `gpupdate /force` to ensure that the latest settings are applied to the current environment.

The Management Agent looks for its control registry settings under the following keys (in the order listed):

- HKEY\_LOCAL\_MACHINE\SOFTWARE\Policies\Boldon James\  
Or if you are establishing the keys directly then below:
- HKEY\_LOCAL\_MACHINE\SOFTWARE\Boldon James\  
Or for 64-bit systems under:
- HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Boldon James\

If equivalent entries exist beneath 1 and 2 above, then the Policies setting takes precedence.

# Windows Event Logging

Classifier Management Agent logs incidents and information to the Windows event log. To view the logs:

1. Open the Event Viewer.
2. Go to **Applications and Services Logs > Boldon James Auditing > Classifier > Management Agent**.

The following events may be logged with source of Management Agent:

Event ID	Status	Category	Meaning and other event data
1000	Information	Service start	Service (Boldon James Classifier Management Agent) has started.
1001	Information	Service stop	Service (Boldon James Classifier Management Agent) has stopped.
1002	Information	Configuration update	Configuration download success
1003	Information	Configuration update	Configuration download failure
2000	Warning	Client monitoring	<p>An unregistered application has been detected.</p> <p>Office Product (value):</p> <ol style="list-style-type: none"> <li>1. Winword</li> <li>2. Excel</li> <li>3. PowerPoint</li> <li>4. Visio</li> <li>5. Project</li> <li>6. Outlook</li> </ol> <p>Issue Type (value):</p> <ol style="list-style-type: none"> <li>1. Classifier not loaded</li> <li>2. Office in Safe Mode</li> </ol>



2001	Information	Client monitoring	Application has successfully registered. Office Product (Value) as per preceding entry. Issue Type (Value)  3 Classifier successfully loaded (after an entry with Entry ID =2000 and Issue type=1).
9000	Critical	Service exception	Unexpected software condition has been detected.