

Exchange | Classifier Administration Guide

UM6412



Gold
Microsoft Partner


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Customer Documentation

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EXCHANGE CLASSIFIER ADMINISTRATION

Exchange Classifier is a Classifier product that provides Classifier functionality within the Exchange Transport pipeline; processing [Messages from inside the organization](#) and [Messages from outside the organization](#) according to Rules defined within the Exchange Classifier Configuration.

Examples of issues Exchange Classifier might be deployed to help address include:

- Mobile devices or business applications generate email that is not marked.
- (External) customers send (sensitive) information in unmarked emails.
- Classifier client auditing does not include the internet message ID (it cannot as this is not available until after the message is sent).
- Out of office responses and other auto forwards are outside the remit of Classifier client applications, meaning that end to end message auditing is difficult.
- The need to generate notifications or include additional recipients when data with particular classifications is transmitted.
- Requirements to apply different marking policies based on the destination address cannot be achieved in the Classifier client.

Exchange Classifier comprises the following components all of which are described in this document (and Exchange Classifier Administration on-line help):

- [Exchange Classifier Administration](#) (a 32-bit MMC snap-in) provides the interface for the Classifier administrator to configure the various features and options supported by Exchange Classifier. Details of the various Exchange Classifier Administration features and settings are described under [Exchange Classifier Configuration](#).

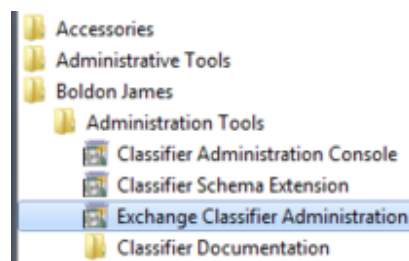
Note: This tool works in tandem with the Classifier Administration snapin and it is important that you familiarise yourself with the relationship between Classifier Configuration and Exchange Classifier Configuration as described in [Configuration Management](#).

Exchange Classifier Administration administers information within the Configuration specific to Exchange Classifier whilst making use of the core Classifier Configuration information (e.g. Selectors, Marking Formats etc.).

Note: A suitable Classifier Exchange licence (IMPEXC.lic) must first be applied to the core Classifier Configuration for the Exchange Classifier configuration features to be available.

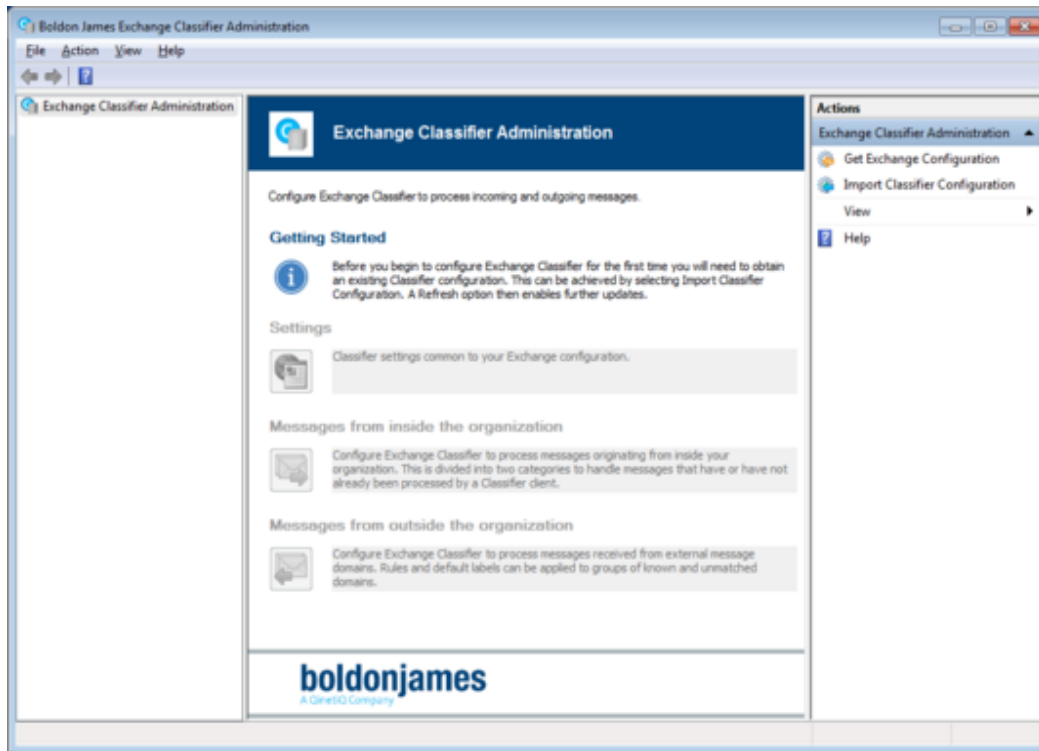
- [Classifier Transport Agent](#) - An Exchange Transport Agent that operates according to the configured Exchange Classifier policy (rules etc).
- [Classifier Message Tracking Service](#) - This optional feature can be used to store (in an SQL database), message user and attachment information passed to it by active [Classifier Transport Agent](#)(s). Whilst you can make use of the stored information, one specific use is to support interrogation (by Classifier Transport Agent(s)) to retrieve a Classification from an original message when an in-reply-to message is received without an associated Classification.

You can invoke Exchange Classifier Administration using the shortcut installed in the start menu:



Start menu short cuts

Invoking the shortcut for the first time would present:



Exchange Classifier snapin

Getting Started

Note: This document assumes that you have already established and Published a stable Classifier Configuration - Selectors, Policies, Rules, options etc.

The general order is as outlined below:

(a) Establish [Exchange Classifier Configuration](#)

- Use [Classifier Administration](#) to add a suitable Exchange Classifier Licence to your existing master Classifier Configuration:
 - Get Server Configuration
 - Global Settings / Licence / Add....
 - Publish Configuration
- Install Exchange Classifier Administration onto a suitable system.

Note: BEFORE PROCEEDING PLEASE MAKE SURE YOU ARE FAMILIAR WITH THE OPERATIONAL CONSIDERATIONS DESCRIBED IN [Configuration Management](#)

- The first action is to use [Import Classifier Configuration](#) to retrieve the existing master Classifier configuration.
- Evolve your Exchange Classifier configuration (define rules, domains etc).

Note: It is suggested that initially you leave the Message Tracking Service disabled in the configuration. Once you are happy with the core operations of the Classifier Transport Agents, the Message Tracking Service can be installed, and then Enabled via a Classifier configuration update.

- Once you are happy with the configuration you can [Publish Exchange Configuration](#) (Exchange Classifier Administration will only retrieve configuration from file store); the Classifier Transport Agents must be configured (Registry settings) to retrieve their configuration from the 'publish location' (see below).
- Exchange Classifier Configuration has no run-time effect until Exchange [Classifier Transport Agent](#)(s) are activated.

(b) Establish [Classifier Transport Agent](#)(s)

- Ensure the relevant Exchange Classifier Configuration is established, Published and available on the relevant systems (e.g. the required Classifier Registry entries are defined on the

Transport Agent servers).

- Install Exchange Classifier (Transport Agents) onto all Exchange Transport hubs.
- Enable the Classifier Transport Agent(s).
- Check that messages are being processed as expected (FLOTs are being added etc).

(c) Optionally Establish [Classifier Message Tracking Service](#)

- Ensure that pre-conditions defined in [Classifier Message Tracking Service](#) are satisfied.
- Install the Classifier Message Tracking Service (if required) onto the appropriate system - for example the host of the SQL Server that is to hold the database.

[Note: Over time the SQL database will grow in line with the messages transmitted. It is the site's responsibility to consider how long messages should be retained within the message tracking database, and to establish appropriate housekeeping procedures.](#)

- Ensure the relevant registry settings, as defined in [Classifier Transport Agent Registry entries](#), are established for each Classifier Transport Agent instance.
- Update the Exchange Classifier configuration to Enable Message Tracking see [Properties \(Message Tracking Service\)](#); Publish the updated Exchange Classifier Configuration; and restart all the Transport Agents.

[Note: The Message Tracking Service does not access either the Exchange Classifier Configuration, nor the Classifier Configuration.](#)

(d) Maintenance of the Exchange Classifier Configuration as per [Configuration Management](#).

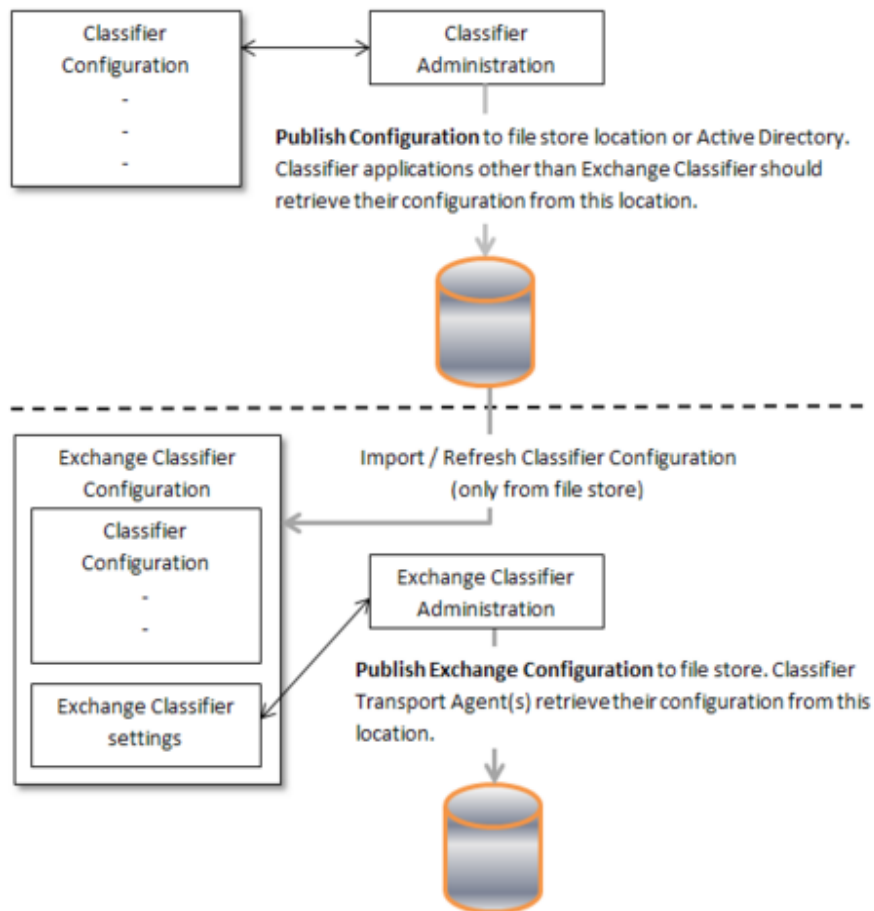
Configuration Management

[Note: Exchange Classifier does not support Active Directory held Configuration.](#)

This topic describes how Classifier Administration and Exchange Classifier Administration interact, and importantly how changes to the overall Classifier Configuration must be coordinated.

[Note: The location to which you Publish Exchange Configuration must be accessible by the Microsoft Exchange Transport Service - that is the folder share permissions for that location must allow access \(READ\) by the NETWORK SERVICE account.](#)

- Exchange Classifier Administration extends the existing Classifier Configuration structures and utilises the existing core configuration information (Selectors, Marking Formats etc.). The diagram below shows an overview of how the two configuration tools operate (Classifier Administration at the top and Exchange Classifier Administration at the bottom):



Configuration Management operations

- Exchange Classifier Administration does not modify the core configuration information structures and Classifier Administration does not modify the Exchange Classifier structures. Exchange Classifier Administration presents actions appropriate to the context:

- [Get Exchange Configuration](#) reads in the whole Exchange configuration structure from the designated location and overwrites the whole of any locally held Exchange configuration information.

Note: Either Import Classifier Configuration or Refresh Classifier Configuration action is available depending upon whether there is already a Exchange Configuration stored locally.

- [Import Classifier Configuration](#) is used initially (immediately post installation when there is no locally held Exchange Configuration) to get a local (read only) copy of an existing Classifier configuration. Initially the local Exchange Classifier configuration will be non-existent and a 'default/empty' Exchange Classifier configuration is generated by [Import Classifier Configuration](#).
 - [Refresh Classifier Configuration](#) refreshes the Classifier configuration structures within your locally held Exchange Configuration.
 - [Publish Exchange Configuration](#) will publish the whole of the locally held Exchange configuration structure (Core + Exchange) to the designated location (file store only).

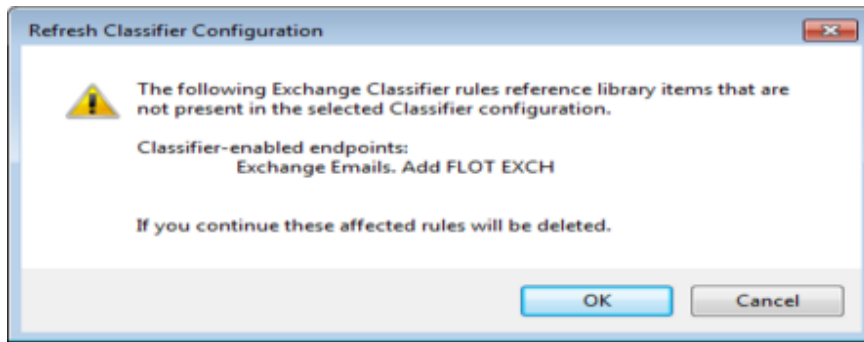
The Exchange Classifier configuration must be published to a location separate from the core master Classifier Configuration.

- The ongoing process for maintaining the Exchange Classifier Configuration is:

Run Exchange Classifier Administration

- Get Exchange Configuration (from the 'master' Exchange configuration location - e.g. ECL).
 - Refresh the core Classifier configuration from the relevant 'master' Classifier Configuration location (e.g. CCL) using Refresh Classifier Configuration.

Note: This will perform consistency checks that there are no rules in the Exchange configuration that make use of items no longer present in the core Classifier configuration.



Inconsistent configuration

Yes will delete all affected rules and display a list of those rules.

Cancel will cancel the Refresh Classifier Configuration action leaving the original Exchange Classifier configuration unchanged. You can then modify the core and/or exchange configurations to address the inconsistencies. A confirmation dialog is presented indicating that your original configuration has been preserved.

- Modify your Classifier Exchange Configuration.
- Publish Exchange Configuration (back to a suitable location ECL).
- Close Exchange Classifier Administration. Restart Exchange Transport(s) to pick up the latest configuration.

Note: Published Exchange Classifier Configuration has no run-time effect until the Exchange Classifier Transport Agent(s) are activated/restarted.

The Exchange Classifier Configuration may make use of the following from core configuration:

- Licence (Exchange Classifier only).
- Selectors and Selector values (any used within the rules configured within the Exchange Classifier configuration).
- Marking formats (any marking formats referenced within the rules configured within the Exchange Classifier configuration).
- User message Library (any messages used within the Exchange Classifier configuration).

So, any changes to the above (e.g. changing the text within a User message, updating a marking format, adding a selector value etc.) made via Classifier Administration may require a Refresh Classifier Configuration / Publish Exchange Configuration sequence.

Note: Deleting an item and creating a new item with the same name within classifier configuration will cause an inconsistency because the configuration uses unique identifiers rather than text names internally.

Note: If you find that having made some changes to the Core and / or Exchange Configurations the effects are not manifest in the system' it is probably worth checking that you have performed the necessary Modify / Publish Classifier Configuration / Refresh Classifier Configuration / Modify / Publish Exchange Configuration actions in the correct order and to/from the correct locations.

- The Configuration Archive mechanisms described in [Classifier Administration Guide > Classifier Administration > Configuration Archives](#) apply to both Publish Configuration and Publish Exchange Configuration - the whole configuration is saved in either case, but of course Publish Configuration (core) will NOT include the Exchange Classifier configuration information.

Exchange Classifier Configuration

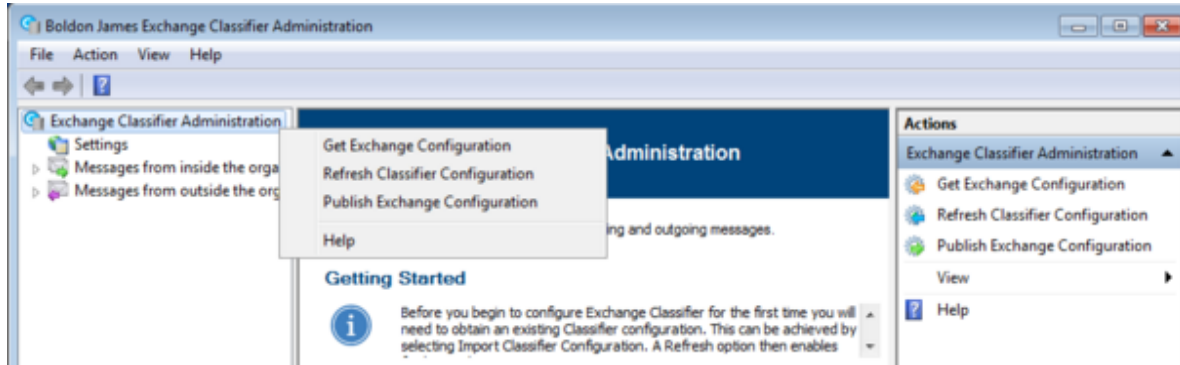
Admin: *Exchange Classifier Administration*

Note: THIS TOPIC ASSUMES THAT YOU ARE FAMILIAR WITH THE OPERATIONAL REQUIREMENTS DESCRIBED IN [Configuration Management](#).

Note: The Selectors used are as defined in the main Classifier configuration. The full set of Selectors and values is available within rule definitions - Exchange Classifier does not make use of any Classifier Policy defined.

The general sequence when making changes is:

- Get Exchange Configuration.
- If necessary Refresh Classifier Configuration (e.g. because the core configuration has changed).
- Make required changes to the Exchange Classifier configuration.
- Publish Exchange Configuration.
- Restart any affected services (Exchange Transport Agent(s)).



Exchange Classifier Administration

Exchange Classifier Configuration supports various actions and configuration of the following:

- [Settings \(Exchange Classifier\)](#) covering various global Exchange Classifier settings.
- [Messages from inside the organisation](#) - Allowing you to configure rules applicable to messages with an Originating mail address of a member of the local domain. Rules can be defined as applying to messages that have already been processed by 'Classifier-enabled endpoints' (e.g. Microsoft Outlook), or to messages from 'Other endpoints'. Each rule can be applicable to messages sent to 'all domains' or to 'specific (configurable) domains'.
- [Messages from outside the organization](#) - Allowing you to configure rules applicable to messages with an originating mail address 'outside' the local domain. Each rule is applicable to a configurable Domain Group. You can associate a Default Label with a Domain Group. There is a permanent 'All unmatched domains' group which operates as a catch-all. A Domain Group allows you to specify zero, one or more rules, a default Label to be applied and various options.

All the rules are managed using the same style of wizard used in the main Classifier Administration - see: [Classifier Administration Guide > Policies > Rules Management > Adding Rules > Rules wizard operation](#) with rules being defined as applying Always, when there is No Label value / Any Label value / a specific Label value.

Get Exchange Configuration

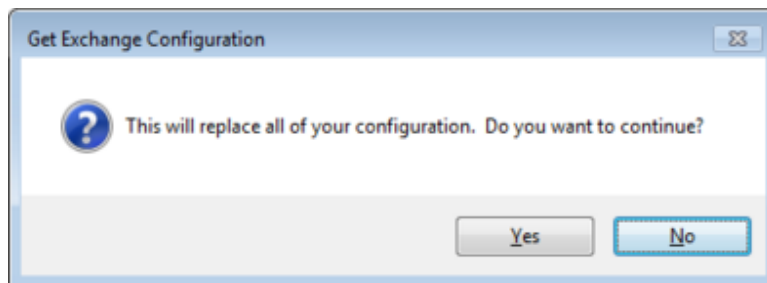
Admin: *Exchange Classifier Administration* ⇒ *Get Exchange Configuration*

Note: THIS TOPIC ASSUMES THAT YOU ARE FAMILIAR WITH THE OPERATIONAL CONSIDERATIONS DESCRIBED IN [Configuration Management](#).

Note: If you have no published Exchange configuration (e.g. after the initial installation of Exchange Classifier Administration) an [Import Classifier Configuration](#) action must be performed (after licensing has been completed as per [Getting Started](#)) which will establish a default (empty) Exchange Configuration.

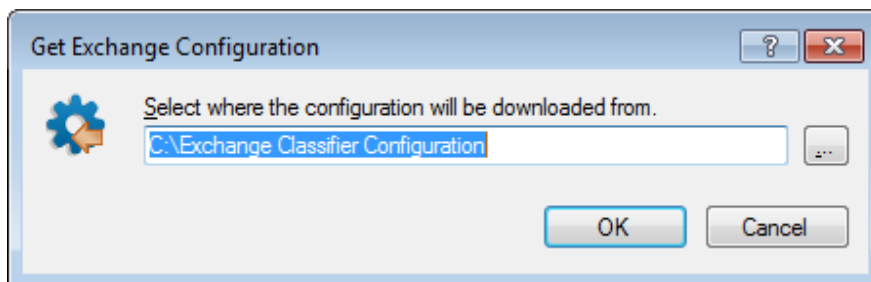
Once a published Exchange configuration has been established, this action is used to retrieve currently published Exchange Configuration from the designated location. It overwrites any previously existing locally held working copy of the Exchange Configuration:

- Select Exchange Classifier Administration.
- Choose the Get Exchange Configuration action.



Overwrite existing configuration

- Press Yes and then complete the Get Configuration dialog with the location of the master configuration.



Get Exchange Configuration

- Press OK to store a local copy of the configuration.

Note: The whole Classifier configuration is retrieved, but it is stored under `..\ExchangeAdminConfiguration` rather than under `..\Configuration for the core Classifier Configuration`.

- You can then modify the Exchange Classifier configuration. Once the changes are complete you must publish the configuration using [Publish Exchange Configuration](#). Although Exchange Classifier Administration does not modify any parts of the configuration administered by Classifier Administration, this publish action overwrites the whole of any existing configuration held at the designated location.

Import Classifier Configuration

Admin: Exchange Classifier Administration ⇒ Import Classifier Configuration

Note: THIS TOPIC ASSUMES THAT YOU ARE FAMILIAR WITH THE OPERATIONAL CONSIDERATIONS DESCRIBED IN [Configuration Management](#).

This action only appears if there is no local Classifier Exchange Configuration (otherwise [Refresh Classifier Configuration](#) appears). Import Classifier Configuration is used to get an initial (immediately post installation and after licensing) local (read only) copy of an existing Classifier configuration. Initially the local Exchange Classifier configuration will be non-existent and a 'default' (empty) Exchange Classifier configuration is generated by the Import Classifier Configuration action.

Note: If having Published Exchange Configuration you subsequently install Exchange Classifier Administration onto a another machine you can use [Get Exchange Configuration](#) to retrieve the Published Exchange Configuration even though Import Classifier Configuration appears.

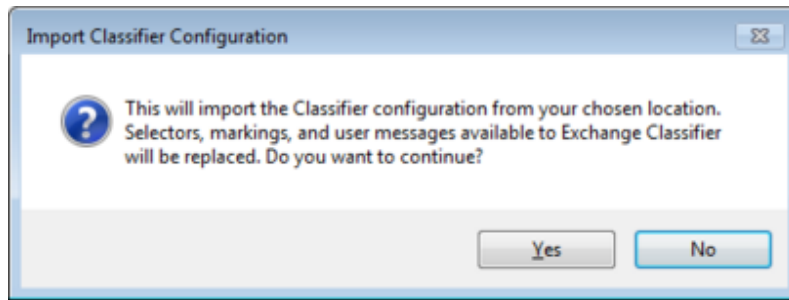
When the core Classifier configuration is changed you should use [Refresh Classifier Configuration](#) to update the Classifier Configuration within the Classifier Exchange Configuration structures.

Note: Apart from the very first time post installation the sequence before administering the Exchange Classifier Configuration should be:

- Get Exchange Configuration from the 'master' Exchange Classifier configuration location - e.g. ECL
 - Refresh Classifier Configuration from the 'master' Classifier Configuration location - e.g. CCL.
-

To Import an initial Classifier Configuration:

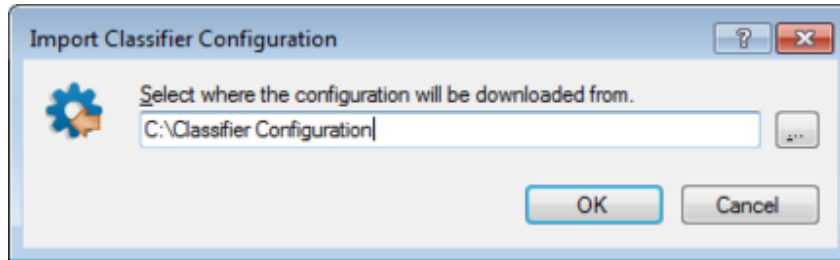
- Select Exchange Classifier Administration.
- Choose the Import Classifier Configuration action.



Import Classifier Configuration confirmation

- Press Yes and then supply the location of the master configuration and press OK.

Note: Exchange Classifier does not support importing a configuration from within Active Directory.



Import Classifier Configuration

- Press OK to store a local copy of the retrieved configuration.

Note: The retrieved information updates the Exchange Classifier Configuration held in ..\ExchangeAdminConfiguration rather than and 'core' configuration held under ..\Configuration.

A 'retrieval successful' dialog appears - press OK.

- You can proceed to establish/modify the Exchange Classifier configuration. Once the changes are complete you must publish the configuration using [Publish Exchange Configuration](#). Although Exchange Classifier Administration does not modify any parts of the configuration administered by Classifier Administration, this publish action overwrites the whole of any existing configuration at the chosen location.

Refresh Classifier Configuration

Admin: Exchange Classifier Administration ⇒ Refresh Classifier Configuration

Note: THIS TOPIC ASSUMES THAT YOU ARE FAMILIAR WITH THE OPERATIONAL CONSIDERATIONS DESCRIBED IN [Configuration Management](#).

This action is used to refresh the Classifier Configuration information within the existing Exchange Classifier Configuration information without changing any of the Exchange Classifier specific information within that configuration.

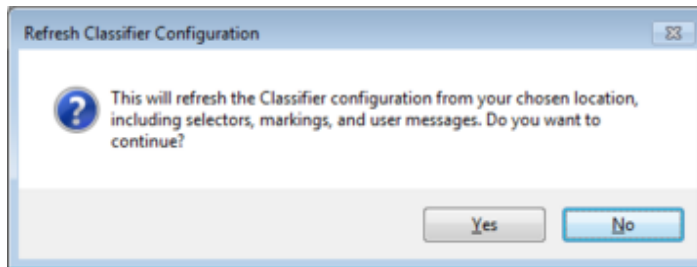
Note: Apart from the very first time post installation the sequence before administering the Exchange Classifier Configuration should be:

Get Exchange Configuration (from 'master' Exchange Classifier configuration location - e.g. ECL).

Refresh Classifier Configuration (from 'master' Classifier configuration location - e.g. CCL).

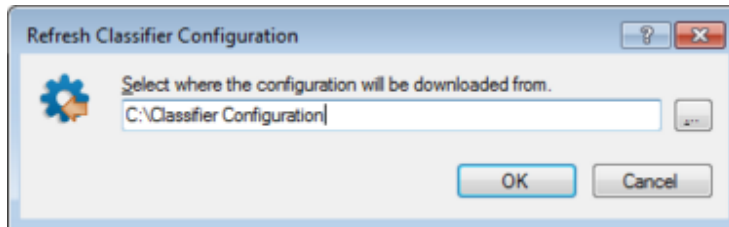
To Refresh the latest Classifier Configuration:

- Select Exchange Classifier Administration.
- Choose the Refresh Classifier Configuration action.



Refresh Classifier Configuration confirmation

- ❑ Press Yes and then supply the location of the master configuration and press OK.



Refresh Classifier Configuration

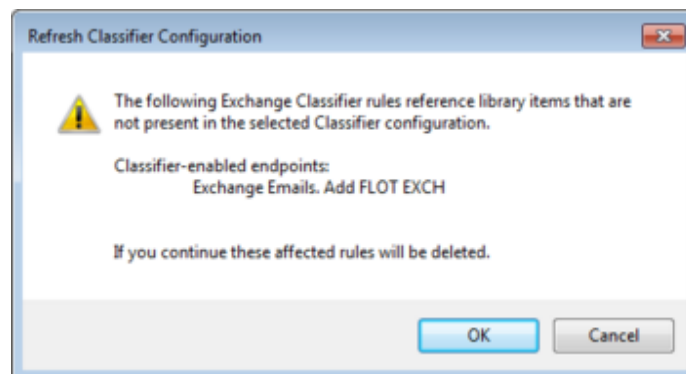
Note: Exchange Classifier does not support Active Directory held Configuration.

- ❑ Press OK to store a local copy of the retrieved configuration.

Note: The retrieved information updates the Exchange Classifier Configuration held in ..\ExchangeAdminConfiguration rather than and 'core' configuration held under ..\Configuration.

A 'retrieval successful' dialog appears - press OK.

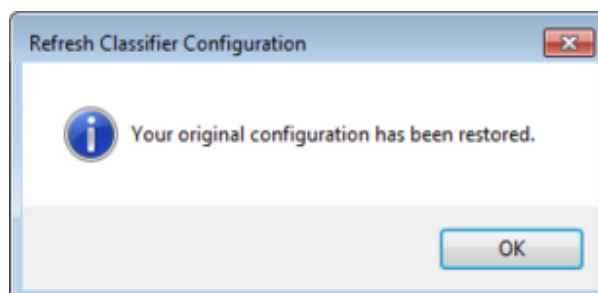
- ❑ Refresh Classifier Configuration will perform consistency checks against the Exchange Classifier Configuration to ensure there are no rules in the Exchange configuration that make use of items no longer present in the core Classifier configuration.



Inconsistent configuration

Yes will delete all affected rules.

Cancel the Refresh action is cancelled and a dialog appears:



Original configuration restored

- ❑ You can establish/modify the Exchange Classifier configuration. Once the changes are complete you must publish the configuration using [Publish Exchange Configuration](#). Although Exchange Classifier Administration does not modify any parts of the configuration administered by Classifier Administration, this publish action overwrites the whole of any existing configuration structures at the chosen location.

Publish Exchange Configuration

Admin: Exchange Classifier Administration ⇒ Publish Exchange Configuration

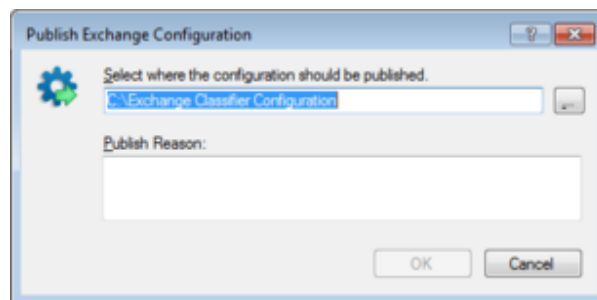
Note: THIS TOPIC ASSUMES THAT YOU ARE FAMILIAR WITH THE OPERATIONAL CONSIDERATIONS DESCRIBED IN [Configuration Management](#).

Note: Published Exchange Classifier Configuration has no run-time effect until the Exchange Classifier Transport Agent(s) are activated.

Note: The location to which you Publish Exchange Configuration must be accessible by the Microsoft Exchange Transport Service - that is the folder share permissions for that location must allow access (READ) by the NETWORK SERVICE account.

This action operates in the same manner as Publish Configuration under Classifier Administration.

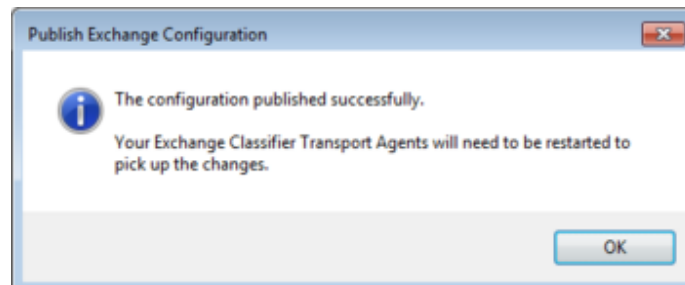
- Select Exchange Classifier Administration.
- Choose Publish Exchange Configuration and complete the dialog as required:



Publish Exchange Configuration

Note: Exchange Classifier does not support Active Directory held Configuration.

- If the configuration is successfully published a dialog appears reminding you that services may need to be restarted for the configuration to come into effect.



Publish Confirmation

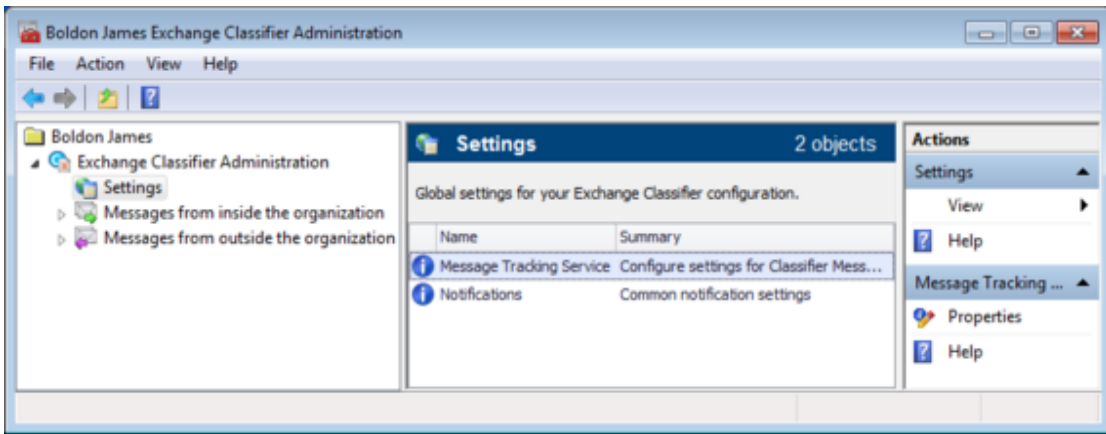
- Remember that published Exchange Classifier Configuration has no run-time effect until the Exchange Classifier Transport Agent(s) are re-started.

Settings (Exchange Classifier)

Admin: Exchange Classifier Administration ⇒ Settings

These are global settings. The following are supported:

- [Properties \(Message Tracking Service\)](#)
- [Properties \(Notifications\)](#)



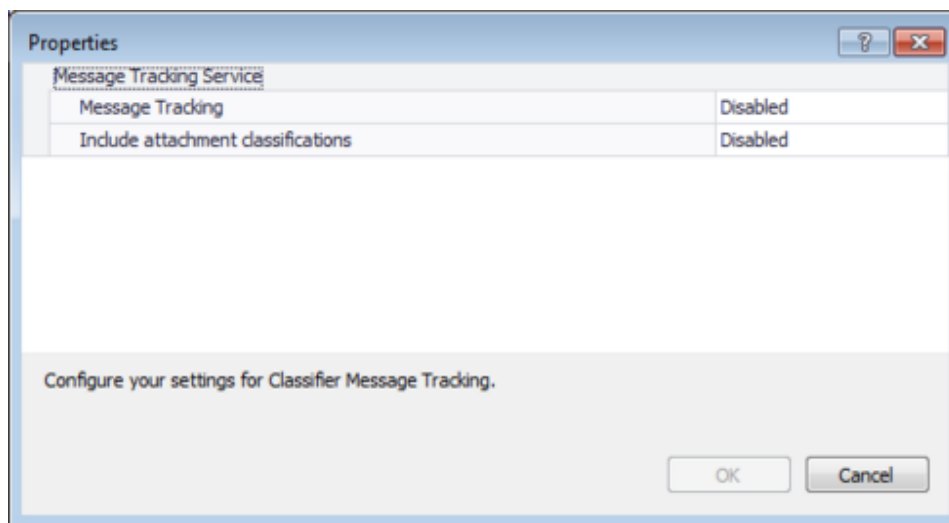
Settings

Properties (Message Tracking Service)

Admin: Exchange Classifier Administration ⇒ Settings ⇒ Message Tracking

Note: This is only required if you plan to use the Message Tracking Service features.

- These settings are used by the Classifier Transport Agent(s) and should only be configured once you have established the [Classifier Message Tracking Service](#) and the [Classifier Transport Agent](#)(s) have been established and the registry configured with the relevant [Transport Agent Message Tracking Settings](#) values.
- Choose Exchange Classifier Administration > Settings > Message Tracking Service > Properties:
- This will present the following dialog allowing you to configure information used by the Message Transport Agent(s) when connecting to the Message Tracking Service:



Properties - Message Tracking

- Enable Message Tracking directs the Classifier Transport Agent(s) to perform message tracking. Each [Classifier Transport Agent](#) must be configured with the relevant Message Tracking Service connection information (see [Transport Agent Message Tracking Settings](#)). The updated configuration must be published ([Publish Exchange Configuration](#)) and all Transport Agents must be restarted.

Note: The Message Tracking switch Enabled / Disabled defines whether or not the Classifier Transport agent(s) use the Classifier Message Tracking Service. This switch has no effect on the Message Tracking Service itself.

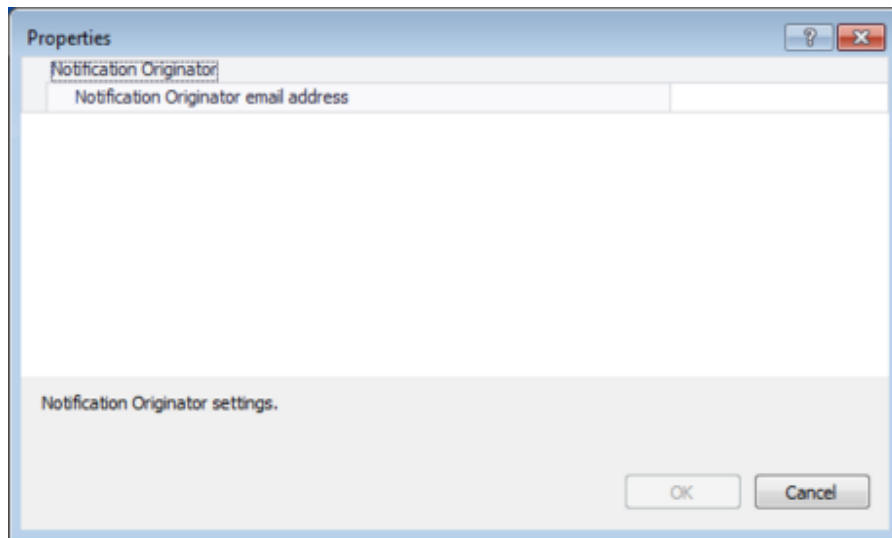
- Include attachment classifications can be Enabled if you wish the Classifier Transport Agent(s) to include attachment classification information in the set of information passed to the Tracking Service for storage. By default this setting is Disabled to limit the message Tracking overheads.

Properties (Notifications)

Admin: Exchange Classifier Administration ⇒ Settings ⇒ Notifications

This allows you to configure information pertaining to any Notifications arising from [Exchange Action settings](#) configured for check rules.

- Choose Exchange Classifier Administration > Settings > Notifications
- This will present the following dialog allowing you to configure an (SMTP) Email address to be used as the originator of notification messages that might be sent by a Transport Agent as a result of rules configured:



Properties - Notifications

No notifications will be sent if no address is configured or the address provided is invalid.

Messages from inside the organization

Admin: Exchange Classifier Administration ⇒ Messages from inside the organization

Messages from inside the organization are messages with an Originating mail address that is a member of the local domain.

Exchange Classifier processes these messages depending upon whether or not they have an associated 'Classifier Label' property (as would typically have been added by Email Classifier or OWA Classifier).

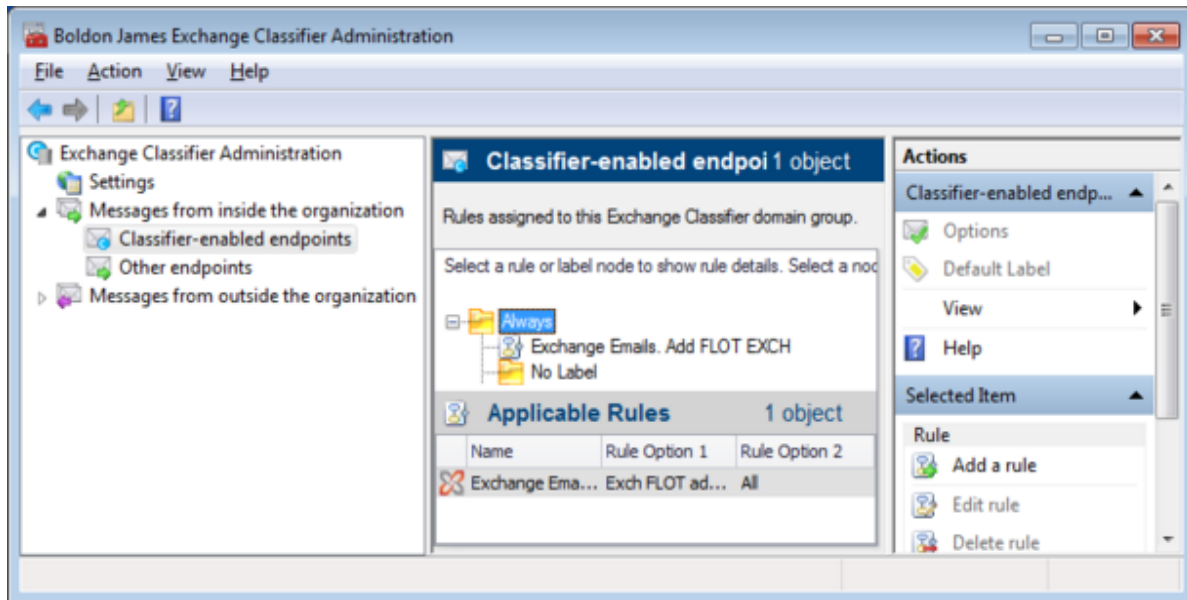
A message originating from Classifier-enabled endpoints would have an associated 'Classifier label'.

A message from any Other endpoints (e.g. a third party application) would not have an associated 'Classifier Label'.

Note: A 'Classifier label' may be present but 'empty' (i.e. it contains no selector values) - this would match a 'No Label' node in the Classifier Rules tree.

You can configure zero, one or more rules to the rules trees under Classifier-enabled endpoints and Other endpoints. Rule configuration allows you to indicate that the rule should apply for recipients in all domains, or for recipients in a (configurable) set of domains.

The rules are managed using the same style of wizard used in Classifier Administration - as described in [Classifier Administration Guide > Policies > Rules Management > Adding Rules > Rules wizard operation](#). Rules can be defined as applying Always, when there is No Label, when there is Any Label value or on a specific Label value basis.



Messages from inside the organization

Classifier-enabled endpoints

These rules apply if the message has previously been processed by a Classifier enabled application (e.g. Outlook, OWA etc.) and therefore has an associated Classifier Label property - even if that property indicates 'No label selected' (i.e. no selector values chosen).

Note: Since by definition this category of messages have a Classification, Options and Default Label are not applicable.

Other endpoints

These rules apply if a message originated locally has not previously been processed by a Classifier enabled application (e.g. Outlook, OWA etc.) and does not have an associated Classifier Label property. Exchange Classifier will see if a classification can be derived from any of the Label Locations configured.

If the message does not have an associated label, and [Message Tracking](#) is Enabled, and the message is a Forward or a Reply and has the 'in-reply-to' property then:

Exchange Classifier will interrogate the Exchange Classifier Message Tracking Service to see whether a label can be obtained from the original message. If a label is available it will be applied to the current message.

You can specify Options as described in [Options \(Domain Group\)](#).

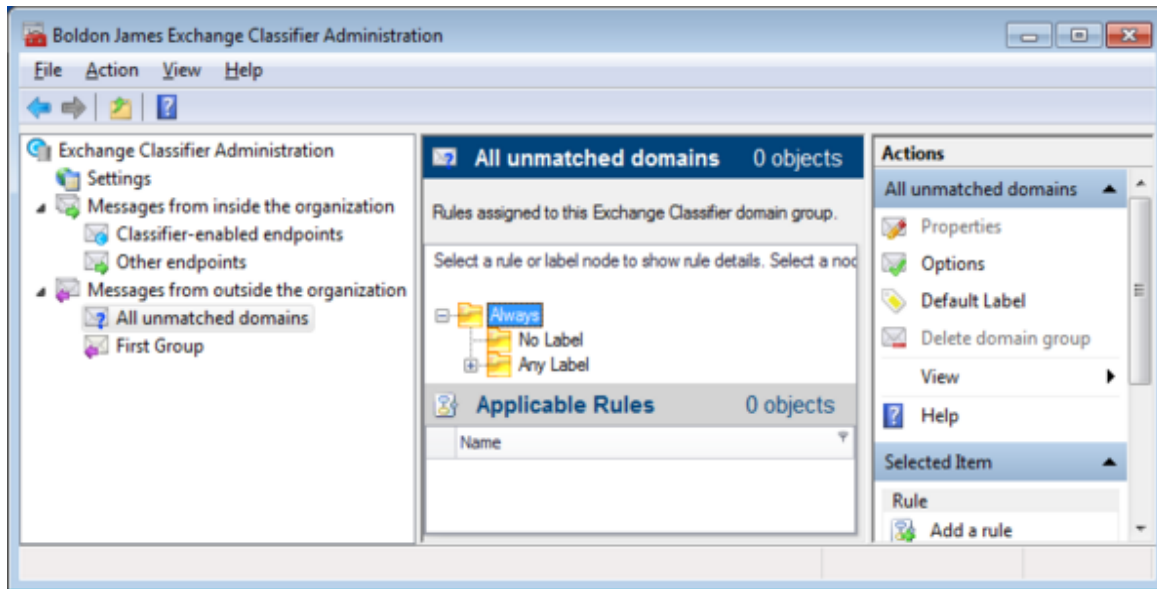
You can define a [Default Label \(Domain Group\)](#) value to be applied to these messages if no label value is available by other mechanisms.

The rules supported by Classifier-enabled endpoints and Other endpoints are described in [Exchange Classifier Rules supported](#) and subordinate topics [Add rules \(Exchange Classifier\)](#) and [Check rules \(Exchange Classifier\)](#).

Messages from outside the organization

Admin: *Exchange Classifier Administration* ⇒ *Messages from outside the organization*

Messages from outside the organization are messages with an Originating mail address that is NOT a member of the local domain.



Messages from outside the organization

[Domain Groups](#) can be configured allowing you to apply different policy actions to different domains. There is a special permanent domain group (All unmatched domains) which is used to configure settings to apply if an originating address cannot be matched against any of the other domain groups configured. New domain groups are defined using [Add a new domain group](#). Each domain group has:

- A unique Domain Group Name.
- [Properties](#) containing zero, one or more domain address space definitions (the All unmatched domains domain group has a fixed meaning which cannot be changed). A domain definition must only appear in one Domain Group. Exchange Classifier determines the Domain Group applicable using a 'best match' algorithm.
- A [Default Label](#) value (blank unless specifically configured). This value is applied to the message if a label value cannot be derived from the message (e.g. using Label Locations, or via Message Tracking).
- Various [Options](#) that control some aspects of unlabelled message processing.
- Associated with each domain group (under the rules tree) can be zero, one or more Rules. The rules are triggered depending on which of the configured Domain Groups contains an address space that 'best' matches the originating domain address; and then the usual Classifier rule matching algorithm applies (based on label).

The rules are managed using the same style of wizard used in the main Classifier Administration - as described in [Classifier Administration Guide > Policies > Rules Management > Adding Rules > Rules wizard operation](#). As per rule management in the main Classifier Administration, Rules can be defined as applying Always, when there is No Label, when there is Any Label value or on a specific Label value basis.

Domain Groups

Admin: *Exchange Classifier Administration* ⇒ *Messages from outside the organization* ⇒ *{Domain group}*

A domain group allows you to define a rule that applies to messages received from a set of originating domains.

Each Domain group contains a list of zero, one or more domain definitions which can be viewed and amended via the [Properties](#) action. Each domain definition must be unique within the Domain groups.

You can define a [Default Label](#) which will be applied to any unlabelled message received from a qualifying domain.

A Classification may be assigned prior to rule execution as described in [Classifier Transport Agent - operational notes](#).

The following actions are supported:

- [Add a new domain group](#)

- [Properties \(Domain group\)](#)
- [Options \(Domain group\)](#)
- [Default Label \(Domain group\)](#)
- [Delete \(Domain group\)](#)

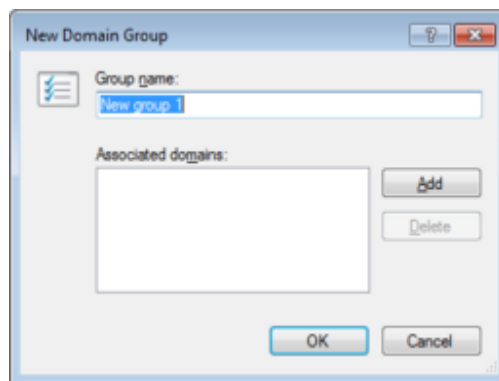
[Add a new domain group](#)

Admin: Exchange Classifier Administration ⇒ Messages from outside the organization ⇒ Add a new domain group

Note: A domain definition can only be a member of a single domain group.

You can define as many domain groups as you require. To define a new domain group:

- Select Exchange Classifier Administration > Messages from outside the organization.
- Choose Add a new domain group. This will present the following dialog:



Add a new domain group

- You can define the Group name, Add a new domain definition, edit or Delete an existing domain entry.

Note: A domain definition can contain wildcards (*) at the start of the string, but not in the middle or end. Thus *.abc is valid, but a.*.co.uk and b.* are not.

When deciding which rule to apply, Exchange Classifier performs a best match between the current address and the configured domain definitions. For example, a match against *.co.uk will take precedence over a match against *.uk.

- Once you have made the required changes press OK.
- You can subsequently change any or all of these properties via the [Properties \(Domain group\)](#) action. A domain group can be deleted using the [Delete \(Domain group\)](#) action.

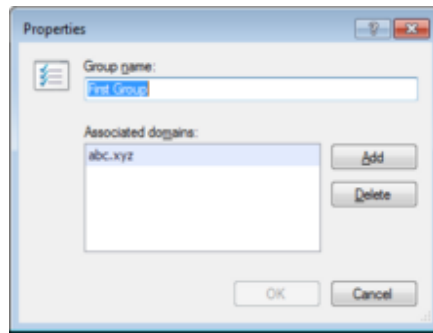
[Properties \(Domain group\)](#)

Admin: Exchange Classifier Administration ⇒ Messages from outside the organization ⇒ {Domain group} / Properties (Domain group)

(Add a new domain group will invoke this Properties (Domain group) dialogue).

You can maintain a domain group using the Properties action.

- Select Exchange Classifier Administration > Messages from outside the organization.
- Select the relevant **Domain group**.
- Choose Properties.



Properties (Domain group)

- You can change the Group name, Add a new domain definition, edit or Delete an existing domain entry.

Note: A domain definition can contain wildcards (*) at the start of the string, but not in the middle or end. Thus *.abc is valid, but a.*.co.uk and b.* are not.

When deciding which rule to apply, Exchange Classifier performs a best match between the current address and the configured domain definitions. For example, a match against *.co.uk will take precedence over a match against *.uk.

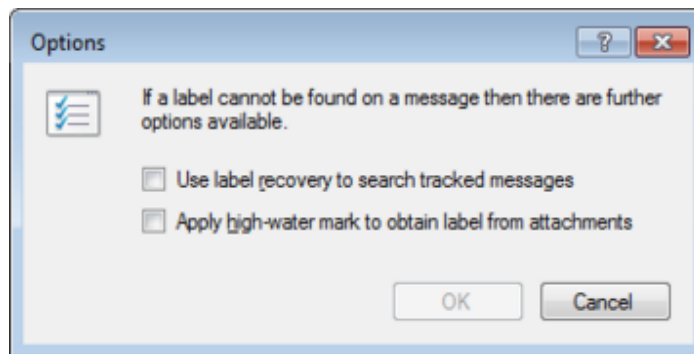
- Once you have made the required changes press OK.

Options (Domain group)

Admin: Exchange Classifier Administration ⇒ Messages from outside the organization ⇒ {Domain group} / Options (Domain group)

Domain Groups (excluding 'All unmatched domains') support various options controlling how the label may be modified:

- Select Exchange Classifier Administration > Messages from outside the organization.
- Select the relevant **Domain group**.
- Choose Options.



Options (Domain group)

Use label recovery to search tracked messages

Enabled If - the message does not have an associated label,
 - and [Message Tracking](#) is enabled,
 - and the message is a Forward or Reply,
 - and the message has the 'in-reply-to' property:
 Exchange Classifier will interrogate the Exchange Classifier Message Tracking Service to see whether a label can be obtained from the original message. If a label is available it will be applied to the current message.

Disabled Label recovery is not attempted.

Apply high-water mark to obtain label from attachments

Note: This setting has no effect on Meeting Requests.

Enabled This option is only significant during the label derivation algorithms

described in [Classifier Transport Agent - operational notes](#) (When a message does not have a label, and a label cannot be derived from Label Locations or Message Tracking service information). If relevant Exchange Classifier will check all attachments to determine the 'highest' label using the algorithm described in [Classifier Administration > Email, OWA and Notes Classifier Features > Configuration Settings \(Email, OWA and Notes\) > Configuration Settings / Classifier Application Settings / Email, OWA and Notes > Automatically elevate email label](#).

Note: Enabling this setting affects the label derivation action as described in [Classifier Transport Agent - operational notes](#).

Disabled A high-water mark check of attachments is not performed when deriving labels.

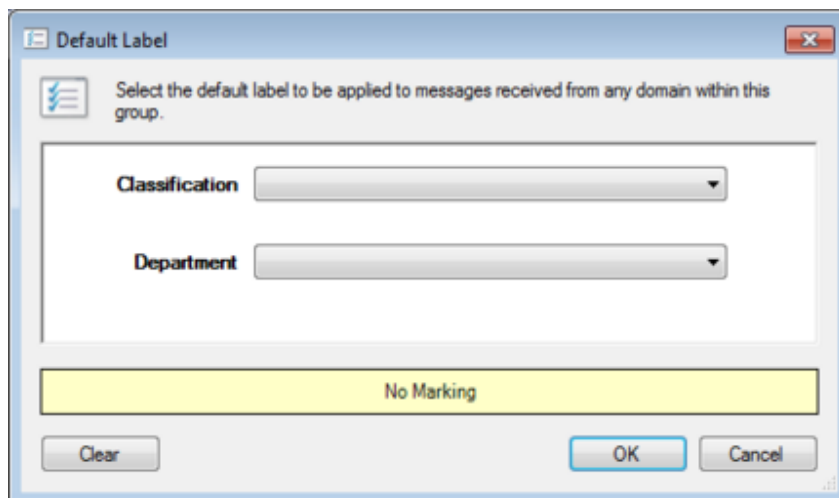
[Default Label \(Domain Group\)](#)

Admin: Exchange Classifier Administration ⇒ Messages from outside the organization ⇒ {Domain group} / Default Label

You can define a default label value for each Domain Group you have defined.

- Select Exchange Classifier Administration > Messages from outside the organization.
- Select the relevant **domain group** node.
- Choose Default Label which will present a dialog containing all the configured Selectors and Values.

Note: Since all values are presented, you should take care that the label values chosen are available in the relevant Classifier policies in use by Classifier applications.



Default Label

- Select the required selector values and press OK.

[Delete \(Domain group\)](#)

Admin: Exchange Classifier Administration ⇒ Messages from outside the organization ⇒ {Domain group} / Delete domain group

To delete a domain group:

- Select Exchange Classifier Administration > Messages from outside the organization.
- Select the relevant <Domain group>.
- Choose Delete domain group and press Yes on the confirmation displayed.

Exchange Classifier Rules supported

Admin: Exchange Classifier Administration ⇒
 Messages from inside the organization ⇒ Classifier-enabled endpoints / Other endpoints ⇒
 Messages from outside the organization ⇒ {Domain group} ⇒
 {Always / No Label / Any Label / Specific Label} /Add a rule or Edit a rule}

This section covers all the rules supported by Exchange Classifier which uses these Rules to control the actions performed when messages are submitted or received.

Note: Your Exchange Transport(s) may have Exchange Transport Rules configured (Microsoft Transport Rule Agent), and/or other third party Transport Agent(s) active as well as Exchange Classifier. Whilst the Exchange Transport Agent mechanisms support such diversity you should be aware of the possibilities for unexpected interactions - the last Transport agent enabled may not be the root cause of issues that arise.

The general style of management of rules (Rules wizard, Add, Copy, delete etc.) is the same as for the other rules supported by Classifier applications ([Classifier Administration > Policies > Rules Management](#)), but Exchange Classifier rules are defined as applying to either [Messages from inside the organization](#), or to [Messages from outside the organization](#), rather than on a Classifier Policy basis as is the case for Classifier Application rules.

The same rule scoping controls are available; that is Rules apply Always, or when there is No Label, or when there is Any Label or when there is a Specific Label value.

Note: An instance of the Classifier Transport Agent will know if another instance within the local domain has processed the message thus avoiding duplicate activity. The Classifier Transport Agent also checks before adding FLOT or LLOT that the message content does not already start/end with the relevant text - as might have been added by Classifier client for example.

The rules supported are similar to the equivalent rules supported by the other Classifier Applications, but only Add rules (which cause Meta-data to be added to a message) and Check rules (check some aspect of site policy and perform an action if the policy is contravened) are supported (there are no Apply rules applicable to Exchange Classifier).

Each rule is presented as a template e.g.

Add a FLOT in [this](#) format

Add a FLOT in [this](#) format when sending to [these](#) domains

Check auto-forwarded message. NDR if check fails with [Exchange Action](#) additional action

When adding rules relating to a specific Classification the templates appear as follow s:

With [this](#) label, add ...

With [this](#) label, check

An Exchange Classifier rule is configured such that it only applies to messages received from or being sent to defined domain(s). Although the basic set of rules supported for Messages from inside the organization, and Messages from outside the organization is essentially the same the manner of defining the domain address information is different.

- For [Messages from inside the organization](#) Add rules you can define domain conditions within the rule template - for example Add a FLOT in [this](#) format, when sending to [these](#) domains. You can either specify that the rule applies when sending to all domains, or that the rule applies to a configurable list of domains. Exchange Classifier will apply the rule that 'best matches' the domain address definitions (i.e. it will use a rule where there is a specific domain match in preference to a rule defined for 'when sending to all domains').
- For [Messages from outside the organization](#) you always define a Domain group and then associate the rule with the Domain Group. Exchange Classifier then uses the originating address to ascertain the applicable Domain Group which in turn identifies the rules to apply.

You may define multiple instances of each type of rule for [Messages from inside the organization](#) and [Messages from outside the organization](#). Classifier determines which rule to apply based on the 'best fit' between the run time label and the label values associated with the rule as described in [Classifier Administration > Policies > Rules Management > Rule Overlap Handling](#)

The rules listed in the tables below only appear in their label unspecific form. In each case there is an equivalent label specific form of the template - for example With [this](#) label, add a FLOT in [this](#) format. Similarly there is also a variant of Add templates (only applicable to [Messages from inside the organization](#)) that allows you to specify the target domains - for example Add a FLOT in [this](#) format, when sending to [these](#) domains.

Note: Check rules are applied before Add rules. So for example a Check clearance for recipients rule will be actioned before any additional recipients are added as a consequence of anAdd these addresses... rule.

[Add rules \(Exchange Classifier\)](#) - these are applied after any Check... rules.

Rule template	Messages from inside the organization	Messages from outside the organization
Add a FLOT in this format, when sending to these domains	Y	
Add a FLOT in this format		Y
Add a LLOT in this format, when sending to these domains	Y	
Add a LLOT in this format		Y
Add a subject here in this format, when sending to these domains	Y	
Add a subject here in this format		Y
Add this X-Header in this format, when sending to these domains	Y	
Add this X-Header in this format		Y
Add these addresses to these recipients, when sending to these domains	Y	
Add these addresses to these recipients		Y

[Check rules \(Exchange Classifier\)](#) - these are applied before any Add... rules.

Rule template	Messages from inside the organization	Messages from outside the organization
Check auto-forwarded message. NDR if check fails with Exchange Action additional action	Y	Y
Check for the high-water mark of all attachments. NDR if check fails with Exchange Action additional action.	Y	Y
Check clearance for recipients. NDR if check fails with Exchange Action additional action (the failing recipient is removed and receives an NDR).	Y	Y
Check clearance for originator. NDR if check fails with Exchange Action additional action	Y	Y

Add rules (Exchange Classifier)

Admin: Exchange Classifier Administration ⇒

- Messages from inside the organization ⇒ Classifier-enabled endpoints / Other endpoints ⇒

- Messages from outside the organization ⇒ {Domain group} ⇒

_____ {Always / No Label / Any Label / Specific Label} /Add a rule or Edit a rule / Add rules

Note: Check rules are actioned before Add rules. So for example a Check clearance for recipients rule will be actioned before any additional recipients are added as a consequence of anAdd these addresses... rule.

Exchange Classifier allow Markings and/or Metadata based on the current label value to be applied to the current message.

Any Marking defined through these mechanisms will overwrite any existing value in the same location defined by any other means (e.g. by Email Classifier).

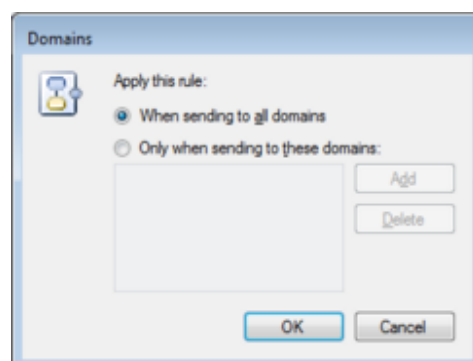
Note: Any rich text formatting specified in a Format is ignored when used in a location that does not support such features (e.g. Subject field).

To add a new rule:

- (a) Perform the operations common to all rules:
- Select the node - one of:
 - Exchange Classifier Administration > Messages from inside the organization > Classifier-enabled endpoints
 - Exchange Classifier Administration > Messages from inside the organization > Other endpoints
 - Exchange Classifier Administration > Messages from outside the organization > < **Domain group**>
 - Select either the Always, No Label, Any Label node or a **specific label value** node in the rules tree presented.
 - Choose Add a rule which will start the Rules wizard. Press Next. This will present the rules available for the application(s) chosen.
 - If required, choose the appropriate rule category filter (Add rules/Check rules).
 - Select the appropriate 'Add ...' rule from the list of rules displayed. This will present the appropriate rule edit template.
 - If the rule is label value based then select the label value token and configure the label setting to meet your requirements.
- (b) Set any rule specific settings and be aware of any rule specific features as described in the relevant sub-topic found in [Classifier Administration > Policies > Add rules > Add a FLOT or LLOT etc.](#)

The Add ... rules supported and their settings tokens (<Label>, here, this,) are:

- Add a FLOT in this format(, when sending to these domains.
 - Add a LLOT in this format(, when sending to these domains.
 - Add to subject here in this format(, when sending to these domains.
 - Add this x-header in this format(, when sending to these domains.
 - Add these email addresses to these recipients(, when sending to these domains.
- (c) This format / this x-header / these email addresses / these recipients are all defined as described in the relevant Classifier Administration topics:
- This Format: [Classifier Administration > Policies > Add rules > Defining the marking format for an "Add rule"](#).
- This x-header: [Classifier Administration > Policies > Add rules > Add an x-header](#).
- These email addresses to these recipients: [Classifier Administration > Policies > Add rules > Add email addresses](#).
- (d) If you have chosen the domain list variant of the rule:
- Select these (domains) which will present the following dialog:



Specify the domains relevant to this rule.

- Select When sending to all domains if you want the rule to apply regardless of the

recipient domain addresses.

- If you want to limit the scope of the rule then select Only when sending to these domains and Add one or more domain address space definitions (see Properties (Domain group)).
- Once you have added/modified the required domain information press OK.
- You can modify the domain information at any time by editing these domains within the relevant rule.

(e) Complete the wizard sequence by supplying a name for the rule.

Note: You may subsequently edit the rule to change any of the settings (e.g. the marking format used).

Check rules (Exchange Classifier)

Admin: Exchange Classifier Administration ⇒

- Messages from inside the organization ⇒ Classifier-enabled endpoints / Other endpoints ⇒

- Messages from outside the organization ⇒ {Domain group} ⇒

{Always / No Label / Any Label / Specific Label} / Add a rule or Edit a rule / Check rules

Note: Check rules are actioned before Add rules. So for example a Check clearance for recipients rule will be actioned before any additional recipients are added as a consequence of an Add these addresses... rule.

The Configuration can define that zero, one or more of the following checks be performed when a message is sent or received.

For each type of Check supported, rules are available in a general (Check ...) or a Label specific (With this <Label>, check....) form depending on whether you are adding the rule as an Any label or a rule associated with a specific label value. To add a new rule:

(a) Perform the operations common to all rules:

- Select the node - one of:

Exchange Classifier Administration > Messages from inside the organization > Classifier-enabled endpoints

Exchange Classifier Administration > Messages from inside the organization > Other endpoints

Exchange Classifier Administration > Messages from outside the organization > <
Domain group>

- Select either the Always, No Label, Any Label node or a **specific label value** node in the rules tree presented.
- Choose Add a rule which will start the Rules wizard. Press Next. This will present the rules available for the application(s) chosen.
- If required, choose the appropriate rule category filter (Add rules/Check rules).
- Select the appropriate 'Check ...' rule from the list of rules displayed. This will present the appropriate rule edit template.
- If the rule is label value based then select the label value token and configure the label setting to meet your requirements.

(b) Set any rule specific settings and be aware of any rule specific features as described in the relevant sub-topic found in [Classifier Administration > Policies > Check rules > Check clearance for recipients](#) etc.

The bold items in the rules below indicate configurable settings.

- Check auto-forwarded messages. NDR if check fails with Exchange Action additional action.

Note: There is no equivalent rule within the Classifier client applications. This rule just detects a message that has been auto-forwarded and processes it accordingly.

- Check for the high-water mark of all attachments. NDR if check fails with Exchange Action additional action.

Note: High-water mark checks will use the Label Locations defined in the main Classifier Configuration when looking for label values.

Note: If high-Water mark checks need to process embedded messages to ascertain labels, it may be necessary to extend the core Plugins configuration (under guidance from Classifier support) to support .MSG and .EML files. See Classifier Administration Guide > Appendix - Label Propagation Mechanisms > Plugins

- **Check clearance for recipients.** NDR if check fails with Exchange Action additional action. See Classifier Administration > Clearance Settings > Perform Clearance Checks when sending messages for details of how these checks are implemented.
-

Note: When performing recipient clearance checks, Exchange Classifier looks for the clearance associated with each member of a distribution list.

- **Check clearance for originator.** NDR if check fails with Exchange Action additional action. See Classifier Administration > Clearance Settings > Perform Clearance Checks when sending messages for details of how these checks are implemented.
-

Note: If Clearance check users is Enabled in the core Classifier Configuration, Exchange Classifier will attempt to retrieve clearance information for recipients from Active Directory even if you have no Exchange Clearance check rules configured.

- (c) For all the Check rules the [NDR options](#) and [Exchange Action settings](#) should be configured.
- (d) Complete the wizard sequence by supplying a name for the rule. The name of the application will automatically be pre-pended.
-

Note: You may subsequently edit the rule to change any of the settings (e.g. the marking format used).

NDR options

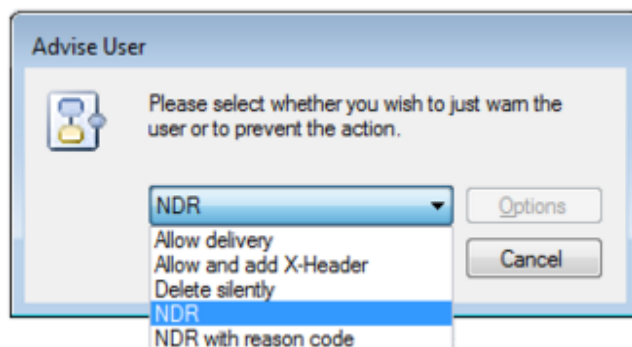
Admin: Exchange Classifier Administration ⇒

- Messages from inside the organization ⇒ Classifier-enabled endpoints / Other endpoints ⇒
 - Messages from outside the organization ⇒ {Domain group} ⇒
 {Always / No Label / Any Label / Specific Label} / Add a rule or Edit a rule
-

Note: There may be Multiple Check rules that are triggered for a message, and each rule may have a different NDR action selected. Exchange Classifier has an inbuilt significance applicable to these settings. If more than one Check fails, then the most significant NDR action from the failing checks is adopted as per the following (least significant first):

- Allow delivery.
 - Allow and add X-Header, (Options apply)
 - Delete silently,
 - NDR,
 - NDR with reason code (Options apply).
-

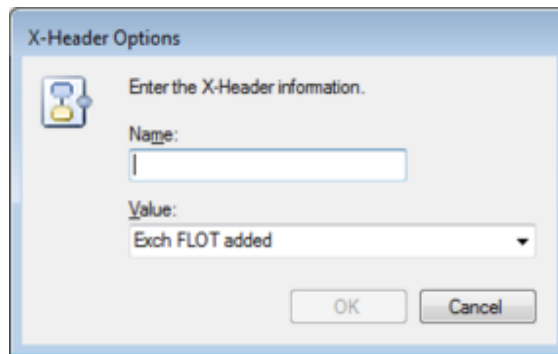
All the Exchange Classifier Check rules include an NDR settings field. Selecting the NDR item presents a dialog containing the following options allowing you to control whether the message is sent, deleted or NDR'd (Non-delivered):



NDR settings

Note: If a Check clearance for recipients rule fails and the action is NDR or NDR with reason code then NDR's will be generated for the failing recipients and those recipients removed. Delivery to other recipients will proceed.

- If you choose Allow and add X-Header, then you define the X-Header and its contents via the Options button.


 A dialog box titled "X-Header Options" with a blue header. It contains a small icon of a person with a speech bubble. The text "Enter the X-Header information." is followed by two fields: "Name:" with an empty text box, and "Value:" with a dropdown menu showing "Exch FLOT added". At the bottom are "OK" and "Cancel" buttons.

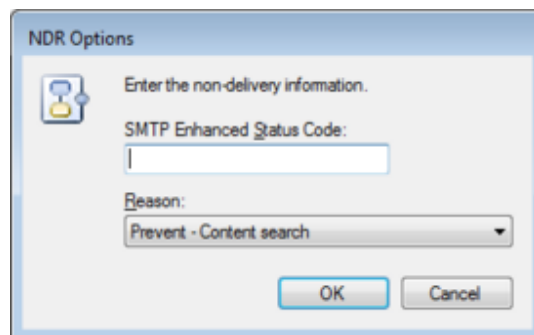
Define X-Header for NDR.

The Name field defines the X-Header to be populated and Value presents a list of configured Marking Formats.

Note: Marking Formats need to be configured using Classifier Administration and the Classifier Configuration must be refreshed if you add or modify marking formats required by Exchange Classifier.

Note: You might use this feature to add an X-Header which then causes your boundary Firewall to take more particular action.

- If you choose NDR with reason code the Options button presents a dialog allowing you to define a reason code and associated message identity:


 A dialog box titled "NDR Options" with a blue header. It contains a small icon of a person with a speech bubble. The text "Enter the non-delivery information." is followed by two fields: "SMTP Enhanced Status Code:" with an empty text box, and "Reason:" with a dropdown menu showing "Prevent - Content search". At the bottom are "OK" and "Cancel" buttons.

Configure reason for NDR

The code is a valid Enhanced status code. Supported values are 5.7.1 and in the range 5.7.10 - 5.7.999.

The Reason value points to an entry in the Classifier Message Library. The message text must be limited to the IA5 character set.

Note: Entries in the Message Library are configured using Classifier Administration. The Classifier Configuration must be refreshed if you add or modify messages required by Exchange Classifier.

Exchange Action settings

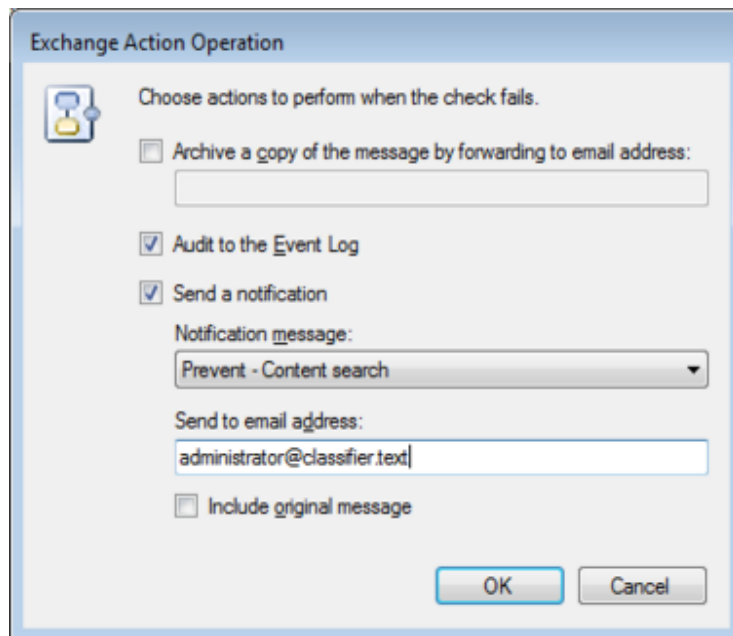
Admin: Exchange Classifier Administration ⇒

- Messages from inside the organization ⇒ Classifier-enabled endpoints / Other endpoints ⇒

- Messages from outside the organization ⇒ {Domain group} ⇒

{Always / No Label / Any Label / Specific Label} / Add a rule or Edit a rule

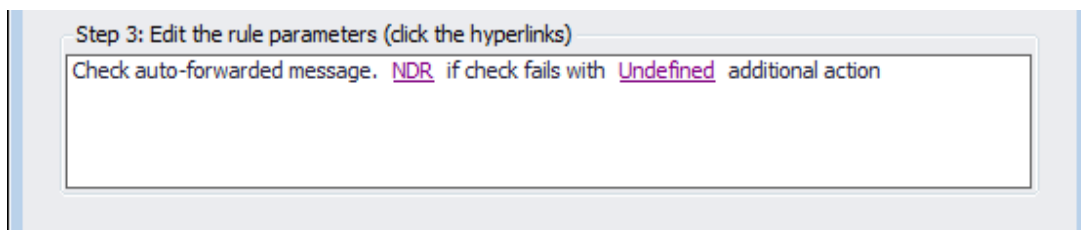
All the Exchange Classifier Check rules include an Exchange Action item. Selecting the Exchange Action item presents a dialog containing the following options allowing you to control some additional actions. You can select zero, one or more of the options (Archive, Audit, Send a notification) and configure any subordinate fields (email address etc.) for the selected actions.



Exchange Action settings

Note: The Audit to the Event Log action relates to auditing specific to the NDR action. Basic auditing of Check messages is controlled by the core Classifier Administration > Settings applicable across the organization > Global Settings > Audit Settings.

If none of the primary actions are selected, the rule will appear with a value of undefined.



Exchange action undefined

Classifier Transport Agent

Note: The Classifier Transport Agent must be installed and activated on each Exchange Hub Transport in each site in your organization.

Note: Whenever you (update) [Publish Exchange Configuration](#), you must re-start the Exchange Transport Agent(s) to ensure that the correct configuration is in use by the Classifier Transport Agent(s).

Classifier Transport Agent is an Exchange Transport Agent that monitors messages passing through a Transport hub and actions any applicable Exchange Classifier rules (e.g. adding a marking or checking recipient clearance).

Note: Classifier Transport Agent takes no action on Delivery Reports, Receipt Notifications, System Messages and Secured (Signed or Encrypted) messages. No message tracking of such messages is performed.

If the Message Tracking Service is enabled, Classifier Transport Agents will transmit relevant information to that service.

Note: A [Test Message Tracking Service](#) command is installed with Exchange Classifier allowing you to test the connection to your Message Tracking Service from each instance of the Classifier Transport Agent.

If the Classifier Transport Agent detects an in-reply-to message that has no Classifier Label, it can interrogate the Message Tracking Service to see if a Classification was associated with the original message: and, if it was, apply that (original) Classification to the reply message. This can happen for example if a reply to a message comes from a mobile device. [Options \(Domain group\)](#) provides a setting to control use of this Message Tracking Service feature.

The rules performed by the Classifier Transport Agent can include notifications to a specific mailbox. All the rules are configured using the same style of interface as described in [Classifier Administration Guide > Policies > Rules Management > Adding Rules > Rules wizard operation](#) Details of the rules supported by Exchange Classifier can be found in:

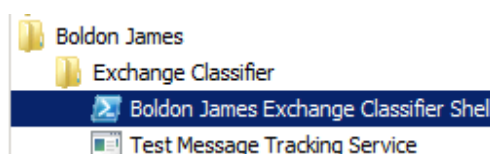
- [Exchange Classifier Rules supported](#)

Note: If Clearance check users is Enabled in the core Classifier Configuration, Exchange Classifier will attempt to retrieve clearance information for recipients from Active Directory even if you have no Exchange Clearance check rules configured.

Installation of the Classifier Transport Agent software is simply a matter of invoking `setup.exe` from the Exchange Classifier folder (under the Exchange Classifier bundle) and following the instructions. Note that installation leaves the Exchange Transport Agent unaffected until Exchange Classifier is enabled as described below. Once the software has been installed you enable the transport agent as follows:

Enabling and disabling a Classifier Transport Agent

- Ensure that Exchange Classifier is licensed within the published Classifier Configuration ([Classifier Administration Guide > Settings applicable across the organization > Global Settings > Licence](#)).
- Ensure that the required registry entries are defined as described in [Classifier Transport Agent Registry entries](#).
- In particular you must establish settings to allow the Classifier Transport Agent(s) to find the correct Exchange Classifier Configuration. These registry entries are defined in [Configuration Settings](#), and must be established below one of:
 - HKLM\Software\Baldon James\ConfigManager\ExchangeServiceMode
 - HKLM\Software\Policies\Baldon James\ConfigManager\ExchangeServiceMode
- Ensure that the relevant Exchange Classifier Configuration is correct and has been published.
- On the system that supports the Transport Agent invoke Baldon James Exchange Management Shell:



Exchange Classifier Start menu items

- ❑ Invoke `.\EnableExchangeClassifier.ps1` or `.\EnableExchangeClassifier2013.ps1` (for Exchange 2013). This will stop the Exchange Transport, register and then Enable the Exchange Classifier Transport Agent, and restart the Transport Agent.

```

Machine: ICS-DC-1.classifier.test

Welcome to the Boldon James Exchange Classifier Shell
Run '.\EnableExchangeClassifier.ps1' to install the Boldon James Classifier Routing Agent.
Run '.\DisableExchangeClassifier.ps1' to uninstall, the Boldon James Classifier Routing Agent.

Note that both of these commands will need to stop and restart the
Microsoft Exchange Transport service in order for the changes to take effect.

[PS] C:\Program Files\Boldon James\Exchange Classifier\Scripts>.\EnableExchangeClassifier.ps1
Transcript started, output file is C:\Users\Administrator\AppData\Roaming\BoldonJamesInstallExchClfr.log

Install Exchange Classifier Routing Agent
-----
date: 01/19/2015 08:42:58
Stopping Microsoft Exchange Transport...

Confirm
Are you sure you want to perform this action?
Performing operation "Stop-Service" on Target "Microsoft Exchange Transport (MSEExchangeTransport)".
[Y] Yes [A] Yes to All [N] No [L] No to All [S] Suspend [?] Help (default is "Y"): y
Registering Exchange Classifier Routing Agent ...

Identity           Enabled           Priority
-----
Classifier Routing Agent      False            4
WARNING: Please exit Windows PowerShell to complete the installation.
WARNING: The following service restart is required for the change(s) to take effect : MSEExchangeTransport
Enabling Exchange Classifier Routing Agent...
WARNING: The following service restart is required for the change(s) to take effect : MSEExchangeTransport
Starting Microsoft Exchange Transport ...
WARNING: Waiting for service 'Microsoft Exchange Transport (MSEExchangeTransport)' to finish starting...
WARNING: Waiting for service 'Microsoft Exchange Transport (MSEExchangeTransport)' to finish starting...
Starting Microsoft Exchange Transport ...
Successfully installed Exchange Classifier Routing Agent
Transcript stopped, output file is C:\Users\Administrator\AppData\Roaming\BoldonJamesInstallExchClfr.log

```

Register and Enable the Transport Agent

- ❑ You can check that the Classifier Transport Agent is available by invoking `Get-TransportAgent`:

```

Machine: ICS-DC-1.classifier.test

[PS] C:\Program Files\Boldon James\Exchange Classifier>Get-TransportAgent

Identity           Enabled           Priority
-----
Transport Rule Agent      True             1
Text Messaging Routing Agent  True            2
Text Messaging Delivery Agent True             3
Classifier Routing Agent   True             4

[PS] C:\Program Files\Boldon James\Exchange Classifier>_

```

Get Transport Agent

- ❑ The `.\DisableExchangeClassifier.ps1` (for Exchange 2010 and 2013) command is provided which will reverse the install:

```

Machine: ICS-DC-1.classifier.test

[PS] C:\Program Files\Boldon James\Exchange Classifier\Scripts>.\DisableExchangeClassifier.ps1
Transcript started, output file is C:\Users\Administrator\AppData\Roaming\BoldonJamesUninstallExchClfr.log

Remove Exchange Classifier Routing Agent
-----
date: 01/19/2015 08:51:16
Stopping Microsoft Exchange Transport...

Confirm
Are you sure you want to perform this action?
Performing operation "Stop-Service" on Target "Microsoft Exchange Transport (MSEExchangeTransport)".
[Y] Yes [A] Yes to All [N] No [L] No to All [S] Suspend [?] Help (default is "Y"): y
WARNING: Waiting for service 'Microsoft Exchange Transport (MSEExchangeTransport)' to finish stopping...
WARNING: Waiting for service 'Microsoft Exchange Transport (MSEExchangeTransport)' to finish stopping...
Disabling Exchange Classifier Routing Agent ...
WARNING: The following service restart is required for the change(s) to take effect : MSEExchangeTransport
Uninstalling Exchange Classifier Routing Agent...
WARNING: The following service restart is required for the change(s) to take effect : MSEExchangeTransport
Starting Microsoft Exchange Transport ...
WARNING: Waiting for service 'Microsoft Exchange Transport (MSEExchangeTransport)' to finish starting...
Successfully removed Exchange Classifier Routing Agent
Please ensure you close any Exchange PowerShell windows before attempting to uninstall the Boldon James Exchan
fier product
Transcript stopped, output file is C:\Users\Administrator\AppData\Roaming\BoldonJamesUninstallExchClfr.log
[PS] C:\Program Files\Boldon James\Exchange Classifier\Scripts>_

```

Disable and de-register the Transport Agent

Classifier Transport Agent Registry entries

This topic describes the Registry entries applicable to Classifier Transport Agent operation.

All registry entries should be established under one of the following:

HKLM\Software\Baldon James\...

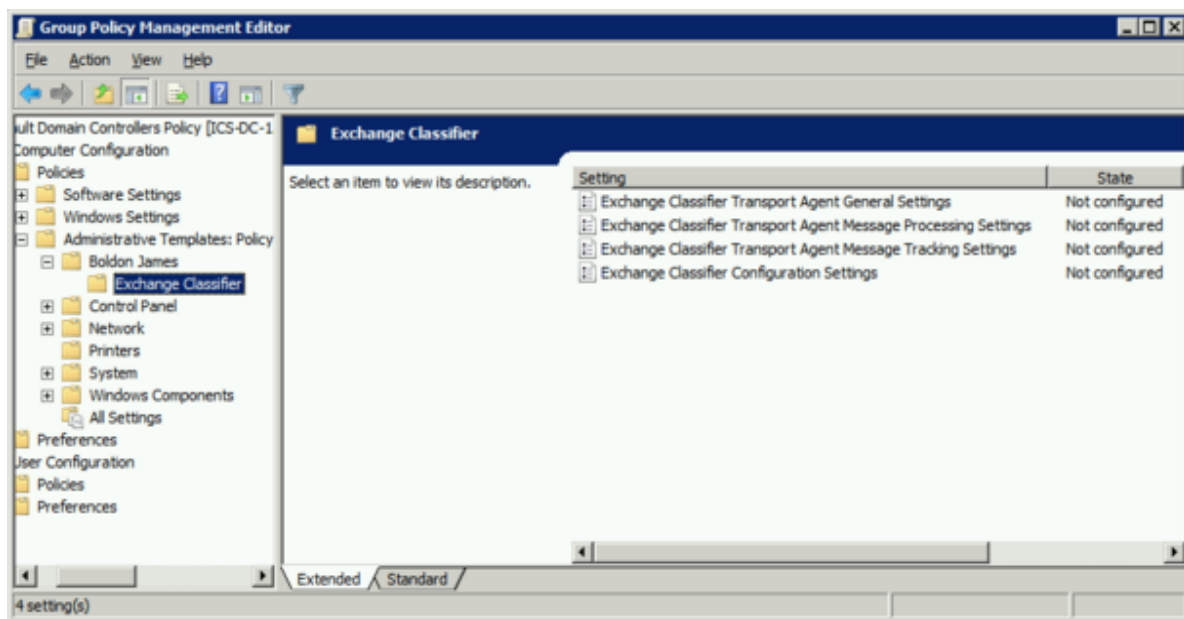
HKLM\Software\Policies\Baldon James\...

You can deploy registry settings using Group Policy mechanisms using the ADMX files supplied with the Exchange Classifier Administration product. These files can be used as follows:

- Copy the following two files from the Exchange Classifier bundle:
 - ..\Exchange Classifier Administration\Deployment\PolicyDefinitions\ExchangeClassifier.admx) to Windows\PolicyDefinitions
 - ..\Exchange Classifier Administration\Deployment\PolicyDefinitions\en-US\ExchangeClassifier.adml) to Windows\PolicyDefinitions\en-US.

Note: If there is a Windows\PolicyDefinitions\en-UK sub-folder the ADML file should also be copied into that sub-folder - but do not create en-UK if it does not already exist.

- Start the Group Policy Management tool.
- Select a group policy object and choose Edit... from the context menu.
- Open Computer > Policies > Administrative Templates > Baldon James > Exchange Classifier.



Group Policy Management

- You can then configure any or all of the supported settings which are grouped as shown above. Each group of settings is described under a separate topic:
 - [Transport Agent General Settings](#)
 - [Transport Agent Message Processing Settings](#)
 - [Transport Agent Message Tracking Settings](#)
 - [Configuration Settings](#) - these settings must be configured for Transport Agent operation.
- You can use `gpupdate /force` to ensure that the latest settings are applied to the current environment.

Transport Agent General Settings

Note: The Exchange Transport service must be restarted for changes to the following to take effect.

The following entries are optional and are only relevant if the Message Tracking Service is Enabled ([Properties \(Message Tracking Service\)](#)).

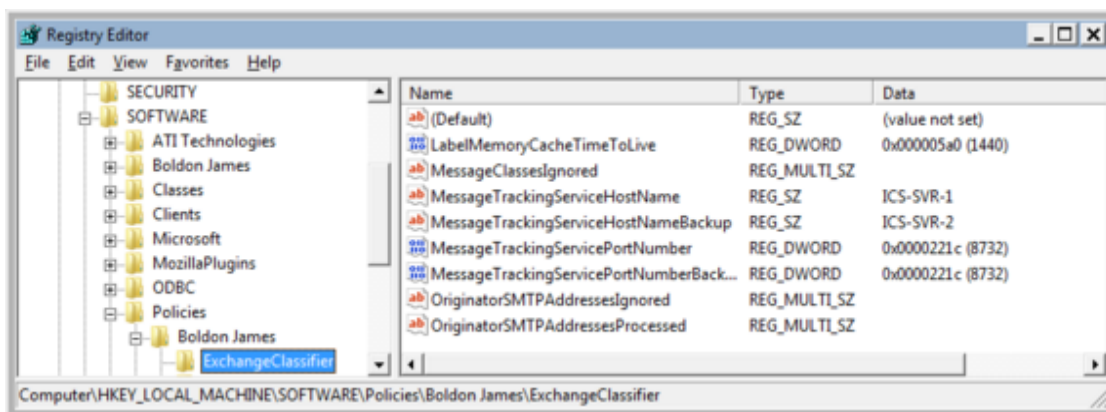
Entries should be established below one of
 HKLM\Software\Baldon James\ExchangeClassifier
 HKLM\Software\Policies\Baldon James\ExchangeClassifier

See [Classifier Transport Agent Registry entries](#) for how to utilise the supplied ADMX files if using Group Policy mechanisms.

Entry	\ClearanceCacheTimeToLive
Type	REG_DWORD.
Data	<u>Note: If Clearance check users is Enabled in the core Classifier Configuration, Exchange Classifier will attempt to retrieve clearance information for recipients from Active Directory even if you have no Exchange Clearance check rules configured.</u>
	Exchange Classifier can maintain an in-memory cache of recipient clearance information.
	Not defined (default) Information is retained in the cache for 24 hours.
0	The cache is not maintained and clearance information will always be retrieved from Active Directory.
N (minutes)	The number of minutes that clearances are retained in the cache.

Entry	\LabelMemoryCacheTimeToLive
Type	REG_DWORD.
Data	Exchange Classifier can maintain an in-memory cache of message labels passing through the system. This is used during label recovery to improve performance by first checking for a message label value from this cache before interrogating the Message Tracking Service.
	Not defined (default) Information is retained in the cache for 24 hours.
0	The cache is not maintained and label recovery attempts always interrogates the Message Tracking Service (if enabled).
N (minutes)	The number of minutes that items are retained in the cache.

Entry	\MessageTrackingServiceMaxQueueSize
Type	REG_DWORD.
Data	If Exchange Classifier is unable to connect to the Message Tracking Service it will queue messages pending the availability of the Message Tracking Service. The size of this queue can be limited using this registry entry. Once the limit is reached tracking of further messages will be discontinued. The queue will be emptied when the Message Tracking Service becomes available.
	Not defined (default) 10,000.
N	The number of messages to be queued when the Message Tracking Service is unavailable.



Exchange Classifier Registry entries

Transport Agent Message Processing Settings

Note: The Exchange Transport service must be restarted for changes to any of the following to take effect.

The following entries are optional and affect how the Classifier Transport Agent(s) operate.

Entries should be established below one of:

HKLM\Software\Baldon James\ExchangeClassifier

HKLM\Software\Policies\Baldon James\ExchangeClassifier

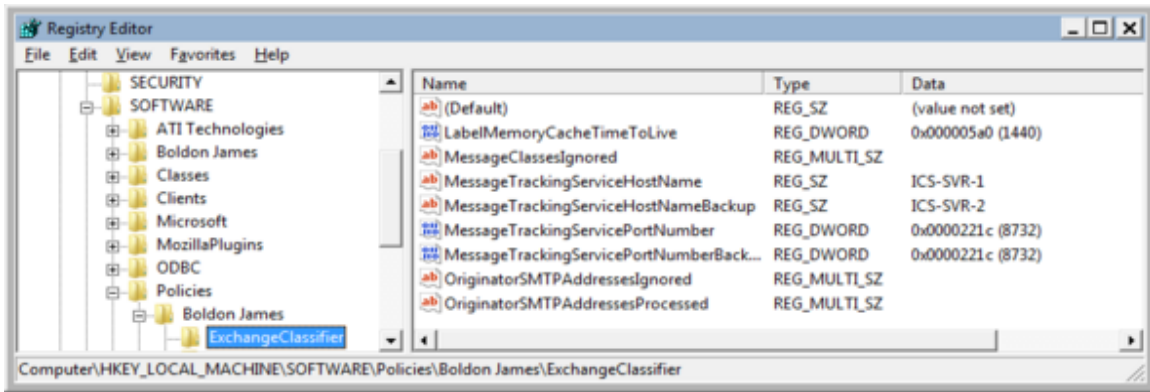
See [Classifier Transport Agent Registry entries](#) for how to utilise the supplied ADMX files if using Group Policy mechanisms.

Entry	\MessageClassesIgnored	
Type	REG_MULTI_SZ.	
Data	Not defined (default) (or empty)	All messages are processed by the Classifier Transport Agent.
	<message classes>	A set of message class definitions. Messages with a message class that matches one of these entries will undergo no further processing by Exchange Classifier Transport Agent(s) (even if the originator is specified in OriginatorSmtpAddressesProcessed).
		Note: Classifier Transport Agent takes no action on Delivery Reports, Receipt Notifications, System Messages and Secured (Signed or Encrypted) messages. No message tracking of such messages is performed.

For example: IPM.NOTE.OUTOFFICE.REPLY.TEMPLATE

Entry	\OriginatorSmtpAddressesIgnored	
Type	REG_MULTI_SZ.	
Data	Contains a list of SMTP addresses for which Exchange Classifier will ignore any messages that originate from any of the configured addresses.	
	Not defined (default) (or empty)	All messages are processed by the Classifier Transport Agent.
	<smtpaddresses>	A list of smtp addresses (Wild cards are supported). Classifier Transport Agents will not process messages with an originator matching a specified address.

Entry	\OriginatorSmtpAddressesProcessed	
Type	REG_MULTI_SZ.	
Data	Contains a list of SMTP addresses. Exchange Classifier will only process messages that originate from one of these configured addresses.	
	Not defined (default) (or empty)	All messages are processed by the Classifier Transport Agent.
	<smtpaddresses>	A list of smtp addresses (Wild cards are supported). Only messages from addresses that are in this list will be processed.
		Note: Ignored takes precedence - so if an address appears in both OriginatorSmtpAddressesIgnored and in OriginatorSmtpAddressesProcessed, it will be ignored.



Exchange Classifier Registry entries

Transport Agent Message Tracking Settings

Note: The Exchange Transport service must be restarted for changes to any of the following to take effect.

The following entries are only relevant if you wish to use the Message Tracking Service facilities. They must be established if Message Tracking is Enabled via [Properties \(Message Tracking Service\)](#). Entries should be established below one of:

HKLM\Software\Boldon James\ExchangeClassifier

HKLM\Software\Policies\Boldon James\ExchangeClassifier

See [Classifier Transport Agent Registry entries](#) for how to utilise the supplied ADMX files if using Group Policy mechanisms.

Entry \MessageTrackingServiceHostName

Type REG_SZ.

Data This should hold the host name or IP address of the system that hosts the Message Tracking Service for this site.

For example: ICS-SVR-1

Entry \MessageTrackingServicePortNumber

Type REG_DWORD.

Data This should hold the port number to be used to contact the Message Tracking Service for this site (described in [Classifier Message Tracking Service / Message Tracking Service Installation](#)).

For example: 8732

Entry \MessageTrackingServiceHostNameBackup

Type REG_SZ.

Data This should hold the host name or IP address of the system that hosts a Backup Message Tracking Service for this site. (See also [Classifier Transport Agent - operational notes / Message Tracking Service Resilience](#) for usage).

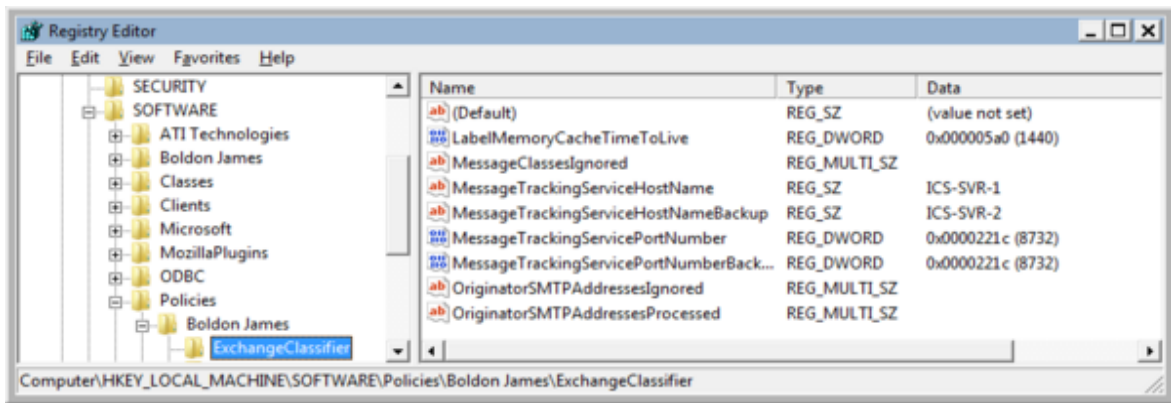
For example: ICS-SVR-2

Entry \MessageTrackingServicePortNumberBackup

Type REG_DWORD.

Data This should hold the port number to be used to contact the Backup Message Tracking Service for this site. (See also [Classifier Transport Agent - operational notes / Message Tracking Service Resilience](#) for usage).

For example: 8732



Exchange Classifier Registry entries

Configuration Settings

Note: The Exchange Transport service must be restarted for changes to any of the following to take effect.

The following entries are mandatory for the Classifier Transport Agent(s) to operate. Entries should be established below one of:

HKLM\Software\Baldon James\ConfigManager\ExchangeServiceMode
 HKLM\Software\Policies\Baldon James\ConfigManager\ExchangeServiceMode

See [Classifier Transport Agent Registry entries](#) for how to utilise the supplied ADMX files if using Group Policy mechanisms.

Entry \LabelConfiguration (Label Configuration Name)

Type REG_SZ.

Data The name of the label configuration to use.

For example: "Classifier test"

Entry \ServerRootType (Server Root Type)

Type REG_DWORD.

Data This defines the type of storage that holds the configuration. Exchange Classifier only supports:

0 Configuration is held in File Store (ServerFileSystemRoot key is then significant).

Entry \ServerFileSystemRoot (Path where your configuration is stored)

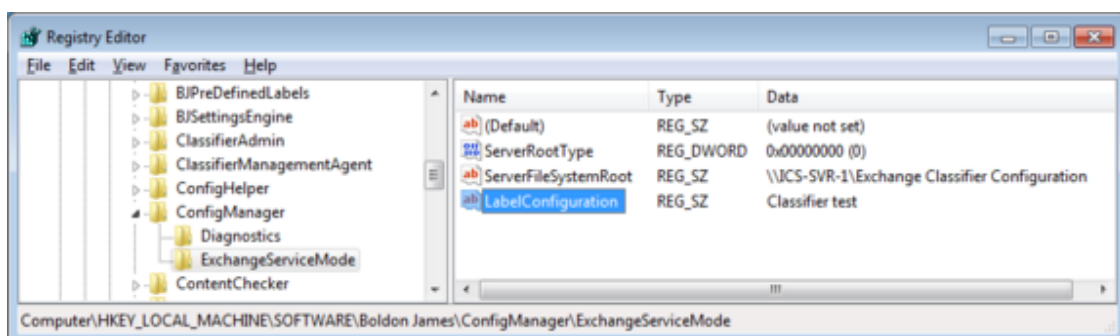
Type REG_SZ.

Data (Required for Exchange Classifier as Active Directory is not supported i.e. ServerRootType = 0)

Note: The location to which you Publish Exchange Configuration must be accessible by the Microsoft Exchange Transport Service - that is the folder share permissions for that location must allow access (READ) by the NETWORK SERVICE account.

Path to the location that holds the Exchange Classifier Configuration.

For example: \\ICS-SVR-1\Exchange Classifier Configuration



Exchange Service Mode registry settings

Classifier Transport Agent - operational notes

The Classifier Transport Agent inspects all messages passing through it. Some messages are of no interest (e.g. Delivery reports etc.) and no action is taken. Messages of interest are either [Messages from inside the organization](#) or [Messages from outside the organization](#).

Note: Some control over set of messages processed is available using one or more of the registry entries described in [Transport Agent Message Processing Settings Registry entries](#)

Note: Classifier Transport Agent takes no action on Delivery Reports, Receipt Notifications, System Messages and Secured (Signed or Encrypted) messages. No message tracking of such messages is performed.

Messages from inside the organization

These are messages with an Originating mail address that is a member of the local domain. Messages fall into two types:

Classifier-enabled endpoints Many (most) messages will already have been processed by a Classifier enabled application (e.g. Outlook) and will have a Classifier Label associated with the message (even if the value is empty). These messages are processed using the associated Classification - i.e. the relevant rules are applied.

Note: Such endpoints do not support an "Apply high-water mark to obtain label from attachment" setting ([Options \(Domain Group\)](#)). It is assumed that originating clients will have performed any such required high-water mark actions including auto-elevation.

Other endpoints These are messages that have not been processed by a Classifier enabled application and have no associated Classifier Label.

Exchange Classifier will attempt to assign a Label as follows (in order of precedence):

- Any message related Label Locations defined in the main Classifier Configuration are checked to see whether a label can be determined.
- If the message has an in-reply-to message attribute (i.e. it is a Reply or Forwarded message), and Use label recovery to search tracked messages is Enabled ([Options \(Domain Group\)](#)), and the original message is known to Message Tracking, then the original message Label (if any) is adopted.
- If the Apply high-water mark to obtain label from attachments is Enabled ([Options \(Domain Group\)](#)), then see if that will yield a label.

Note: This setting is ignored for Meeting requests to avoid user interface anomalies.

Note: Enabling this setting means that even if a label has been obtained from label locations or label recovery a "high-water mark" label value will be used - effectively an Auto-elevate operation is performed.

Note: If high-Water mark checks need to process embedded messages to ascertain labels, it may be necessary to extend the core Plugins configuration (under guidance from Classifier support) to support .MSG and .EML files. See Classifier Administration Guide > Appendix - Label Propagation Mechanisms > Plugins

- Otherwise use the Default label associated with Other endpoints ([Default Label \(Domain Group\)](#))

Note: Default labels are not added to Meeting requests to avoid user interface anomalies.

Apply the Classification derived above and apply the applicable rules.

If the Message Tracking Service is enabled, Classifier Transport Agent will transmit relevant information to that service. All messages seen by the Transport Agent(s) are tracked except for Delivery Reports, Receipt Notifications, System messages, Secured (Signed or Encrypted) messages and those excluded by [Transport Agent Message Processing Settings](#) registry entries).

Messages from outside the organization

These are messages with an Originating mail address that is a NOT a member of the local domain.

Check the configured Domain Groups to find the best match (if any) for the originating address. If a match is found then proceed using that group, otherwise proceed using the All unmatched domains group.

Exchange Classifier will attempt to assign a Label as follows (in order of precedence):

- If there is a [Classifier label](#) associated with the message then use that value.
- Any message related Label Locations defined in the core Classifier Configuration are checked to see whether a label can be determined.
- If the message is in-reply-to a message, and Use label recovery to search tracked messages is Enabled ([Options \(Domain Group\)](#)), and the original message is known to the Message Tracking Service, then the original message Label (if any) is adopted.
- If the Apply high-water mark to obtain label from attachments is Enabled ([Options \(Domain Group\)](#)), then see if that will yield a label.

Note: Enabling this setting means that even if a label has been obtained from a Classifier label, label locations or label recovery a "high-water mark" label value will be used - effectively an Auto-elevate operation is performed.

- Otherwise use the Default label associated with Other endpoints ([Default Label \(Domain Group\)](#))

Apply the Classification derived above to the message and apply the relevant rules

If the Message Tracking Service is enabled, Classifier Transport Agent will transmit relevant information to that service. All messages seen by the Transport Agent(s) are tracked except for Delivery Reports, Receipt Notifications, System messages, Secured (Signed or Encrypted) messages and those excluded by [Transport Agent Message Processing Settings](#) registry entries).

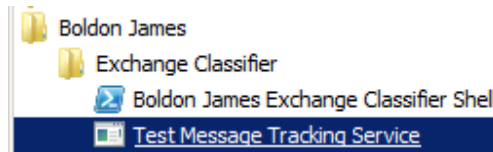
Message Tracking Service Resilience

When Message Tracking is enabled, Classifier Transport Agents will attempt to connect to the 'primary Message Tracking Service'. If that fails it will immediately attempt to connect to the 'backup Message Tracking Service' (if configured). If both fail the Transport Agent will retry in ten minutes. An incident will be written to the Windows event log.

If the Message Tracking Service is (temporarily) unavailable Classifier Transport Agent will queue the message information (up to a limit as specified by `MessageTrackingServiceMaxQueueSize` ([Transport Agent General Settings](#))). The queue will be emptied in due course once the Message Tracking Service is available.

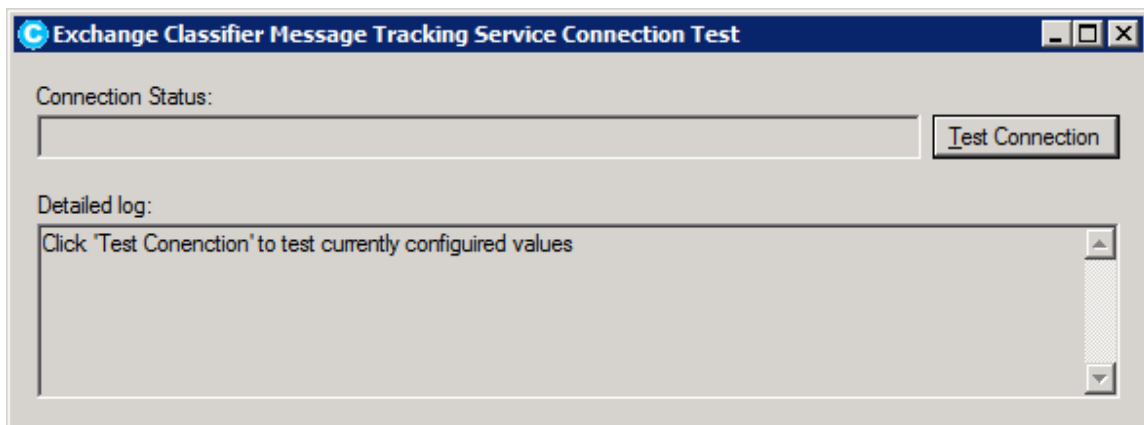
Test Message Tracking Service

When Exchange Classifier is installed a Test Message Tracking Service command is included in the Start menu:



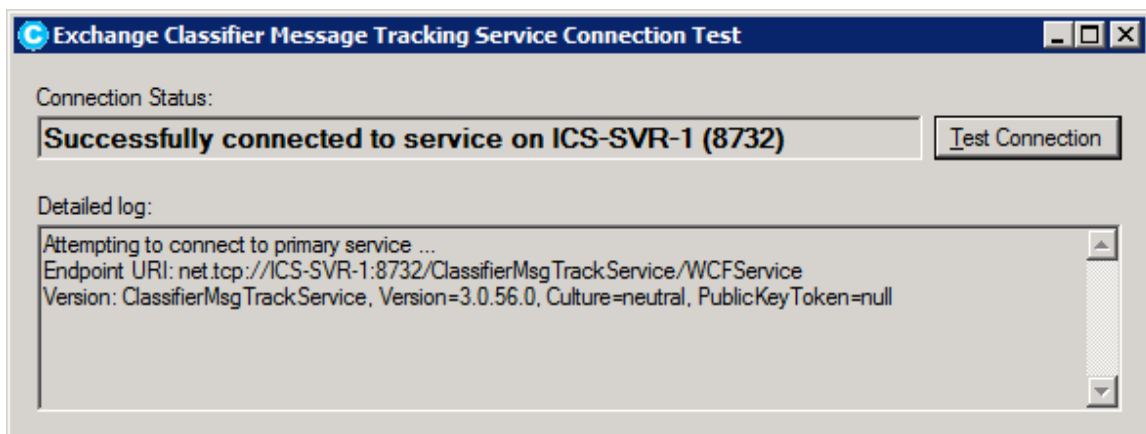
Test Message Tracking Service command

You can invoke this command to check that the local configuration settings ([Transport Agent Message Tracking Settings](#)) will connect to the relevant Message Tracking Service.



Test Message Tracking Service

- Press Test Connection - this will use the currently defined settings to check the connection to the Message Tracking Service. If the connection fails you can see the settings that have been used.



Message Tracking Service connection successful

Classifier Message Tracking Service

Note: The Classifier Message Tracking Service stores its data in an SQL database. Check the [Classifier Message Tracking Service Release Note](#) for pre-requisites.

Note: If you wish to use the Message Tracking Service, it is recommended that each site in your organization should support its own SQL database with at least one associated Classifier Message Tracking Service instance.

All transport agents running on a site should use that site's Classifier Message Tracking Service(s) / SQL server.

Classifier Transport Agents are configured to point to the relevant Message Tracking Service with the option of configuring 'Backup Message Tracking Service' connection information ([Transport Agent Message Tracking Settings](#)). Usage of this backup connection is described in [Classifier Transport Agent - operational notes / Message Tracking Service Resilience](#)

The Classifier Message Tracking Service currently supports two functions:

- Storage of message, user and attachment information passed to it by active [Classifier Transport Agent](#)(s).

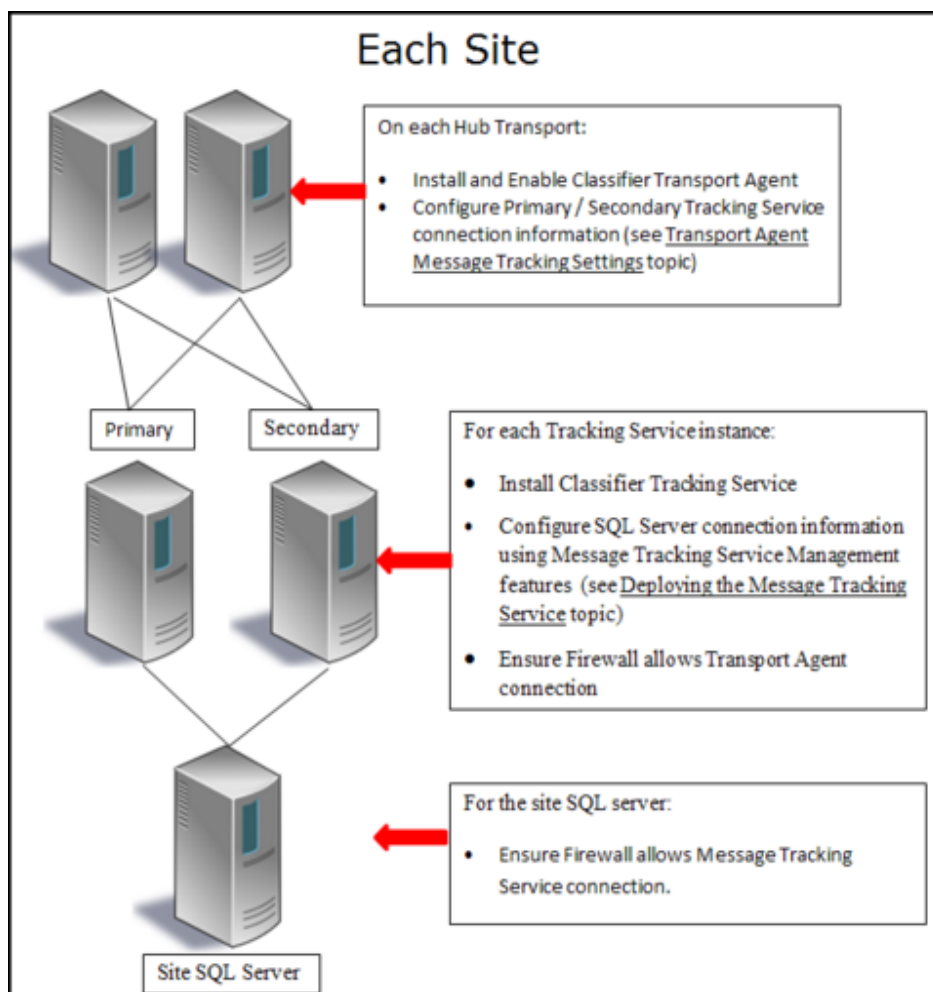
Note: Classifier Transport Agent takes no action on Delivery Reports, Receipt Notifications, System Messages and Secured (Signed or Encrypted) messages. No message tracking of such messages is performed.

- Supporting a search initiated by a Classifier Transport Agent to find (and return) a Classification value for a specific message.

Note: If, when replying to a message, the message subject is changed a new 'conversation' is usually started and all trace of the original message is lost. This means that 'label recovery' from the original message is not possible.

Each message passing through a site is tracked once (if tracking is enabled).

The diagram below summarises the deployment options described fully in this topic. Each site within your organization would need a similar deployment to ensure that all messages are tracked effectively.



Deployment Overview

You may have to configure Firewall(s) to allow the necessary flows if components are running on different servers:

- Hub Transport contact to Message Tracking Service (Firewall on Message Tracking Service server)
- Message Tracking Service contact to SQL Server (Firewall on SQL Server)

The deployment is flexible. For example, you could have one Message Tracking Service supporting all your Hub Transports, or one Tracking service per Hub Transport; and the physical location of Tracking Services is a matter for the site.

Message Tracking Service Pre-requisites

The following pre-requisites should be satisfied before you proceed:

1. SQL server is installed and running.

Note: Over time the SQL database will grow in line with the messages transmitted. It is the site's responsibility to consider how long messages should be retained within the message tracking database, and to establish appropriate housekeeping procedures.

2. A domain administrator account is available suitable for installing the software. This is required below.
3. You have access to a domain account that has [SQL Server permission](#) (*db_creator* server role) allowing creation and modification of a database (e.g. the user that installed the SQL Server software). Required when [Deploying the Message Tracking Service](#).
4. You have a domain user established that the Classifier Message Tracking Service will run as (e.g. ClassifierTrackUser). This is required below and when [Deploying the Message Tracking Service](#).
5. Some environments may experience authentication problems (Transport Agents connecting to the Message Tracking Service) which may be addressed by setting Service Principal Names (SPNs) on the user (4 above) using:

```
setspn -a SPN <domain>\<username>.
```

Where SPN = ExchClassifierTrackingSvc/<Server name>. For example:

```
setspn -a ExchClassifierTrackingSvc/ICS-SVR-1 classifier.test\ClassifierTrackUser
setspn -a ExchClassifierTrackingSvc/ICS-SVR-1.classifier.test.com classifier.test
\ClassifierTrackUser
```

You can check the setting using ADSI edit - finding the relevant user and viewing Properties --> ServicePrincipalName.

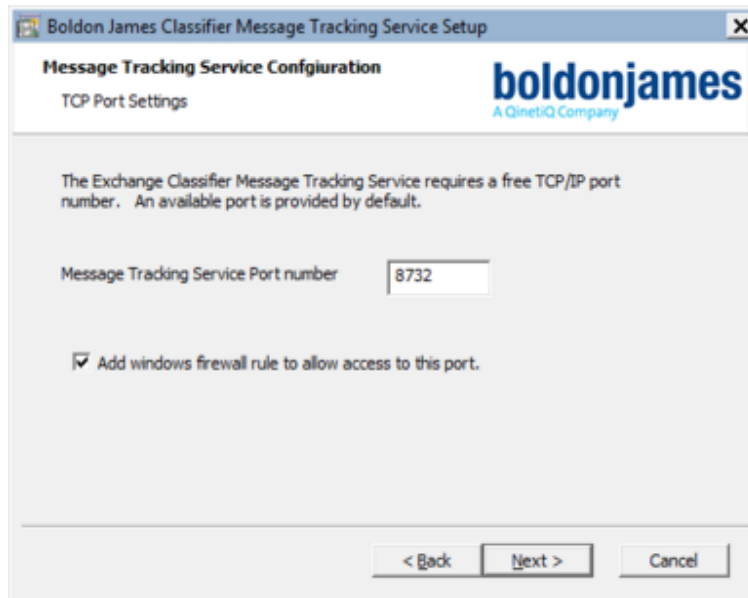
Message Tracking Service Installation

To install the Classifier Tracking Service:

- As the domain administrator account (item 2 above):
- Invoke setup.exe from the Classifier Message Tracking Service > Contents, follow the instructions and supply the relevant items:

The User Name / Password corresponds to item 4 above (e.g. ClassifierTrackUser)

- ❑ Complete the additional settings dialog:



Message Tracking Service configuration

A check is made that the supplied Port is not currently in use.

Add windows firewall rule... should be checked if Transport Agents are running on other servers.

Note: It is recommended that you use a single User Name for all Tracking Services within the site as otherwise additional manual configuration will be required.

Deploying the Message Tracking Service

Various scenarios are described:

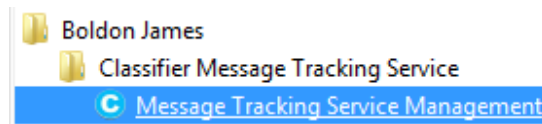
- (A) First installation of Message Tracking Service on a site

Once the basic installation is complete:

- ❑ Ensure that the SQL Service is available.

Note: Over time the SQL database will grow in line with the messages transmitted. It is the site's responsibility to consider how long messages should be retained within the message tracking database, and to establish appropriate housekeeping procedures.

- ❑ Logon as a user with SQL Server permission (*db_creator* server role) allowing creation and modification of a database (e.g. the user that installed the SQL Server software).
- ❑ Invoke (Classifier Message Tracking Service) Message Tracking Service Management from the Start menu shortcut provided:

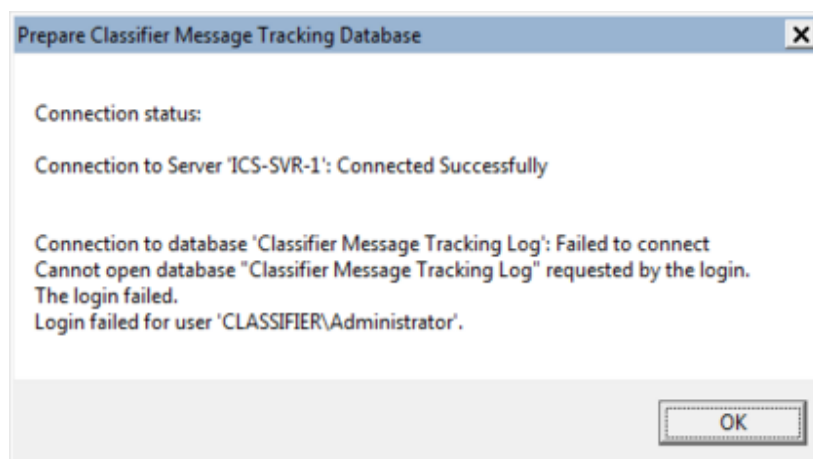


Tracking Service Management - start menu

- ❑ This presents the following Classifier Message Tracking Service Management dialog:

Tracking Service Management

- Complete the fields presented
 - The Database Server - The example shown assumes use of tcpip: to connect. The actual connection mechanism to be used is a site matter. It is assumed that your site Database Administrator will be able to supply the relevant connection information.
 - The Database instance (site Database administrator to supply).
 - The Message Tracking Database Name is fixed for the Message Tracking Service (Classifier Message Tracking Log).
 - The Message Tracking Service User Login should include the domain name. This is the domain user identified in [Classifier Message Tracking Service](#) / Message Tracking Service Pre-requisites.
- You can press Test Connection at any time. Pressing Test Connection after you have entered the correct values, but before you have pressed Prepare Database will check the connection to the server, but connection to the database will fail since it has not yet been created.



Management - Test connection

If the connection fails, check that the Firewall (on the SQL Server) may be inhibiting the connection.

- Once the fields are correctly completed press Prepare Database. This will:
 - Create the database (Classifier Message Tracking Log) on the designated server.
 - Create the necessary tables within that database.
 - Writes a log file recording the execution of the SQL script. The file (PrepareDatabase) can be found in the user's temp directory (Run %TEMP%).
- If you have additional Message Tracking Servers to establish within your site Press Export Settings on the interface above to write an XML file of your current settings to a file store location of your choice (e.g. MessageTrackingServiceSettings.XML). This file can then be used as described in Scenario (B) below.
- You can then Start the Message Tracking Service via Administrative Tools\Services.

(B) Additional Message Tracking Service instances in the site

Any additional Message Tracking Services in the site will need to be installed and configured.

- Logon to a server that is to host another instance of the Message Tracking Service.
- Install the Message Tracking Service software as described in [Classifier Message Tracking Service](#) \ Message Tracking Service Installation.
- Invoke (Classifier Message Tracking Service) Message Tracking Service Management from the Start menu shortcut provided to present:

Classifier Message Tracking Service Management

Prepare Database and Configure Message Tracking Service

Database Server (tcp:hostname.port' or localhost) Database Instance (can be empty if single instance)

ICS-SVR-1

Message Tracking Database Name Message Tracking Service User Login (DOMAIN\user)

Classifier Message Tracking Log

Prepare Database Export Settings

Configure Message Tracking Service

Import database configuration settings and store them in the Registry for the service to use. Import Settings

Alternatively enter values for Database Server and Database Instance and click 'Save Settings' to store them in the Registry for the service to use. Save Settings

Test connection to database using configured settings Test Connection

Please enter values for 'Server Name', 'Database Instance' and 'Database User'

Tracking Service Management - Import

- Press Import Settings and supply the location to which you exported the settings above (MessageTrackingServiceSettings.XML).
- Check that the Import has updated the dialog as expected. You could then try Test Connection.
- Press Save Settings to save these settings to the local Registry.

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