Quick Start

Policy Patrol Disclaimers 10

This guide will help you start using Policy Patrol Disclaimers as quickly as possible. For more detailed instructions, consult the Policy Patrol manual.

Step 1. Prepare for installation

System requirements

Before installing Policy Patrol, check whether you meet the system requirements:

Policy Patrol Email (32-bit version):

- ☑ Windows Server 2003
- ☑ Microsoft Exchange Server 2003, Windows Small Business Server 2003, or Lotus Domino R5-R8 or other mail server.
- ☑ Microsoft .NET Framework 2.0 (If you do not have this installed the Policy Patrol installation program will install it for you)

Policy Patrol Email (64-bit version):

- ☑ Windows Server 2003, 2008/2008 R2, 2012/2012 R2.
- ☑ Microsoft Exchange Server 2013, 2010, 2007 or Windows Small Business Server 2008/2011.
- ☑ Microsoft .NET Framework 2.0 (If you do not have this installed the Policy Patrol installation program will install it for you)

⇒ Policy Patrol Email 64-bit can be installed on an **Exchange 2007/2010/2013** machine with one of the following roles:

- Hub Transport Role
- Edge Transport Role (requires Active Directory access)

Note: For Outlook Sent Items to be updated, Policy Patrol must be installed on an Exchange Server machine with the Hub Transport Role (not an Edge Transport Role).

⇒ If you are not installing Policy Patrol on the same machine as Exchange Server, Policy Patrol will not process internal mails or be able to update Outlook Sent Items

with email signatures and other modifications. In order to install Policy Patrol on a non-Exchange Server machine you must follow the instructions for installing Policy Patrol on a **separate machine**:

Installing Policy Patrol on a separate machine
(http://www.policypatrol.com/assets/pp10-separatemachine.pdf)

⇒ If you have **Lotus Domino R5-8 Mail Server** (or another mail server), you must install Policy Patrol on a separate machine. Policy Patrol does not offer internal mail filtering for Lotus Domino or updating of Outlook Sent Items. Policy Patrol can retrieve Lotus Domino users & groups and their user properties for the user merge fields. Download the following document for instructions on how to install Policy Patrol with Lotus Domino:

Installing Policy Patrol with Lotus Domino
(http://www.policypatrol.com/assets/pp10-lotusdomino.pdf)

⇒ Policy Patrol (32-bit and 64-bit) can be installed in a **clustered** environment. If you wish to install Policy Patrol 32-bit in an Active/Passive cluster, download the document below for further instructions (Policy Patrol 32-bit does not support Active/Active clusters). If you are installing Policy Patrol 64-bit in a cluster, there are no specific cluster instructions to follow; You can perform a regular installation as described in step 2:

Installing Policy Patrol in a cluster
(http://www.policypatrol.com/assets/pp10-clustering.pdf)

Note: You need to purchase an additional server license for the clustered node. The additional server license cost is found in the price list at http://www.policypatrol.com/pricing.

⇒ If you have **frontend and backend** Exchange servers, you must always install Policy Patrol on the backend server. However if you use email clients that are using the frontend server to relay their email, you must install Policy Patrol on the frontend server as well as the backend server.

Note: You need to purchase an additional server license for each additional Policy Patrol server installation. The additional server license cost is found in the price list at http://www.policypatrol.com/pricing.

⇒ If you have **Policy Patrol 7, 8 or 9** installed, you can perform an upgrade to version 10 whilst keeping your existing configuration. For further instructions on this, please consult the following document:

Policy Patrol 9 Upgrade Guide
(http://www.policypatrol.com/assets/pp10-upgradeguide.pdf)

⇒ If you have **Policy Patrol 4, 5 or 6** installed, you can keep your configuration but you must first upgrade to version 7 before you upgrade to version 10. For further

instructions on how to upgrade to Policy Patrol 7, please consult the following document:

Policy Patrol 7 Upgrade Guide
(http://www.policypatrol.com/assets/pp7-upgradeguide.pdf)

⇒ If you have **Policy Patrol 1, 2 or 3** installed, it is not possible to use your existing configuration files in version 10.

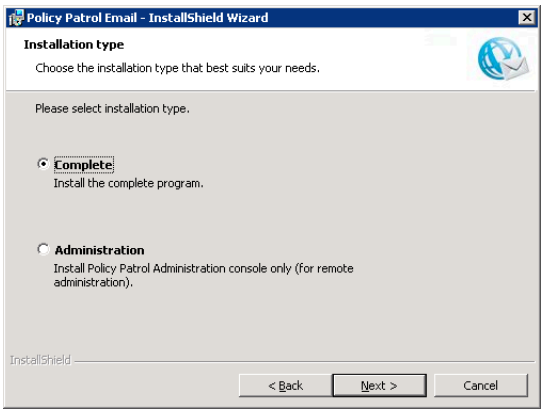
Step 2. Install Policy Patrol

1. Double-click on **PolicyPatrol.exe** (32-bit version) or **PolicyPatrol64.exe** (64-bit version). The Install Program will start up. If you do not have Microsoft .NET Framework installed, the Policy Patrol installation program will install it for you.

2. In the Welcome screen, click **Next**.

3. Read the License Agreement and select **I accept the terms in the license agreement** and click **Next**.

4. Select the installation type. If you select **Complete**, the complete program will be installed. If you only wish to install the Administration console (for remote administration), select **Administration console**.



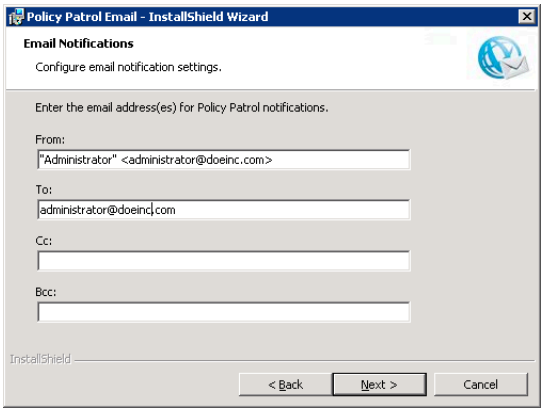
5. Enter your user name, company name and Policy Patrol serial number. If you are evaluating Policy Patrol, leave the serial number field empty. Click **Next**.

6. If you did not enter a serial number: A dialog will pop up asking you to select the evaluation license to be installed. Select **Policy Patrol Disclaimers** and click **Next**.

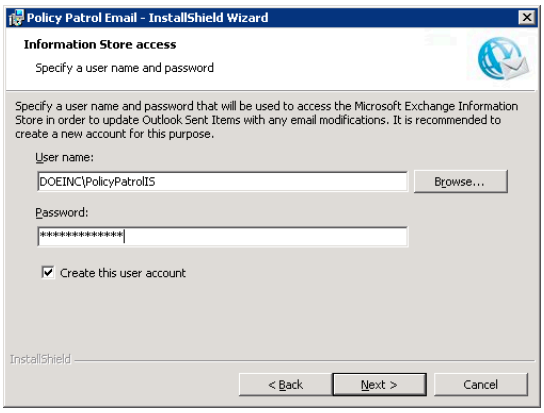
   Note: If you are evaluating Policy Patrol and wish to try out a different Policy Patrol edition after the installation, you can go to **Policy Patrol Administration** > **<server name>** > **Security** > **Licenses**, select the license and click **Remove**. Policy Patrol will warn that no valid license is found. Click **OK**. A dialog will now pop up allowing you to select a new evaluation license type.

7. Select the destination folder for the Policy Patrol installation. By default the program will be installed in C:\Program Files\Red Earth Software\Policy Patrol Email (32-bit version) or C:\Program Files (x86)\Red Earth Software\Policy Patrol Email (64-bit version). If you wish to change the location, click **Change** and select another folder. When you are ready, click **Next**.

8. Specify the notification settings. Enter the From:, To:, Cc: and Bcc: fields for the Policy Patrol notification emails. Policy Patrol notification emails inform you about evaluation expiry dates, licensing issues and new updates to the program. The display name is pre-configured as Administrator, but you can change this by entering the following: "Display name" <email address>, i.e. "Joe Bloggs" <jbloggs@bloggsco.com>. Click **Next**.



9. In order to gain access to the Exchange Information Store for updating Outlook Sent Items with email modifications, a new Policy Patrol user account must be created. Specify the User name and Password that Policy Patrol will use. The installation will automatically assign the correct rights. Please note that if you want to use an existing account instead of creating a new one, that this account cannot be a member of the Administrators group in Active Directory. If the account does not yet exist, leave the option **Create this user account** enabled so that Policy Patrol will automatically create the user account. When you are ready, click **Next**. Note that this dialog only appears if you are installing Policy Patrol on an Exchange Server 2003, 2007, 2010 or 2013 machine.

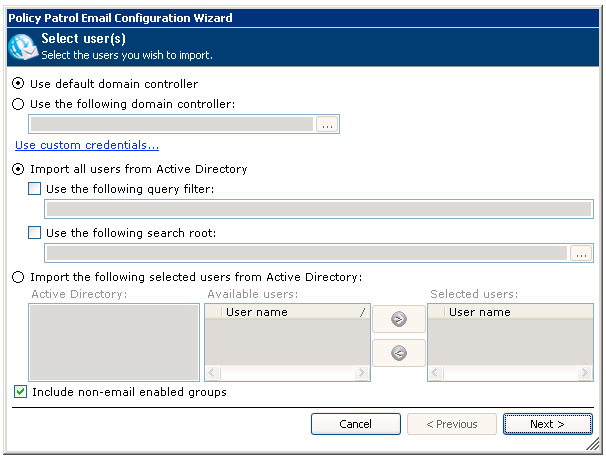


10. Click **Install** to start installing.

11. When the installation wizard has finished copying the files, click **Finish**.

12. The configuration wizard will now start up. Click **Next** in the Welcome screen.

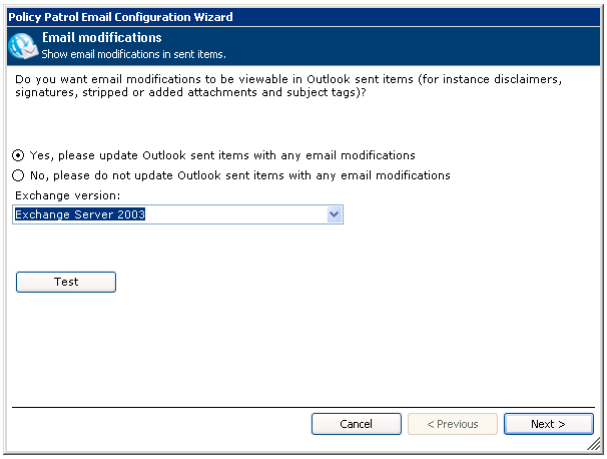
13. Specify the location from where you would like to import your users (Active Directory, Lotus Domino or Manual input) and click **Next**. (Note: the 64-bit version only includes the Active Directory and Manual Input options.)



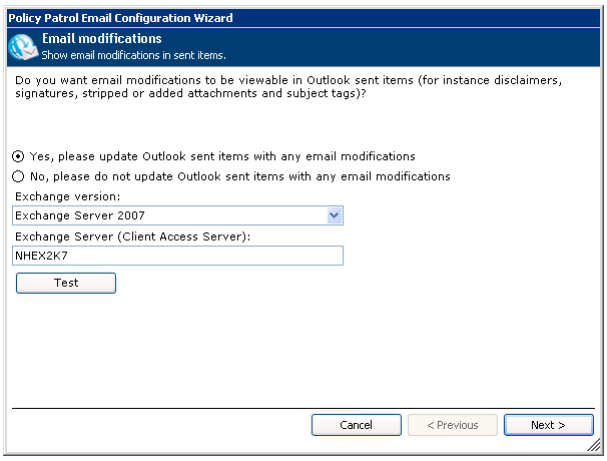
14. Specify the server or domain controller and select the users that you wish to license. You can either license all users or you can select only certain users to be licensed. For more detailed information on the different options in this dialog, please consult the product manual. Click **Next**.

15. Select whether you wish to view email modifications in Outlook Sent items. If you select **Yes**, any modifications that are applied to outgoing emails by Policy Patrol, such as disclaimers, signatures, subject tags and adding or stripping attachments, will automatically show in Outlook Sent Items (after a few seconds the message in Sent Items will be replaced with the actual message that was sent). Depending on your Exchange Server version, a number of options will be shown.

If you have Exchange 2003: In 'Exchange version', Exchange Server 2003 should be selected.



If you have Exchange 2007/2010/2013: In 'Exchange version', your Exchange version should be selected (Exchange Server 2013, 2010 or 2007). In 'Exchange Server (Client Access Server)' the name of your Exchange Client Access Server should be listed. If you only have one Exchange Server, the name of the local server should be listed. If you have multiple Exchange Servers, you need to enter the name of your Client Access Server.



When you are ready, click **Next**. Note: This dialog does not appear if Policy Patrol is not being installed on Exchange Server 2013, 2010, 2007, or 2003.

16. In the Configuration complete dialog, click **Finish**.

Step 3. Configure disclaimers and signatures

To configure a disclaimer or signature, go to **Email Signatures**. Select the appropriate folder and click **New**. The Rules wizard will guide you through the users,

directions, conditions, exceptions and actions for the rule. To add a disclaimer, in Rule Actions, click on **Modify message** and select the action **Add disclaimer/signature**.

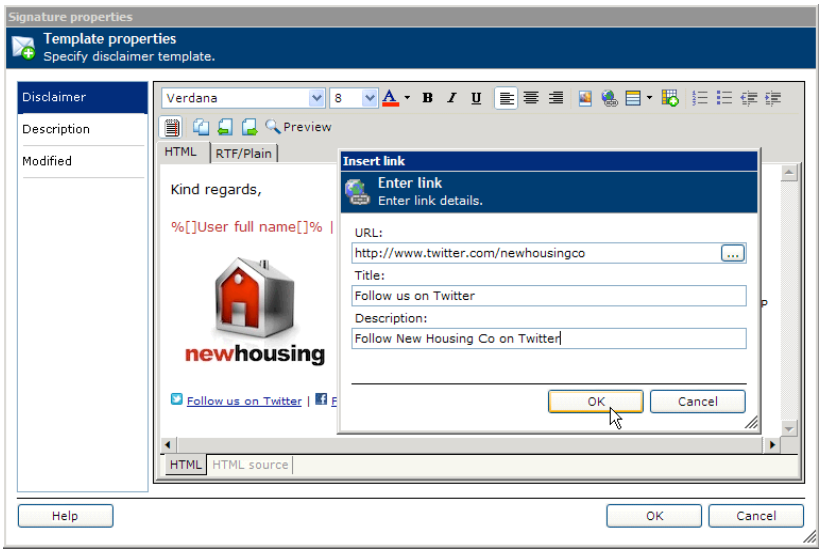
A dialog will pop up where you can select the type of disclaimer/signature you wish to add:

Add disclaimer/signature: Your email disclaimer/signature template is added to the top or bottom of your email message.

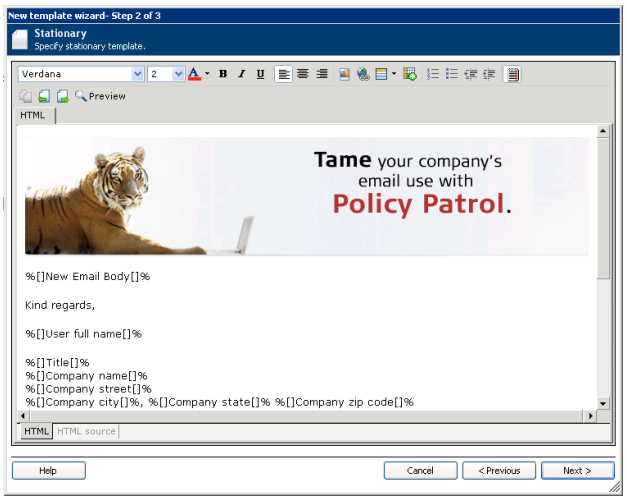
Add disclaimer/signature and format entire email (HTML only): Your email message is inserted into your HTML Stationary template.

In this dialog there are further options including avoiding multiple disclaimers, placing the disclaimer/signature after the most recent message text and using a subject code to add/suppress a disclaimer/signature.

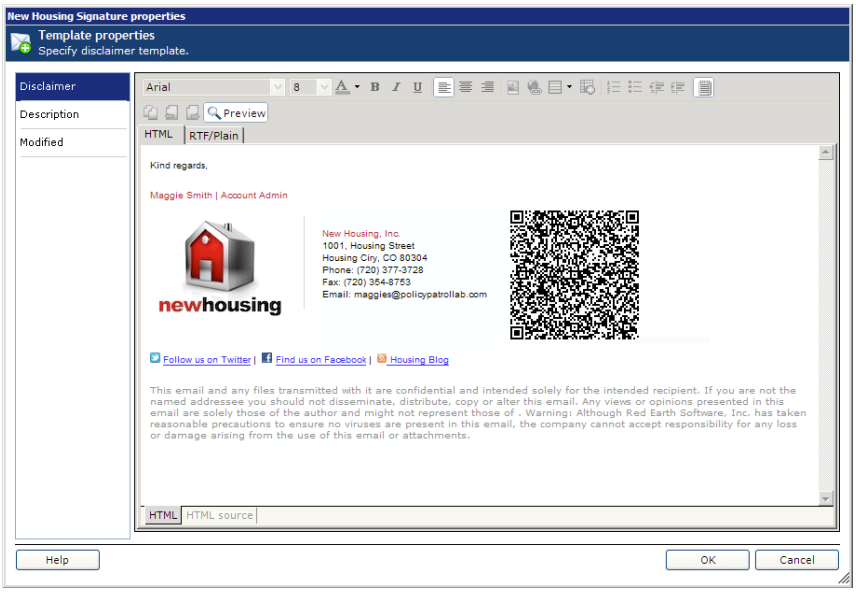
The program already includes a number of sample disclaimers and signatures in **Settings** > **Templates** > **Sample templates**. You can edit these or create your own. The disclaimer templates can include formatting, pictures and Active Directory merge fields that are replaced with the user's Active Directory Properties. You can even use QR Codes and insert the sender's Avatar into the email signature.



Example of a standard disclaimer/signature template



Example of an HTML Stationary template



Example of a signature with a QR Code

Note that the only difference between the standard Disclaimer template and the HTML Stationary template is that the latter includes the following merge fields:

%[]New Email Body[]%: This field will be replaced with the most recently entered message text, i.e. the email text above the first message separator.

%[]Previous Email Body[]%:This field will be replaced with the previous message text, i.e. the email text below the first message separator.

It is also possible to add a random disclaimer/signature by selecting the secondary action **Add random disclaimer/signature**. Policy Patrol will then rotate your

disclaimers and signatures by randomly adding any disclaimer or signature template that exists in the selected folder.

Step 4. More information

⇒ Below is a list of the most frequently asked disclaimer questions:

1. No disclaimers/signatures are being added
2. User merge field is not being replaced
3. What happens if I send a message on behalf of another user?
4. Avoid multiple disclaimers is not working
5. How can I adjust the disclaimer line breaks?
6. How can I avoid an empty line in a signature for non-existent fields?
7. Outlook Sent Items are not being updated
8. How can I insert a QR Code in my email signature?

The answers to these questions and more can be found in our knowledge base at: https://support.redearthsoftware.com/forums.

⇒ For more information on how to configure Policy Patrol, please download the product manual from: http://www.policypatrol.com/documentation.

⇒ If you have any technical or configuration questions please send an email to: support@redearthsoftware.com.

⇒ If you require any assistance, please contact us at one of the following offices:

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