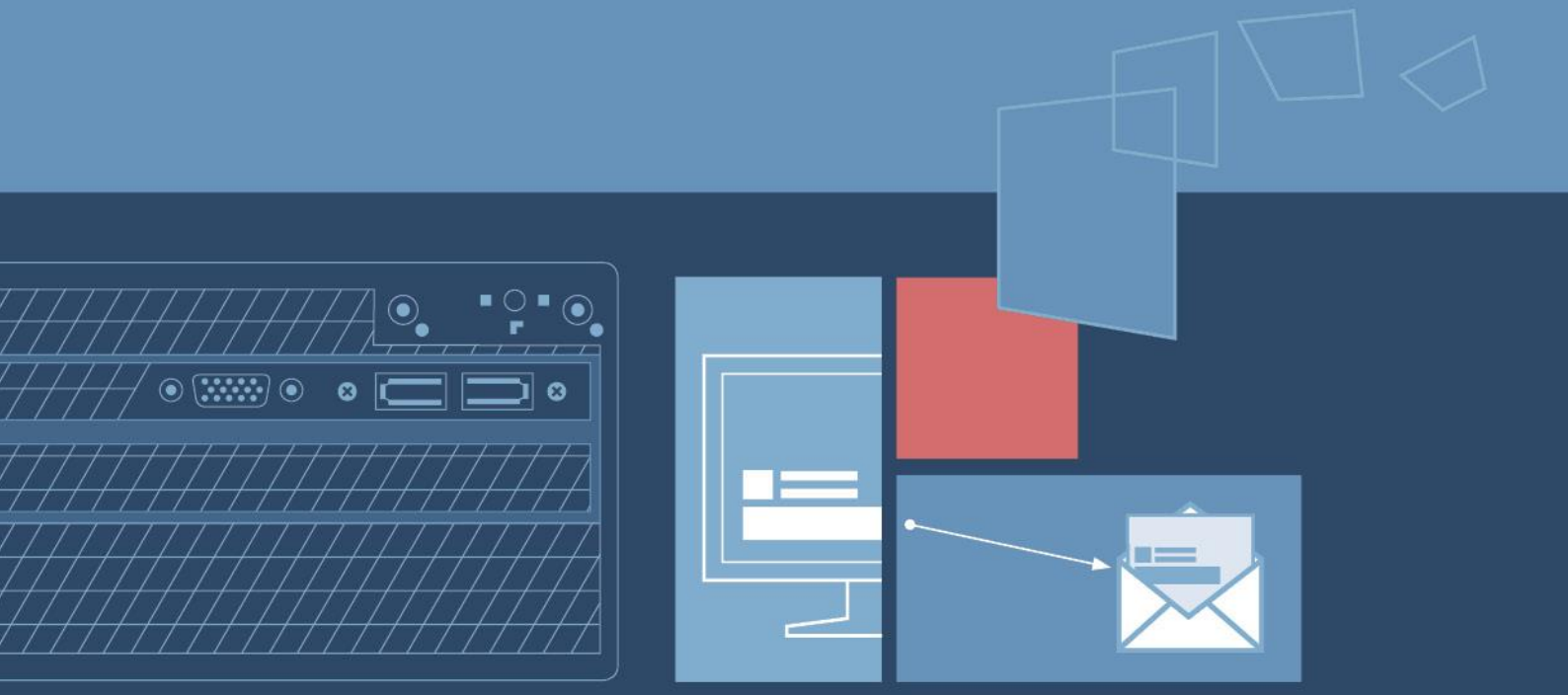
exclaimer™ signature manager
outlook edition

Exclaimer Signature Manager Outlook Edition Getting Started Guide



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About This Guide

This aim of this guide is to provide information about installing and configuring Exclaimer Signature Manager Outlook Edition. Here, you can find out about system requirements, licensing, what changes occur on your system when Exclaimer Signature Manager Outlook Edition is installed and the installation process itself.

Installation details are provided for a standard install (via an install wizard) and for a 'silent' install on remote servers (via the command prompt). Having installed Exclaimer Signature Manager Outlook Edition, detailed help for all aspects of the application is available from the help menu.

Signature Manager Outlook Edition Overview

Exclaimer Signature Manager Outlook Edition allows you to create great looking, professional signatures centrally (including company branding, legal disclaimers and promotional content) for use in all email messages sent from Microsoft Outlook and Microsoft OWA.

How does it work?

Within Exclaimer Signature Manager Outlook Edition, a signature is not just a block of contact information for the message sender. In this context, a signature is comprised of three distinct parts:

- Signature (business card content)
- Campaign (sales / promotional content)
- Disclaimer (legal / corporate) content

These parts are defined in separate Outlook policies which are combined (when given criteria are met) to form the final signature. An Outlook policy can be thought of as a set of rules which are used to control how signatures are applied to email messages. It includes:

- The policy type - signature, campaign or disclaimer
- The circumstances under which the policy should be triggered (using conditions, exceptions, date range and next policy options)
- Signature content (using templates)
- How the signature should be deployed

You can create as many policies as required - for example, you might choose to apply different campaign content for each department within your organization. In this situation you could create one signature and one disclaimer policy for all users, but a separate campaign policy for each department.

Similarly, some users may not require any campaign material; therefore you would define a signature where only signature and disclaimer content are applied.

When Exclaimer Signature Manager Outlook Edition is installed and appropriate deployment options have been set, it is running in the background all of the time. Any new or updated signatures are copied to a specified deployment folder (the network share) and then deployed to users automatically.

So, when a user chooses to create a new email message (or if they choose to reply to / forward a message), they will see any applicable signatures in their message.

If more than one signature applies, the last one processed will be used but users can right-click (on the signature) to view / select from a list of additional signatures. If required, users can amend the content of a signature within their message.

But That's Not All...

Exclaimer Signature Manager Outlook Edition includes a library of professionally designed signature, campaign and disclaimer templates which can be used as-is, or as a start point for creating your own versions. Templates are created and edited using an intuitive template editor, which will be familiar to anyone who has worked with Microsoft Outlook.

Versions are created in HTML, RTF and Plain Text formats, with an instant preview feature so you can see how your template will be displayed in email messages, at a glance. With the ability to include tables, images, RSS feeds and dynamic Active Directory fields, you can be as creative as you want to be.

And There's More...

A key benefit of using Exclaimer Signature Manager Outlook Edition is the ability to apply smart, sophisticated signatures throughout your organization, helping to create a professional, consistent brand image. But what happens if users define their own signatures locally, using standard options in Microsoft Outlook?

Exclaimer Signature Manager Outlook Edition allows you to control Outlook mail format settings for all users so that every new, replied or forwarded email complies with your organization's house style. This is achieved with Outlook mail format policies; with this type of policy you can control:

- Message format options - control the default format for message composition and preferred editors to be used.
- Message font options - enforce your organization's house style by specifying default font settings for new messages, together with replies, forwarded messages and plain text email.
- General Outlook options - choose whether any signatures or stationery that a user might have set locally are retained or overwritten by Exclaimer Signature Manager Outlook Edition.

Having defined your templates and policies, there's no need to worry about complicated testing processes, since Exclaimer Signature Manager Outlook Edition includes an intuitive policy tester. This simulates the generation of signatures for given Outlook users, so you can quickly see if policies are defined correctly.

Licensing

Our aim is to get you working with Exclaimer software as quickly as possible, with minimal restrictions. As such, we have implemented a flexible licensing policy.

If you have installed Exclaimer software for the first time, you can use it for five days without any form of registration. After five days, you are prompted to register for a 30 day trial. During the trial period, all signatures are appended with the following text:

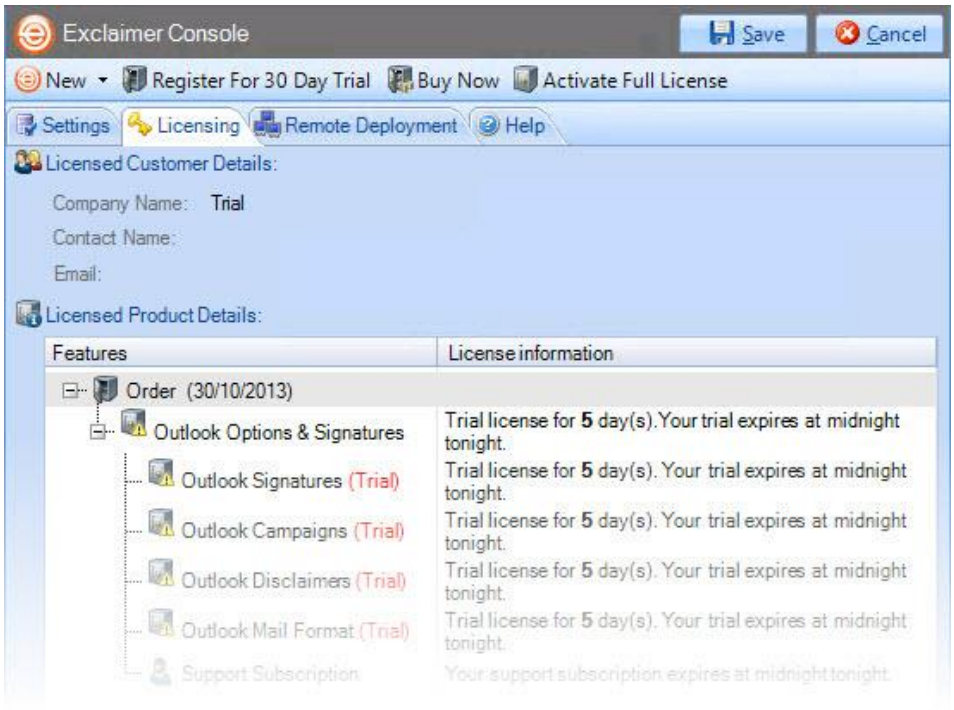
This Signature was created by Exclaimer Signature Manager Outlook Edition

This text is only added when signatures are generated within the trial period; once the license is activated the message is removed. Having completed this trial, you can either:

- Purchase the product from the Exclaimer website (http://www.exclaimer.com) or by contacting the Exclaimer sales team (sales@exclaimer.com)
- Contact the Exclaimer sales team to extend your trial

Licensing Information

Having installed Exclaimer Signature Manager Outlook Edition, licensing information and options can be found on the licensing tab within the Exclaimer Console:



You can access this by selecting the Exclaimer branch of the console tree and clicking the licensing tab, or by selecting licensing from the actions pane.

System Requirements

System requirements for hardware and software are summarized in the following sections.

Server Requirements

Hardware

Item	Minimum Requirements	Recommended Requirements
CPU	x86 or x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.	x86 or x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.
Memory	2GB	4GB
Disk Space	350MB	500MB
Screen Resolution	1024 x 768 pixels	1152 x 864 or higher

Software

Item	Minimum Requirements
Operating Systems	Windows Server 2003 x86 (including all service pack levels) Windows Server 2003 R2 x86 and x64 (including all service pack levels) Windows Server 2008 x86 and x64 (including all service pack levels) Windows Server 2008 R2 (including all service pack levels) Windows Server 2012 Windows Server 2012 R2 Windows Small Business Server 2003 Windows Small Business Server 2008 Windows Small Business Server 2011 Windows XP x86 and x64 (including all service pack levels) Windows Vista x86 and x64 (including all service pack levels) Windows 7 x86 and x64 (including all service pack levels) Windows 8 x86 and x64 Windows 8.1 x86 and x64
Microsoft .NET Framework	Microsoft .Net Framework 2.0
Active Directory	Domain and Forest functional level of Windows Server 2003 and above

Client (ExSync.exe) Requirements

Hardware

Item	Minimum Requirements	Recommended Requirements
CPU	x86 or x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.	x86 or x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.
Memory	512MB	1GB
Disk Space	20MB	20MB

Software

Item	Minimum Requirements
Operating Systems	Windows Server 2003 x86 (including all service pack levels) Windows Server 2003 R2 x86 and x64 (including all service pack levels) Windows Server 2008 x86 and x64 (including all service pack levels) Windows Server 2008 R2 (including all service pack levels) Windows Server 2012 Windows Server 2012 R2 Windows Small Business Server 2003 Windows Small Business Server 2008 Windows Small Business Server 2011 Windows XP x86 and x64 (including all service pack levels) Windows Vista x86 and x64 (including all service pack levels) Windows 7 x86 and x64 (including all service pack levels) Windows 8 x86 and x64 Windows 8.1 x86 and x64
Microsoft Outlook	Outlook 2003 (including all service pack levels) Outlook 2007 (including all service pack levels) Outlook 2010 x86 and x64 (including all service pack levels) Outlook 2013 x86 and x64
Outlook Web Access (OWA) \ Outlook Web Apps	Outlook Web Access 2003 Outlook Web Access 2007 Outlook Web Apps 2010 Outlook Web Apps 2013 Office 365

Installation Overview

The installation process for Exclaimer Signature Manager Outlook Edition is very straightforward, using an installation wizard to copy required files and complete most setup behind the scenes.

Once the installation is complete, you may need to complete a few additional steps, depending upon how you wish to deploy signatures from Exclaimer Signature Manager Outlook Edition to your Outlook users. There are two possible scenarios to consider:

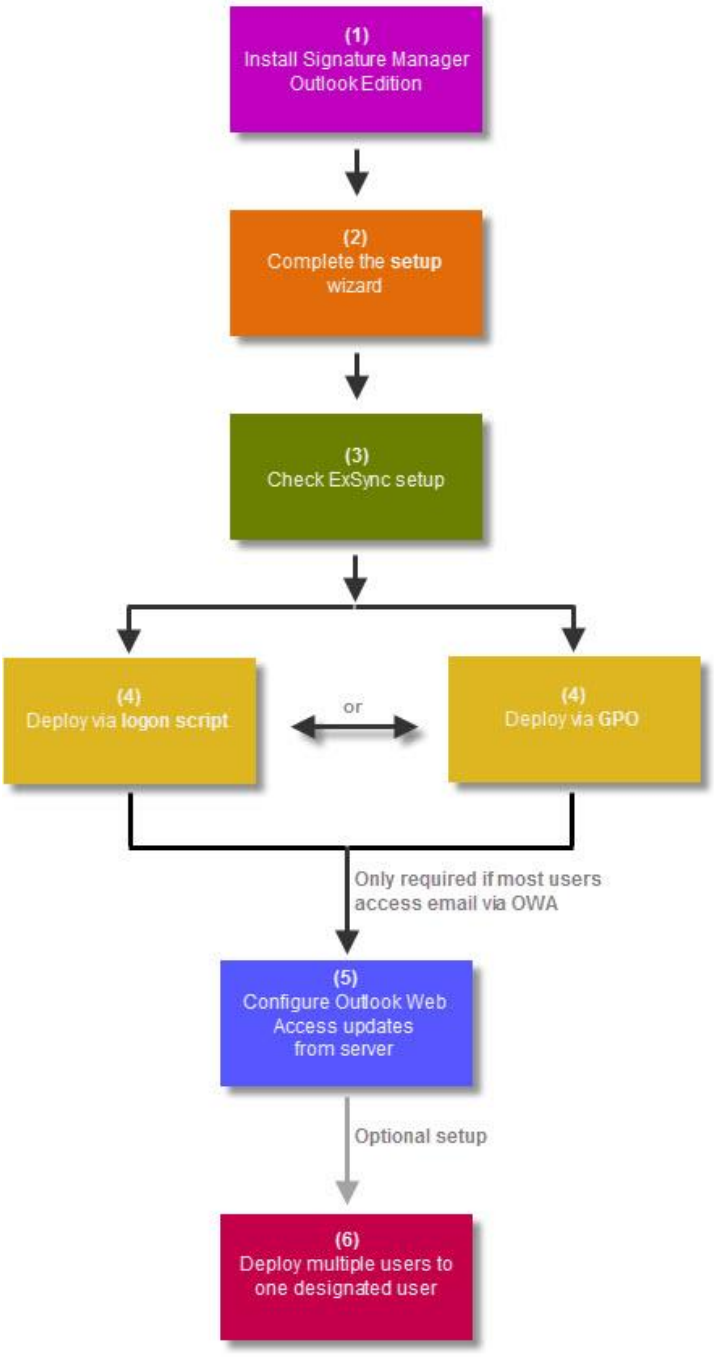
- Within your organization most users log on to your domain via Microsoft Outlook but some occasionally use OWA. In this situation, set deployment (via a .BAT or a VBS file) as a logon script [pg.24] or a Group Policy Object (GPO) [pg.26].

  -or-

- Within your organization most users typically use OWA and rarely log on to your domain via Microsoft Outlook. In this situation, set deployment (via a .BAT or VBS file) as a logon script [pg.24] or a Group Policy Object (GPO) [pg.26]. This sets ExSync for the relatively few users who log on to your domain and you should then configure OWA settings to use server updates, as detailed in the main user guide for Exclaimer Signature Manager Outlook Edition.

The Installation Process

With both deployment scenarios (described previously) in mind, the following diagram summarizes the installation and setup process for Exclaimer Signature Manager Outlook Edition:



Here, **steps 1 to 4** are mandatory (irrespective of how most users access their email) and are detailed in this guide. Then, **step 5** is only required if most people use OWA, or if you are using Exchange 2013 or Office 365. **Step 6** is entirely optional. Information regarding these steps can be found in the main user guide for Exclaimer Signature Manager Outlook Edition.

System Changes

The installation process makes the following changes to your system:

- The Exclaimer Outlook Settings Connector Service is installed.
- The Exclaimer Signature Manager Outlook Edition Configuration Service is installed.
- The Exclaimer Signature Manager Outlook Edition Remote Deployment Service is installed

File Location(s)

As part of the installation process, you are asked to specify a destination folder, into which program files will be installed. The default folder is C:\Program Files\Exclaimer Ltd\Signature Manager.

In addition to program files, a number of configuration files are copied to your system. The location of these files varies according to operating system, as summarized below:

Item	Minimum Requirements
Windows Server 2003 x64 Windows Server 2003 R2 x64 Windows Server 2003 x86 Windows Server 2003 R2 x86 Windows XP x86 and x64	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Signature Manager
Windows Server 2008 x64 Windows Server 2008 R2 x64 Windows Server 2008 x86 Windows Server 2008 R2 x86 Windows Server 2012 Windows Vista x86 and x64 Windows 7 x86 and x64 Windows 8 x86 and x64 Windows Small Business Server 2008 Windows Small Business Server 2011	\ProgramData\Exclaimer Ltd\Signature Manager

Downloading Signature Manager Outlook Edition

The Exclaimer Signature Manager Outlook Edition installation file is named setup.exe and can be downloaded from the products page on the Exclaimer website (www.exclaimer.com).

Once downloaded, setup.exe should be run on the computer from which you wish to manage signatures.

NOTE

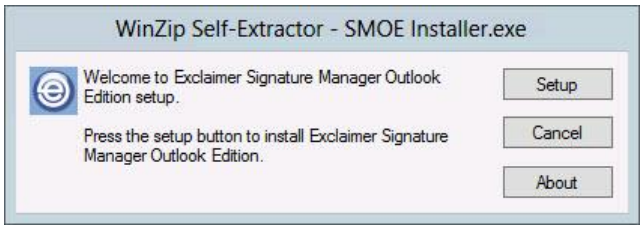
If required, an **MSI** is available from support by contacting support@exclaimer.com.

The Installation Wizard

The installation process for Exclaimer Signature Manager Outlook Edition is completed using a familiar 'wizard' approach to guide you through each process, step-by-step. This process includes the Exclaimer license agreement and copies files to your preferred destination folder. Once complete, you can use the application for five days, after which you must register for a 30 day trial to continue using Exclaimer Signature Manager Outlook Edition.

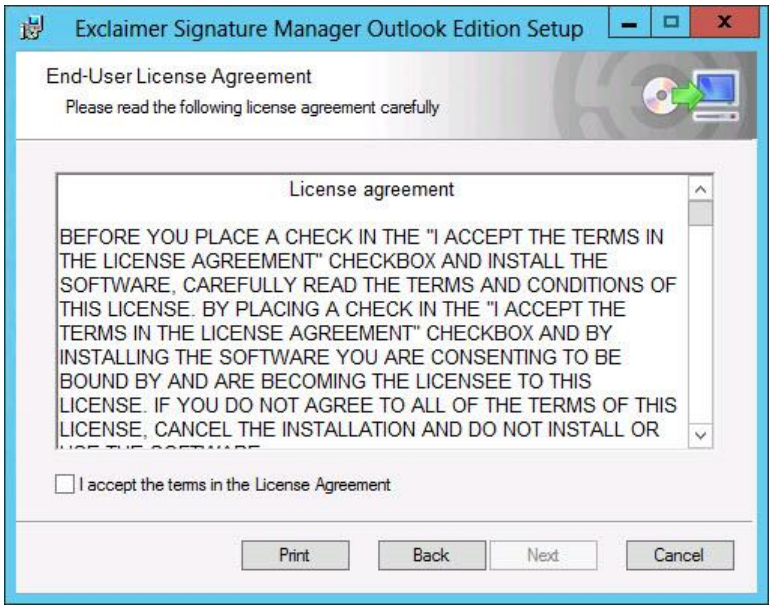
To complete the installation wizard, follow the steps below:

1. Double click the setup file to start the installation process:

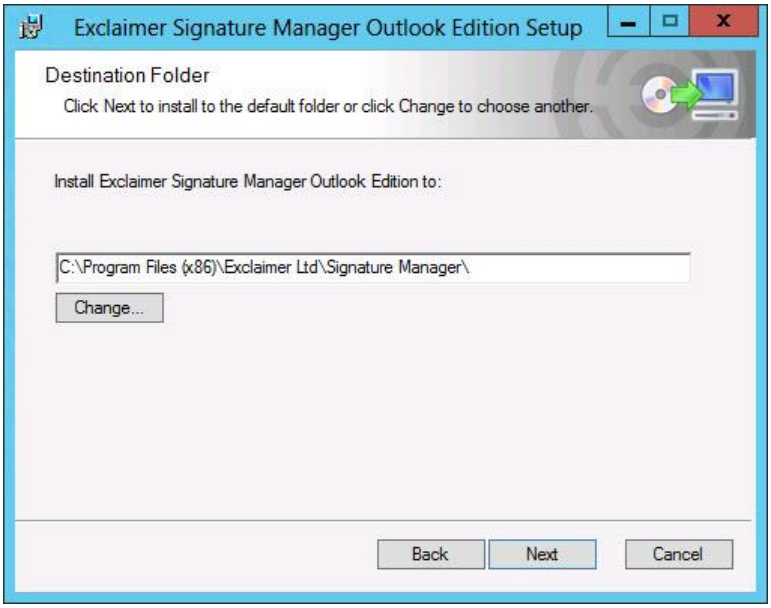


2. Click setup to display a welcome message:

3. Click the next button to view the end-user license agreement:

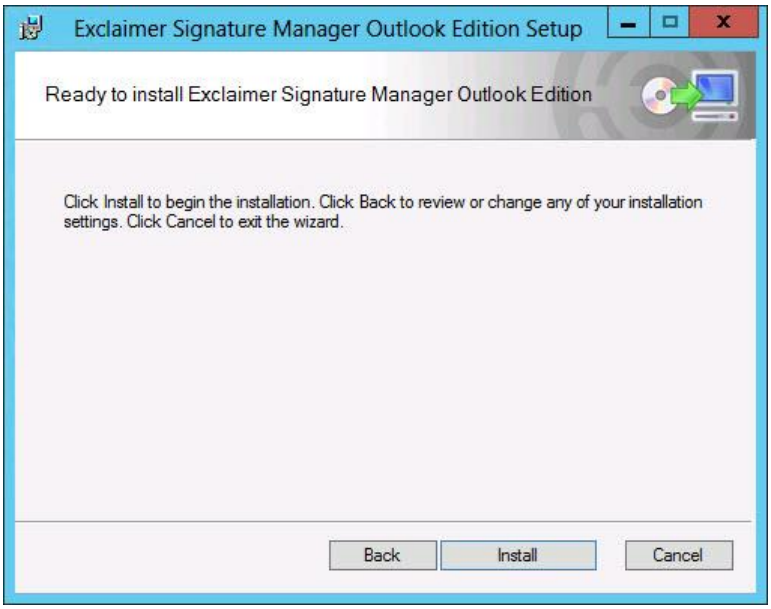


4. Having read the license agreement, check the I accept the terms in the license agreement box and click next to specify a destination folder for installed files:



From here you can accept the default folder, or click to specify a new location.

5. Click next to review:



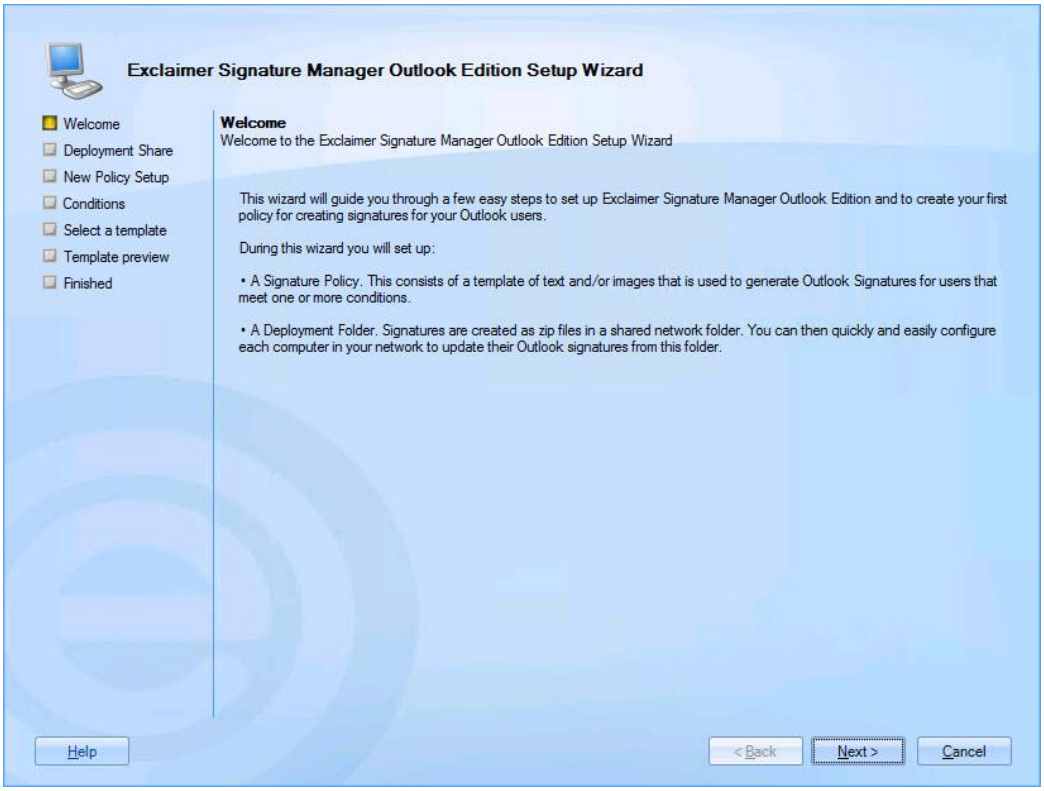
6. Click the install button to perform the installation. Progress is displayed on screen and final confirmation is shown upon completion:

7. Click finish to close the wizard. If you are installing Exclaimer Signature Manager Outlook Edition for the first time, the setup wizard [pg.17]is launched. You should complete this wizard to create your first policy and get started with Exclaimer Signature Manager Outlook Edition.

The Setup Wizard

Having completed the installation wizard [pg.14] for the first time, the setup wizard is launched automatically. This wizard takes you through the basic setup required to create your first signature policy and get started with Exclaimer Signature Manager Outlook Edition. To complete this wizard, follow the steps below:

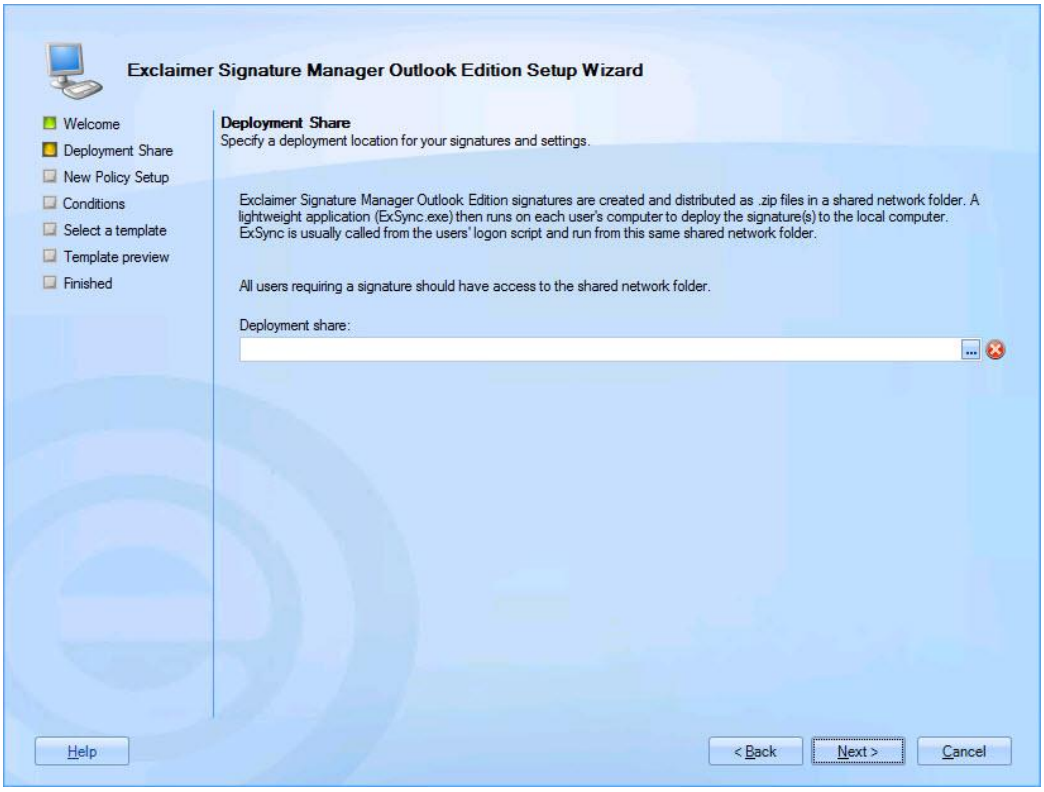
1. The first stage of the setup wizard displays summary information about the process:



2. Click next to move to the next stage and set a deployment share. This folder is primarily used to store signatures (as generated by Exclaimer Signature Manager Outlook Edition) in the form of a zip file, and for users to access the ExSync [pg.22] agent.

   When choosing a deployment share you should ensure that the specified drive has enough disk space to store signatures for all users in your organization. Signatures are generated according to a specified update interval and stored in the deployment share.

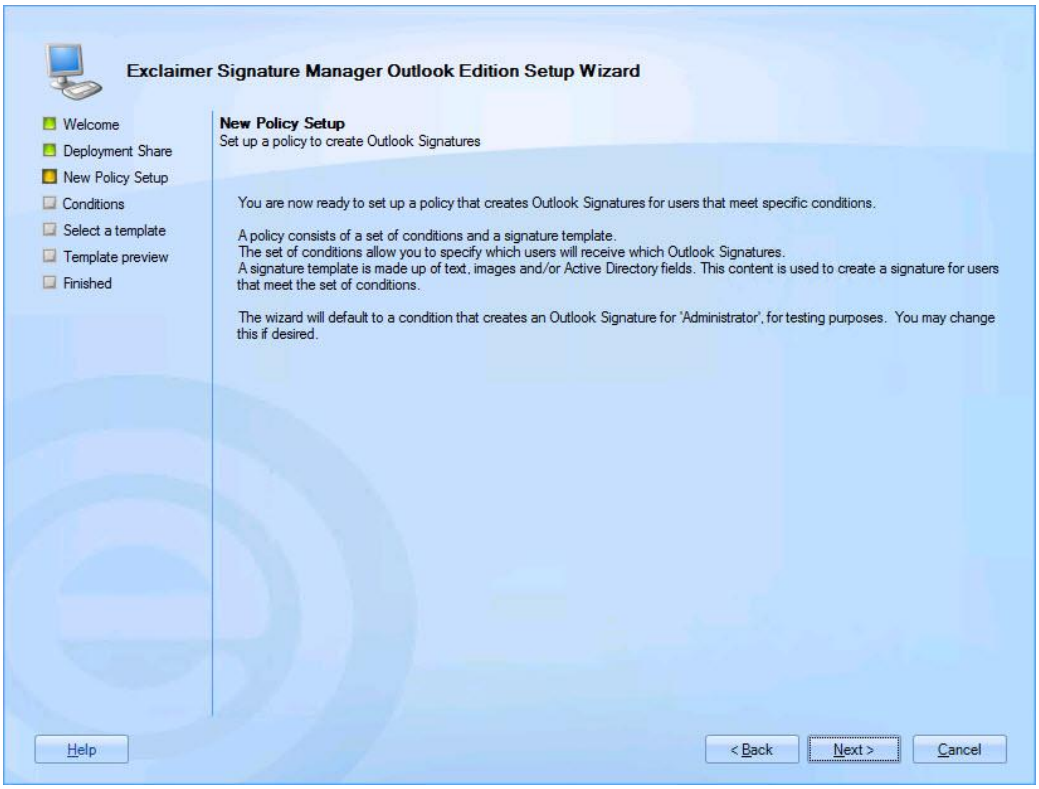
Therefore, if you have 1000 users, 1000 ZIP files will be created and stored:



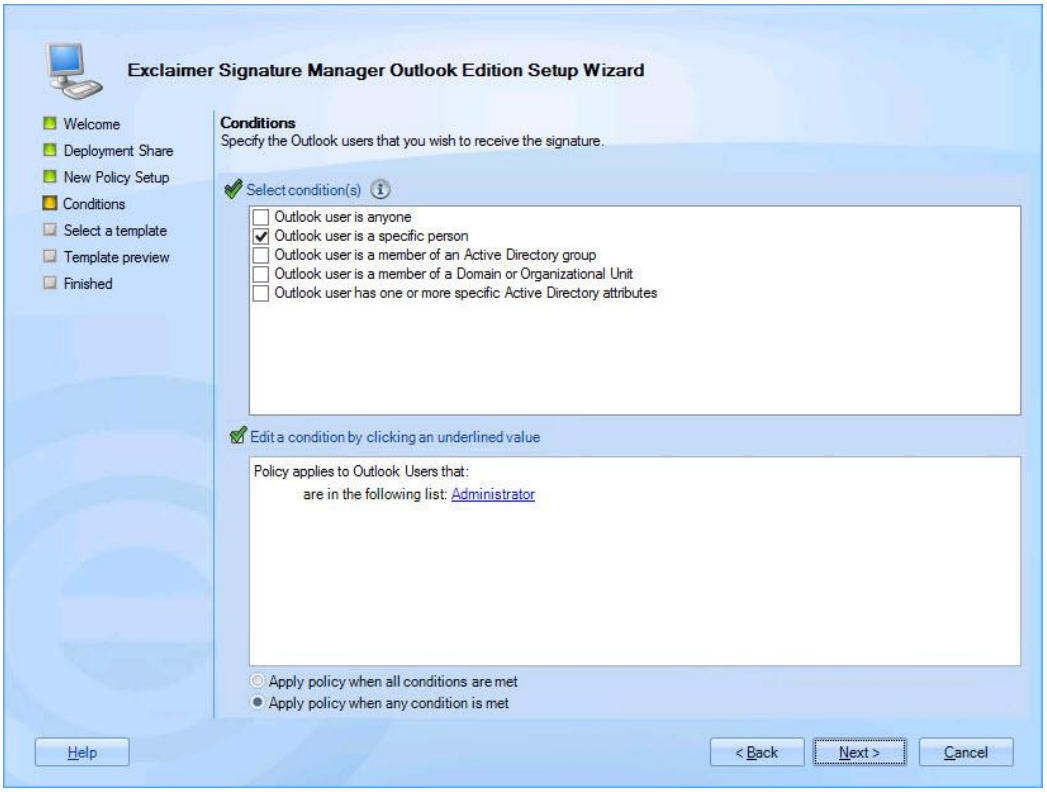
NOTE

Local paths (C:\, F:\, etc.) are not supported for deployment. You must specify a UNC path - \\servername\networksharedfoldername).

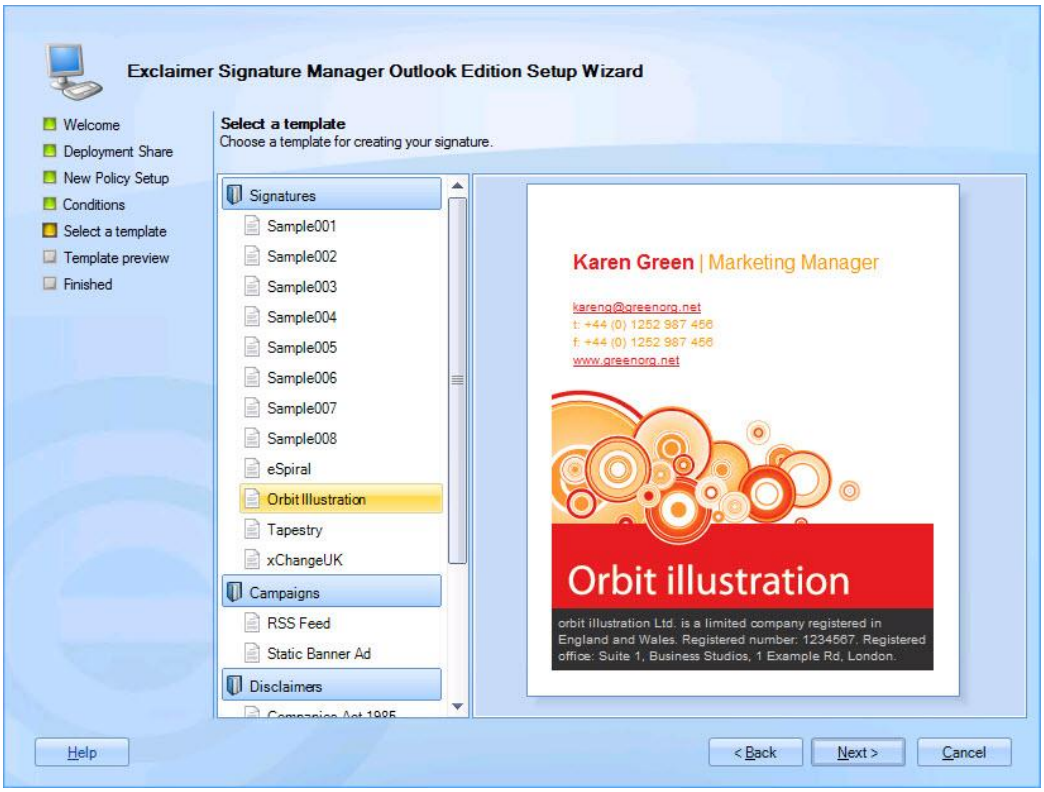
3. Click next to move to the next stage and review setup required for your first policy:



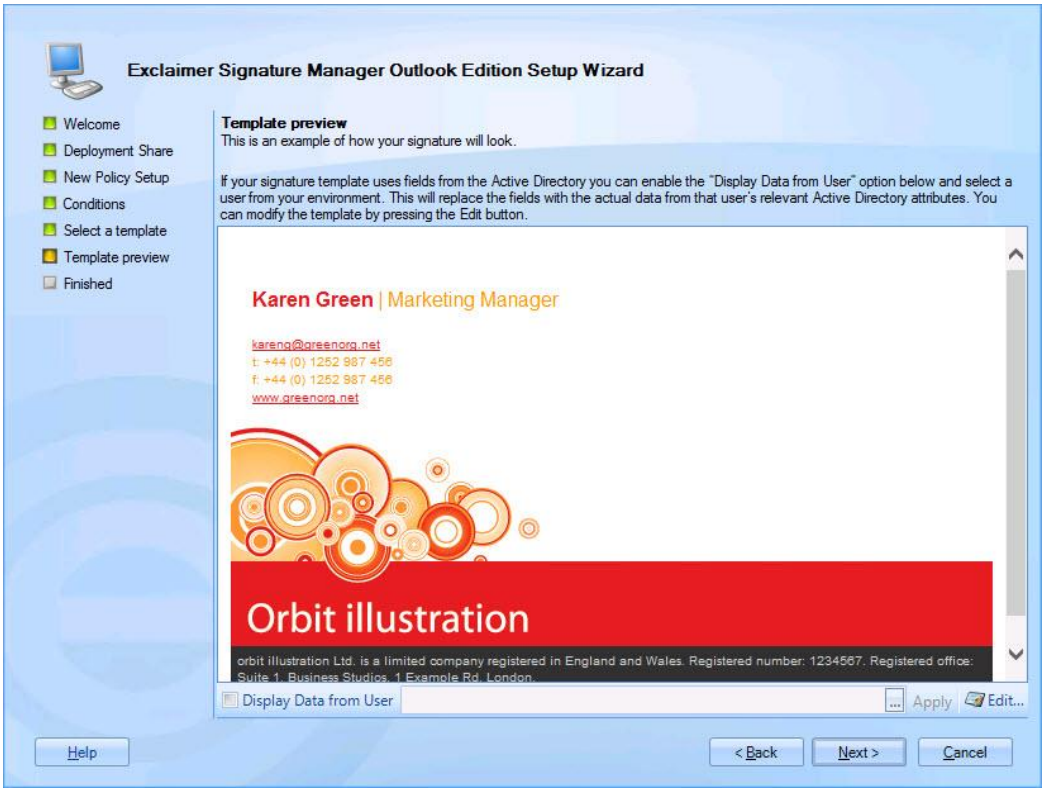
4. Click next to set conditions for your first policy. You can update this policy at any time after the installation, so if you are not sure what to set now, simply accept default conditions and continue:



5. Click next to move to the next stage and select a template to associate with your first policy. A number of standard templates are provided but you can update your selection at any time after the installation. If you are not sure what to select at this point, simply accept the default and continue:

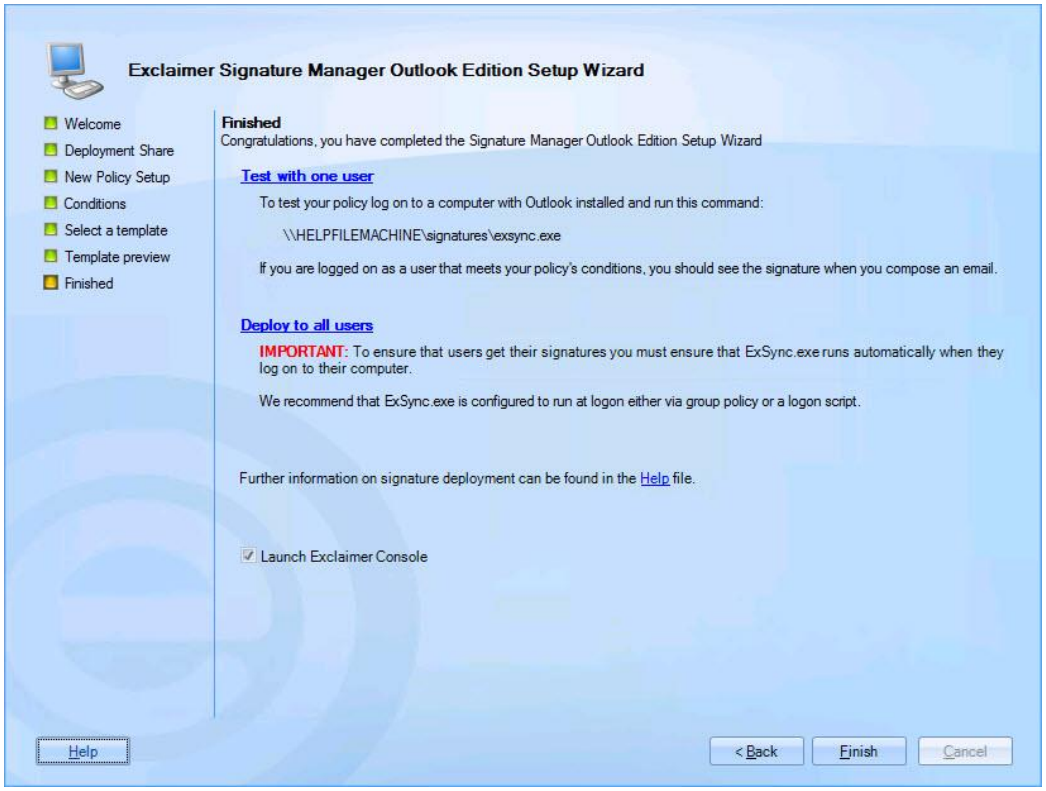


6. Click next to preview the selected template, to see how it would be shown in a signature:



If the selected template contains Active Directory fields, the preview may vary depending on which user is associated with the policy (as determined by conditions set in step 4). If required, you can select a specific user via the display data from user option.

7. Click next to review key settings:



8. Click finish to exit and launch Exclaimer Signature Manager Outlook Edition. From here, you may wish to check / set additional deployment options (see setting up ExSync [pg.22], deploying via a logon script [pg.24], deploying via GPO [pg.26]. Further configuration options are detailed in the main user guide for Exclaimer Signature Manager Outlook Edition.

NOTE

Once setup is completed, a **signature deployment policy** is automatically created. This policy determines how signatures are updated, where they are shared (the **deployment folder** specified in step 2 above) and for which users. By default, this **signature deployment policy** applies to **all** users, but you can add further policies if you have more complex requirements.

Setting up ExSync

To deploy signatures from Exclaimer Signature Manager Outlook Edition to each user's computer, an agent named ExSync needs to be running on each client machine. ExSync is designed to update Outlook signatures regularly, using minimal processing / memory resources.

You can automate the process of running ExSync on client machines using a Group Policy Object (GPO) [pg.26] or a logon script [pg.24]. Users will not be aware of the agent running during the normal operation of their machine.

> NOTE
>
> For more information on creating or amending Group Policy Objects go to the Microsoft Technet website and search for **Group Policy Object**.

How Do I Obtain A Copy Of ExSync?

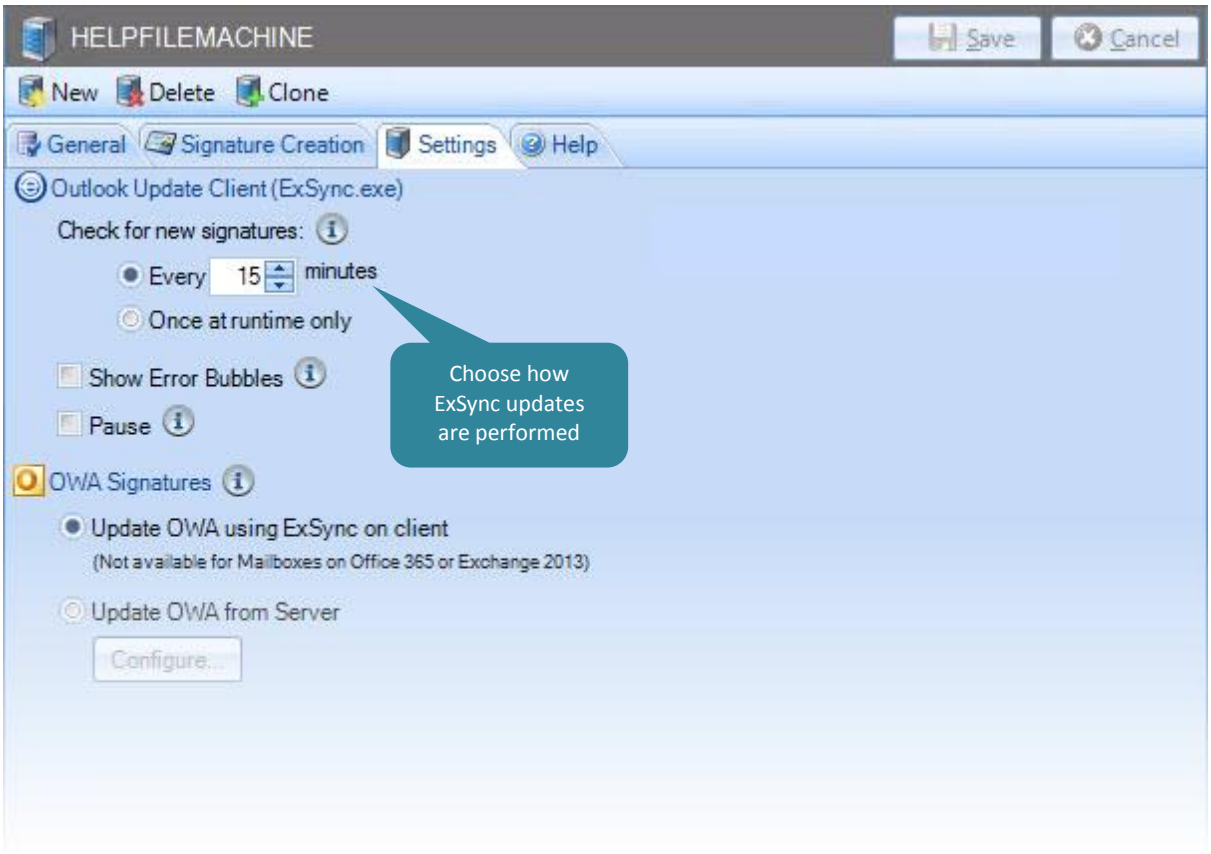
Having completed the installation process [pg.14] and the setup wizard [pg.17], the ExSync agent is automatically copied to your specified deployment share, from where it is run. However, to use ExSync, you need to:

- Set the update mode for ExSync [pg.23]
- Ensure that ExSync runs automatically on all client computers [pg.24]

Setting the Update Mode for ExSync

Using Exclaimer Signature Manager Outlook Edition settings, you can set the mode in which Outlook policies are applied to user computers via ExSync [pg.22]. To do this, follow the steps below:

1. Within the Exclaimer console, select the signature deployment policies branch of the console tree.
2. From here, select the required deployment policy. A default deployment policy is created automatically when Exclaimer Signature Manager Outlook Edition is installed and a deployment share is specified in the setup wizard [pg.17], but additional deployment policies can also be added.
3. Select the settings tab to view settings for the selected deployment policy:



4. Set the frequency with which ExSync should check for new signatures (in minutes) or choose to update once at runtime only. Selecting once at runtime only sets ExSync to update immediately and then to close down, whilst defining a set frequency updates at continuous intervals.
5. Save changes.

Ensuring that ExSync Runs Automatically

Once ExSync has been deployed to client machines, you need to ensure that it runs automatically. To do this, you can use a logon script [pg.24] or GPO [pg.26].

Deploying Via a Logon Script

This method of deployment is useful if you already have a logon script, or if you wish to deploy Exclaimer Signature Manager Outlook Edition signatures to a select number of users for test purposes. For clarity, this process has been documented in three stages:

- Stage 1: Create new or update existing logon.bat [pg.24]
- Stage 2: Set login.bat as the login script for required users [pg.25]
- Stage 3: Ask users to log out and log back in [pg.25]

Stage 1: Create New or Update Existing Logon.Bat

If you do not already have a logon.bat file, you should create one now. To do this:

1. Open Windows Notepad.
2. Create a file named logon.bat.
3. Enter the full UNC path to ExSync, for example: \\Server\Share\exsync.exe.
4. Save the logon.bat file.
5. Copy the logon.bat file to your shared NETLOGON folder.

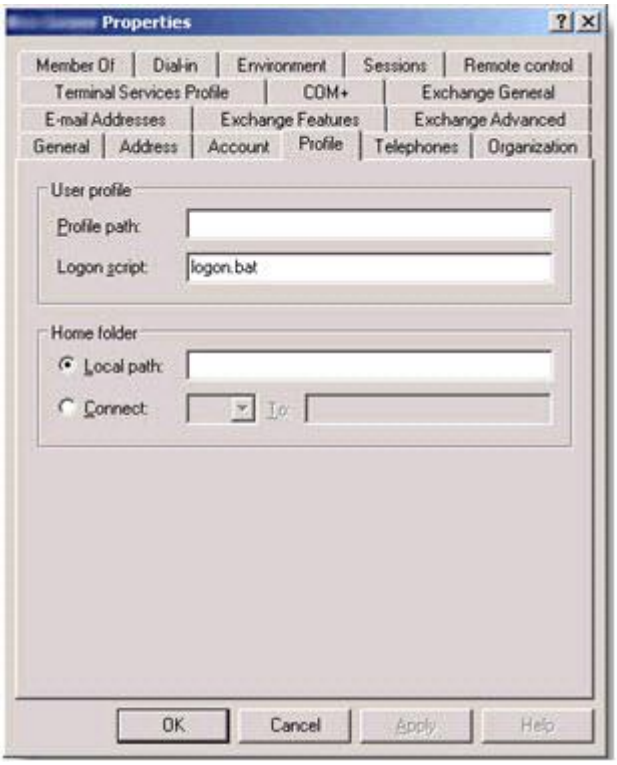
NOTE

If you already have a **logon.bat** file, simply add the full UNC path to **ExSync** to it (for example: **\\Server\Share\exsync.exe**) and save it to your shared **NETLOGON** folder.

Stage 2: Set Logon.Bat as the Logon Script for Required Users

If required, you can set logon.bat as the login script for each Active Directory user. To do this:

1. Open Microsoft's Active Directory management tool, Active Directory Users and Computers.
2. Locate the required user (in the directory structure).
3. Double-click the user name, or right-click and select properties:



4. Select the appropriate tab, in this case profile.
5. Enter logon.bat into the logon script attribute and click OK.

Stage 3: Ask Users to Log Out and Log Back In

Ensure that your users log off and log back on at least once to activate the new login script.

Deploying via Group Policy Object (GPO)

This method of deployment allows you to deploy the login script using your default Group Policy Object (GPO) or to a GPO that you have created. For clarity, this process has been documented in two stages:

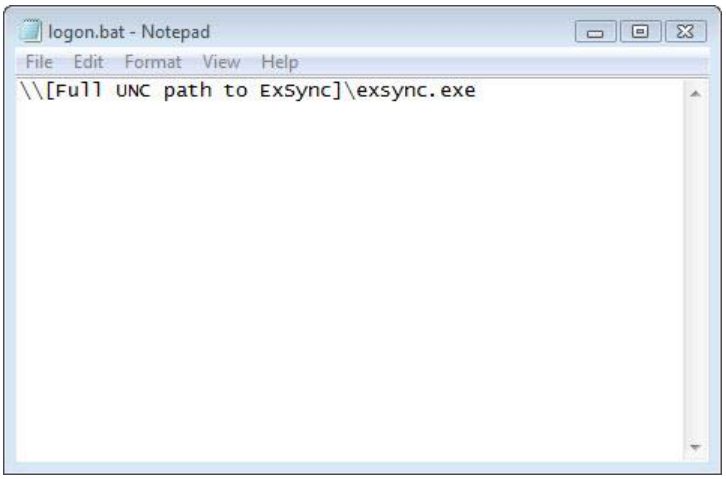
- Stage 1: Create new or update existing logon.bat / logon.vbs [pg.27]
- Stage 2: Propagate the new GPO [pg.27]

Stage 1: Create New or Update Existing Logon.Bat / Logon.VBS

If you do not already have a logon.bat file, or a logon.vbs file you should create one now.

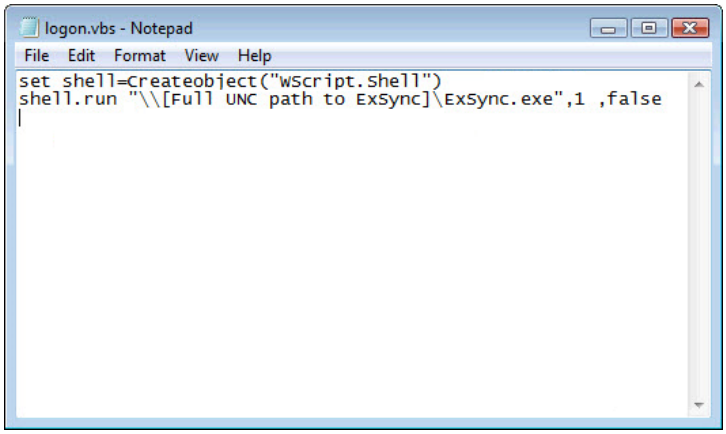
> NOTE
>
> The login script needs to be applied to the user configuration of a GPO and not the computer configuration.

1. Locate the logon scripts folder of the required GPO (in the Group Policy Object management console).
2. Open the logon.bat or logon.vbs file. If neither of these files is present, create one.
3. Add the script shown below into the BAT file:



-or-

Add the script shown below into the VBS file:



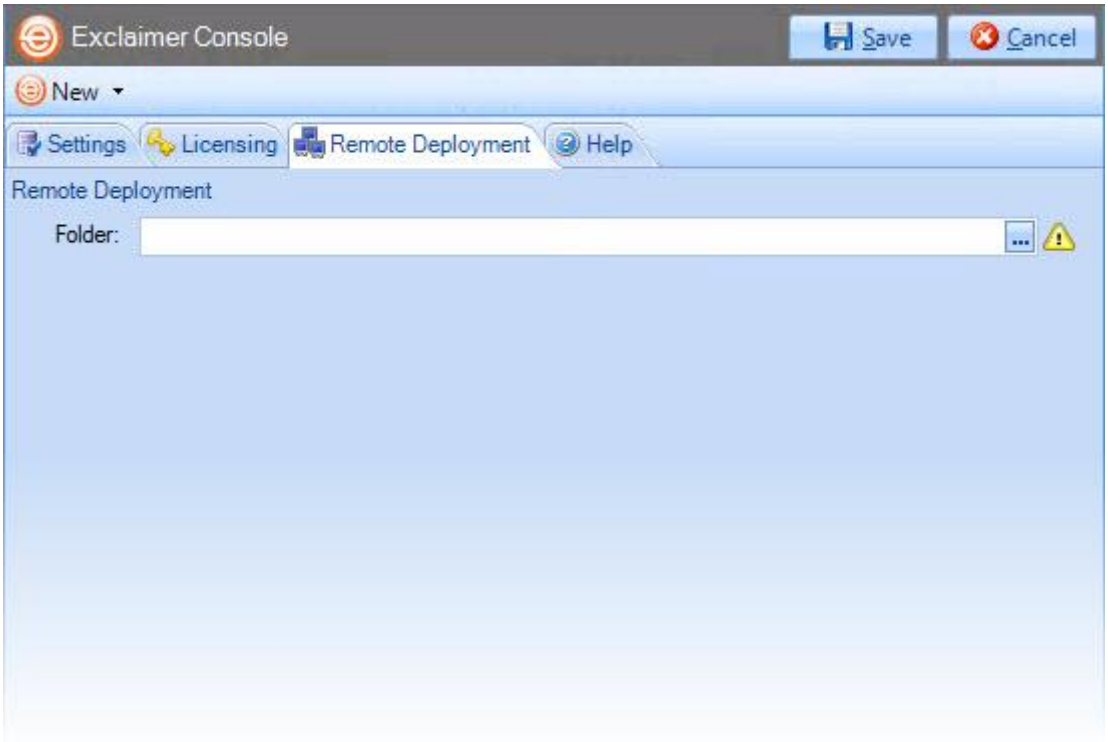
4. Save the logon.bat or logon.vbs file to the logon scripts folder of the GPO (as found in step 1).

Stage 2: Propagate the New GPO

The new GPO is updated for each user when they log off and back on. If you need to propagate the change before this is possible, type gpupdate in the Windows run field on that user's computer.

Remote Deployment

If you have multiple Exclaimer installations on your network (for example, you might have servers in different offices around the country), you can manage configuration in a single location and deploy this to all other servers. To do this, use the remote deployment tab to specify a shared location:



Then, whenever you save any changes to the configuration, you are asked to confirm if you would like to deploy them to other servers. If you opt to deploy changes, a file is written to the remote deployment folder and imported by the other installations.

NOTE

Initially, Exclaimer software must be installed on each server - installation cannot be completed via remote deployment. Once installed, specify a **remote deployment** folder to manage subsequent configuration changes with remote deployment (each installation must have the same **remote deployment** folder).

How It Works

The remote deployment folder is defined using the remote deployment tab within the Exclaimer Console.

The specified folder must be a shared folder on the network (only one remote deployment folder should be used on an entire domain). When configuration changes are saved, the computer (on which those changes have been saved) pushes new configuration data to the remote deployment folder.

Remote machines receive notification from the operating system when new configuration data is detected in the shared folder, and they then pull (i.e. import) that data into their local installation. Push and pull operations are completed via the Exclaimer Signature Manager Outlook Edition Remote Deployment service.

The Remote Deployment Folder

Create a shared folder on your network that will be accessible by all machines that are running Exclaimer Signature Manager Outlook Edition.

If you do not want the share to be visible to users, you should use a hidden share. This is done by adding a dollar ($) symbol to the end of the share name. Hidden shares cannot be viewed when browsing the network with Explorer, for example.

You should ensure that the user who is logged into the Exclaimer console (that is saving data) has read and write access to this folder.

The following sections detail two methods of applying folder permissions. These are applicable for both the sharing and the NTFS Security permissions of the shared folder - i.e. you must make the same permission changes in both the sharing and security tabs of the folder's properties dialog.

Folder Permissions (Easy Method)

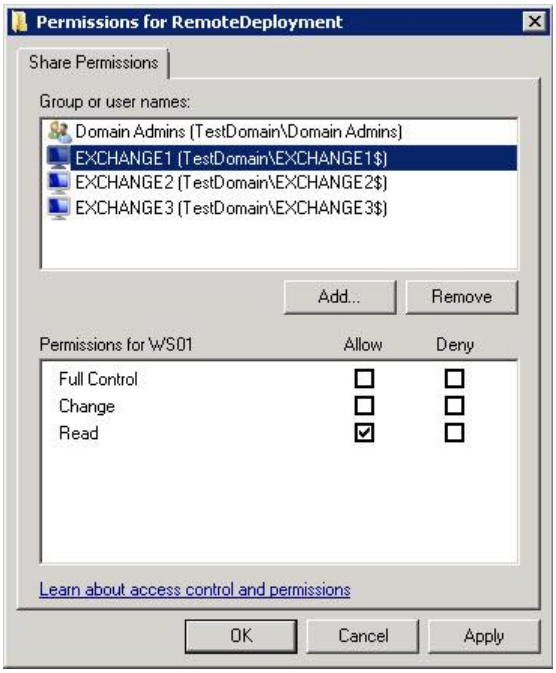
Allow the Everyone group to have Read permissions.

Folder Permissions (Secure Method)

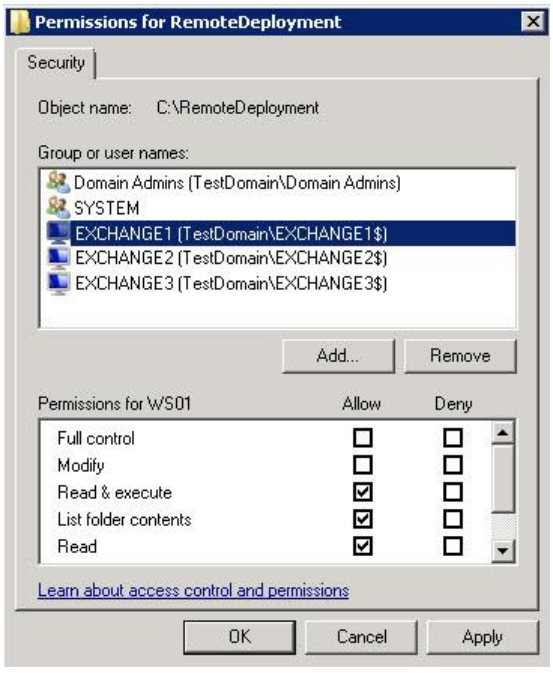
Allow Read permissions only for the computer account of each server with Exclaimer Signature Manager Outlook Edition installed upon it.

This is essential because the Exclaimer Signature Manager Outlook Edition Remote Deployment service runs under the LocalSystem account; this account (as the name suggests) only has access to the local system of the machine that it is running on - not to any network resources.

The only way this account can ever see a network resource is when the computer account is given specific access to that resource - i.e. the folder on the network resource allows itself to be accessed by the LocalSystem account of a specific remote machine. In this case, access is restricted to only reading data from the remote deployment folder. Example permission settings are shown below:



Share Permissions



Security Permissions

Remote Deployment Timings

As soon as the Exclaimer Signature Manager Outlook Edition Remote Deployment service notices that there has been a change to the remote deployment folder, it starts a timer. Every ten seconds a check is made to see if the file has been written to in the last five seconds. If it has not, the file is added to a queue which will perform the actual import; otherwise the file remains in the timer list.

This means that the import should begin a maximum of ten seconds after the save finishes, though in practice it could be a little more than this depending on server load and how quickly the import thread is given control by the operating system. Similarly, the import could begin sooner, depending on when the save completes relative to the timer interval.

Before checking that configuration changes have been applied successfully on remote machines, sufficient time should be allowed for those machines to actually perform the import (the import can take some time with complex configurations).

Changing an Existing Remote Deployment Folder

If all Signature Manager Outlook Edition installations are set to point to a specific remote deployment folder and you later decide to change that folder, there is no need to manually change every server to point to the new location.

Having changed the location on one machine and saved the configuration, that machine will write a copy of the configuration data to both the old AND the new locations. Any servers pointing to the old location will import the configuration which includes the new remote deployment folder path so, on subsequent deployments, they will pull data from the new location.

As such, you are advised NOT to delete the old remote deployment folder until enough time has elapsed for all remote machines to import the configuration file that contains the new folder location.

Command Line Installation

If you are installing Exclaimer Signature Manager Outlook Edition on multiple servers (for example, at different offices in different locations), you can complete all required configuration on one server, then export that configuration and import it at other locations.

To save time, you can perform a 'silent' installation at other locations, using command line options. A command line installation installs Exclaimer Signature Manager Outlook Edition without the need to step through the installation wizard [pg.14].

Programs and services are installed and when Exclaimer Signature Manager Outlook Edition is launched, the setup wizard [pg.17] is launched. You need to step through the setup wizard but once this is done, you can import your original configuration file.

NOTE

For further information about importing and exporting configuration files, please refer to the User Guide or Online Help for Exclaimer Signature Manager Outlook Edition.

Required Preparation

Command line installations are run using an MSI installation, rather than the standard setup.exe. To obtain the required MSI installation file, please contact Exclaimer support (support@exclaimer.com).

Supported Command Line Options

The following options are supported for a command line installation:

Parameter	Description
INSTALLLOCATION	Where the application should be installed. This corresponds to the Installation Directory screen in the standard installation wizard.

For example:

```
"Signature Manager Outlook Edition Install.msi" /qn
INSTALLLOCATION="D:\Program Files\Exclaimer Ltd\Signature Manager Outlook
Edition\"
```

Note that environment variables cannot be used in paths - you must specify full paths explicitly.

Uninstalling Signature Manager Outlook Edition

The uninstall process removes the following items for Exclaimer Signature Manager Outlook Edition:

- Application program files
- The Exclaimer Outlook Settings Connector Service
- The Exclaimer Signature Manager Outlook Edition Configuration Service
- The Exclaimer Signature Manager Outlook Edition Remote Deployment Service

Configuration files are **not** removed as part of the uninstall process. The location of these files on your system depends upon which operating system is in use, as summarized below:

Item	Minimum Requirements
Windows Server 2003 x64 Windows Server 2003 R2 x64 Windows Server 2003 x86 Windows Server 2003 R2 x86 Windows XP x86 and x64	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Signature Manager
Windows Server 2008 x64 Windows Server 2008 R2 x64 Windows Server 2008 x86 Windows Server 2008 R2 x86 Windows Server 2012 Windows Vista x86 and x64 Windows 7 x86 and x64 Windows 8 x86 and x64 Windows Small Business Server 2008 Windows Small Business Server 2011	\ProgramData\Exclaimer Ltd\Signature Manager

Preparation

As a precaution you may wish to export your configuration before running the uninstall process.

The export includes all settings for Exclaimer Signature Manager Outlook Edition. These are written to an econfig file, a proprietary file type for Exclaimer products. To export current settings, follow the steps below:

1. Open the Exclaimer Console.
2. Ensure that Exclaimer is selected in the console tree (i.e. the topmost branch).
3. Select export configuration from the actions pane, or from the action menu. The export configuration window is displayed.
4. Navigate to the required drive and folder, to which the export file should be saved.
5. Specify the required file name for the export file.
6. Click save to complete the export.

Running the Uninstall Process

There are two ways to start the uninstall process for Exclaimer Signature Manager Outlook Edition:

- Activate the original setup.exe and choose the uninstall option; then follow on-screen instructions.
- Use programs and features in Windows Server 2008, Windows Vista or Windows 7/Windows 8; then follow on-screen instructions.

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