Exclaimer® Signature Management Exchange Edition

Getting Started Guide

Version 1

Document Information

Prepared by: **Exclaimer**

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Document Control

Document Name: Signature Manager Exchange Edition - Getting Started Guide

Change History

Version	Date	Details of change
1	04/11/2020	Released

Contents

1   Overview

1.1   Document Scope

This document describes how to use install and configure Exclaimer Signature Manager Exchange Edition.

1.2   Intended Audience

This document is intended for use as a reference by Exclaimer trial customers.

1.3   Reference Documentation

For additional information about the Exclaimer Signature Manager Exchange Edition, please refer to the following Exclaimer documentation:

Title	Document Type
Exclaimer Signature Manager Exchange Edition	User Manual/Online Help

2   Introduction to Signature Manager Exchange Edition

Before you begin to start installing then configuring the Signature Manager Exchange Edition, make sure you have read this chapter thoroughly and you are aware of all the requirements.

2.1 Purpose

Exclaimer Signature Manager Exchange Edition allows you to create great looking, professional signatures centrally (including company branding, legal disclaimers and promotional content) and to control the circumstances (that is, rules) under which these signatures should be applied to email messages that are sent from your organisation.

2.2 System requirements

2.2.1 Hardware

Item	Minimum Requirements	Recommended Requirements
CPU	x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.	x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.
Memory	2GB	4GB
Disk Space	350MB	500MB
Screen Resolution	1024x768 pixels	1152x864 or higher

2.2.2 Software

Item	Minimum Requirements
Operating Systems	Windows Server 2012 Windows Server 2012 R2 Windows Server 2016 Windows Server 2019 (including core)
Exchange Server	Microsoft Exchange Server 2010 (Service Pack 3 and above) Microsoft Exchange Server 2013 (Service Pack 1 and above) Microsoft Exchange Server 2016 RTM and above Microsoft Exchange Server 2019 RTM and above (including Core)
Exchange Server Roles	Microsoft Exchange Hub Transport Server (2010) Microsoft Exchange Mailbox Server (2013, 2016 & 2019)
Microsoft .Net Framework	Microsoft .Net Framework 4.5.2 or above

<div style="border:1px solid">

3 Working with Signature Manager Exchange Edition

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3.1 Before you start

This chapter briefly describes:

How Exclaimer Signature Manager Exchange Edition works

Key Benefits of Exclaimer Signature Manager Exchange Edition

Information on Licensing

3.2 How it works

Signature templates and associated policies are defined centrally, by an Administrator.

When a user sends an email message, the message is checked against all defined signature policies and, if it matches specified criteria for a policy, that policy is applied, and associated signature content is added to the message.

All of this happens 'behind the scenes' - the message that is finally received at the other end can be quite different to the one that the user sees when they press 'send'. Depending on how signature policies and templates are defined, the final message might be displayed in a different way, and signature content will be included.

If required, the Sent Items Update feature can be used to store sent messages exactly as they were received (that is, the processed version), or to store the original version of the message AND the processed version.

3.3 Key benefits

Some key benefits of Exclaimer Signature Manager Exchange Edition are:

- Signature Content:

  With the ability to create rich, highly creative templates (including tables, images and dynamic Active Directory fields) and to add these before or after original email messages, a signature has the potential to be so much more than just contact details. With Exclaimer Signature Manager Exchange Edition, you can consistently apply personalised signature details, legal disclaimers, corporate branding, banners (for example, for sales promotions and corporate events) and so much more - the possibilities are immense.

  Exclaimer Signature Manager Exchange Edition includes a library of professionally designed templates which can be used 'out of the box', or as a start point for creating your own versions. New templates can be created, and existing templates edited by using an intuitive template editor – this will be familiar to anyone who has worked with Microsoft Outlook.

  Templates are created in HTML, RTF and Plain Text formats, with an instant preview feature so you can, at a glance, see how your template will be displayed within email messages.

- Signature Rules:

  Once you have created your templates, you will want to specify criteria (that is, rules) that must be met in order to determine which signature should be applied to messages.

  At a basic level, this might be as simple as saying 'apply this template to all messages', but other times you may have more complex requirements. For example, you might choose to apply different signatures according to the sender, or according to the day of the week, or dependent upon the content of the email body and/or subject line - a vast range of scenarios can be achieved using signature policies.

  A signature policy can be thought of as a set of rules which are specified to control how signatures are applied to email messages. With a range of conditions and exceptions (which can be applied to messages sent and received both internally and externally), you determine if, when and how signatures are applied.

- Complete Control:

  Perhaps one policy isn't enough - you need to apply (or not apply) certain signatures according to whether or not a previous signature has already been applied. With Exclaimer Signature Manager Exchange Edition, you can create policy chains to define such dependencies.

  Once you have defined your templates and policies, you don't need to worry about complicated testing processes. Exclaimer Signature Manager Outlook Edition includes an intuitive policy tester, which simulates the generation of signatures for given Outlook users - this allows you to view if the policies defined are correct.

3.4 Licensing

Our aim is to get you working with Exclaimer software as quickly as possible, with minimal restrictions. And because of this 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 Exchange Edition.`

This text is only added when signatures are generated within the trial period; once the license is activated the message is removed.

Once you have completed the trial period, you can either:

- Purchase the product from the Exclaimer website or by contacting the Exclaimer Sales team (sales@exclaimer.com).

- Contact the Exclaimer sales team to extend your trial.

3.4.1 Licensing information

Once you have successfully installed Exclaimer Signature Manager Exchange Edition, you can view the licensing information and other options, on the Licensing tab, within the Exclaimer Console:
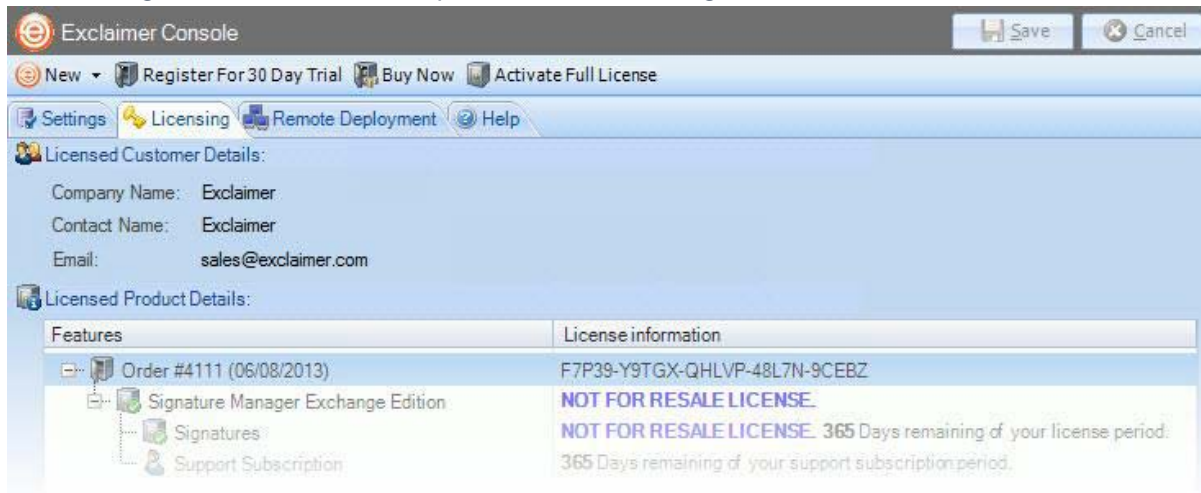
You can access this by selecting the Exclaimer branch of the console tree, then click the **Licensing** tab or select **Licensing** from the **Actions** pane.

4   Installing Signature Manager Exchange Edition

Exclaimer Signature Manager Exchange Edition serves signatures via a Microsoft Exchange Transport Agent. As such, it needs to be installed on all server that has the Microsoft Exchange Hub Transport Role installed.

The installation process is comprised of two parts - installation and setup. Both stages are quick and easy to complete, using a familiar 'wizard' approach to guide you through each process, step-by-step.

The installation process includes the Exclaimer license agreement and copies files to your preferred destination folder. Once complete, the setup wizard is launched, so you can configure basic settings for Exclaimer Signature Manager Exchange Edition, which will enable you to get started as soon as the wizard is complete.

> **CAUTION!**
>
> The installation process makes the following changes to your system:
>
> - The Exclaimer Signature Manager Exchange Edition Transport Agent is installed with a Priority set to 1.
>
> - The Exclaimer Signature Manager Exchange Edition Configuration Service is installed.
>
> - The Exclaimer Signature Manager Exchange Edition Remote Deployment Service is installed.
>
> - The Exclaimer Signature Manager Exchange Edition Sent Items Update Service is installed.
>
> - The Microsoft Exchange Transport Service is restarted (this is required to ensure that the Transport Agent installation change takes effect with the Microsoft Exchange server).

> NOTE: In multi-server environments, Exclaimer Signature Manager Exchange Edition should be installed on each Hub Transport server that processes messages which require signatures. For further information about installing on multiple servers, please refer to the Remote Deployment and Command Line Installation sections of this guide.

4.1 File Locations

During the installation process, you need 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:

Operating System	File Location
Windows Server 2012 Windows Server 2012 R2 Windows Server 2016 Windows Server 2019 (including Core)	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Mail Disclaimers
Windows Server 2012 Windows Server 2012 R2 Windows Server 2016 Windows Server 2019 (including Core)	\ProgramData\Exclaimer Ltd\ Mail Disclaimers

5   Downloading Signature Manager Exchange Edition

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

Once downloaded, run the `setup.exe` should be run on all Exchange 2007 and 2010 servers with the Hub Transport Role, and on all Exchange 2013 and 2016 servers with the Mailbox Role.

> NOTE: To obtain the required MSI installation file, please contact Exclaimer Support.

If you are installing Signature Manager Exchange Edition on more than one Exchange server, you should also check remote deployment options.

5.1 Installation Wizard

The installation process for Exclaimer Signature Manager Exchange 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 Exchange Edition.

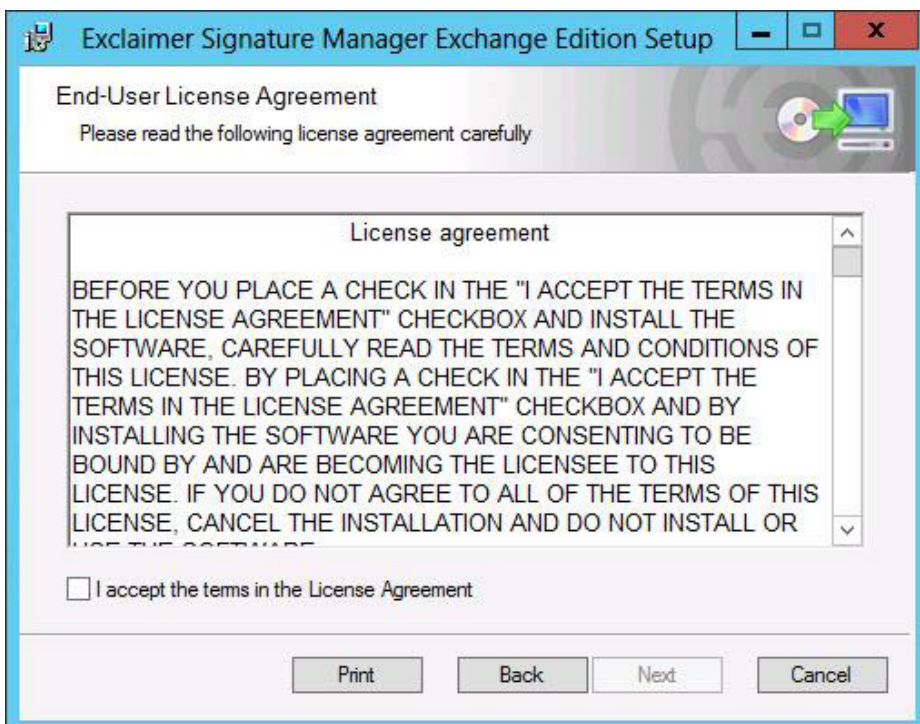**To complete the installation wizard, follow the steps below:**

1.   Double-click the `setup.exe` to start the installation process. The WinZip Self-Extractor -SMOW
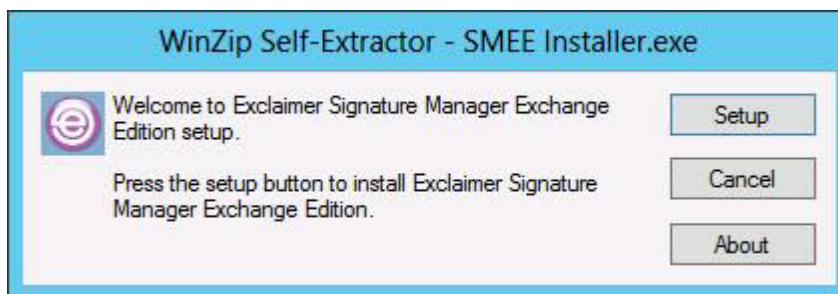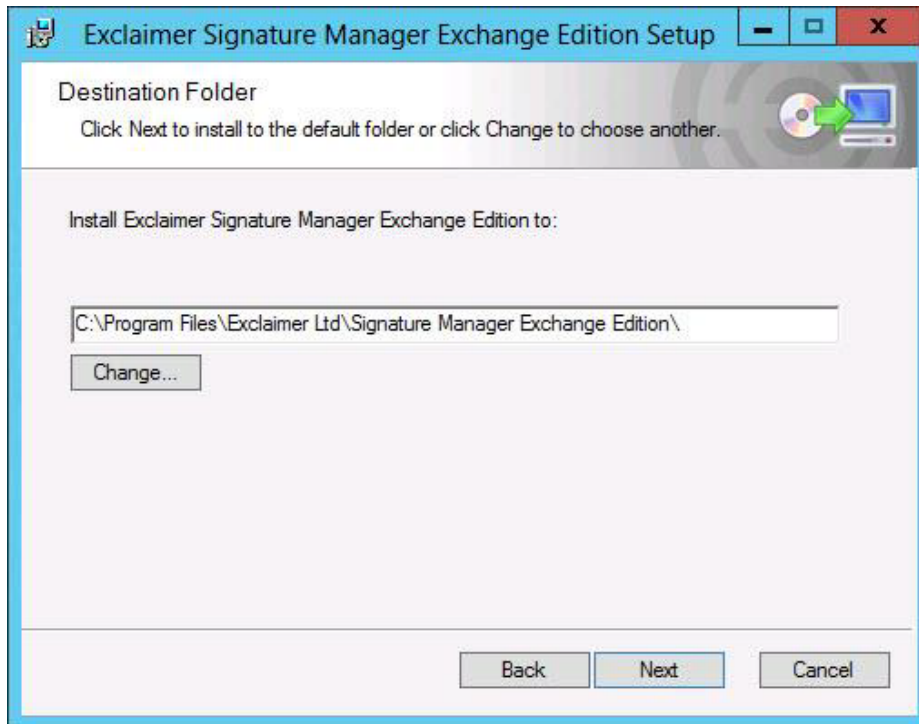

2.   Click **Setup** to display a Welcome message:

3. Click **Next** to view the End-User License Agreement:

4. Having read the license agreement, select **I accept the terms in the License Agreement** then click **Next** to specify a destination folder for installed files:

If required, you can accept the default folder or click Change to specify a new folder location.

5. Click Next to proceed then click Install to start the installation process.
A warning message is displayed prompting that the Microsoft Exchange Transport Service will be restarted during this process. Click **Yes** to proceed with the installation, else click **No** to abort the installation.
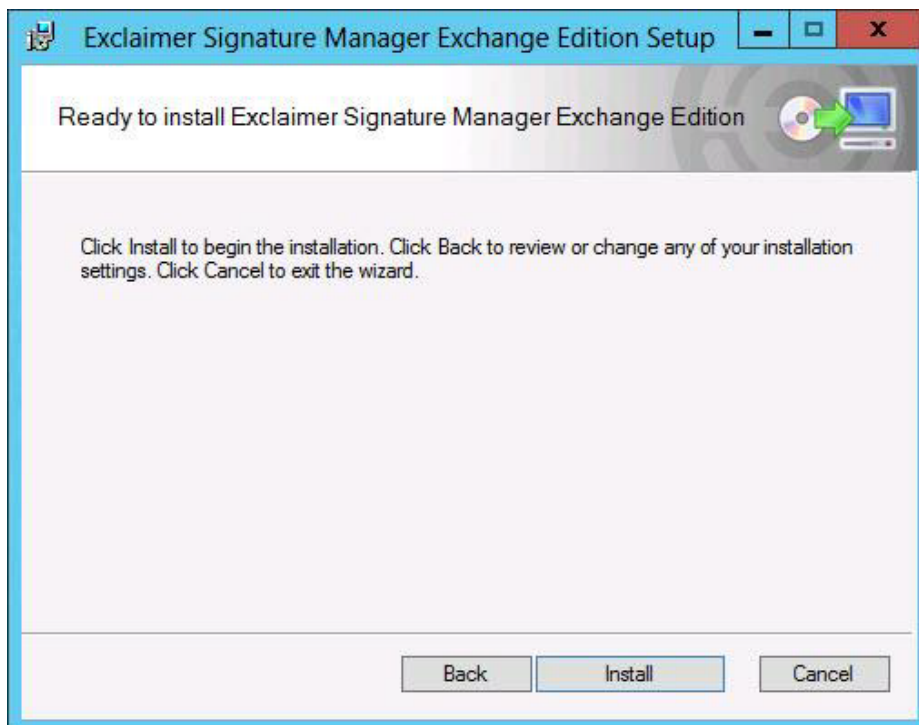
6. You can see the installation progress on the screen and the final confirmation is displayed upon completion:

7. Click **Finish** to close the wizard.

CAUTION!	After installing the Exclaimer Signature Manager Exchange Edition, the Setup wizard is launched. You must complete the Setup wizard to create your first policy and get started with Exclaimer Signature Manager Exchange Edition.

5.2 Setup Wizard

Once you have successfully completed the installation wizard, the Setup wizard is launched automatically. The setup wizard takes you through the basic setup required to create your first signature policy and get started with Exclaimer Signature Manager Exchange Edition.
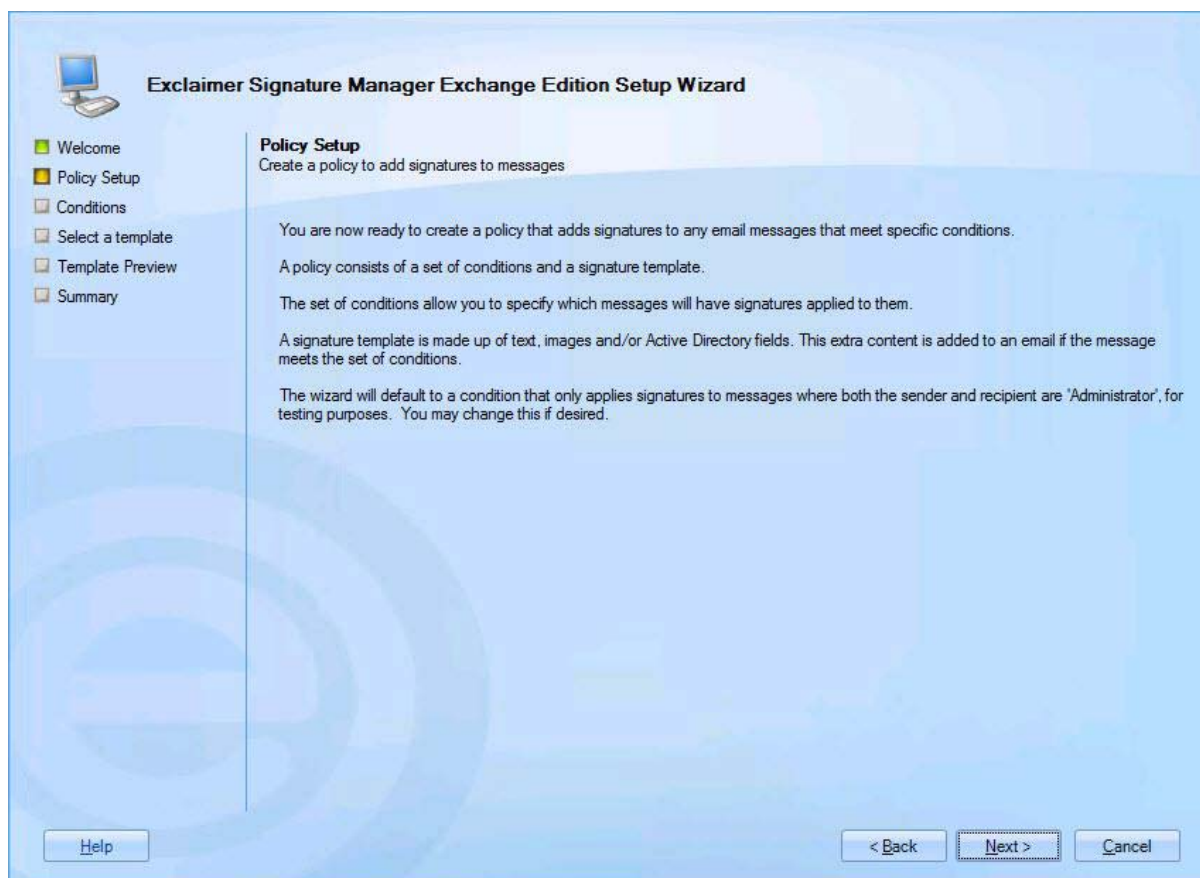
To complete this wizard, follow the steps below:

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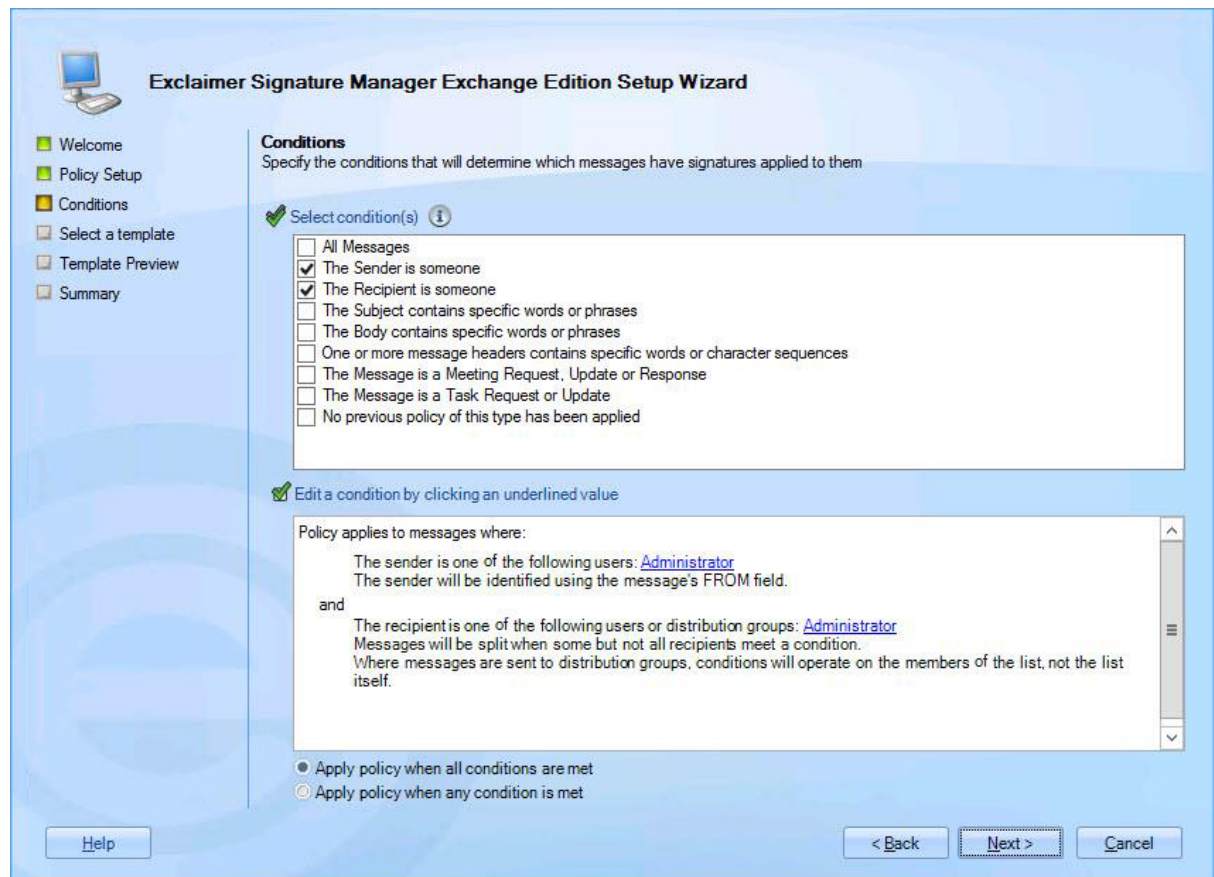

2. Click **Next** to move to the next stage to view an introduction to the policy setup that you are about to complete:

3. Click **Next** to proceed to the next stage and set conditions for your first signature policy.

For testing purposes, by default, conditions are set so that the policy will be triggered for any emails where both the sender and the recipient are set to be the currently logged-in user. You can update these conditions now, or at any time after the installation; so, if you are not sure what to set at this point, simply accept the default conditions and continue:

4. 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 any time after the installation. If you are not sure what to select at this point, simply accept the default and continue:
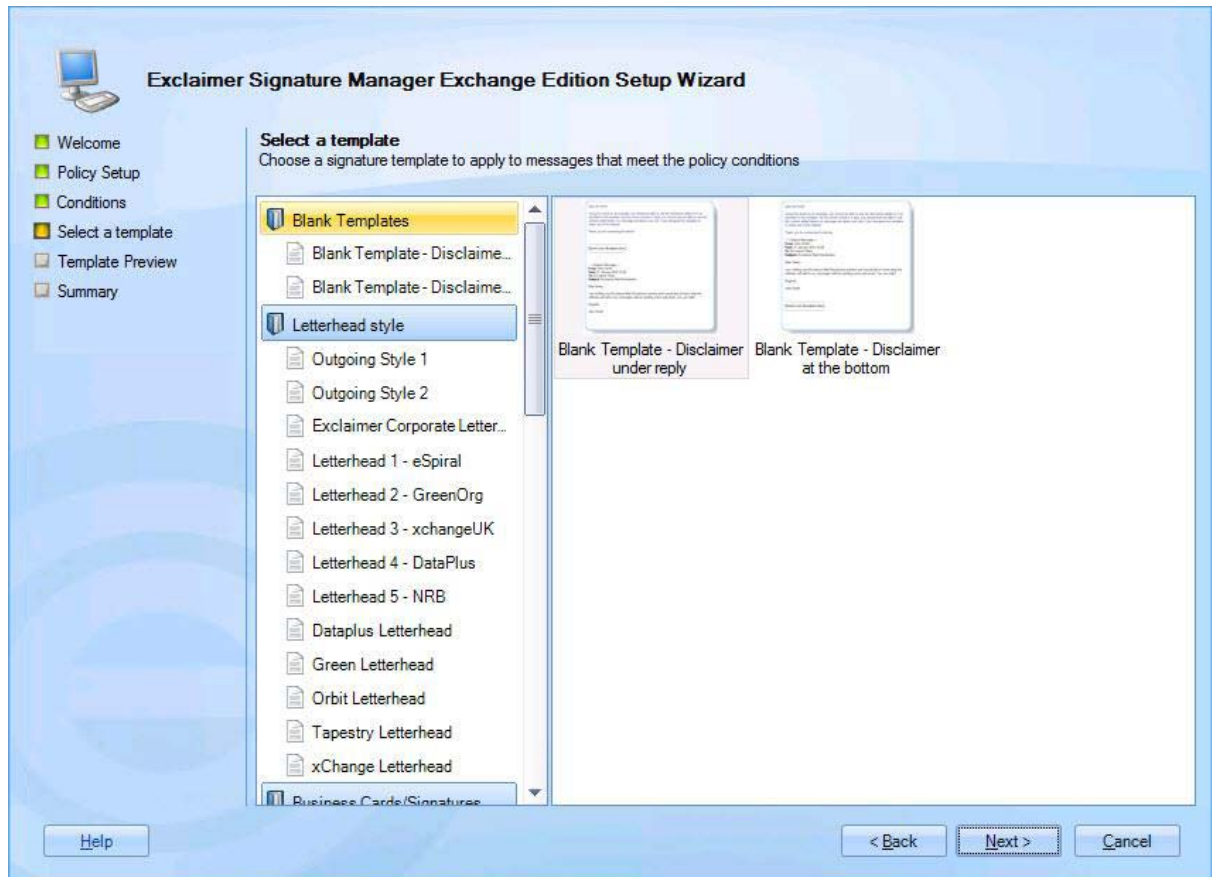
5. Click **Next** to preview the selected template, to see how it will be displayed on the signature:
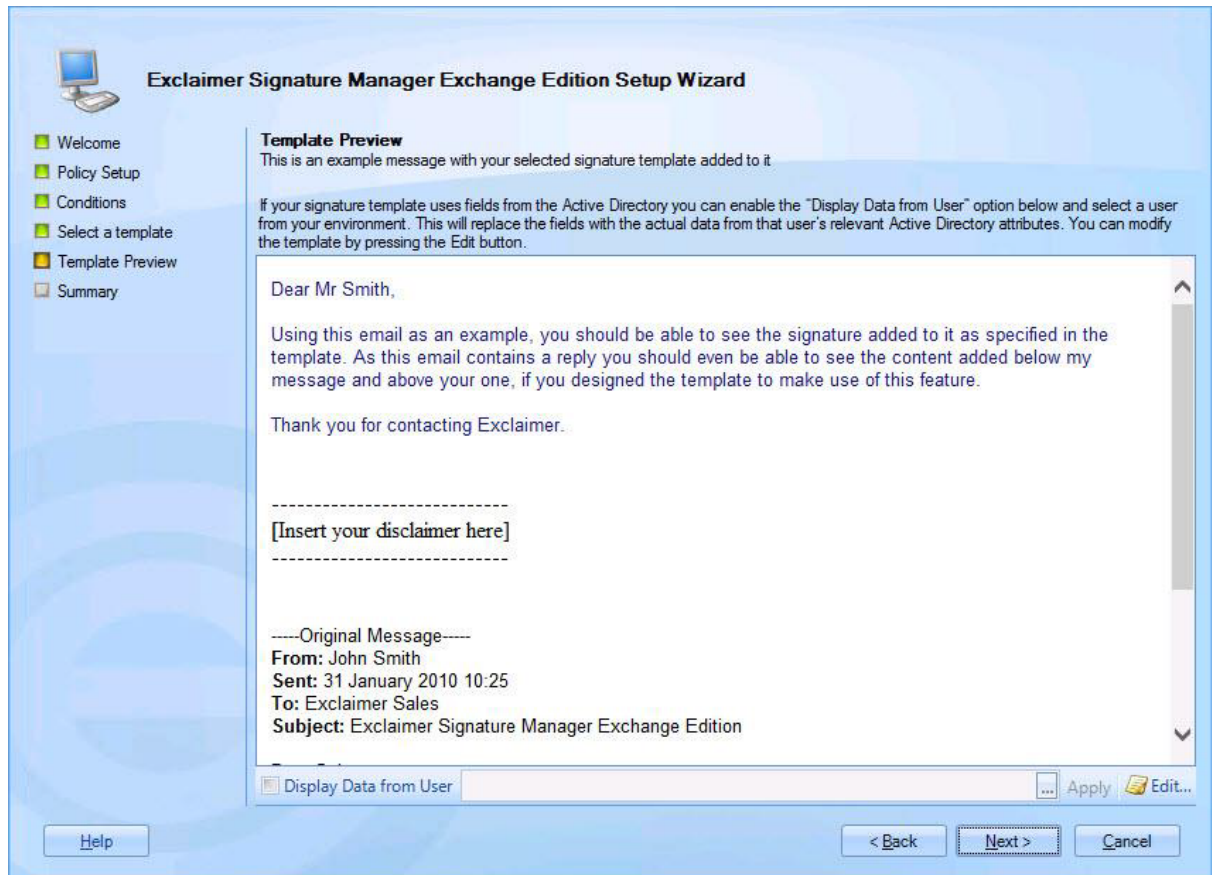
If the selected template contains Active Directory fields, the preview may vary depending on which user is associated with the message. If required, you can select a specific user via the **Display Data from User** option.

If you wish to edit the selected template, click **Edit** to open the template editor and make required changes.

6. Click **Next** to complete the process and start Exclaimer Signature Manager Exchange Edition in the Exclaimer console:
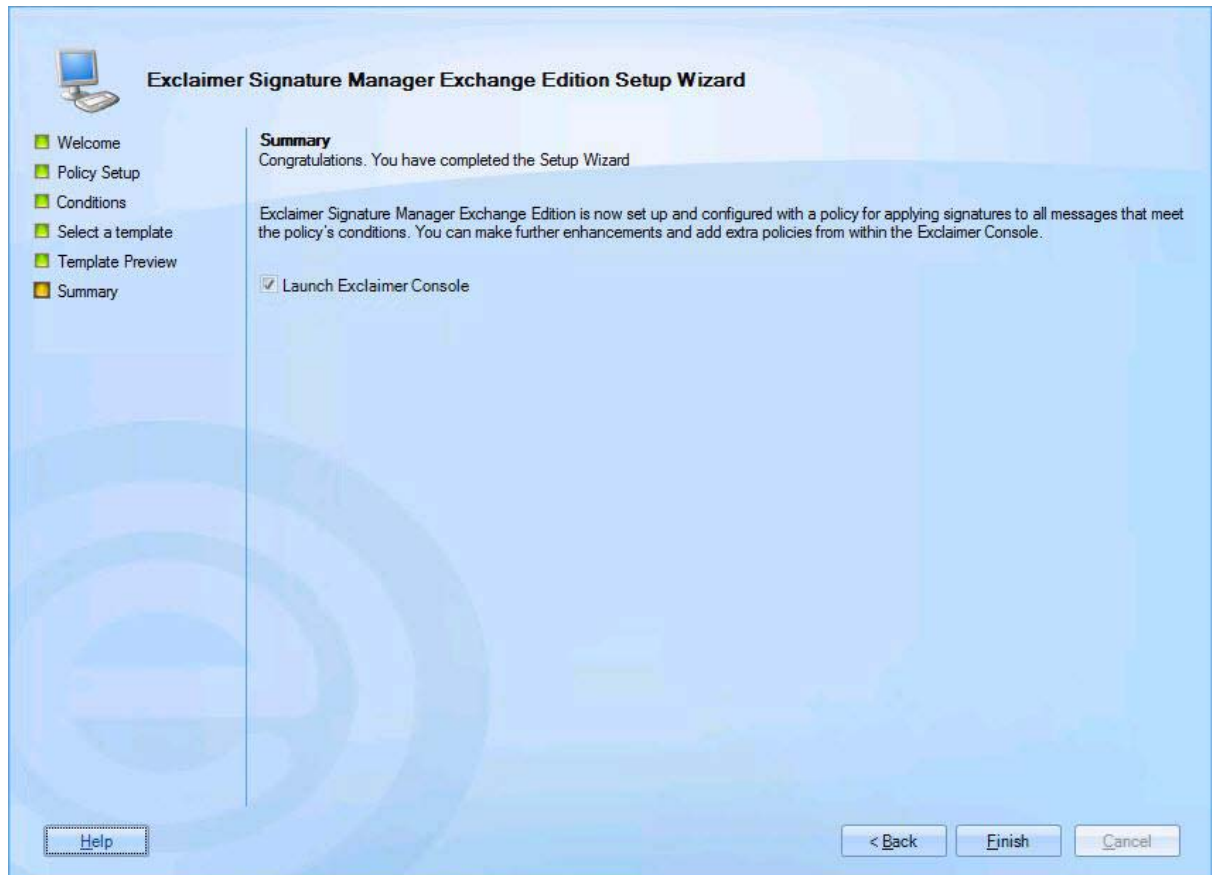
7. Click **Finish** to exit and launch **Exclaimer Signature Manager Exchange Edition**.

> NOTE: Having completed the installation process, it is a good idea to check Exclaimer
> console settings. If you wish to manage multiple servers, you should also check
> remote deployment options.

6   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:
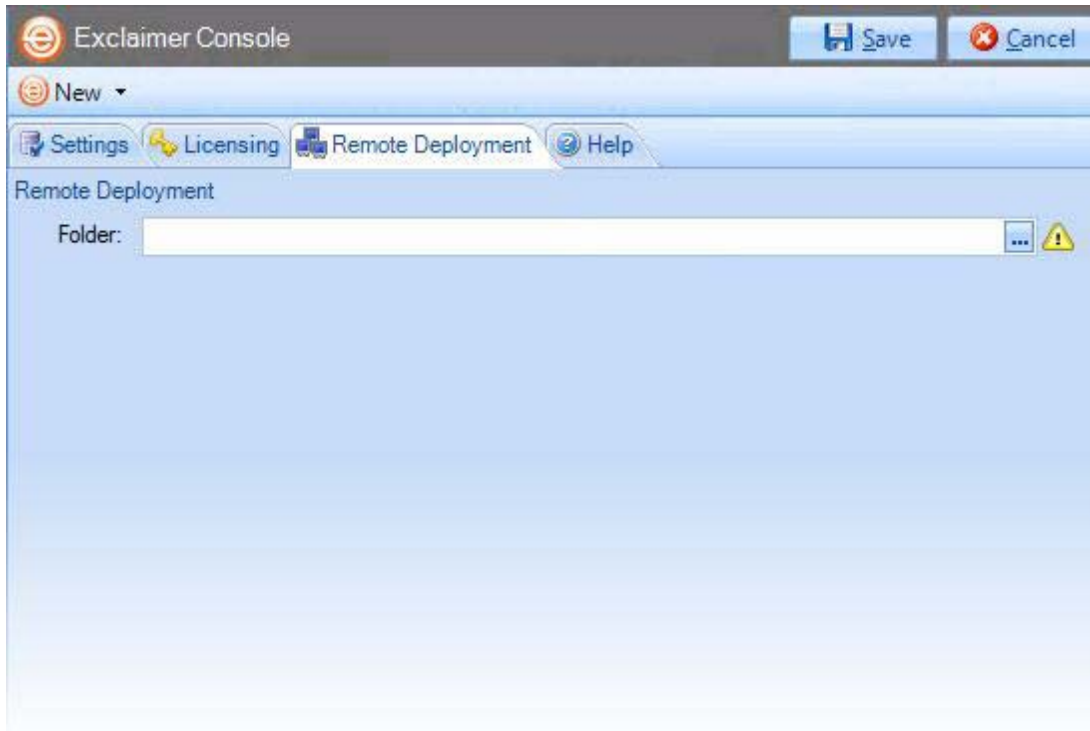
Then, whenever you save any changes to the configuration, you are asked to confirm if you would like to deploy them to other servers. If you opt to deploy the changes, a file is written to the remote deployment folder and imported by the other installations.

> 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).

6.1 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 (that is, import) that data into their local installation. Push and pull operations are completed via the Exclaimer Signature Manager Exchange Edition Remote Deployment service.

6.2 The Remote Deployment folder

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

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 (that is, you must make the same permission changes in both the sharing and security tabs of the folder's properties dialog).

6.2.1 Folder Permissions (Easy Method)

Allow the Everyone group to have Read permissions.

6.2.2 Folder Permissions (Secure Method)

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

This is essential because the Exclaimer Signature Manager Exchange 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; that is, 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:
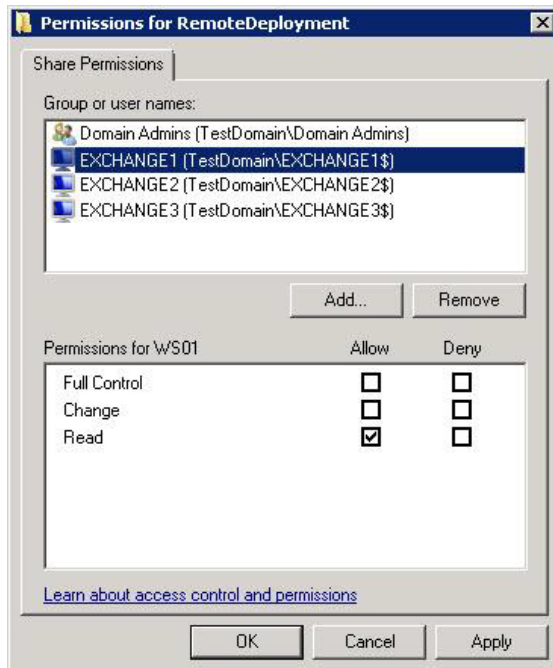
Share tab
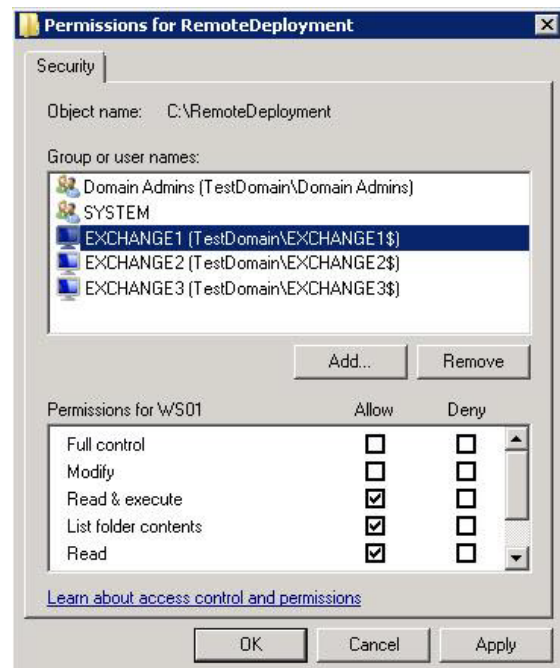
Security tab

6.3 Remote Deployment Timings

As soon as the Exclaimer Signature Manager Exchange 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).

6.4 Changing an Existing Remote Deployment Folder

If all Signature Manager Exchange 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.

7   Command Line Installation

If you are installing Exclaimer Signature Manager Exchange 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 Exchange Edition without the need to go through the installation wizard.

Programs and services are installed and when Exclaimer Signature Manager Exchange Edition is launched, the setup wizard is launched. You need to go 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 see How to export/import configuration files of On Premise products.

7.1 Required Preparation

Command line installations are run using an MSI installation, rather than the standard `setup.exe`.

> NOTE: To obtain the required MSI installation file, please contact Exclaimer Support.

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

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

8   Uninstalling Signature Manager Exchange Edition

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

- Application program files

- The Exclaimer Exchange Settings Configuration Service

- The Exclaimer Signature Manager Remote Deployment Service

- The Exclaimer Signature Manager Sent Items 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 summarised below:

Item	Minimum Requirements
Windows Server 2012 Windows Server 2012 R2 Windows Server 2016 Windows Server 2019 (including Core)	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Signature Manager
Windows Server 2012 Windows Server 2012 R2 Windows Server 2016 Windows Server 2019 (including Core)	\ProgramData\Exclaimer Ltd\Signature Manager

8.1 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 Exchange 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 (that is, 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.

8.2 Running the Uninstall Process

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

- Activate the original `setup.exe` and choose the uninstall option; then follow the on-screen instructions.

- Use programs and features then follow the on-screen instructions.