



Review Guide: Exclaimer Mail Utilities

Disclaim, Brand, Sign & Protect

Exclaimer Mail Utilities is an extremely effective rules based Emailware™ tool that enables you to manage how your email system deals with email sent and received by your organization. It combines many features that are beneficial to the management of email communication including disclaimers, branding, signatures, auto-responding, forwarding and mail blocking.

The disclaiming of company email is a vital part of business in today's culture of compliance and regulation. Exclaimer Mail Utilities not only enables you to comply with these varying and often wide reaching regulations it can also brand, sign and protect all your organization's email.

Features include

- Dynamic control over the insertion of disclaimers into outgoing, incoming or internal email
- Manage the flow of email through your organization
- Brand all outgoing email for a professional look including creative layouts and graphics
- Protect against spam with the Mail Utilities Anti-Spam module
- Create personalized signatures using fields from your Active Directory
- Block or redirect email to or from specific domains or users
- Create disclaimers for Plain Text, HTML and RTF email messages
- Journal email messages to a specific mailbox
- Protect against virus infected email messages with Zero-Hour™ Virus Protection
- Fully integrated with Active Directory enabling you to trigger rules on AD fields and include AD fields within the email messages you send and receive
- Compatible with mobile devices including BlackBerrys, PDAs and SmartPhones.

Why do I need Exclaimer Mail Utilities?

It's all about making your life easier by simplifying the process of managing, disclaiming and formatting the look of your organization's email. There are hundreds of reasons why you might need Exclaimer Mail Utilities. However, it's not until you start to ask yourself a few questions that you really begin to see how it can help.

For example, 'am I legally required to include any information in my organization's email?', 'do I need to journal email for compliance purposes?' or 'do I want a marketing message that can reach hundreds, if not thousands of customers a day?'. And this is just the tip of the Exclaimer iceberg! These and many other questions form part of the reasons why our users chose to use Exclaimer Mail Utilities.

Branding

Design the look of your organization's email so that it falls in line with your organization's brand guidelines. You can create dynamic signatures that will insert AD fields so you can automatically add a user's name and contact information to an email. You can even use it as a marketing tool with banner style advertisements in every email your organization sends.

Compliance

Disclaim all your email for legal and email regulation purposes. As well as disclaiming some regulation requires you to journal email which is also possible using Exclaimer Mail Utilities. This enables you to comply with regulations such as Circular 230, Sarbanes-Oxley, HIPAA and EU Directive 2003/58/EC.

Protect

You can use Exclaimer Anti-Spam and Anti-Virus to help protect your systems against virus and spam attacks. Exclaimer Anti-Spam does not use any form of content analysis which gives us the ability to be language agnostic. This type of advanced filtering technique allows us to achieve over a 99.9% capture rate. And because we don't use a Bayesian filter there is no learning process that your system has to go through. Our solution simply works 'out-of-the-box'.

Management

Control the flow of email through your organization managing where emails are being delivered using auto-forward and responding to emails that require an auto-response. Our easy to set up custom rules allow you to direct the flow of email to and from domains, groups or users within your organization. For example, you could have a support email address that you want to send an auto reply when someone sends an email to it, just so they know that their email has been received and is being assigned to a support representative.

Scalability

Exclaimer Mail Utilities is a highly scalable solution with the ability to deal with millions of email messages for thousands of users. It has been

specifically designed to scale up and cope with the demand that large email systems and large volumes of email put on its processes. We have over 25,000 clients with 24 million end users, and large enterprise deployments of up to 125,000 mailboxes in groups of over 400 Exchange servers. It can deal with vast quantities of email in very short periods of time, maintaining a consistent flow of email through to users' Mailboxes.

Integration

Installation is quick and easy allowing you to start using disclaimers and other Exclaimer features extremely quickly. Even setting up large multi-server systems is easy as you can deploy all your settings centrally from one server or workstation.

Summary

- Use for regulation management and compliance purposes
- Create professional looking branded email messages
- Add disclaimers to email messages
- Insert dynamic signatures using fields from your AD
- Block spam and virus infected email.

What it does to your email

Exclaimer Mail Utilities works by processing mail that is being sent through your Exchange server. Whether it is internal, incoming or outgoing it will process messages according to the rules you set up in the Exclaimer Control Panel.

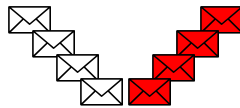
It can re-direct, copy and auto-respond as well as filter spam and virus infected email from your users' mailboxes.

Dealing with spam and virus infected email

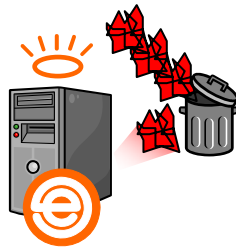
Exclaimer Mail Utilities performs a number of tests to ensure that the mail that is delivered to your users' mailboxes is genuine and virus free. The tests that are used to identify spam and virus infected email do not rely on any form of Bayesian or content analysis.



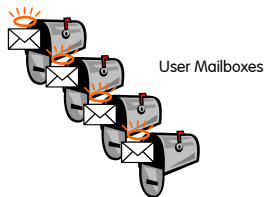
Every Mail Server will receive a mixture of spam, virus infected and genuine email.



Good Mail Server with Exclaimer Mail Utilities

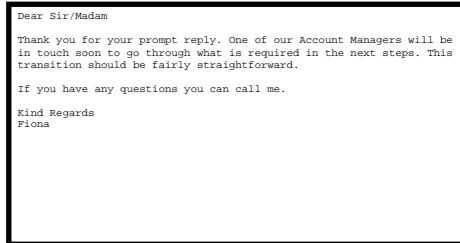


Some spam and virus infected emails don't even get past the message submission phase. This isn't the last line of defence though. If an email fails to pass further spam and virus tests in the Pre-Exchange Transportation phase it will be dealt with appropriately, either being destroyed or quarantined.



What can it do to my email?

Exclaimer Mail Utilities can do a number of things to your email messages in order to comply with legislation or regulation. It will even allow you to brand them for a more professional look. These formatting changes and insertion of signatures and disclaiming text is done in the Post-Exchange Categorization phase just before the email is sent or delivered. The example below shows an email message in the various stages of transformation starting with the message the sender created and ending with the email message that is delivered to the recipient(s). The content of the message essentially remains the same. It is just presented in a more professional format.

A screenshot of an email message in its original, unformatted state. The text is plain and left-aligned. It includes a salutation, a paragraph of text, a closing sentence, and a signature.

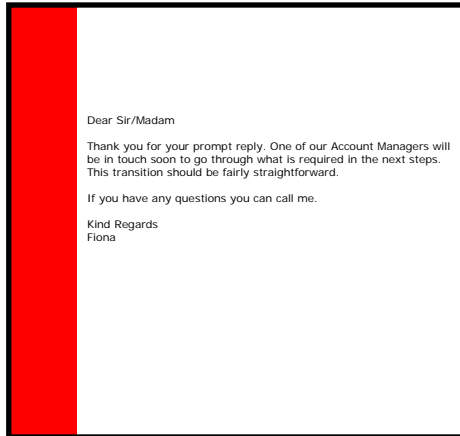
Dear Sir/Madam

Thank you for your prompt reply. One of our Account Managers will be in touch soon to go through what is required in the next steps. This transition should be fairly straightforward.

If you have any questions you can call me.

Kind Regards
Fiona

Original message

A screenshot of the same email message with basic formatting applied. A red vertical bar is added to the left side. The text is now centered horizontally. The signature is formatted as a separate line.

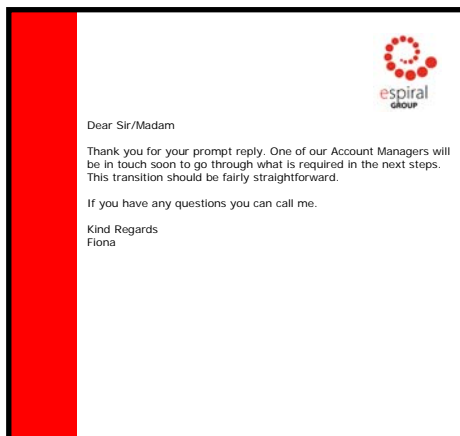
Dear Sir/Madam

Thank you for your prompt reply. One of our Account Managers will be in touch soon to go through what is required in the next steps. This transition should be fairly straightforward.

If you have any questions you can call me.

Kind Regards
Fiona

With layout and text formatting


A screenshot of the email message with the Espiral Group logo added. The logo is positioned in the top right corner of the message body. The rest of the formatting from the previous stage is retained.

Dear Sir/Madam

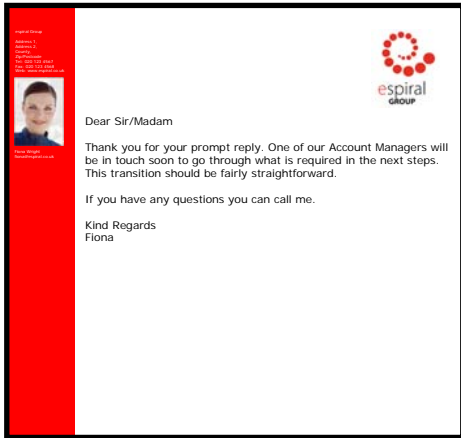
Thank you for your prompt reply. One of our Account Managers will be in touch soon to go through what is required in the next steps. This transition should be fairly straightforward.

If you have any questions you can call me.

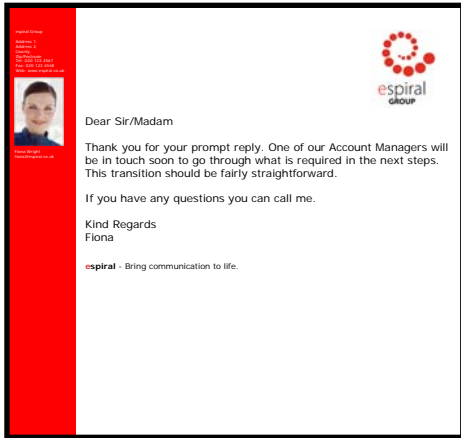
Kind Regards
Fiona



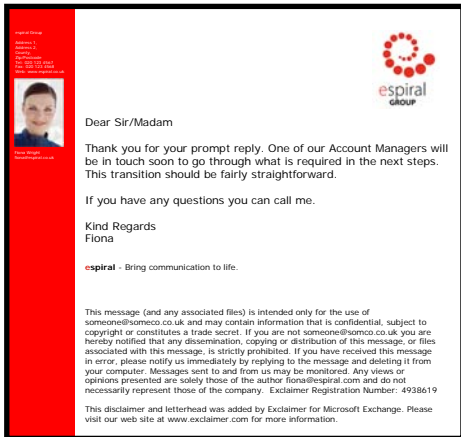
Logo added



Signature added



Tagline added

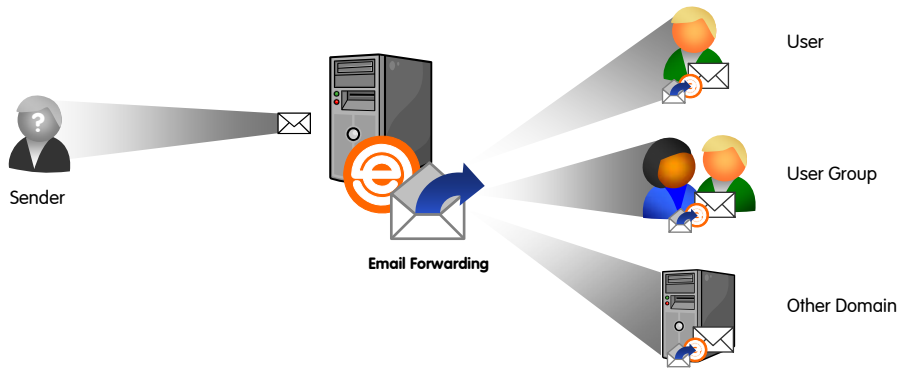


Disclaimer added

This is the final message sent to its recipient(s).

Email Forwarding

Exclaimer email forwarding allows you to automatically direct email messages to other users, groups or domains. This is useful if you have world wide sales offices you can have email forwarded to a particular user group rather than a specific user or if you have redundant domains e.g. if you have taken over another company and no longer require their domain.



Auto-Responding

Exclaimer auto-responders can be formatted to look however you like with full HTML formatting, including the ability to add attachments and show the original email. For example, you could set up an auto-responder for your sales enquiry email address that says one of your sales representatives will be in touch shortly. You could also include a PDF(s) that contains details of particular products or services your organization offers.

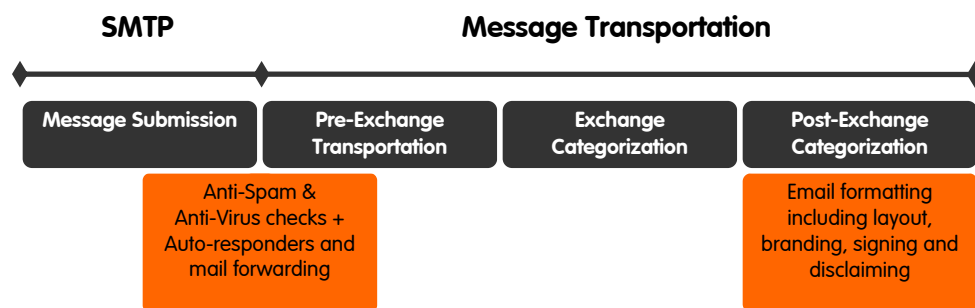


How it works

Exclaimer Mail Utilities and SMTP

It works when the email message goes through SMTP, with some tests being performed by the Anti-Spam and Anti-Virus modules as well as the auto-responders and mail forwarding features in the Message Submission and Pre-Exchange Transportation phases. The remaining Exclaimer Mail Utilities features like disclaiming, branding and signing are activated and processed during the Post-Exchange Categorization phase.

Processing email messages in this way allows for far greater control over the email messages you company sends and receives. You can specify when and where disclaimers are inserted, change how messages are processed and delivered, and dynamically insert AD fields, all from your mail server.



Setting it up

Exclaimer Mail Utilities uses an easy to follow wizard to help guide you through the set up. You can select the options that you want to use to process your organization's email. Once you have saved your settings Exclaimer Mail Utilities will begin processing mail.

Monitoring incoming, outgoing and internal email

Exclaimer Mail Utilities works with Microsoft Exchange to process email messages that are sent or received internally and email messages that are being received from outside your organization or being sent from your organization.

Disclaiming, Branding and Signing

You can add disclaimers, brand email and add signatures to email dynamically from a centrally controlled location. Using fields directly from your Active Directory you can create signatures that automatically find and insert names, telephone numbers, website addresses and much more information contained within your AD into email messages.

Anti-Spam and Anti-Virus

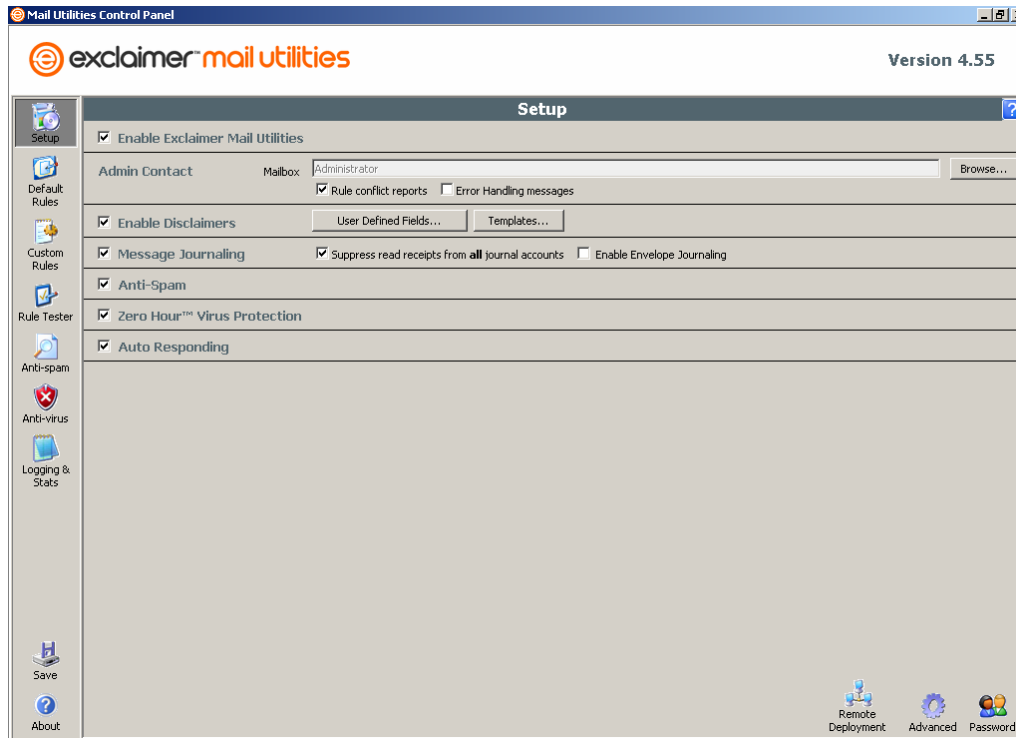
Exclaimer Mail Utilities uses a variety of techniques to identify and filter out spam and virus infected email from genuine messages sent to your organization. By using more than one technique to filter email messages Mail Utilities has proven to be very effective, with a false positive rate of 0.005%.

Auto-responding and forwarding

These options allow you to automatically direct email messages whilst they are being sent or received. For example, you could forward a copy of all emails sent from a particular user account for QA/monitoring purposes.

The options you can use to process your email

Control Panel:



Enable Exclaimer

You can use this option to quickly enable or to disable Exclaimer's rules and features.

Admin Contact

This should specify an email account where all rule conflict reports, error handling messages and other admin messages Exclaimer sends are received and monitored.

Enable Disclaimers

You can use this feature to turn Exclaimer's email disclaimers on or off. You can amend the default disclaimers in the Default Rules panel.

Message Journaling

You can use this option to enable or disable message journaling. You can set up your message journaling options in the Default Rules panel.

Message journaling allows you to BCC all the emails your organization receives to a specified email account.

Anti-Spam

You can use this option to enable or disable Exclaimer's anti-spam filter. You can set up and refine Exclaimer's anti-spam settings using the Anti-spam panel.

Zero-Hour™ Virus Protection

You can use this option to enable or disable Exclaimer's Anti-Virus protection. You can modify Exclaimer's anti-virus settings in the Anti-Virus panel.

Auto-Responding

You can use this option to enable or disable all auto-responders.

Custom Rules

This option allows you to create rules for processing incoming, outgoing and internal email messages enabling you to, among other things add disclaimers, journal, auto respond and change the delivery options.

Rule Tester

You use this option to make sure the rules you have created actually work in the way you want without having to use them in the live environment.

Logging & Stats

This is used for viewing the performance data and error logging that Exclaimer Mail Utilities generates.

Custom Rules box

Add Mail Rule

Sender: Anyone internal
Recipient: Anyone external

Addressing | Delivery Options | Disclaimers | Message Journaling | Auto-responder

Sender is is not

- Anyone
- Anyone internal
- Anyone in the Active Directory
- Anyone with an X400 address
- Anyone external
- Any Active Directory Contact
- Email address
- Email domain
- Active Directory Container (Organizational Unit)
- Active Directory Users and Groups
- Active Directory Attributes
- Subject contains
- Message header equals

Recipient is is not

- Anyone
- Anyone internal
- Anyone in the Active Directory
- Anyone with an X400 address
- Anyone external
- Any Active Directory Contact
- Email address
- Email domain
- Active Directory Container (Organizational Unit)
- Active Directory Users and Groups
- Active Directory Attributes
- Subject contains
- Message header equals

Rule name: Disclaimer set up using custom rules

Rule enabled

OK Cancel

The custom rules box allows you to set up rules that can control how email is dealt with by Exclaimer Mail Utilities. You can select any of the email processing options to create a rule that does what you need. You

can even combine a number of rules to perform different tasks, for example, one rule could journal incoming messages and another could disclaim outgoing messages.

Reviewing Exclaimer Mail Utilities

We recommend that for evaluation purposes you install Exclaimer Mail Utilities on the Exchange server that contains the Exchange store you'll be using.

Recommended Set Up

For system requirements and installation instructions you can download a copy of the Exclaimer Mail Utilities manual at <http://www.exclaimer.com/documentation>.

IMPORTANT! - Exclaimer Mail Utilities will process all incoming, internal and outgoing email messages. When you install the trial version you can choose whether you want to activate Anti-Spam, Anti-Virus, disclaimers and other Mail Utilities' features. This ensures that if you are trialing it on your live system that your email is only affected when you choose it to be.

How to set up Anti-Spam in Evaluation mode

Exclaimer Mail Utilities Anti-Spam allows you to set up the spam filtering in an Evaluation mode so that it doesn't affect emails being sent to your users' mailboxes. The Evaluation mode ensures that messages classified as spam are only marked in the message's Internet headers. This means that your users will be unaware of any changes to the message. You can use an Outlook rule (or similar) to test the effectiveness on selected users in a controlled manner.

Create a disclaimer for a specific email account

You have the option of creating this type of rule when you first install Exclaimer Mail Utilities. If you decided not to create this rule during your initial set up then you can create one now by following the steps below.

In order to demonstrate Exclaimer Mail Utilities features you can set up the system so that it only works on one email account. To do this you open the control panel and use a custom rule to create a rule that is only applied to email messages sent to or from a specific email address.

1. Click on the **Custom Rules** button in the left-hand menu on the **Control Panel**.
2. Click on the **Add Rule...** button at the bottom of the **Custom Rules** section.
3. In the **Addressing** tab under the **Sender** section select the **Email Address** radio button. Type the email address you want the disclaimer added to in the text area at the bottom of this section.

Note – This will only apply a disclaimer to email messages sent from this email address.

4. In the **Recipient** section select the **Anyone** radio button.

Note – This rule will be applied to email messages from the email address you specified sent to any recipient. Setting a custom rule up in this way means that it will only be applied to one sender and will not affect other email being sent and received from your organization.

5. In the **Disclaimers** tab, select the 'Use this disclaimer' option from the **Disclaimer** drop down menu.
6. Click on the **Edit/Preview disclaimer...** button.
7. Either select from one of Exclaimer disclaimer templates or enter your own text in the **Disclaimer Editor**.

Note – It is a good idea to choose a templated disclaimer that includes Active Directory fields so you can see how dynamic content is added by Exclaimer Mail Utilities in disclaimers and signatures.

8. Click on **OK** in the **Disclaimer Editor** box.
9. Click on **OK** in the **Add Mail Rule** box.
10. Click on **Save** in the left-hand menu on the **Control Panel** to activate the changes you have made.

Create a custom delivery option

To demonstrate email forwarding, use the following steps. The rule you create will forward an email message sent to a particular individual to an alternative email address.

1. Click on the **Custom Rules** button in the left-hand menu on the **Control Panel**.
2. Click on the **Add Rule...** button at the bottom of the **Custom Rules** section.
3. In the **Addressing** tab under the **Sender** section select the **Email Address** radio button. Type the email address you want to use to demonstrate email forwarding in the text area at the bottom of this section.

4. In the **Recipient** section select the **Anyone** radio button.

Note – This rule will be applied to email messages from the email address you specified sent to any recipient. Setting a custom rule up in this way means that it will only be applied to one sender and will not affect other email being sent and received from your organization.

5. In the **Delivery Options** tab, select the 'Use these delivery options' option from the **Delivery options** drop down menu.

6. Select the 'Deliver the message but change the destination as follows' radio button.
7. In the 'Email sent to address(es) or domain(s)' text box type the email address or domain that the incoming email is addressed to. For example, this can be in the form of a domain 'yourdomain.com' or an email address 'sales@yourdomain.com'.
8. In the 'should be rerouted to domain or email address' text box type the email address or domain that you want the email forwarded to.
9. Click on **OK** in the **Add Mail Rule** box.
10. Click on **Save** in the left-hand menu on the **Control Panel** to activate the changes you have made.

Create an email auto-responder

You can set up a rule that automatically responds to email messages that are sent to a particular email address or AD group. This is useful if you want to send, for example, a courtesy email letting the sender know that their message has been received and is being dealt with.

1. Click on the **Custom Rules** button in the left-hand menu on the **Control Panel**.
2. Click on the **Add Rule...** button at the bottom of the **Custom Rules** section.
3. In the **Addressing** tab under the **Sender** section select the **Email Address** radio button. Type the email address you want the auto response to trigger on in the text area at the bottom of this section.

4. In the **Recipient** section select the **Anyone** radio button.

Note – This rule will be applied to email messages from the email address you specified sent to any recipient. Setting a custom rule up in this way means that it will only be applied to one sender and will not affect other email being sent and received from your organization.

5. In the **Auto-responder** tab, select the 'Use this auto-responder' option from the **Auto-responder** drop down menu.
6. In the **Subject + Content** tab fill out the details for your auto-response subject, whether it has attachments and the contents of the email itself.
7. In the **Sender + Recipients** tab fill out who you want the auto-response sent to. Remember, you can send an auto-response to another recipient and not just to the person who originally sent the email.
8. In the **Options** tab you can select whether the auto-response is sent as Plain text, HTML or both.

9. To avoid the auto-response getting accidentally caught in infinite loops, you can set the maximum number of times it responds to the same sender. By default this is set to 10 responses in a 60 minute period. For example, this issue may appear when a sender has their out-of-office notification turned on which may reply to the auto-response, which in turn the auto-responder will reply to. Without any form of same sender checking this will continue until either the auto-responder or the out-of-office notification is switched off.
10. Click on **OK** in the **Add Mail Rule** box.
11. Click on **Save** in the left-hand menu on the **Control Panel** to activate the changes you have made.

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