



Manual CI-MAIL-POLICY 5

for Microsoft Exchange® 2007 / 2010 / 2013 / 2016 / 2019

Office 365 - Cloud

© ci solution GmbH 2007-2018

Deutsch

3. November 2018

Version 5.0.0



Überzeugen Sie sich von ci solution GmbH
<https://www.ci-solution.com/referenzen.html>



ci solution GmbH

Andreas Stäblein Straße 14 - 97820 Remlingen

E-Mail: info@ci-solution.com

Fon: +49 (0) 9369 / 980-441 Fax: +49 (0) 9369 / 980-443



This manual describes the basic functionality of CI-Mail-Policy. It shows you how to setup the software and how to create rules and actions using the rule wizard.

Please feel free to contact us if you have any questions. We'd be glad to help you implement your ideas.

Table of contents

Introduction.....	5
System Requirements.....	6
Installation	7
Pre-Installation Requirements / Tasks	7
Install the Software	8
After the Installation - Impersonation for Exchange	9
Update CI-Mail-Policy	10
Exchange Updates and Service Packs (CUs, RUs)	11
Basics 12	
Administration Console.....	12
Installation in the Cloud	16
Installation for Exchange Online (Office 365) environment	17
Office 365 Connectors and Rules.....	25
Installation for Exchange Online (Office 365) in combination with local Exchange (Exchange On-Premise).....	32
SPF Sender Policy Framework / Antispam.....	37
Settings	38
Setting up a test environment	40
Rule-creation: email Disclaimer attach	41
Create a new rule.....	41
Define the name and direction of the shipping.....	42
Set conditions / rules and exceptions	44
Define action - attach Disclaimer	46
How to.....	50
...create and edit email Disclaimer with the CI Manager.....	50
...add a Image?	53



Variables.....	55
1. Spezific Variables.....	55
2. Base-Variables	55
##Variablen – Delte Line if variable is empty	58
Rich text format.....	59
Error handling	60
Service settings	61
Enter registration / license	62
FAIL events in Exchange Message Tracking related to the cimailpolicyreceiver transport agent.....	63
Creating a receive connector, see Exchange manually	65
Feedback and contact	72

Introduction

CI-Mail-Policy is a rule-based email action framework for Microsoft Exchange Servers. It enables you to perform specified actions on incoming and outgoing emails. CI-Mail-Policy's rules and actions are similar to Microsoft Exchange's "Transport rule actions" – but a lot more flexible.

As a service running on your Exchange Server, CI-Mail-Policy takes action on emails while they are in transit - being sent from A to B. This allows you to interfere and act on emails without the sender or receiver being able to prevent it. It is therefore absolutely device independent.

Some examples of what you can do with CI-Mail-Policy:

- ▶ Add a legal disclaimer to messages as they're sent to external recipients.
- ▶ Add an email signature to all emails with dynamic user data from Active Directory (name, contact information, logo, etc.)
- ▶ Time-based email signature marketing campaigns. Add Banners, promote products & upcoming events.
- ▶ Remove email signatures from internally sent emails.
- ▶ Monitor emails for specific content and take action on them.
- ▶ Remove attachments from emails, save them to a file server and include a link.
- ▶ And many more...

The framework-based design of CI-Mail-Policy allows you to create countless individual rule/action pairs to monitor and act upon emails when necessary.

CI-Mail-Policy can be used with the licenses for CI archives and CI-Sign to a limited extent, this mode to basic functions, in addition to CI-Archive or CI-Sign, be used. A valid CI-Mail-Policy License for full functionality is required, we offer a bundle.

System Requirements

It's our philosophy to provide current and up to date software. Be sure to keep your Server (which is the base our software runs on) up to date, to ensure compatibility and to benefit from the latest features.

Minimum System Requirements:

- ▶ .NET Framework 4.6 latest Service Pack
- ▶ Microsoft Exchange Server Version 2013 CU 21
- ▶ Windows Server 2008R2 or higher. (For Server 2008 run CI-Mail-Policy V3)

Important: When running the latest version of CI-Mail-Policy you should also be sure to use the latest Service Packs for Exchange Server and .Net Framework. In general, the release date of the CI-Mail-Policy version should be as close as possible to the release date of the Exchange Rollup / Cumulative Update.

Here you can a revision history for Exchange:

[http://technet.microsoft.com/de-de/library/hh135098\(v=exchg.150\) .aspx](http://technet.microsoft.com/de-de/library/hh135098(v=exchg.150) .aspx)

You are running older Exchange Server versions?

Contact us. We have older versions of CI-Mail-Policy, we can provide on demand.

Installation

During installation the CI-Mail-Policy Administration Console is installed next to the Service. A server reboot is usually not necessary.

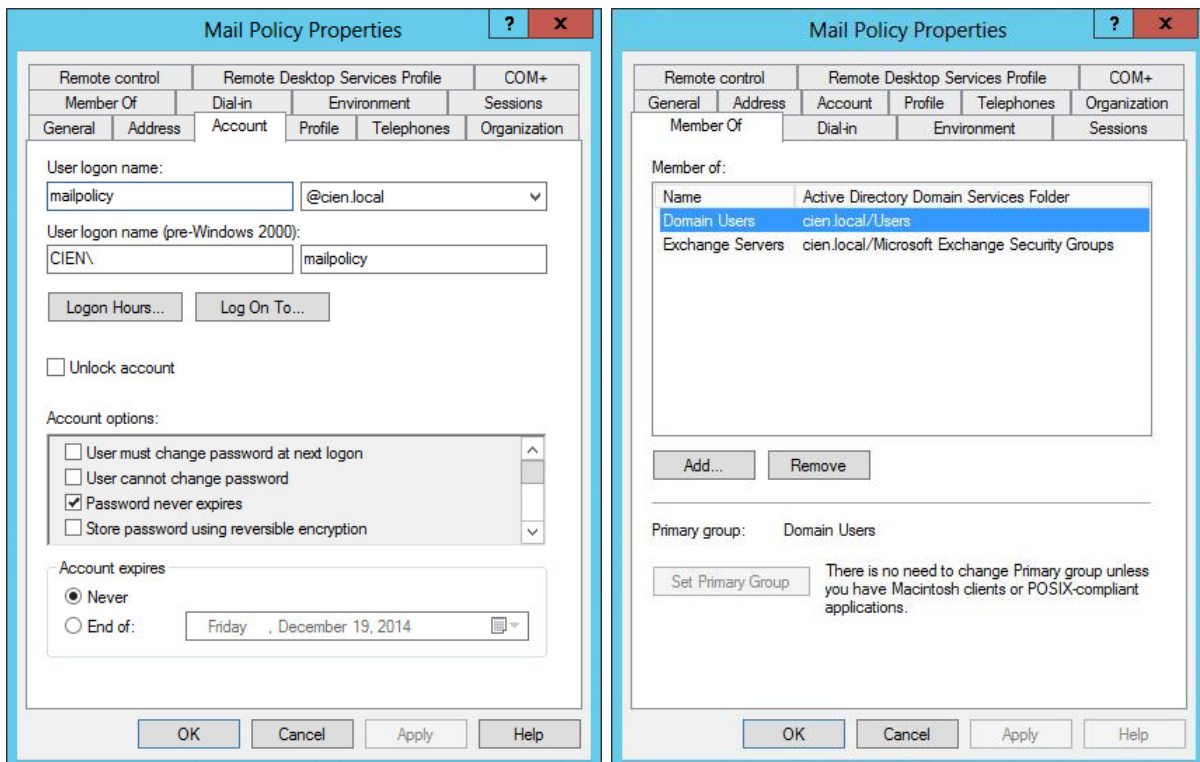
To get started, download and unzip the software package from our website (<http://en.ci-solution.com/ci-mail-policy/download/>). **Beware:** we provide different installation packages for each Exchange Server Version. Please choose accordingly.

Before installing CI-Mail-Policy, please be sure to fulfill the pre-installation tasks as described below.

Pre-Installation Requirements / Tasks

Please fulfill these requirements before installing CI-Mail-Policy:

1. Create a **new user with mailbox** called "mailpolicy".
2. Add the new user to the groups "*Domain users*" and "*Exchange Servers*".
You should not add the user to further groups; this is rather counterproductive.

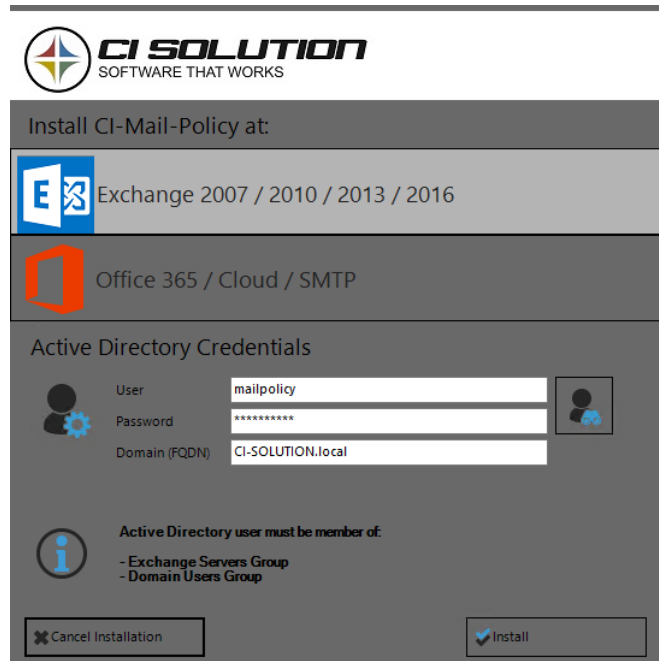


Install the Software

We provide different installation packages for each Exchange Server Version. Choose the package accordingly.

We recommend that you disable the UAC at least for the duration of the installation.

1. Run the setup (.msi file) and follow the instructions until you reach the screen below.
2. Enter username and password of the user you've just created ("mailpolicy"). Also enter the domain – as full qualified domain name.



If the installer could not create and connect to Receive Connector, you will not be able to continue setup. **See chapter how to create the Receive Connector manually.**

Upon successful installation the Microsoft Exchange Transport service will get restarted. Don't worry about it... Emails will continue to get processed after the service has been restarted. In rare cases, it is necessary to restart the server.

Note: The (automatically) created Receive Connector

"CIMailPolicyReceiverConnector" will not be removed when uninstalling CI-Mail-Policy. You must remove it manually.

After the Installation - Impersonation for Exchange

If you wish to update “sent items” after adding legal disclaimers or signatures to emails, the “mailpolicy” user must be assigned to the Exchange Management Role “ApplicationImpersonation” which enables users/applications to impersonate other users in an organization to perform tasks on behalf of the user. To assign “ApplicationImpersonation” to the user “mailpolicy” execute the following Cmdlet in the **Microsoft Exchange Management Shell**:

```
New-ManagementRoleAssignment -name:mailPolicyAssignment -Role:ApplicationImpersonation  
-user: "mailpolicy"
```

It may take up to 15 minutes until permissions are fully passed through. Perform an IIS Reset to speed things up if necessary. Also keep in mind, that updating “sent items” is a subsequent process. You’ll see the update in “sent items” about 2 – 5 minutes after the mail has been sent.

Update CI-Mail-Policy

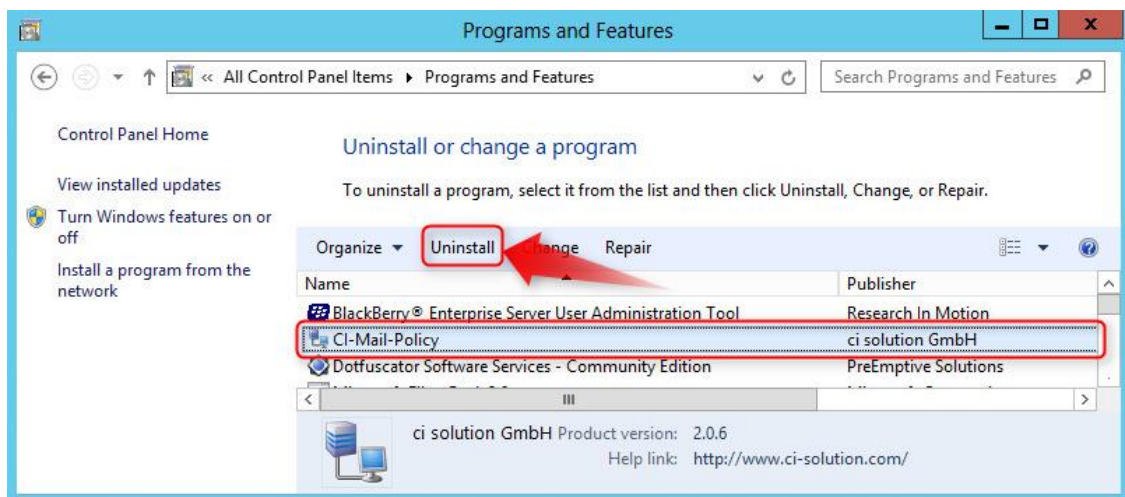
NOTE



First, uninstall the old version of CI-Mail-Policy.

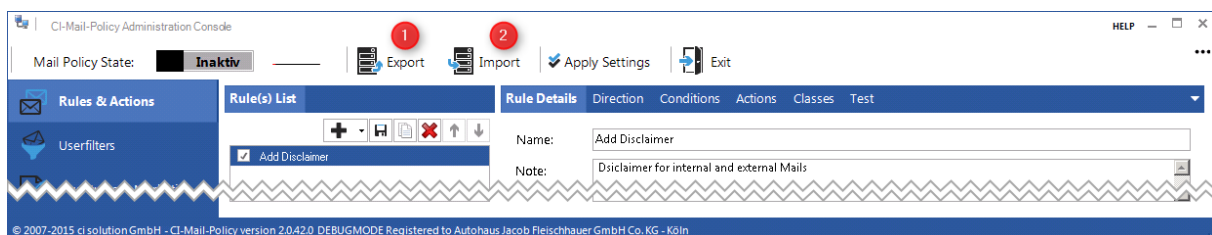
Your settings will remain unchanged.

Uninstall CI-Mail-Policy using Control Panel > Programs and Features. Now install the latest release. A reboot is usually not required – but does no harm either.



Howto: Backup CI-Mail-Policy Settings

On Menu in the admin console of CI-Mail-Policy. Hit “*export*” to save settings (rules & user filters) in an XML file.



Exchange Updates and Service Packs (CUs, RUs)

HINWEIS



All major Exchange updates which are **full builds**, such as Service Packs and Cumulative Updates (CUs), require you to **reinstall CI-Mail-Policy**

All major Exchange updates which are **full builds**, such as Service Packs and Cumulative Updates (CUs), require you to **reinstall CI-Mail-Policy**. This is also the case if an update provides new Exchange DLLs. The reinstallation enforces CI-Mail-Policy to use the latest Exchange DLLs, which is important for it to work properly.

Basics

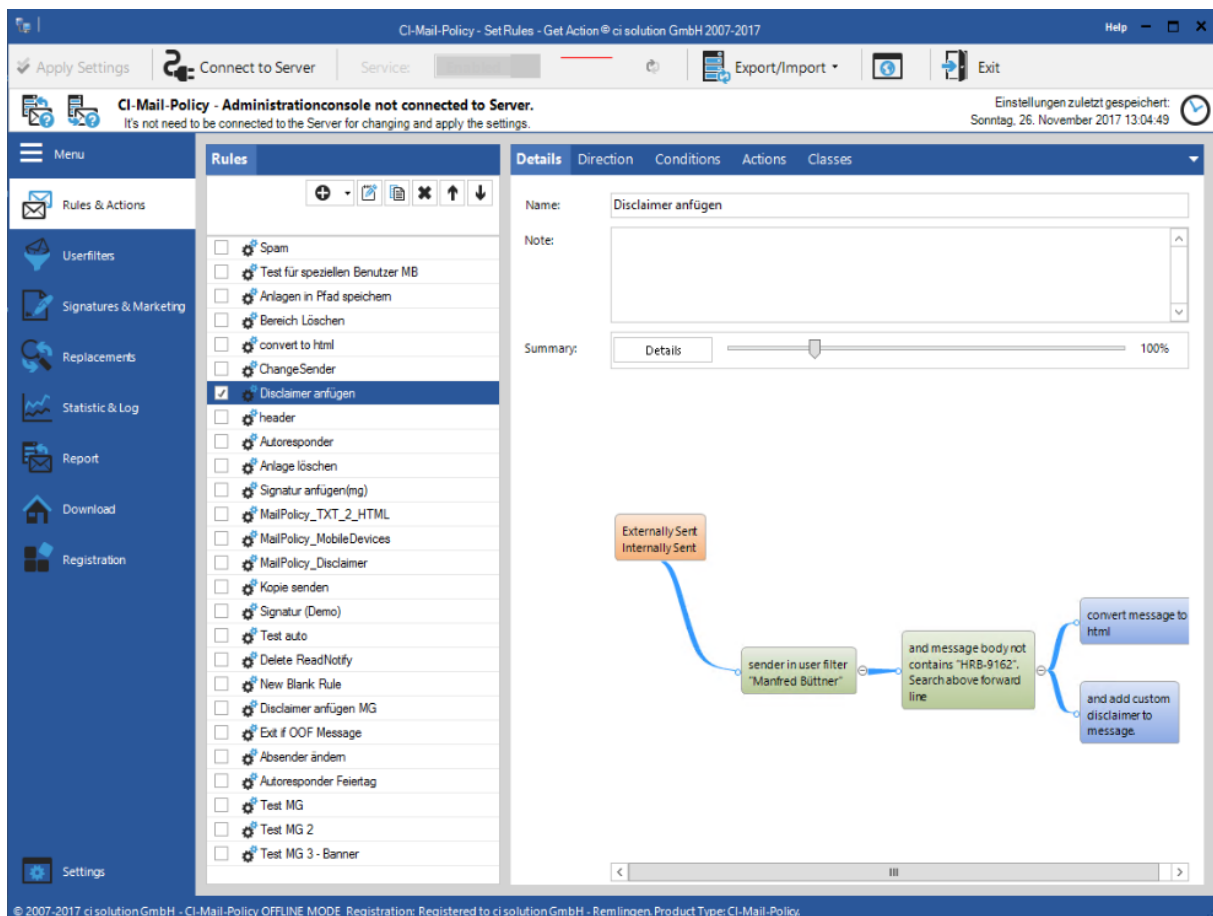
Administration Console

Click “CI-Mail-Policy” icon to launch the administration console.

You will be asked to enter a password – which is empty at first login.

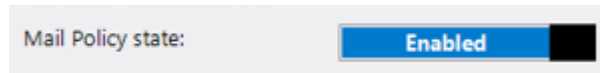
You can set a password in the settings of the administration console or add users for logon.

The Version is displayed in this Screen, too.



You are on the main screen of the software.

On the desk of CI-Mail-Policy state you can stop the execution of the rules. The service will not stop here!



More domains (internal): are multiple Exchange servers internally then further domains can be specified. These tabs inserted here using the following syntax: domain.local.

If the Exchange Server is in a different domain, can be specified here, in which for example users were found.

Rules

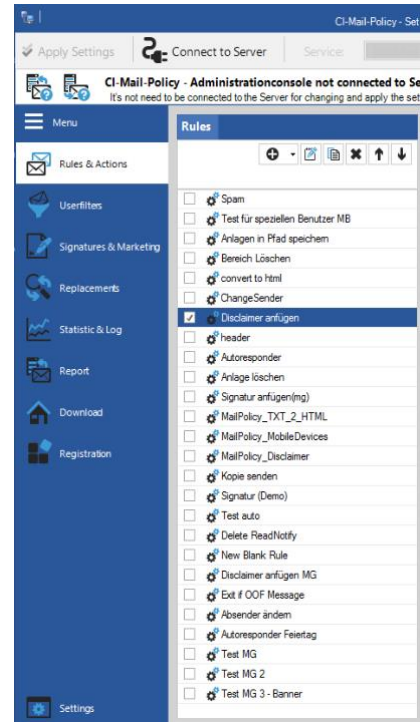
Use meaningful names. To facilitate to the overview!

Different tests can a rule here enabled/disabled are. (Activated when the hook is set.)

After a change in the main screen is stored here automatically.

To recreate a rule to edit or delete, use the appropriate buttons.

The process can be optimized accordingly by means of the order, because it more make no sense, for example, according to a specific rule or more to define checks the sequence can be aborted by means of an action.



User filter

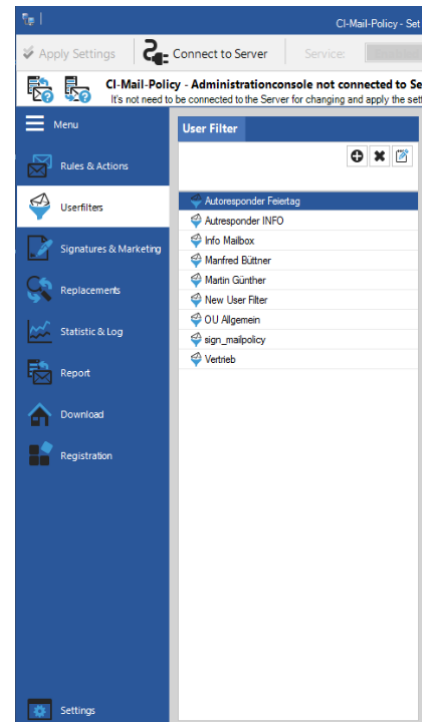
Each rule can get a user filter as a condition or exception. Thus, you can set whether this E-Mail applies to mask (E.g. *@ci-solution.com), a user, a group, or an OU.

The filter can also consist of a combination of (group/OU)

Thus, a test of the rules can be!

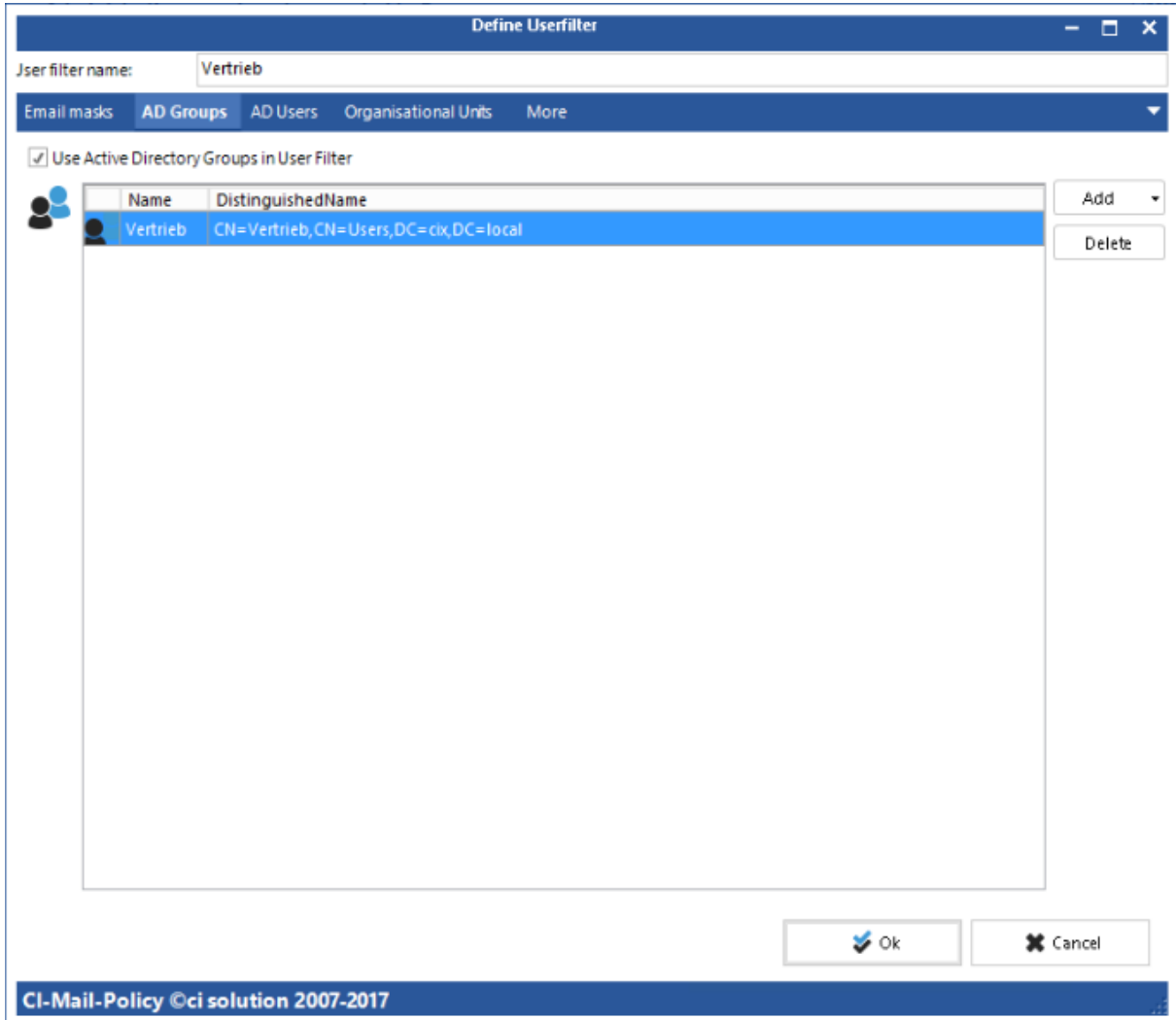
Important: The user must be a direct member of the corresponding. Be group or OU. Nestings are not resolved.

If you want the software first extensively testing, we recommend this first on a certain group of einzuschräncken. Thus, you can test alone, without involving the entire company immediately.



The following example defines a group named sales.

In this example, the Group sales is included.



Define Userfilter

User filter name: Vertrieb

Email masks AD Groups AD Users Organisational Units More

Use Active Directory Groups in User Filter

Name	DistinguishedName
Vertrieb	CN=Vertrieb,CN=Users,DC=cix,DC=local

Add

Delete

Ok Cancel

CI-Mail-Policy ©ci solution 2007-2017

The forms are largely self-explanatory and contain the forms appropriate examples and instructions.

We recommend using, since you can simply work to achieve appropriate results in your Active Directory group. As soon as you 'down break up on the users' they need to configure if necessary in CI-Mail-Policy!

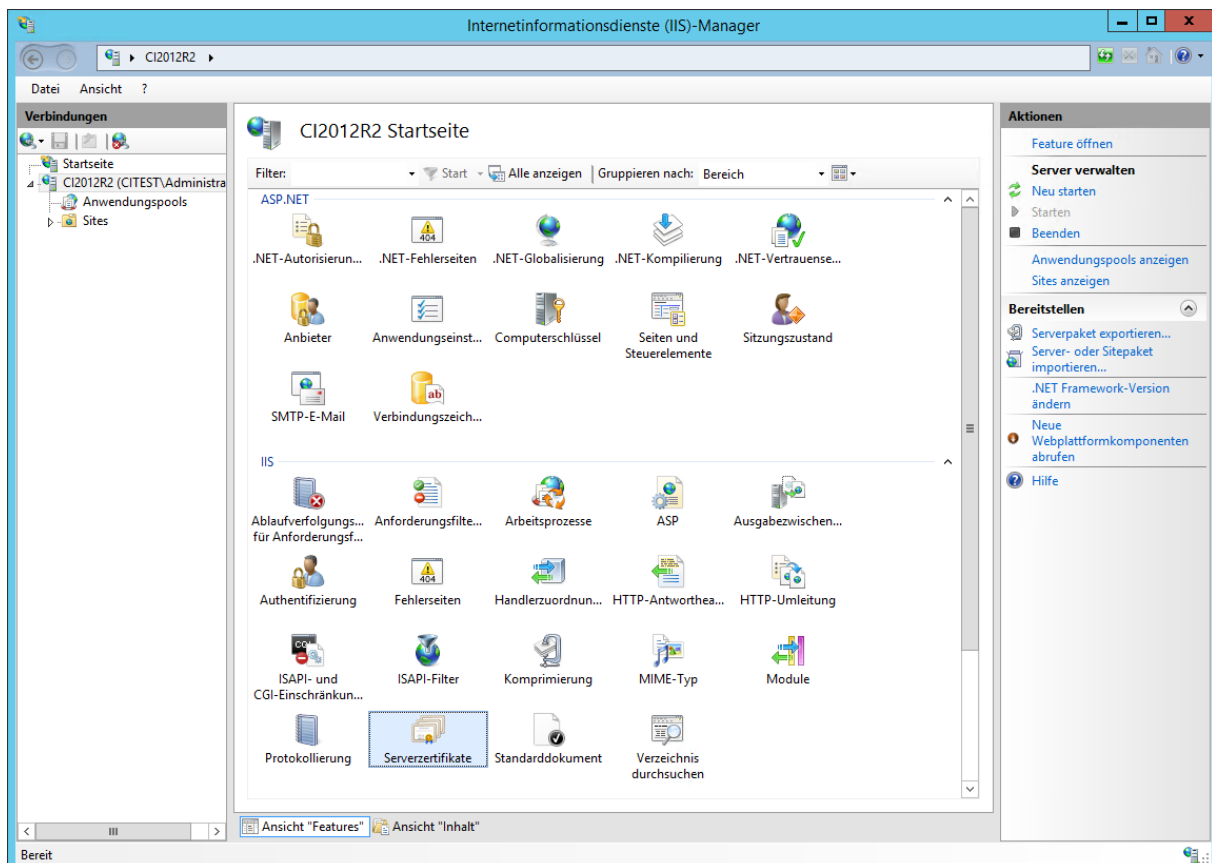
Installation in the Cloud

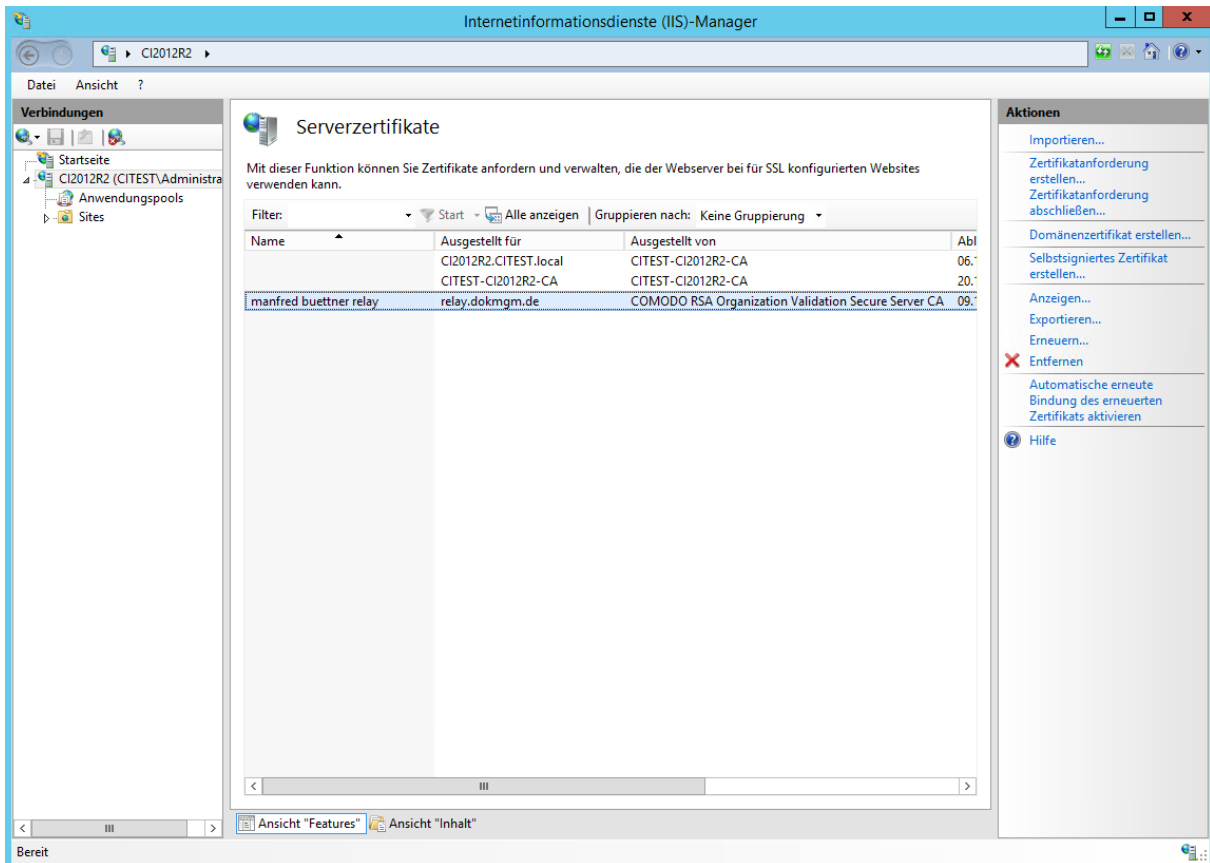
CI-Mail-Policy Version 4.x support cloud environments. Here two scenarios are supported

1. Exchange Online (Office 365)
2. Hybrid environments with Local Exchange (Exchange on premise) and Exchange Online (Office 365)

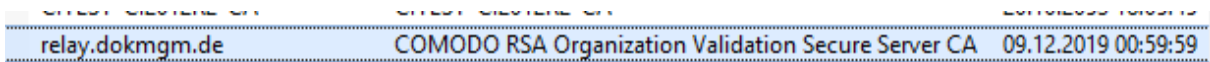
The installation differs depending on the above variant.

You need a Certificate. You can buy it for 50-80 Dollar/Year, if you haven't a own. We have buy one at SSL-TRUST.COM (for 50 Euro/year with 3 years time).





See here, VALIDDATE.



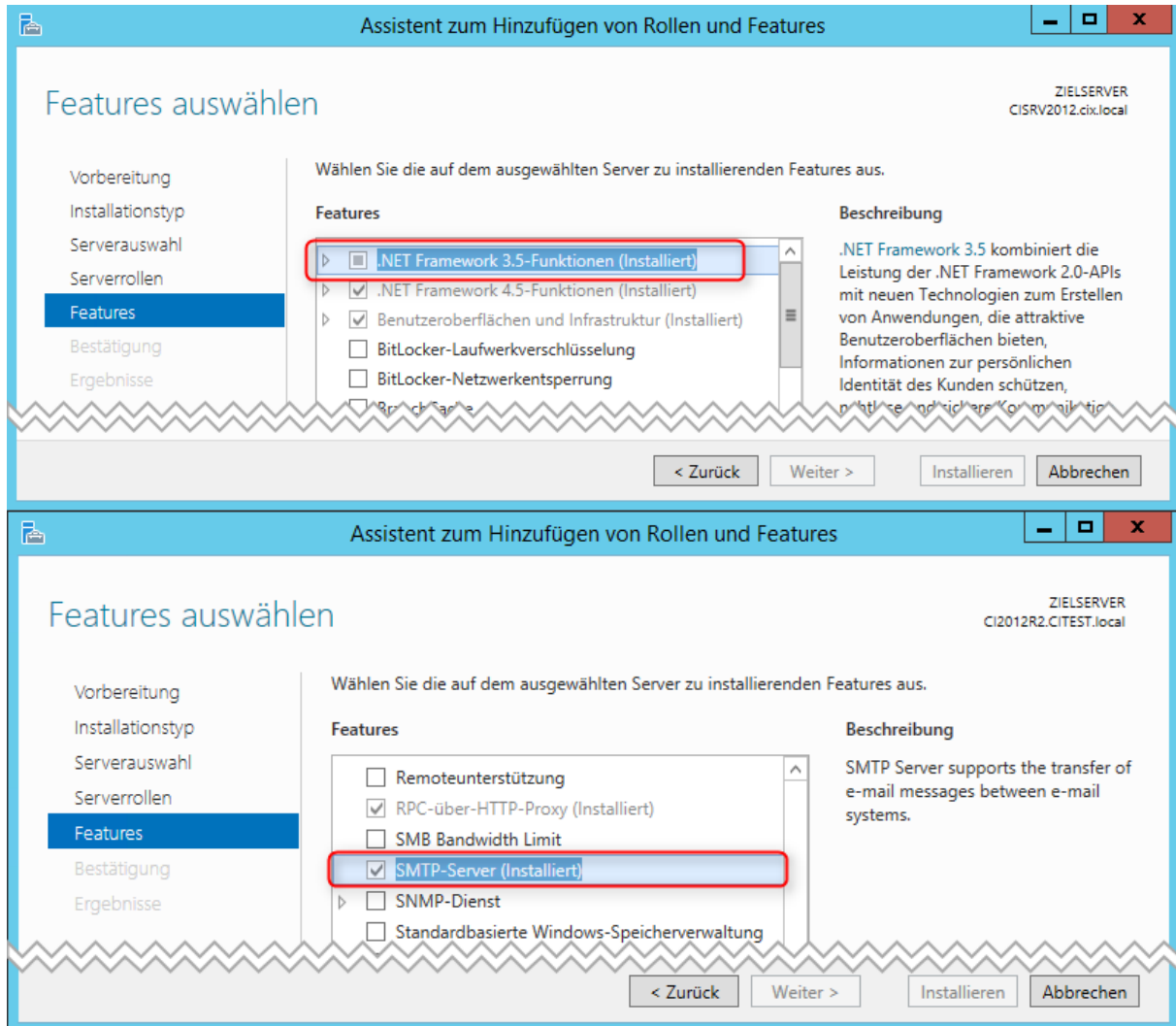
Installation for Exchange Online (Office 365) environment

For pure Exchange Online environments, you need in your local network a SMTP Relay Server (also called smart host). When sending the e-mails are routed through this server. At this point CI-Mail-Policy adds email signatures / disclaimer to the e-mails to.

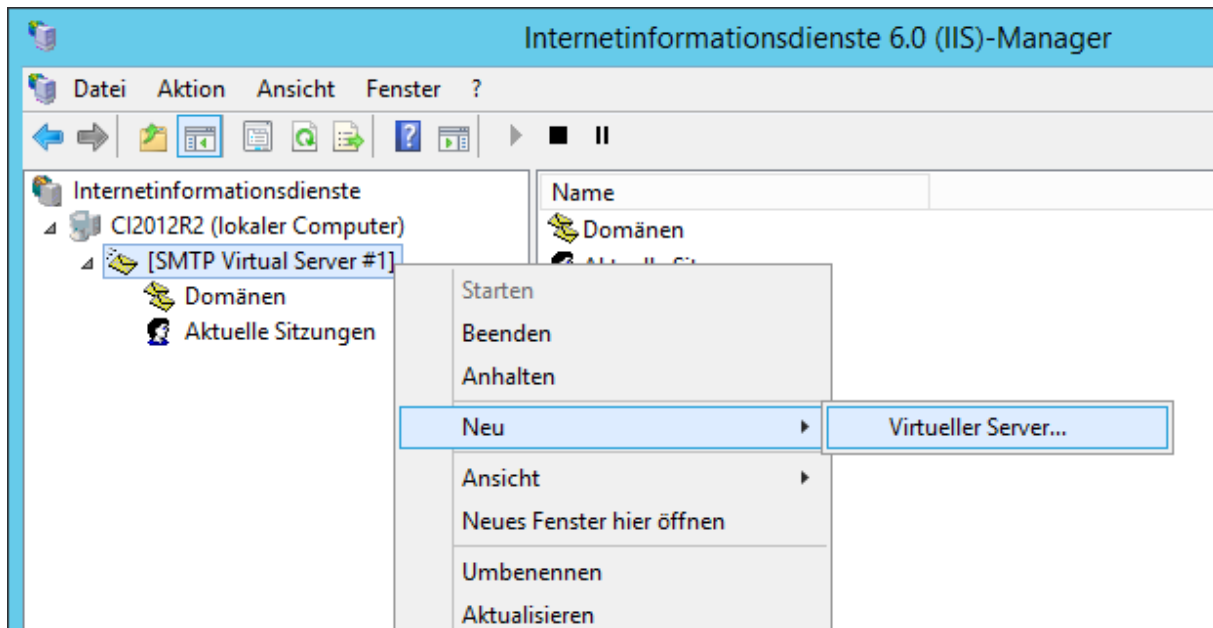
Install and configure SMTP-Relay Server

The SMTP Relay Server must be installed on a domain controller on the local network. Make sure that the following, "features" on the server are installed or install them.

- .NET Framework 3.5-Functions
- SMTP Server

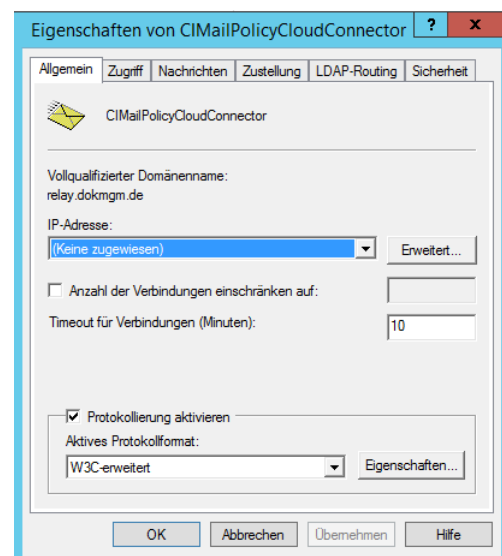


After successful installation of the components, start the "Internet Information Services 6.0" configuration interface (pay attention to the "6.0", because in the other console you can't find).

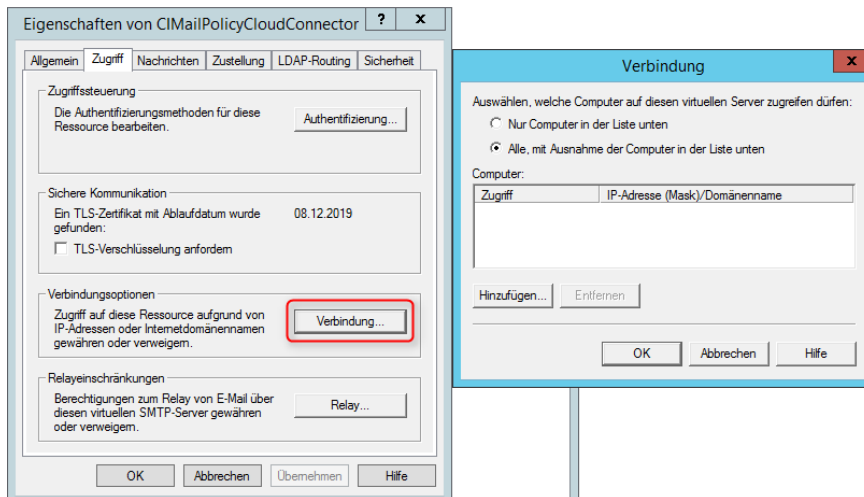


Create a new virtual server. Rename this order in "CIMailPolicyCloudConnector".

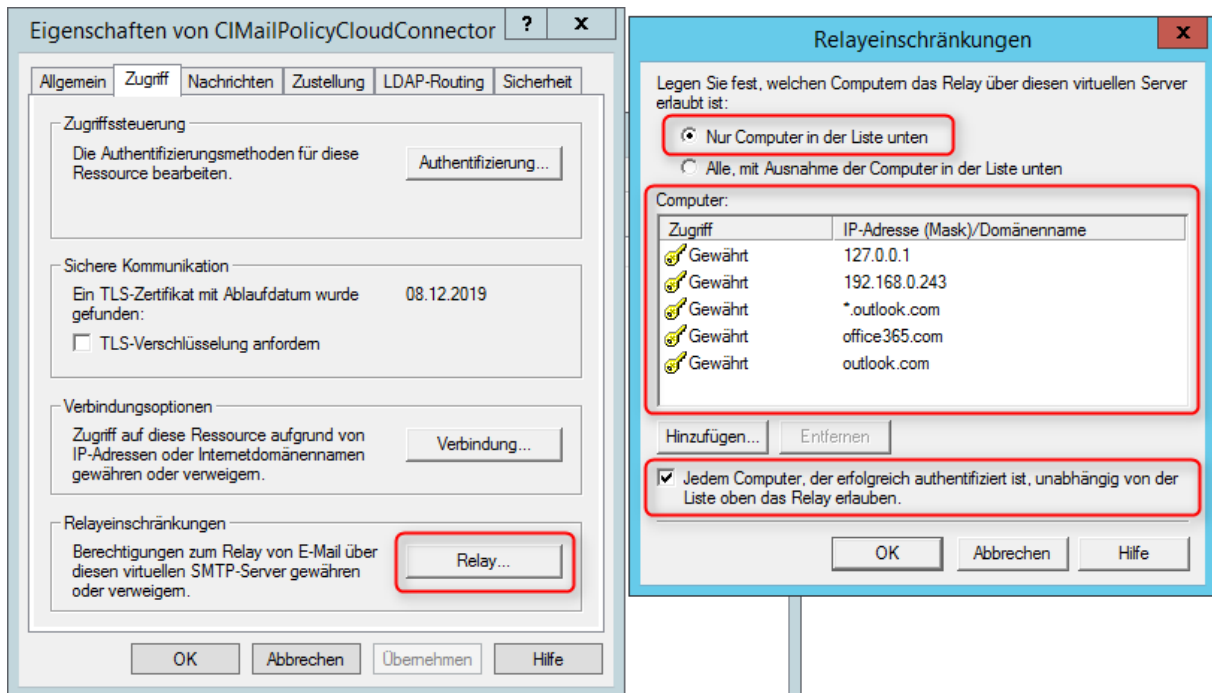
Open properties of the server.



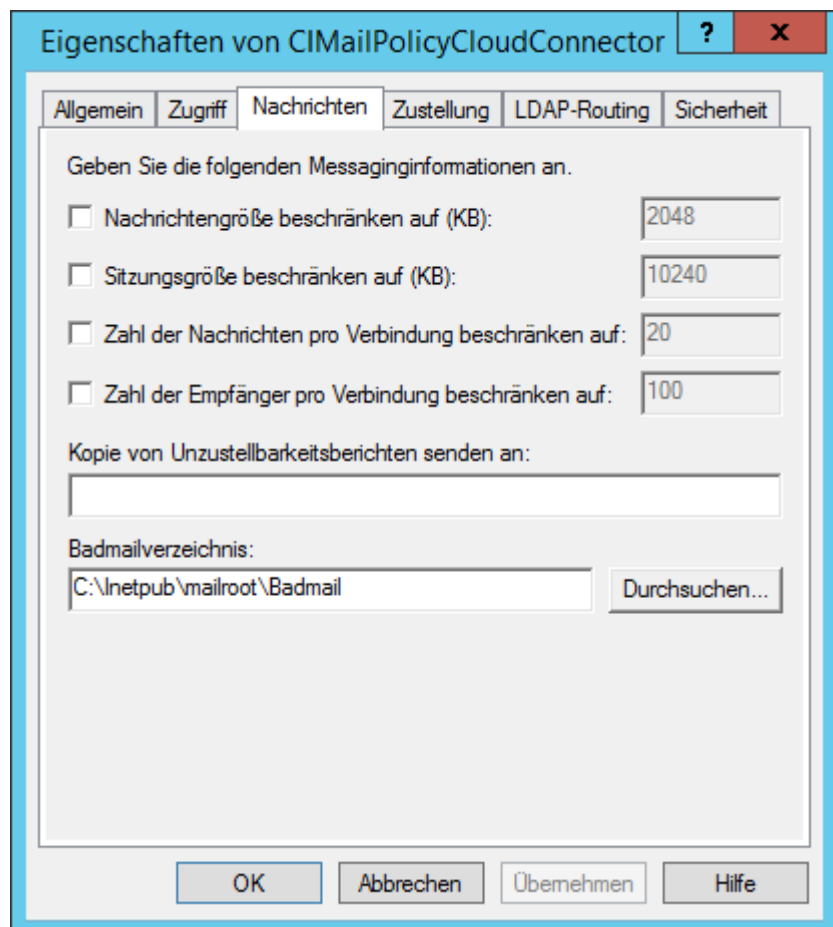
Open the properties of the server. Navigate to access -> Connection and check properties.



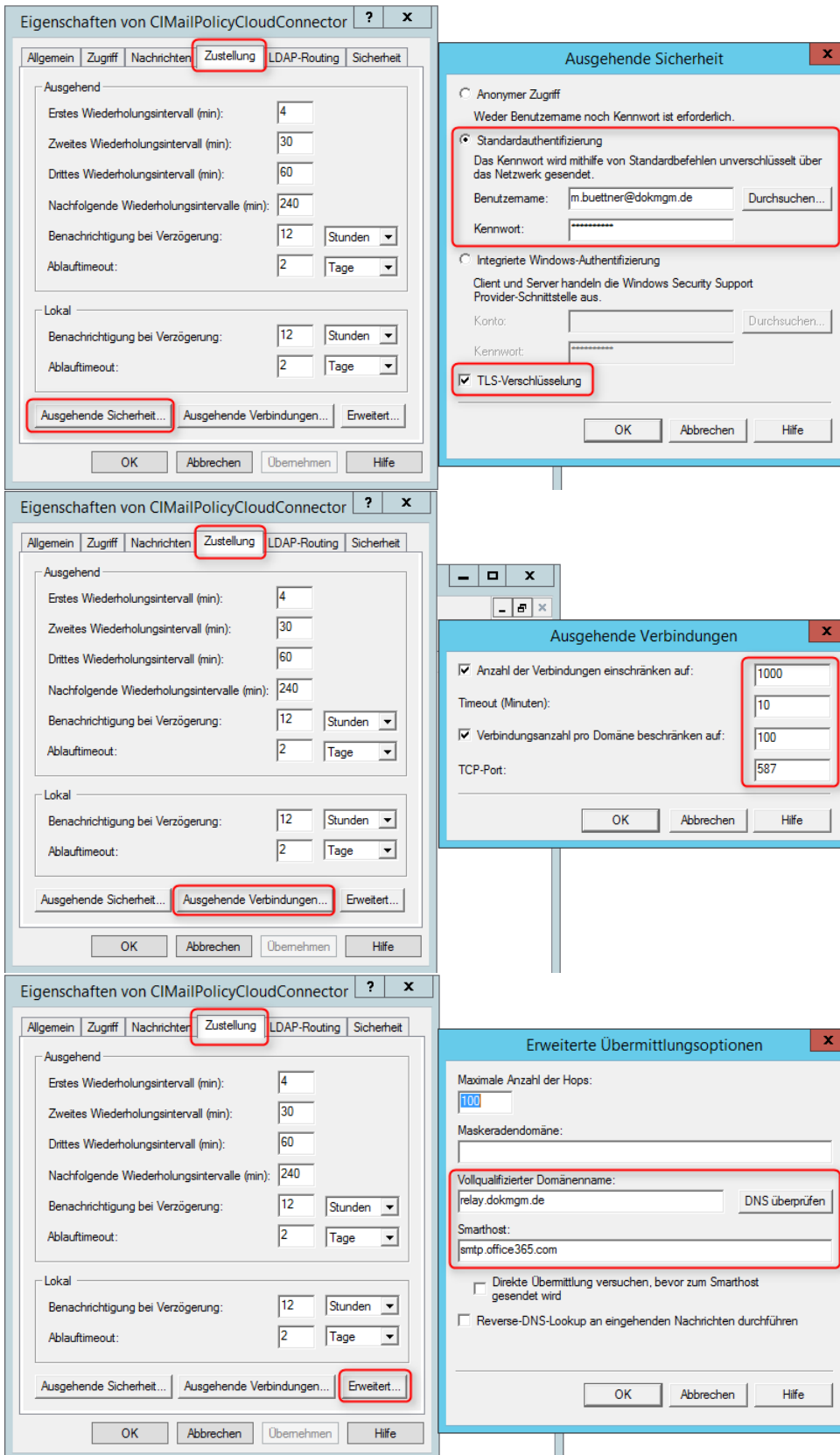
Check now Relay...



Navigate to „Messages“. Deactivate all restrictions.

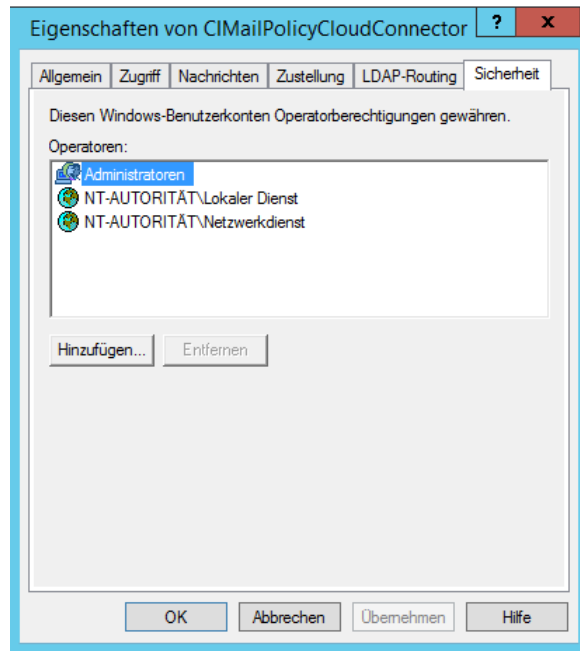
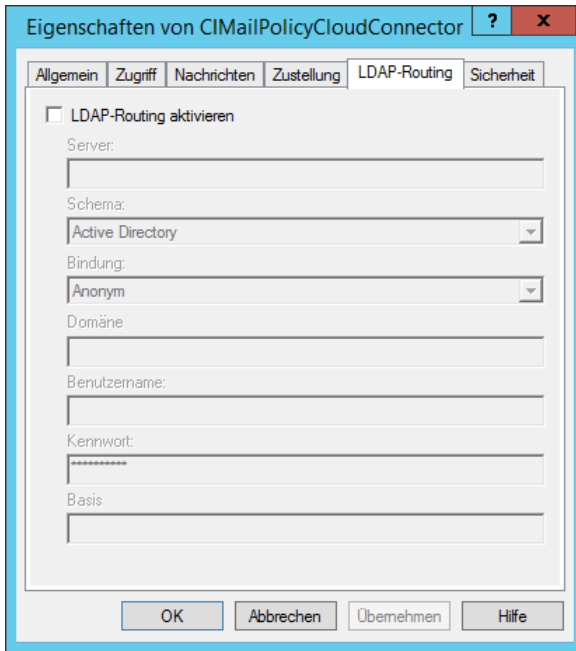


We use her the global Office 365 Administrator. For resend you need SendAs-Rights

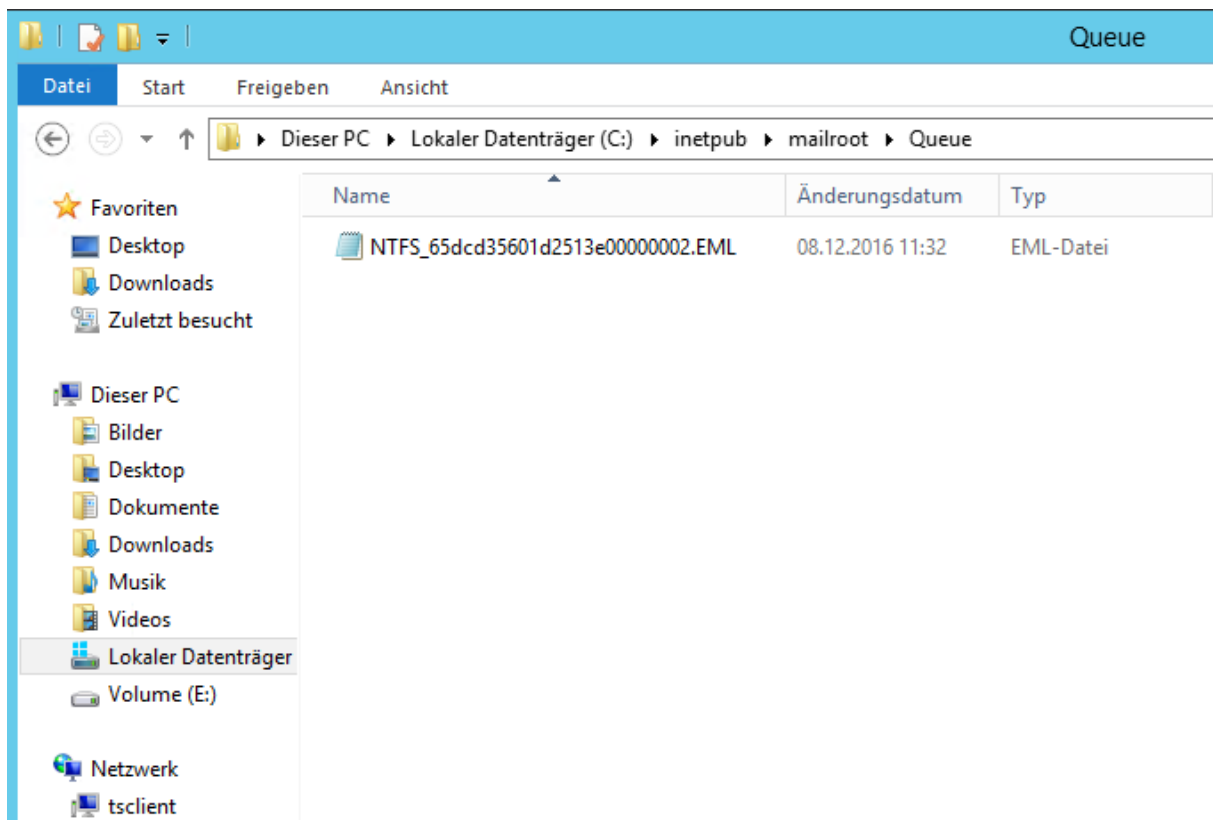


The image displays three sequential screenshots of the 'Eigenschaften von CIMailPolicyCloudConnector' configuration window, with red boxes highlighting specific settings in each tab:

- First Screenshot (Zustellung tab):** The 'Ausgehende Sicherheit...' button is highlighted.
- Second Screenshot (Ausgehende Sicherheit dialog):** The 'Standardauthentifizierung' section is highlighted, showing the 'Benutzername' field set to 'm.buettner@dokmgm.de' and the 'TLS-Verschlüsselung' checkbox checked.
- Third Screenshot (Ausgehende Verbindungen dialog):** The connection limits are highlighted: 'Anzahl der Verbindungen einschränken auf:' is set to 1000, 'Verbindungsanzahl pro Domäne beschränken auf:' is set to 100, and 'TCP-Port:' is set to 587.
- Fourth Screenshot (Erweiterte Übermittlungsoptionen dialog):** The 'Vollqualifizierter Domänenname:' field is highlighted, set to 'relay.dokmgm.de', with a 'DNS überprüfen' button next to it. The 'Smarthost:' field is set to 'smtp.office365.com'.




A vie to the queue if a mail is incoming and in progress.




Install CI-Mail-Policy

After completing the preparations, you now run the setup of CI-Mail-Policy. Enter the user data of the previously created user.


Install CI-Mail-Policy at:

 Exchange 2007 / 2010 / 2013 / 2016

 Office 365 / Cloud / SMTP

Active Directory Credentials

User	<input type="text" value="Administrator"/>
Password	<input type="password" value="*****"/>
Domain	<input type="text" value="CITEST.LOCAL"/>
AD Controller	<input type="text" value="192.168.0.243"/>

 **Active Directory user must be member of:**

- Exchange Servers Group
- Domain Users Group

Configure Exchange Online for the use of SMTP relays

Office 365 Connectors and Rules

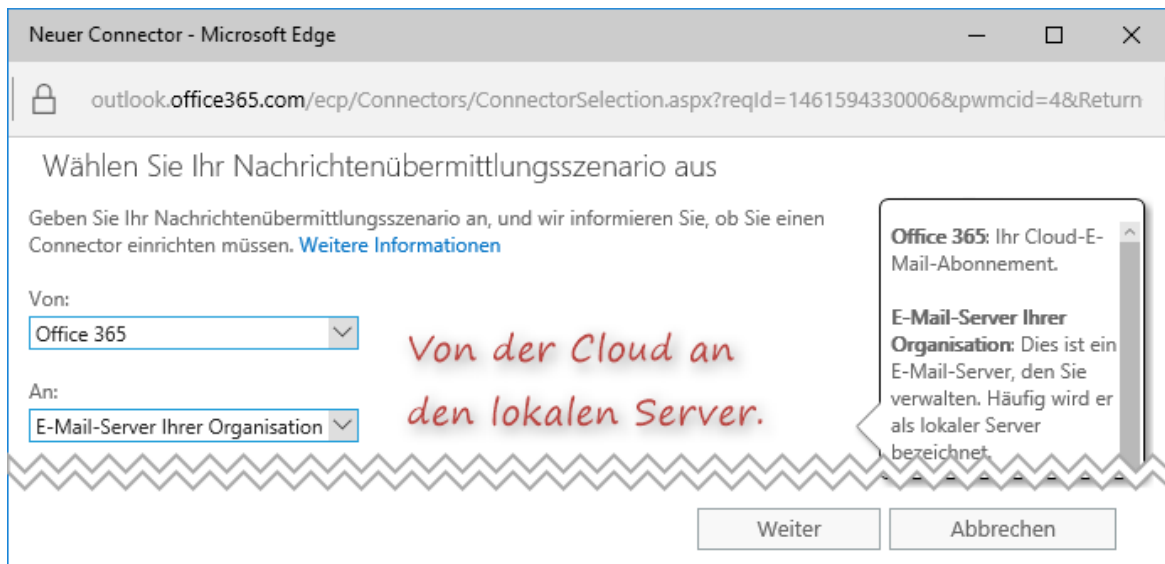
For routing of e-mail through the local server, we need:

- (Send) Connector to send emails to the local server (smart host)
- Transport Rule, which forwards e-mails to the Send Connector
- (Receive-) Connector to receive the e-mails (from the local server) to re-send

(Send-) Connector to send emails to the local server (smart host)

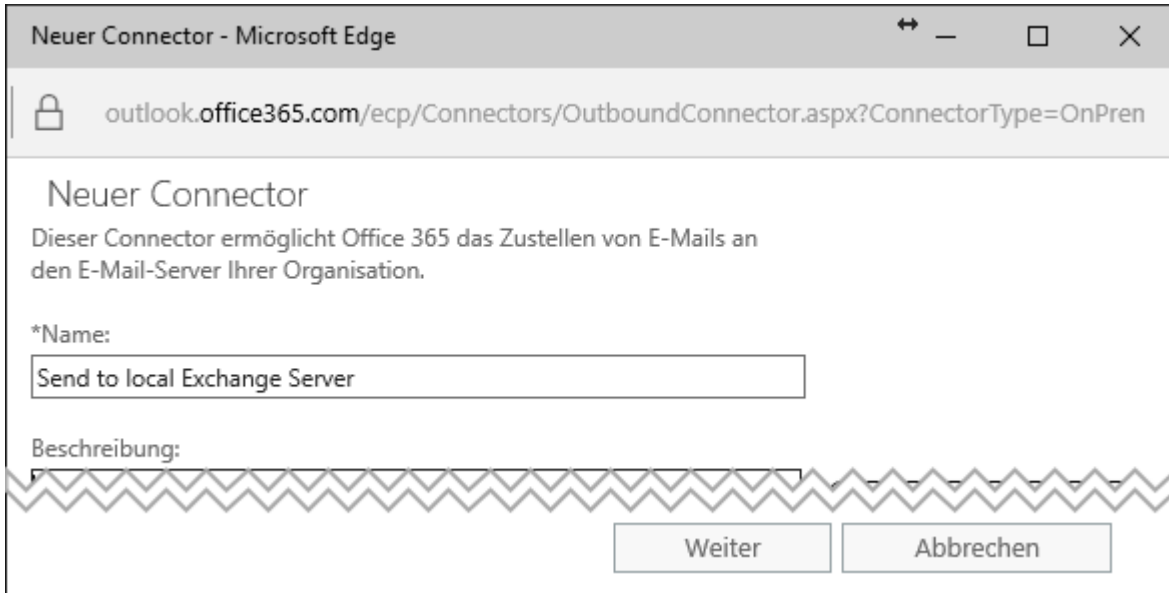
Go to the **Office 365 Exchange Admin Center** > **Message Flow** > **Connectors**.

Create a new connector.



The first step is to specify the transmission direction. From Office 365 to the local server.

Therefore, this is referred to as "Send-Connector".



Neuer Connector - Microsoft Edge

outlook.office365.com/ecp/Connectors/OutboundConnector.aspx?ConnectorType=OnPren

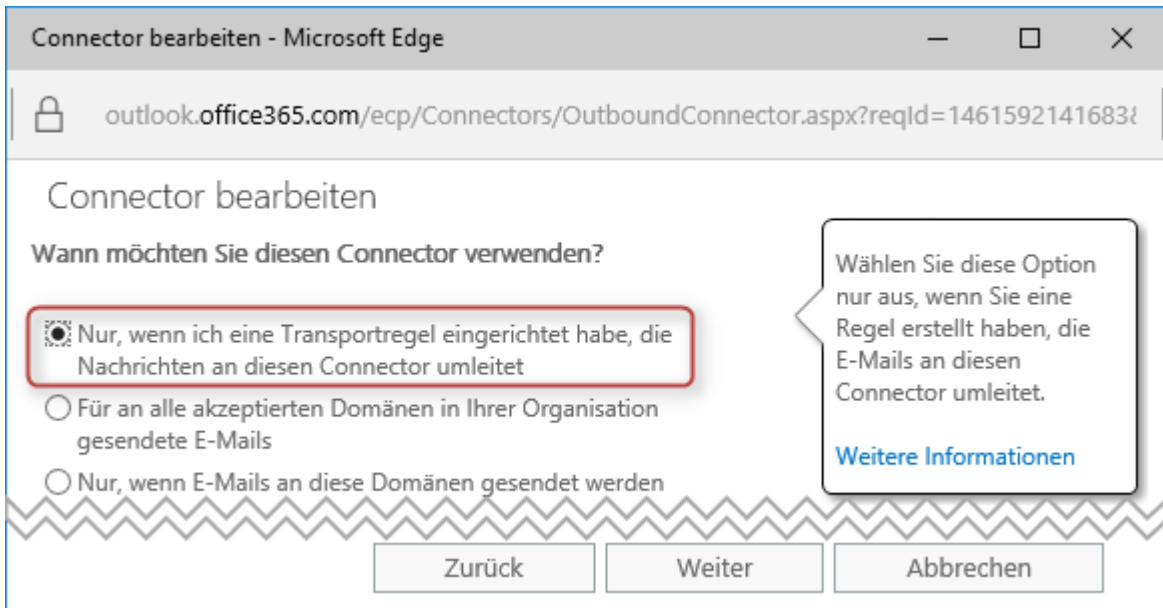
Neuer Connector

Dieser Connector ermöglicht Office 365 das Zustellen von E-Mails an den E-Mail-Server Ihrer Organisation.

*Name:

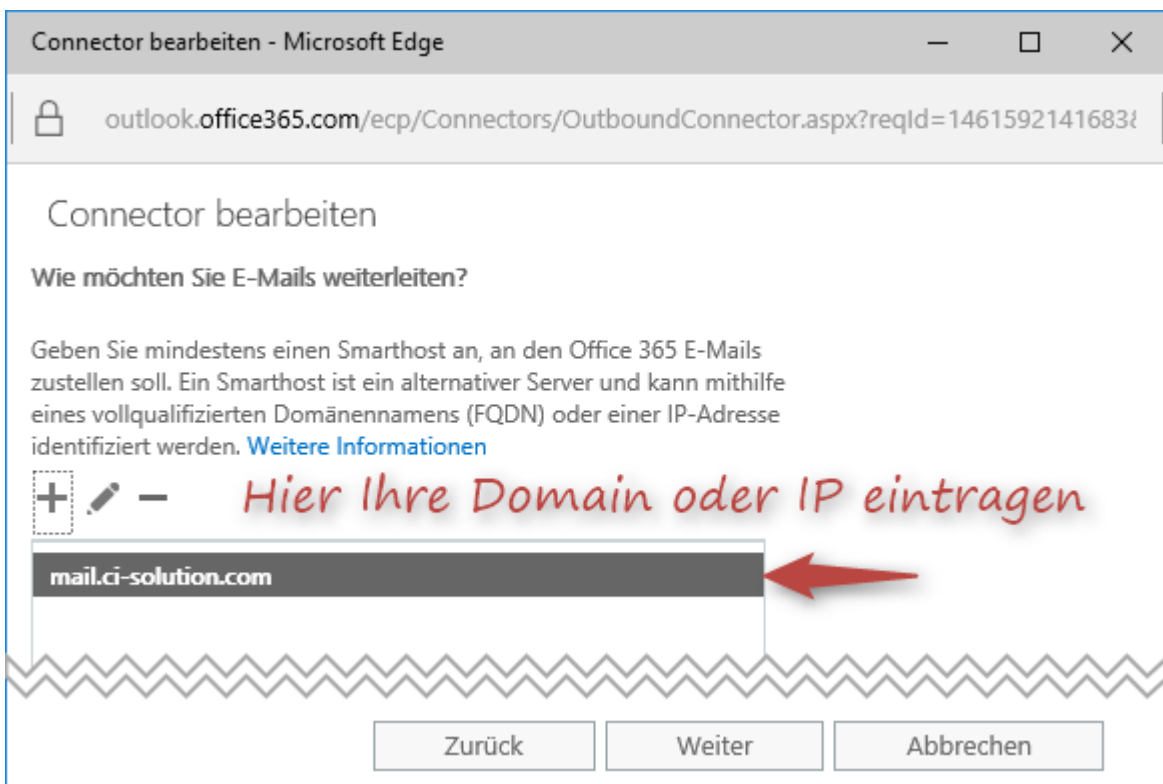
Beschreibung:

Enter a descriptive name. The name has no function otherwise.



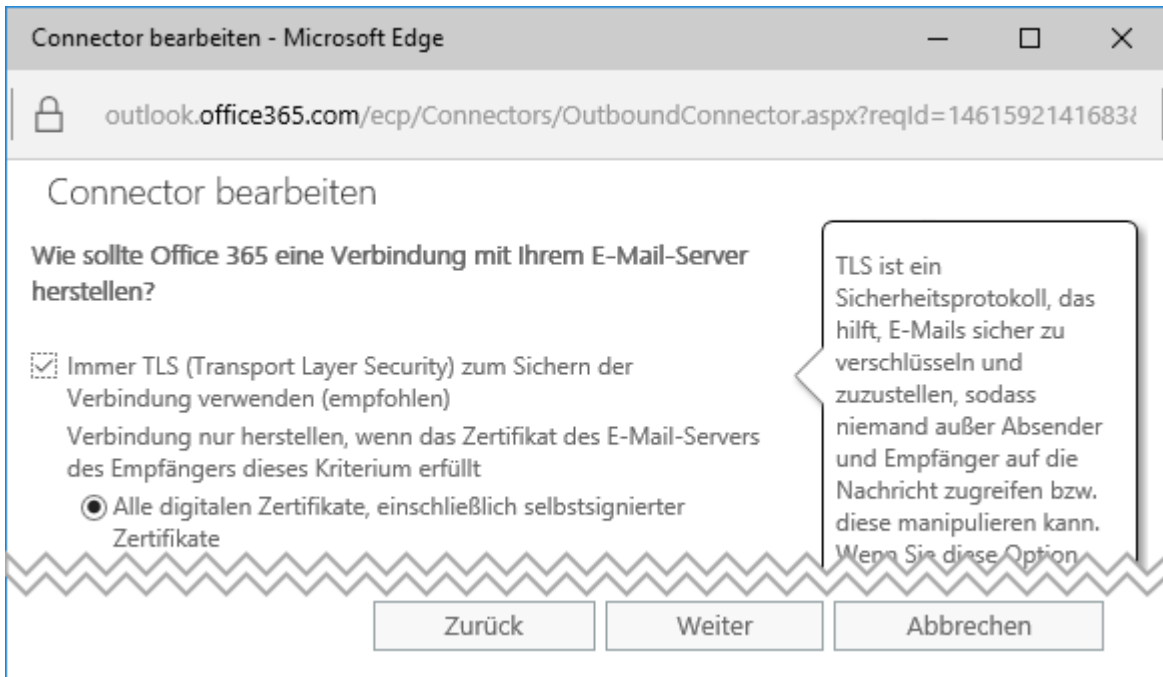
Select here "Only when I have set up a transport rule that redirects to that connector".

Thorough the transport rule only specific emails are forwarded to the connector.



Here you enter the fully-qualified domain name or the local server IP address (smarthost).

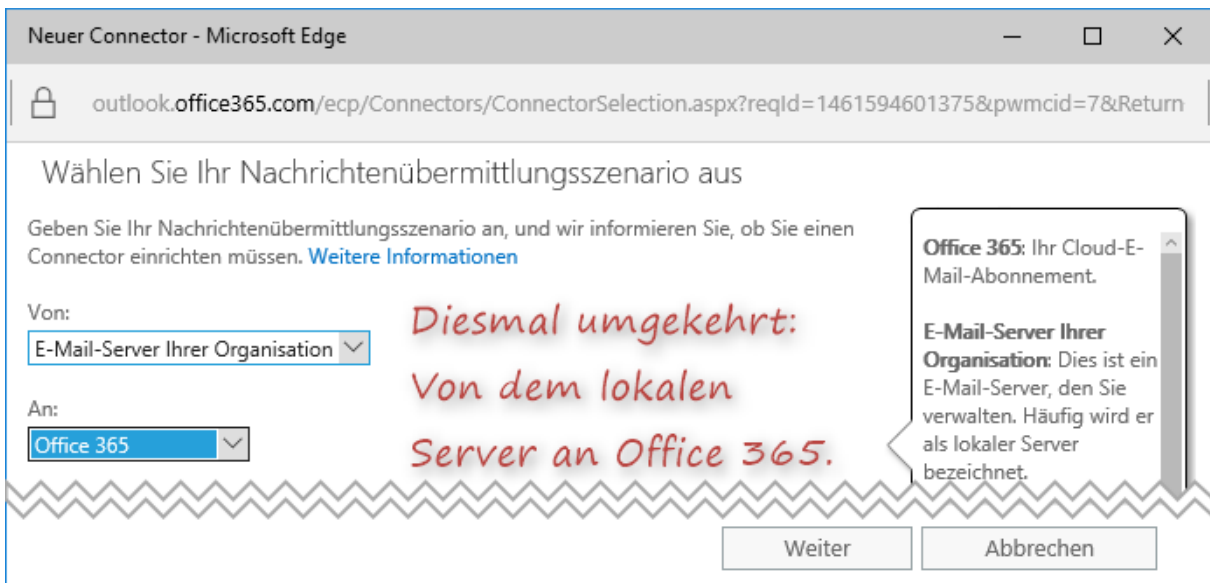
The appropriate ports (SMTP, TLS) must be open.



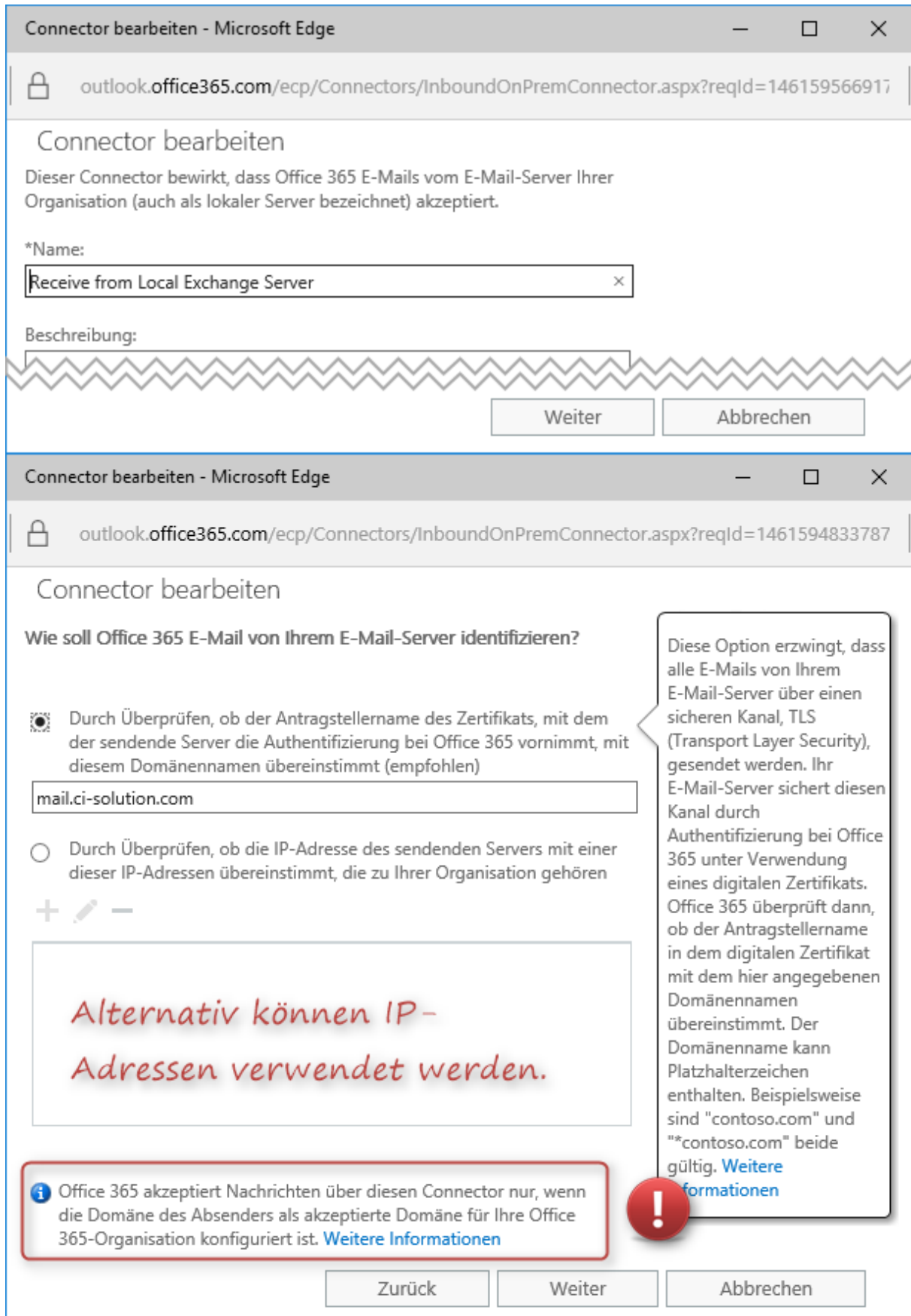
Use TLS to send encrypted emails.

(Receive-) Connector for receiving e-mails (from the local server)

Now you create an additional connector to receive emails.



For this connector, the transmission direction is reversed. From the local server to Office 365



Connector bearbeiten - Microsoft Edge

outlook.office365.com/ecp/Connectors/InboundOnPremConnector.aspx?reqId=146159566917

Connector bearbeiten

Dieser Connector bewirkt, dass Office 365 E-Mails vom E-Mail-Server Ihrer Organisation (auch als lokaler Server bezeichnet) akzeptiert.

*Name:

Beschreibung:

Connector bearbeiten - Microsoft Edge

outlook.office365.com/ecp/Connectors/InboundOnPremConnector.aspx?reqId=1461594833787

Connector bearbeiten

Wie soll Office 365 E-Mail von Ihrem E-Mail-Server identifizieren?

Durch Überprüfen, ob der Antragstellernamen des Zertifikats, mit dem der sendende Server die Authentifizierung bei Office 365 vornimmt, mit diesem Domännennamen übereinstimmt (empfohlen)

Durch Überprüfen, ob die IP-Adresse des sendenden Servers mit einer dieser IP-Adressen übereinstimmt, die zu Ihrer Organisation gehören

+ ✎ -

Alternativ können IP-Adressen verwendet werden.

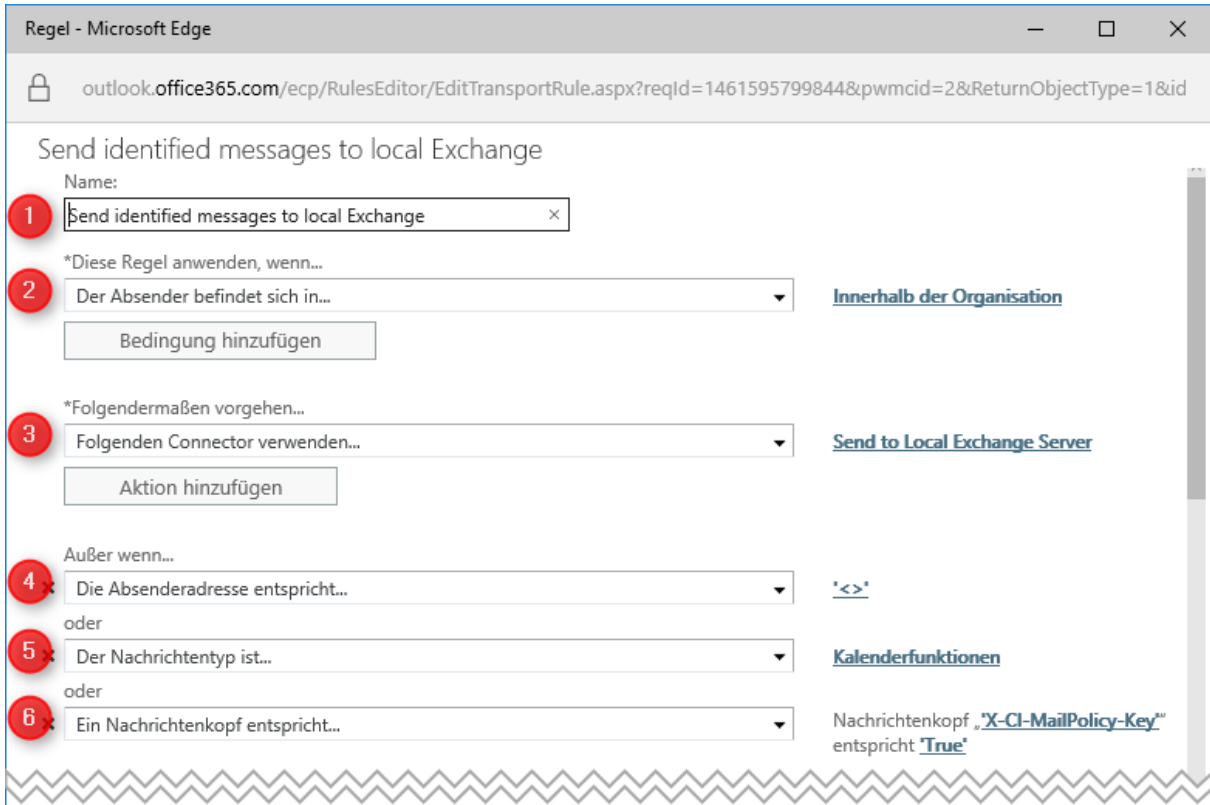
i Office 365 akzeptiert Nachrichten über diesen Connector nur, wenn die Domäne des Absenders als akzeptierte Domäne für Ihre Office 365-Organisation konfiguriert ist. [Weitere Informationen](#)

Diese Option erzwingt, dass alle E-Mails von Ihrem E-Mail-Server über einen sicheren Kanal, TLS (Transport Layer Security), gesendet werden. Ihr E-Mail-Server sichert diesen Kanal durch Authentifizierung bei Office 365 unter Verwendung eines digitalen Zertifikats. Office 365 überprüft dann, ob der Antragstellernamen in dem digitalen Zertifikat mit dem hier angegebenen Domännennamen übereinstimmt. Der Domännennamen kann Platzhalterzeichen enthalten. Beispielsweise sind "contoso.com" und "*contoso.com" beide gültig. [Weitere Informationen](#)

If you specify a domain name here, this must be specified as an accepted domain in the Exchange Admin Center. Alternatively, you can also specify the (external) IP address of your server.

Transport Rule, which forwards emails over the Send connector

Finally, you still need a transport rule that forwards e-mail via the Send Connector. Below you'll find the required configuration of the rule.



The screenshot shows the Outlook Rules Editor interface for a transport rule. The rule name is "Send identified messages to local Exchange". The configuration is as follows:

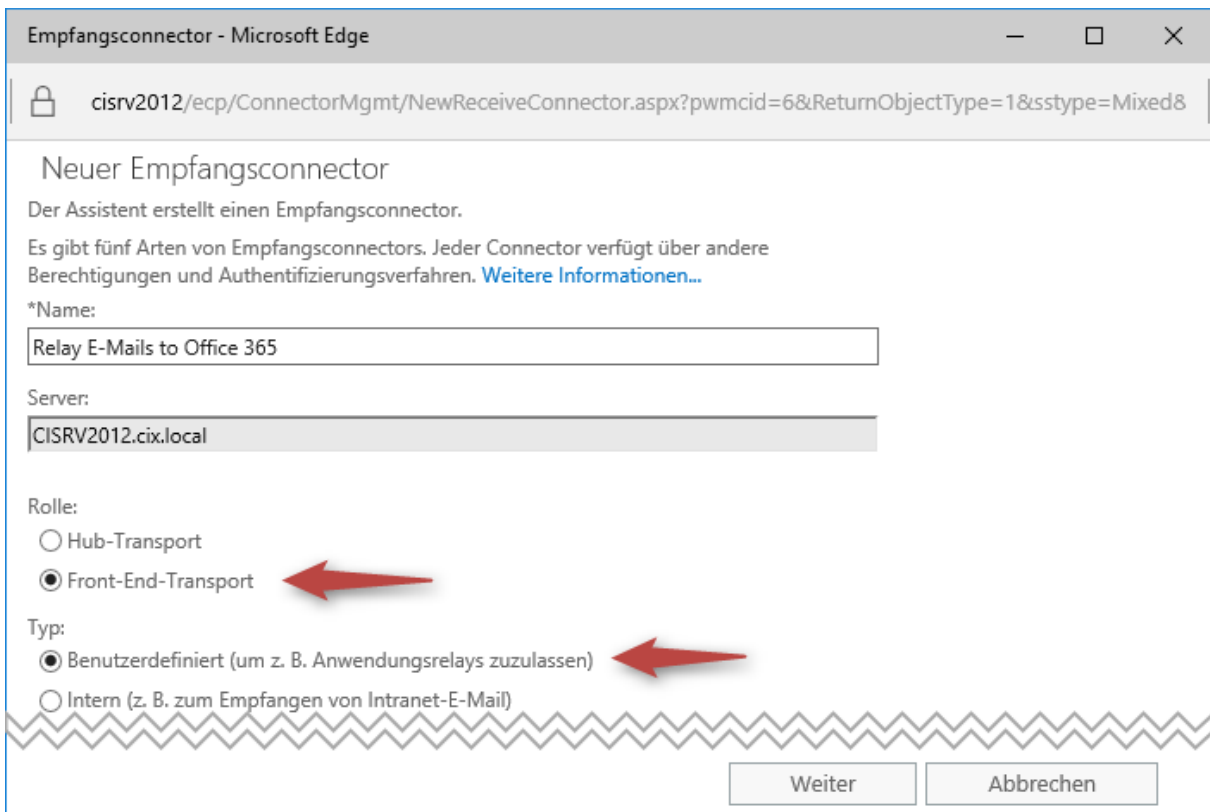
- Name:** Send identified messages to local Exchange
- *Diese Regel anwenden, wenn... (Condition):** Der Absender befindet sich in... [Innerhalb der Organisation](#)
- *Folgendermaßen vorgehen... (Action):** Folgenden Connector verwenden... [Send to Local Exchange Server](#)
- Außer wenn... (Exception 1):** Die Absenderadresse entspricht... ['<>'](#)
- oder (Exception 2):** Der Nachrichtentyp ist... [Kalenderfunktionen](#)
- oder (Exception 3):** Ein Nachrichtenkopf entspricht... Nachrichtenkopf ["X-CI-MailPolicy-Key"](#) entspricht ["True"](#)

1. As usual ... Please enter a meaningful name.
2. rule applies to senders who are inside the organization.
3. You specify the previously created Send Connector. Through this connector e-mails are routed/sent to the local server.
4. Exception: If the sender address is empty. Thus, CI-Mail-Policy can't do anything with it.
5. Exclude calendar items. These are not relevant.
6. Exception: The e-mail has already been processed by CI-Mail-Policy. In this case the message header "X-CI-Mail-Policy-Key" is set to "true".

Installation for Exchange Online (Office 365) in combination with local Exchange (Exchange On-Premise)

Perform the installation as described in Chapter 0. CI-Mail-Policy can now already be used for the local Exchange Server (on-premise). This means that rules and actions of CI-Mail-Policy will be applied to all emails which pass the local Hub Transport. To extend CI-Mail-Policy to emails sent from the cloud – you must set up a smart host over which emails are sent. To do this, follow the steps described in chapter 6.2. In addition, you need a receive connector on the local Exchange Server. See the following steps on how to set it up.

Open the Exchange Admin Center (ecp). Go to **Messageflow > Receiveconnector** to add a new connector.



Empfangsconnector - Microsoft Edge

cisrv2012/ecp/ConnectorMgmt/NewReceiveConnector.aspx?pwmcid=6&ReturnObjectType=1&sstype=Mixed8

Neuer Empfangsconnector

Der Assistent erstellt einen Empfangsconnector.

Es gibt fünf Arten von Empfangsconnectors. Jeder Connector verfügt über andere Berechtigungen und Authentifizierungsverfahren. [Weitere Informationen...](#)

*Name:

Server:

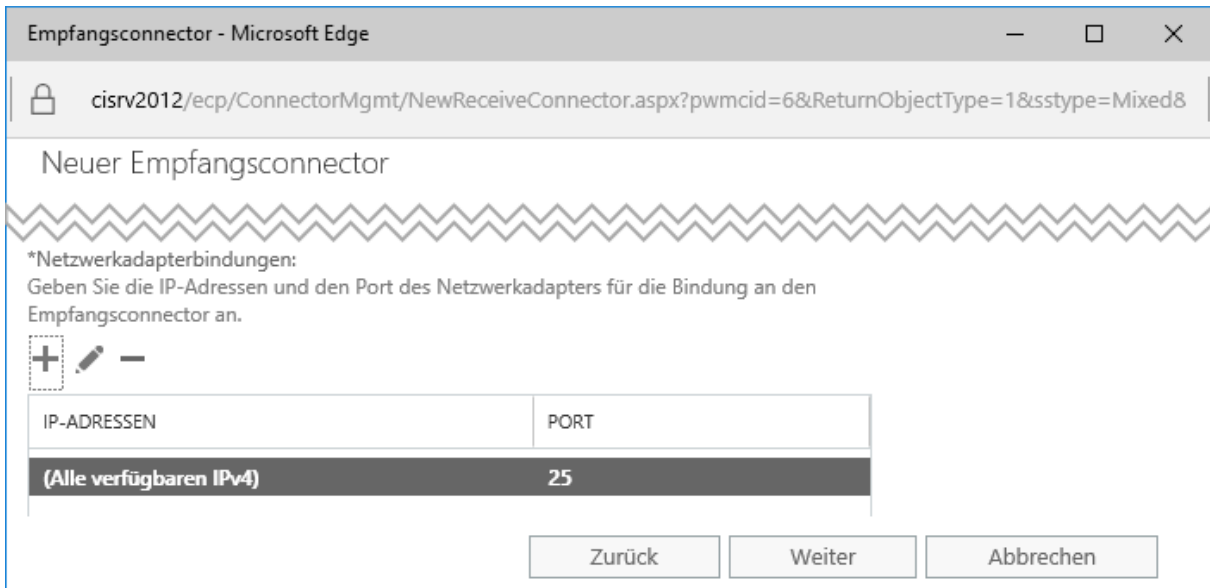
Rolle:

- Hub-Transport
- Front-End-Transport

Typ:

- Benutzerdefiniert (um z. B. Anwendungsrelays zuzulassen)
- Intern (z. B. zum Empfangen von Intranet-E-Mail)

Enter a descriptive name and select the options as shown in the picture.



Empfangsconnector - Microsoft Edge

cisrv2012/ecp/ConnectorMgmt/NewReceiveConnector.aspx?pwmcid=6&ReturnObjectType=1&sstype=Mixed&

Neuer Empfangsconnector

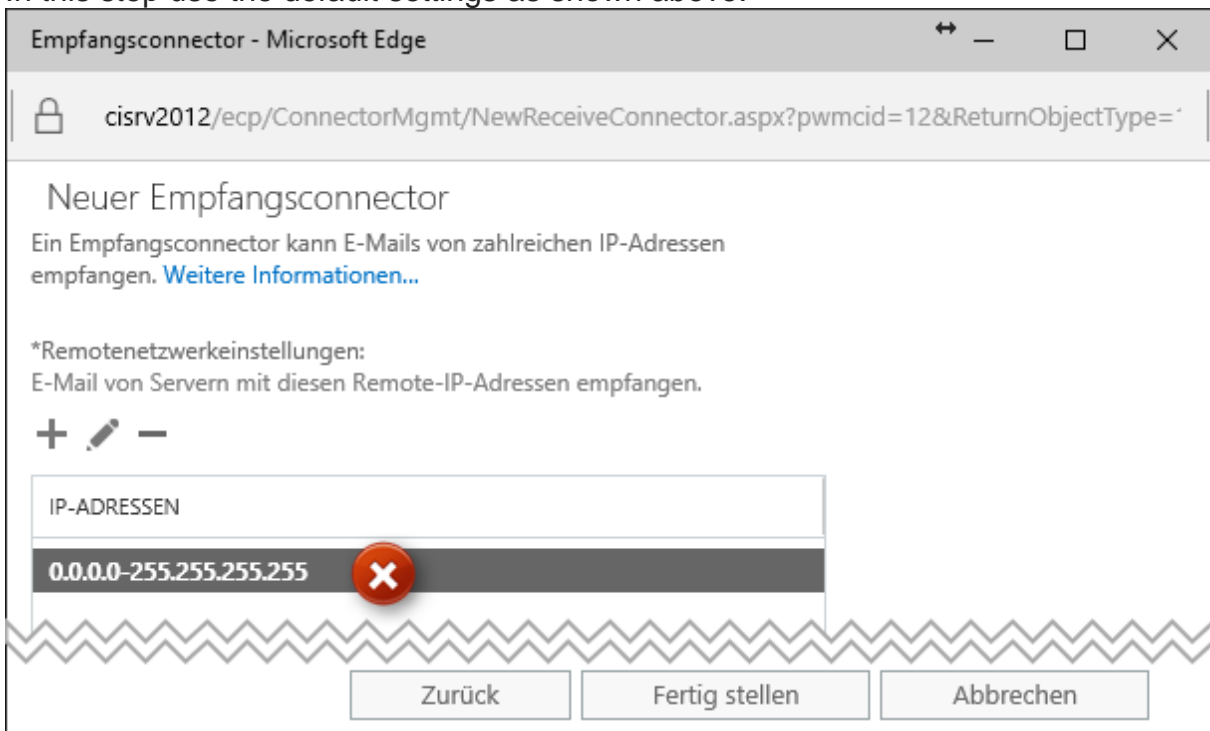
*Netzwerkadapterbindungen:
Geben Sie die IP-Adressen und den Port des Netzwerkadapters für die Bindung an den Empfangsconnector an.

+ ✎ -

IP-ADRESSEN	PORT
(Alle verfügbaren IPv4)	25

Zurück Weiter Abbrechen

In this step use the default settings as shown above.



Empfangsconnector - Microsoft Edge


cisrv2012/ecp/ConnectorMgmt/NewReceiveConnector.aspx?pwmcid=12&ReturnObjectType='

Neuer Empfangsconnector

Ein Empfangsconnector kann E-Mails von zahlreichen IP-Adressen empfangen. [Weitere Informationen...](#)

*Remotenetzwerkeinstellungen:
E-Mail von Servern mit diesen Remote-IP-Adressen empfangen.

+ ✎ -

IP-ADRESSEN
0.0.0.0-255.255.255.255 

Zurück Fertig stellen Abbrechen

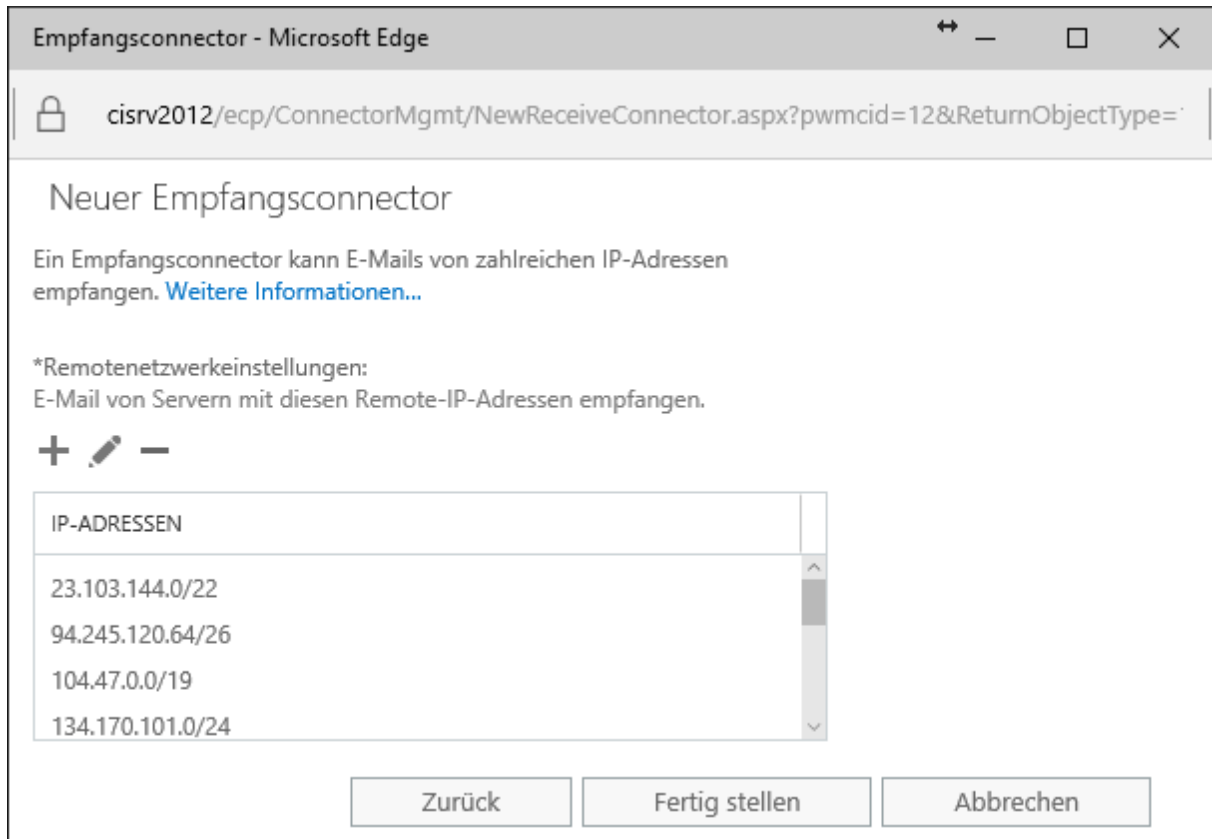
In the next step, you specify from which IP addresses the connector is allowed to receive emails. First, remove the default address. Now Add the IP addresses which Office 365 uses to send mails. For a list of all IP addresses, see [https://technet.microsoft.com/en-us/library/dn163583\(v=exchg.150\).aspx](https://technet.microsoft.com/en-us/library/dn163583(v=exchg.150).aspx).

IP Ranges by region

Exchange Online Protection routes mail in the most efficient manner while maintaining compliance with our contractual obligations to our customers. With this in mind, the below EOP endpoints are the current list of regional IPv4 ranges; however, these IP addresses may be re-provisioned without advance notice to another function within EOP to

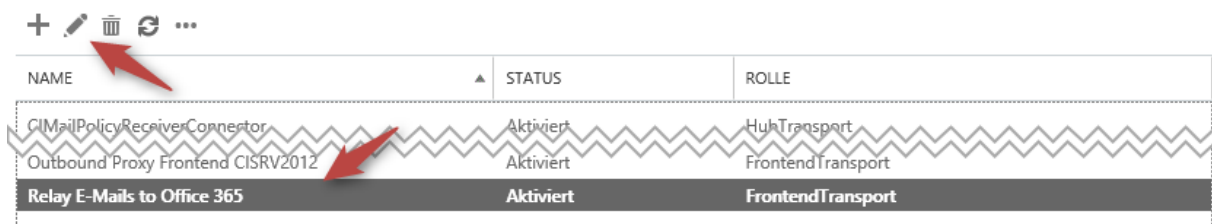
Americas	EMEA	APAC
23.103.148.0/22 23.103.191.0/24 23.103.198.0/23 23.103.200.0/21 64.4.22.64/26 65.55.164.0/24	23.103.144.0/22 94.245.120.64/26 104.47.0.0/19 134.170.101.0/24 134.170.171.0/24 57.56.172.0/24	23.103.136.0/21 23.103.152.0/22 23.103.155.0/27 23.103.155.64/27 65.55.88.0/24 134.17.64.0/19

On this page you will also find a list of the IP address by region. After adding the for your region relevant IP addresses, the mask looks similar to this:




Now create the connector by confirming the settings.

Open the properties after creating. Review and update "security" to the following settings.



Exchange-Empfangsconnector - Microsoft Edge ×

 cisrv2012/ecp/ConnectorMgmt/EditReceiveConnector.aspx?pwmcid=31&ReturnObjectType=1&id=85514334-316;b4

[Hilfe](#)



Relay E-Mails to Office 365

Allgemein


► **Sicherheit**

Bereichsdefinition

Authentifizierung:
Geben Sie die Sicherheitsmechanismen für eingehende Verbindungen an.

- Transport Layer Security (TLS) 
- Domänensicherheit aktivieren (Gegenseitige TLS-Authentifizierung)
- Standardauthentifizierung
 - Standardauthentifizierung erst nach dem Start von TLS anbieten
- Integrierte Windows-Authentifizierung
- Exchange-Serverauthentifizierung
- Extern gesichert (z. B. mit IPSec) 

Berechtigungsgruppen:
Geben Sie an, wer eine Verbindung mit diesem Empfangsconnector herstellen darf.

- Exchange-Server 
- Legacy-Exchange-Server
- Partner
- Exchange-Benutzer
- Anonyme Benutzer

SPF Sender Policy Framework / Antispam

We recommend adding an SPF record to avoid having messages flagged as spam. If you are sending from a static IP address, add it to your SPF record in your domain registrar's DNS settings as follows:

DNS entry	Value
SPF	v=spf1 ip4:<Static IP Address> include:spf.protection.outlook.com ~all

See: [https://technet.microsoft.com/en-us/library/dn554323\(v=exchg.150\).aspx#Howtodirectsend](https://technet.microsoft.com/en-us/library/dn554323(v=exchg.150).aspx#Howtodirectsend)

Here an example:

Eintrag bearbeiten

Typ:

Präfix: ?

Name: dokmgm.de

Wert:

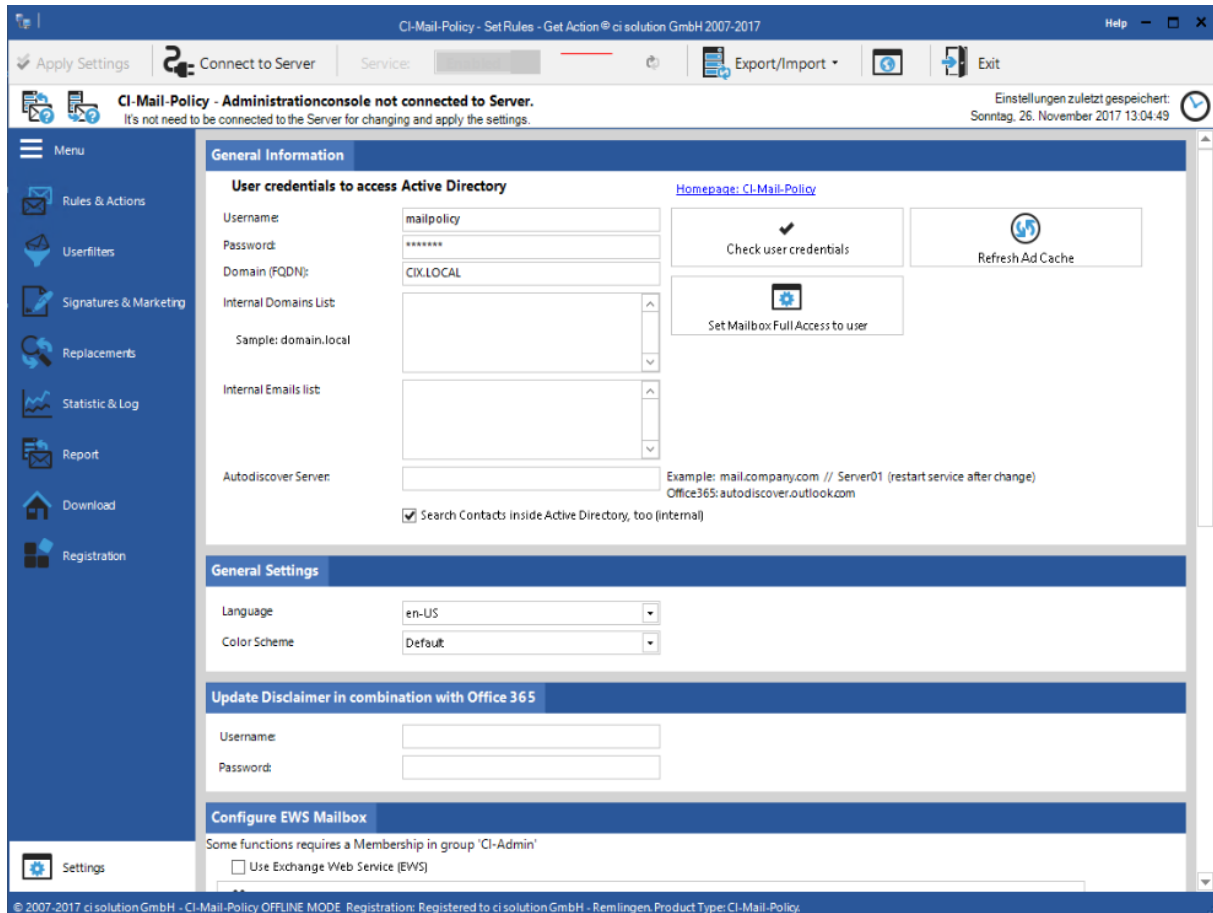
```
"v=spf1 mx ip4: 88.128.150.198  
include:spf.protection.outlook.com  
include:mail.ci-solution.com ~all"
```

Abbrechen

Bearbeiten

Settings

In the upper area of the software, you will find settings (settings). You can drag the form with the mouse to the left, then move up in the settings.



Also, the color scheme can be set in addition to the language.

The console can be protected with a password.

See "Report Configuration", select the option "Send report". Thus, you get a detailed report for each email by you can see whether your email was recorded and processed through an action by a condition. It is usually much more interesting is why your E-Mail was not collected. You realize it also what is very useful especially when testing. Here, you can set whether the report is only sent if sent from a particular email address. Thus they significantly restrict the reporting and keep track.

Export settings and import are ensuring the rules as well as to the Exchange if multiple servers are to be equipped with the same rules. Also for the support it is useful may send them to Exprotieren and us.

Setting up a test environment

To test the software as well as new rules and actions, it is advisable to use a filter which actions are limited to a user, a specific group or OU. So, you can test alone, without that other users are affected. Proceed as follows:

- 1 you create a user filter that uses for one or more users, groups, or OUs.
2. when you create a rule action select conditions "Sender is in user filter" and specify the created filter there.

This setting can be used to test your rules and actions of all alone for a limited range of "users".

Tip: Select the option "Send report" in the software settings under "Report Configuration". Thus, you get a detailed report for each email by you can see whether your email was recorded and processed through an action by a condition. It is usually much more interesting is why your E-Mail was not collected. You realize it also what is very useful especially when testing.

Rule-creation: email Disclaimer attach

This chapter describes how to create a rule which appends a signature Disclaimer (Disclaimer of warranties) to outgoing emails.

Create a new rule

First, create a new rule.

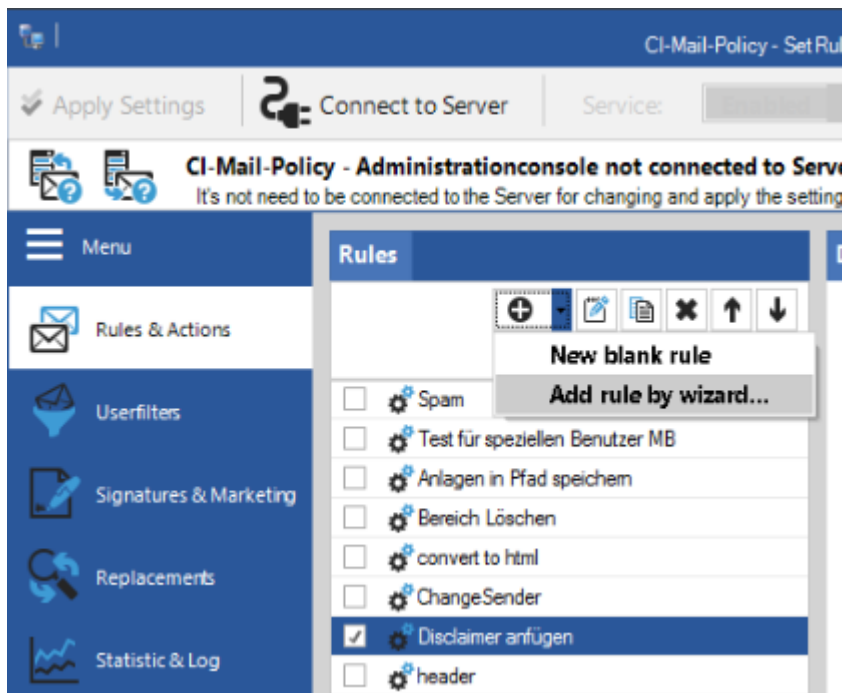


Figure 1: New rule by clicking on "+" create

By clicking on "+" Wizard ("Wizard") typically opens.

Define the name and direction of the shipping

Here, (1) to give the name of your rule and determine for which shipping direction (2) this rule work. You have the following options:

- 1 Internally sent (internally sent mail)
2. recieved internally (from internally retained - if there are **Multiple internal Exchange Server** .)
- 3 Products sent (to externally posted)
- 4 Products recieved (by externally maintained)

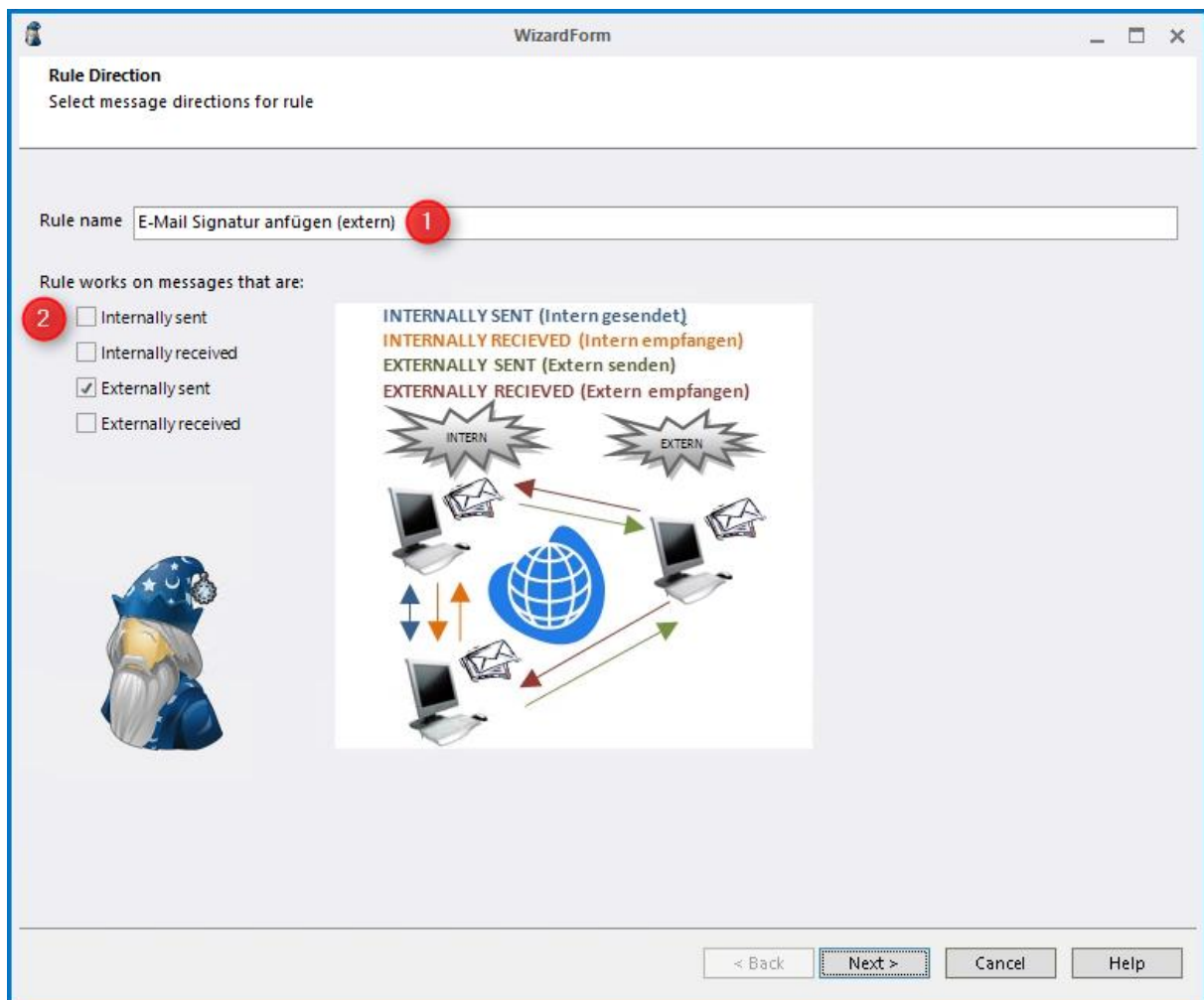


Figure 2: Rules Wizard - specify the name of (1) your rule and determine shipping direction (2) for which this rule work.

Although they combined can select **all** shipping directions, this is really useful only in rare cases. Select the direction of shipping therefore wisely so that you configure no 'endless' mail delivery by an action next throws and results in an infinite loop.

Select in this example 'products sent', because the signature after external E-Mails should be appended.

Set conditions / rules and exceptions

In the upper field, you can define the terms / rules, exceptions are laid down in the bottom box.

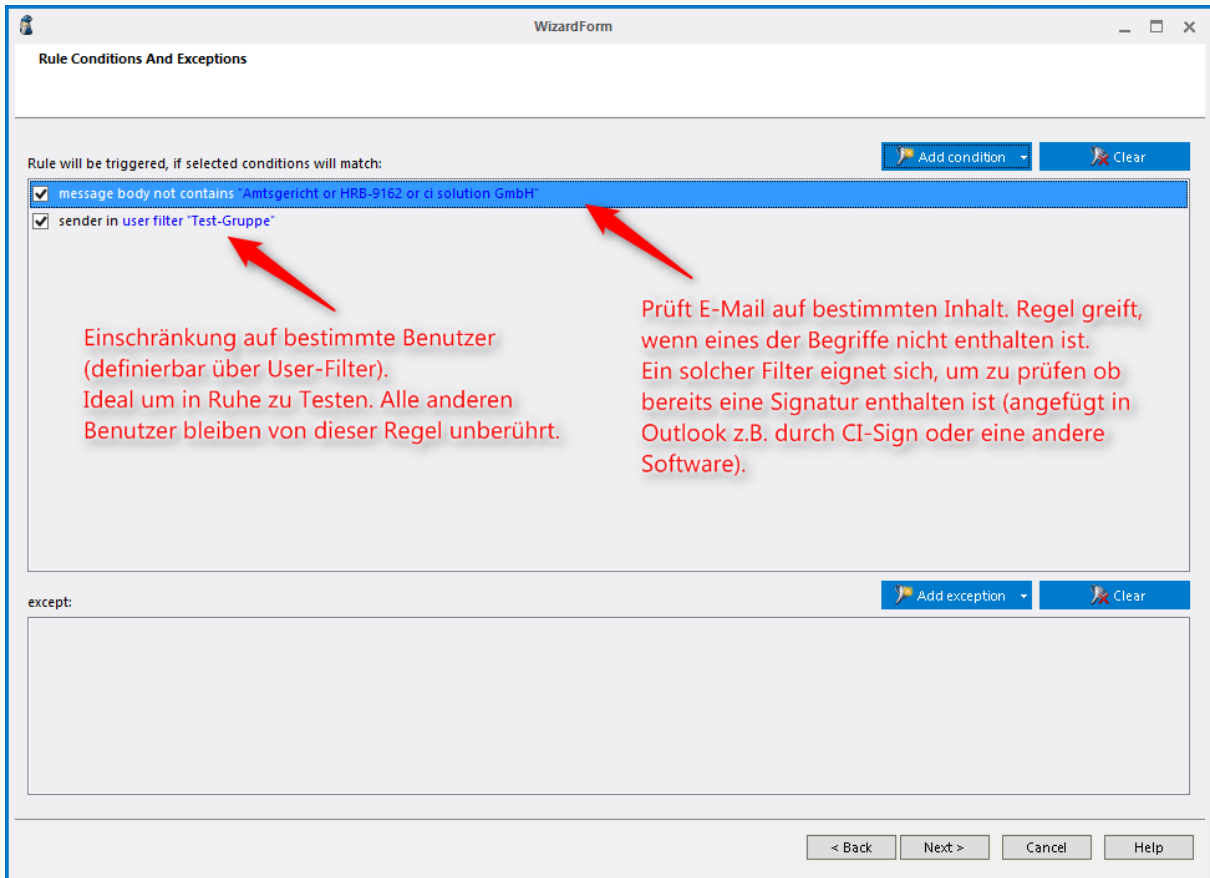


Figure 3: define conditions and exceptions

This step is optional. Nevertheless, the rules from the figure reflect a classic application and are most frequently used in connection with signatures. These are described in the following.

Rule 1: Here is checked whether an email contains certain terms. In this case "Court", "HRB-9162" and "ci solution GmbH". These are terms from our signature from the mandatory. Is one of the terms do not contain is to assume that the E-Mail contains no signature yet. Only a signature to be appended by CI-Mail-Policy.

Use cases: This rule definition is usually used to check whether

- a signature in Outlook, OWA, inserted through other software, E.g. CI-sign.

In this case no more should be added to Yes.

- a user who has removed the signature and violated guidelines. In this case, the signature can be - attached or you define more/other actions, E.g. that the email is rejected.
- the email will contain no signature because it was sent via a mobile device.

Rule 2: Determines that the action only for specific users will be running. These are a "user filter" defined.

Use cases:

- Test alone, by restricting the rule on a few users (only on yourself?). All others unaware of them.
- Restrict rules on parts of your company. This goes on user, group, OU level, as well as for E-Mail masks (for example, *@ci-solution.com).
- In conjunction with mobile devices (iPhone, Android & co.): the first rule verifies that already a signature in the email is contained. This can you further "exacerbate", by restricting the rule only for users in a specific group, namely the Group of users with mobile devices.

Define action - attach Disclaimer

In the next step, the actual action is now defined. Here you specify what should happen if **all** conditions are met. One of the conditions set out in the previous step fails, the action is not performed.

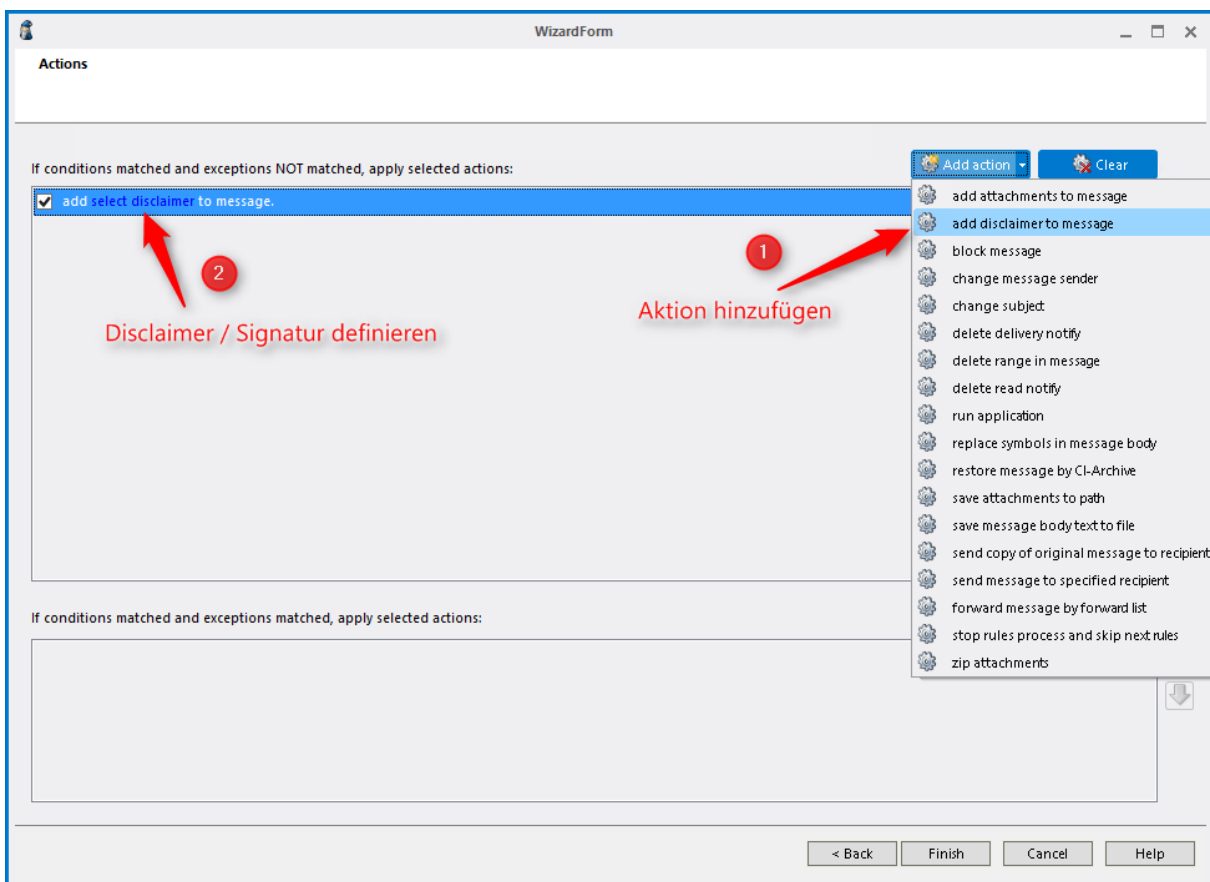


Figure 4: Defining action - add signature / Disclaimer

First the desired action on the drop-down menu select, in this example "add disclaimer to message". 'Select disclaimer' then click on the link to select the signature and edit. A new dialog box opens.

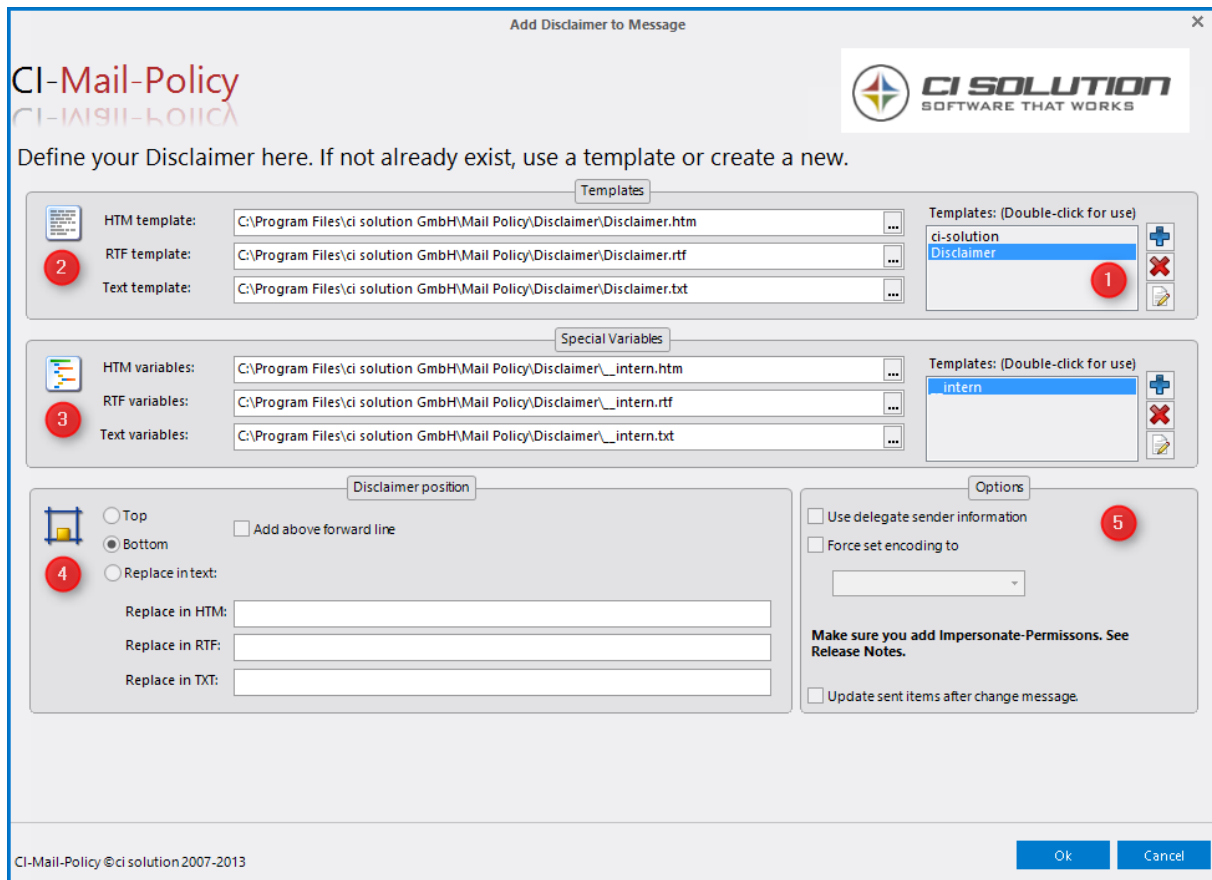


Figure 5: Disclaimer / signature & options select and edit

In this window, select the disclaimer / signature and set all related options:

- (1) Here you can see a list of all signatures that are available. (You will find this in the programs directory under *program Files\ci solution GmbH\Mail Policy\Disclaimer*). By double-clicking on one of the signatures, it is applied to all formats. A signature "Disclaimer" is included with the installation. You can customize these by clicking on the Edit icon or an additional by clicking on "+" create. In both cases, the CI Manager opens. During the initial installation, this will be loaded from the Internet. For a description, see the section: [11.1 ...Create email signatures with the CI Manager and edit.](#)
- (2) Select the signature of, which should be added. Select a signature from the list as described in (1), or specify a specially created signature. If you select a signature from a network share, enter the UNC path

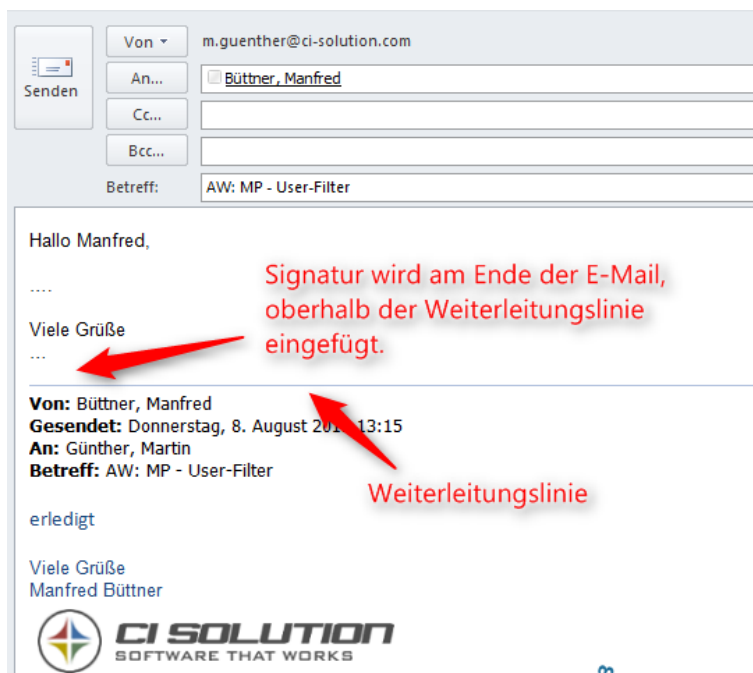
necessarily (%%Servername%Ordner%...) on. Integrated network drives especially are not always available, when no user is logged on.

- (3) If you use so-called special variables in your signature, E.g. time-controlled information, such as trade fairs, products, or other announcements to integrate (keyword: signature marketing), then specify the corresponding file with the content here. If you are working with the CI Manager, this is the __intern.xxx file (.htm / .rtf / .txt).
- (4) Here you define at what position in the email your signature is inserted and "signature"marketing. Here are several options available:
- **Top:** At the beginning of the email before the content.
 - **Bottom:** At the end of the E-Mail after the content. In this regard, observe the option "Add line above forward".
 - **Replace in text:** Replace a specific text (E.g. "my sent from iPhone") by the signature. Create best a unique "tag" which is usually not in E-Mails for substitution, E.g. % iPhoneSignatur% %. An email with Outlook checks written and MS Word changed the E-Mail before sending. That can cause that your keyword from "% test% %" word in "%test%%<o:p> </o:p> " is. Mailpolicy (and any other product :-)) may no longer recognize your original "keyword" and accordingly no actions. This you must replace check and take care. Allow to send a report. Here you can analyze **exactly why a substitution was not performed.**

Add above forward line / insert above the transmission line:

If enabled, searches CI-Mail-Policy for the transmission line and adds - if found - one in the signature.

I.e. If you select "bottom" the signature is not



The screenshot shows an email composition window. The 'Senden' button is visible. The recipient is 'Büttner, Manfred' (m.guenther@ci-solution.com). The subject is 'AW: MP - User-Filter'. The email body contains the following text:

Hallo Manfred,

 Viele Grüße

Below this is a horizontal line representing the forwarded email. The signature is placed above this line, as indicated by a red arrow and the text: "Signatur wird am Ende der E-Mail, oberhalb der Weiterleitungslinie eingefügt." The line itself is labeled "Weiterleitungslinie" with another red arrow. The forwarded email content includes:

Von: Büttner, Manfred
Gesendet: Donnerstag, 8. August 2012, 13:15
An: Günther, Martin
Betreff: AW: MP - User-Filter

The forwarded email body contains the text: "erledigt", "Viele Grüße", and "Manfred Büttner". At the bottom of the window is the CI SOLUTION logo and the text "SOFTWARE THAT WORKS".

inserted at the end of the entire email (answer / forward), but just above the transmission line at the end of the first E-Mail.

Is deleted by the user in Outlook before sending the transmission line, she can not be found by mail policy.

Email client from mobile devices (Android, iPhone) different format the forwarding line or specify none at all. Here, there can be problems. Simply contact us if necessary. We are always interested in developing the software.

(5) Here, you can set additional settings:

Use delegate transmitter information: Used AD sends the data (for the signature) of the user who on behalf of another.

Force set encoding to: Set encoding, such as UTF-8

Update sent items after change: updated "Sent items" after an email has been changed. In hindsight, the Outlook / OWA users can see that a signature was appended. Important: The **Impersonalisierung** is a prerequisite for this.

How to...

...create and edit email Disclaimer with the CI Manager

The CI Manager is our program for the creation and editing of email signatures and disclaimers. It is a WYSIWYG editor for signatures in the .htm, .rtf, and .txt format. You may already know it from CI-sign. The component is the installation of CI-Mail-Policy not automatically installed, but downloaded the first call from the Internet.

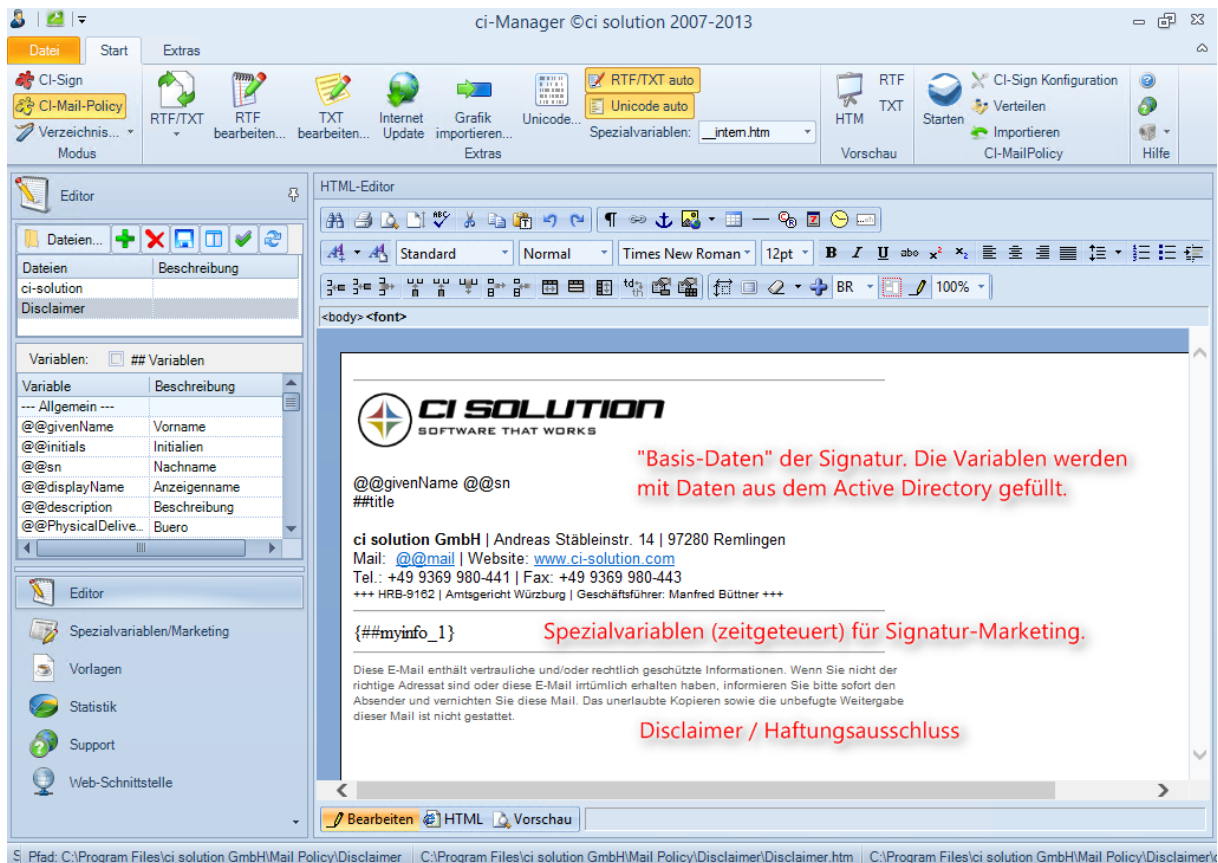
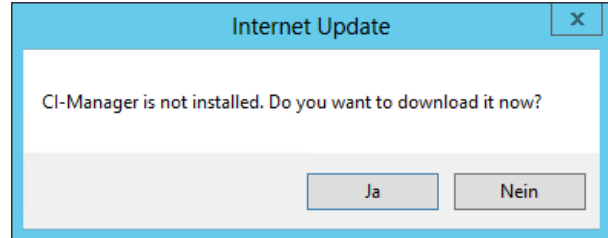


Figure 7: CI Manager to create and edit signatures

Here you can create new signatures and edit existing. The figure shows a signature that includes basic information about the user and the company, has a range of signature marketing and at the end of a disclaimer. The user data is drawn at run time from the Active Directory and included in the signature.

Signature marketing or announcements and information of any kind could tie you up directly in the signature. We recommend to use the special variable however. They can provide you with a time stamp, so do it after without automatically removed.



Almost no limits to the design are used to it. But that poses a big problem. Their emails are considered by their recipients on the various devices and with the various email clients. And they have a sometimes completely different interpretation of HTML which the signature represented differently (Web designers know very well... the problem). The complex, your signature is built, the variances are greater. Keep the signature therefore as easy as possible. It is to take better light smears in terms of the layout in purchase, but to gain consistency. You have more control over the appearance on the various clients.

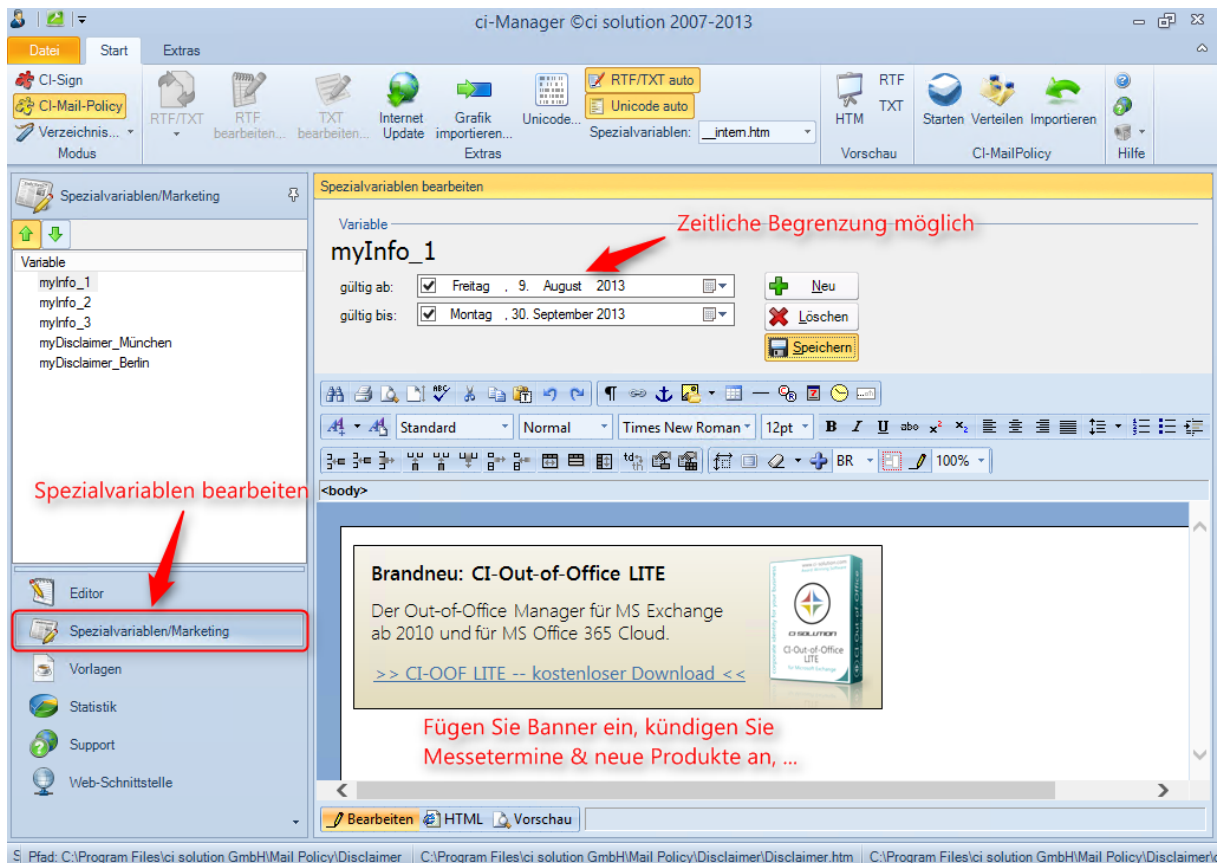


Figure 8: CI-Manager - special variables edit

You can use the special variable not only for signature marketing, but as a variable text blocks. So, you can insert example company, location or departmental-specific information. In the figure you can see *myDisclaimer_München* and *myDisclaimer_Berlin*. Can paste now dynamically in the signature, by combining the special variable to an Active Directory attribute: Instead of {##myDisclaimer_München} or {##myDisclaimer_Berlin} in the signature, use {##myDisclaimer_@@|}. At run time is for @@| (= location or place) Insert the location of the user. When an employee from Munich is thus {##myDisclaimer_München} and the corresponding Disclaimer for Munich is inserted. Behind an enormous dynamism. We wish you lots of fun... ;-)

...add a Image?

The CI-Image-Manager is **version 5.0.0.7 of CI Manager** available. Perform an update of the CI Manager if necessary.

In the menu bar of the CI Manager for the group "Pictures" (here framed). About "import / manage" takes you to the CI Image Manager. Here, you can import new graphics in the library, and you can edit existing graphics. The selection also displays all the graphics available in the library (all graphics from the folder *Mail Policy*¥*Disclaimer* be displayed). Here, select a graphic to insert it at the current cursor position.

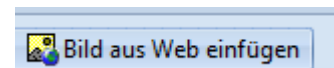


Figure 9: Import, edit, and insert into the signature template graphics.

The selection is empty (i.e. present) still no pictures in the library, you must first the desired graphics via "import / manage" Add. You can do this manually by copying the images in the folder *Mail Policy*¥*Disclaimer* into it. After a restart of the CI Manager, manually added graphics in the selection are displayed.

Insert picture from Web

A graphic from the Web, add the button "Insert picture from Web" a. In the window that opens, enter the URL (<http://www...>) to the graphics.



Note: no graphics are set in RTF displayed, make sure that they are located in the signature directory! As well, these need to be directly involved, so as not coming from a subfolder!

The CI Manager helps you to insert the graphics properly. Some will be but also other programs or even text editors for editing used. Hence this note.

In case of doubt with click right the graphic, choose image properties. The path is displayed in the "source". Here stand only image NAME.JPG (or PNG, or GIF)

Variables

1. Spezific Variables

@@Sender - sender, one as an E-Mail address for information as well as notifications.

@@Subject - subject of the email for info mail

@@MessageRecipients - recipients of the E-Mail

Personalized signatures you can use the following variables:

See manual ci guides.

The following variables maintained in the action BLOCKED:

@@BlockedRecipients, @@ProcessedRecipients

In addition to the @@Variables are also the ##Variables available.

2. Base-Variables

Tab english Register deutsch	Label english Beschriftung deutsch	Attributname LDAP-Feldbezeichnung	Variable
General Allgemein	First name Vorname	givenName	@@givenName
	Initials Initialen	initials	@@initials
	Last name Nachname	sn	@@sn
	Display name Anzeigename	displayName	@@displayName
	Description Beschreibung	description	@@description
	Office Büro	PhysicalDeliveryOfficeName	@@PhysicalDeliveryOfficeName
	Telephone number Rufnummer	telephoneNumber	@@telephoneNumber
	Other Telephone number Andere Rufnummern	otherTelephone	@@otherTelephone
	E-mail E-Mail	mail	@@mail
	Web page Webseite	wWWHomepage	@@wWWHomepage
	Other Web pages Andere Webseite	url	@@url
Address	Street	streetAddress	@@streetAddress



Adresse	Strasse		
	P.O. Box Postfach	postOfficeBox	@@postOfficeBox
	City Stadt	l	@@l
	State/province Bundesland / Kanton	st	@@st
	ZIP/Postal code PLZ	postalCode	@@postalCode
	Country/region Land / Region	CO	@@CO
Account Konto	User logon name Benutzeranmeldename	UserPrincipalName	@@UserPrincipalName
	User logon name (pre-Windows 2000) Benutzeranmeldename (Nt 3.5x / 4.0)	sAMAccountName	@@sAMAccountName
	Log On To Anmelden	logonWorkstations	@@logonWorkstations
Profile Profil	Profile path Profilpfad	profilePath	@@profilePath
	Script path Anmeldeskript	scriptPath	@@scriptPath
	Home Folder local Path / Connect to Basisordner lokaler Pfad / Verbinden von UNC (Pfad)	homeDirectory	@@homeDirectory
	Connect to (Driveletter) Basisordner verbinden von (Buchstabe)	homeDrive	@@homeDrive
Telephones Rufnummern	Home Privat	homePhone	@@homePhone
	Other Home Andere Privat	otherHomePhone	@@otherHomePhone
	Pager Funkruf	pager	@@pager
	Other Pager Andere Funkruf / Pager	otherPager	@@otherPager
	Mobile Mobil	mobile	@@mobile
	Other Mobile Andere Mobil	otherMobile	@@otherMobile
	Fax Fax	facsimileTelephoneNumber	@@facsimileTelephoneNumber
	Other Fax Andere Fax	otherFacsimileTelephoneNumber	@@otherFacsimileTelephoneNumber
	IP phone IP-Telefon	ipPhone	@@ipPhone
	Other IP phone Andere IP-Telefon	otherIpPhone	@@otherIpPhone
	Notes Anmerkung	info	@@info @@info_Enter (berücksichtigt Zeilenumbrüche)



			Info00 bis info09 Liest Zeilenweise aus dem Anmerkungsfeld
Organization Organisation	Title Anrede	title	@@title
	Department Abteilung	department department0, department1 „;“	@@department
	Company Firma	Company	@@company
	Manager Vorgesetzte(r)	manager	@@manager
Member of Mitglied von	Member of Mitglied von	memberOf	@@memberOf
	Primary group Primäre Gruppe	primaryGroupID	@@primaryGroupID
Further Attributes Weitere Attribute	cn cn	cn	@@cn
	distinguishedName distinguishedName	distinguishedName	@@distinguishedName
	Language Sprache	c	@@c
Extended Attributes Erweiterte Attribute	xData1 .. xData15 unter Exchange sind diese Felder die extensionAttribute 1..15.	xData1 bei xData2 bis xData5 @@xData2x0 .. @@xData5x0 @@xData2x1 .. @@xData5x1 @@xData2x2 .. @@xData5x2	@@xData1 ... @@xData15
UserDefined	ov1 bis ov5	Parameter	Parameter @@ov1 ... @@ov5
empty	Immer gelöschte Variable	z.B. für Ersetzungen	@@empty / ##empty
employeeType	employeeType	AD-Variable unsichtbar	@@employeeType
personalTitle	personalTitle	AD-Variable unsichtbar	@@personalTitle

##Variablen – Delte Line if variable is empty

All @@Variables could be used with ##Variable, too
is the variable is empty it removes the complete line out of the signature.

Sample:

Mobil: ##mobile

```
<font size="2" face="Arial">  
  <br />  
  Tel: @@telephoneNumber  
  <br />  
  Mobil: ##mobile  
  <br />  
  E-Mail: @@mail  
  <br />  
  <br />  
</font>
```

Rich text format

We recommend the RTF to keep easy format and to adjust in the direction of TEXT. Use WordPad™ for changes to the RTF templates. Graphics are in RTF format when providers such as Hotmail, GMX, Google,... differently interpreted. The appearance of HTML and text format is usually not a problem.

While the same mail in RTF format in Outlook will be shown correctly, can be seen "only" a gray image many Web mail providers instead of graphics. Taking into account that the RTF format makes up only a very small percentage, we recommend signing a 'simplification' of the RTF.

Error handling

Service does not start

The mail policy service is automatically started by Windows. The start can sometimes take several minutes. It depends on the available resources.

Miscellaneous

CI-Mail-Policy logs in the event viewer under applications. There you will find the corresponding error messages.

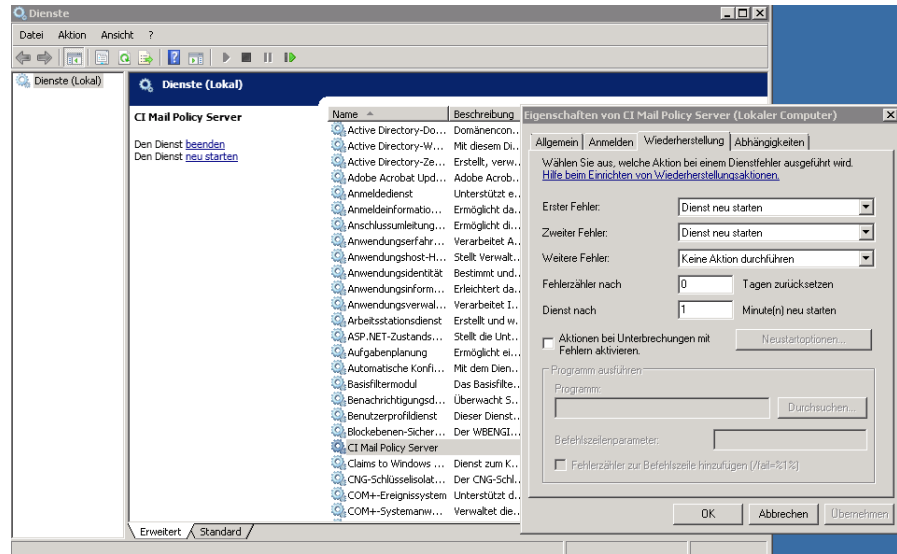
Service settings

We recommend the following settings under services:

First error:
Restart Service

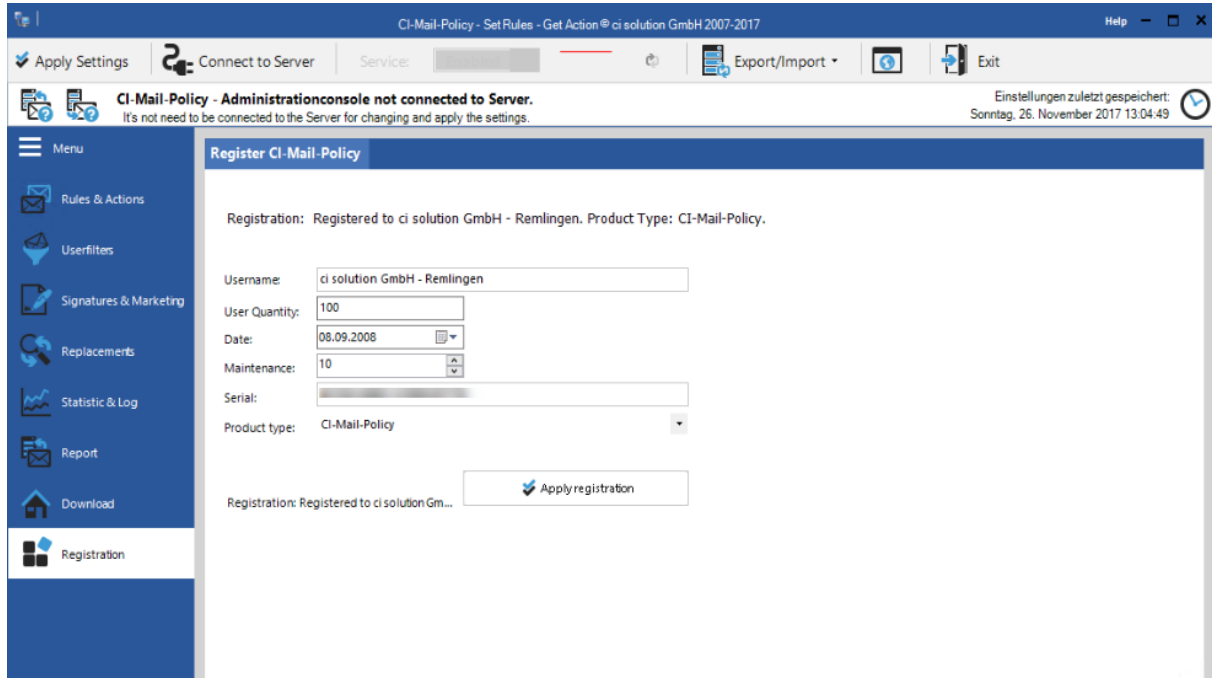
Second mistake:
Restart Service

Third mistake:
Perform no action.



Enter registration / license

In the settings, you will find the possibility to enter your license.



Registration type:

When the input to correct spelling (case sensitive)

In the best case, you insert the received license COPY & PASTE.

Check before you update that the License is inside support range. In case of doubt, you can just send us an email.

The support period is from the date (= date of purchase) and maintenance (service time) out.

A newer version will not run with an old license-key!

FAIL events in Exchange Message Tracking related to the cimailpolicyreceiver transport agent

After installing CI-Mail-Policy, you notice that Exchange Message Tracking starts to log a number of FAIL events related to the cimailpolicyreceiver transport agent.

In Exchange Message Tracking, the messages appear with the below properties:

EventID: FAIL

Source: AGENT

SourceContext: cimailpolicyreceiver

Cause

CI-Mail-Policy occasionally needs to 'split' a message because it needs to apply different policies for different recipients, for example to send internal for one recipient and deliver external for another. It does this by removing one or more recipients from the original message and generating a new message for these recipients. This results in a FAIL event in Exchange Message Tracking as the original message does not reach the originally intended recipients.

Notes:

The removal of recipients is the only way to apply multiple policies to a single message, no messages are lost due to this behavior

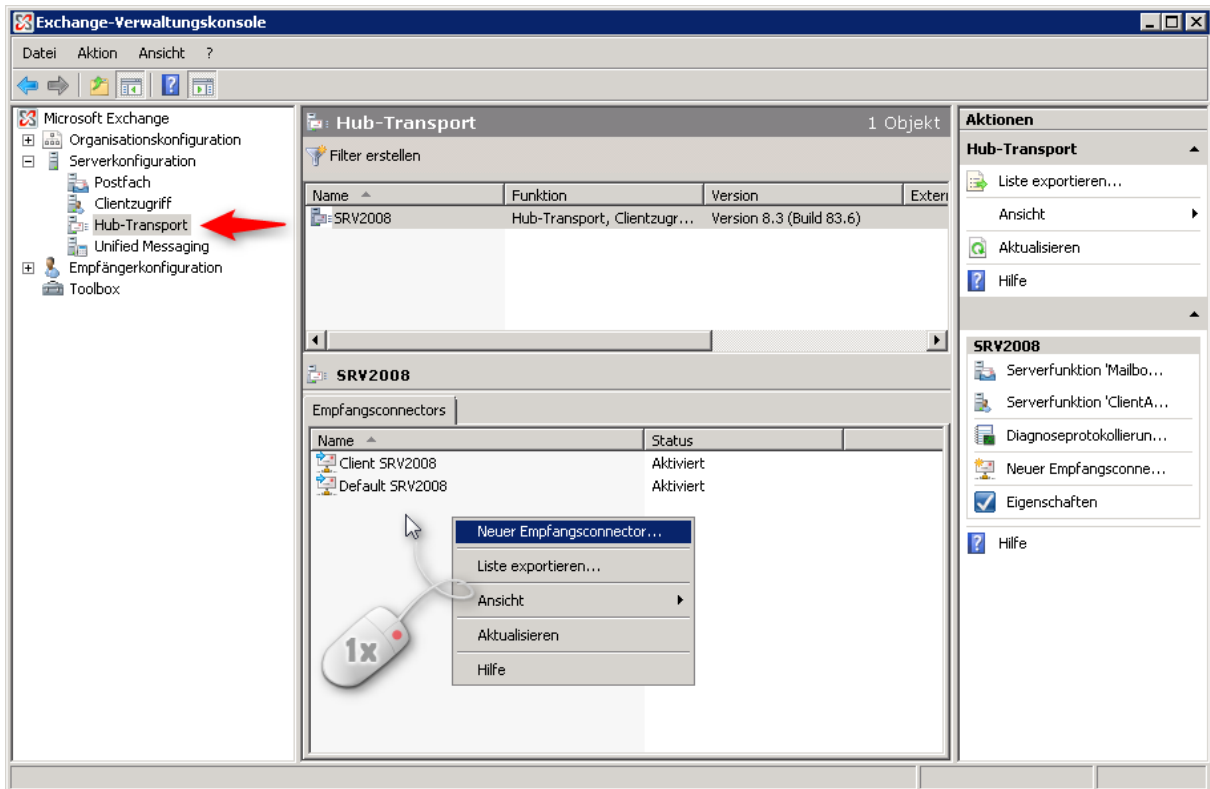
Similar behavior is seen when an Exchange redirect transport rule is used

What To Do

The FAIL event appearing in the Exchange Message Tracking logs for this reason is expected behavior and can be safely ignored, no action is required.


Creating a receive connector, see Exchange manually

The receive connector can install of CI-Mail-Policy (since version 2) running Exchange 2010 / 2013 to be applied. In Exchange 2007 this must be applied manually. Below you will find a step by step description.



Open the Exchange Management Console (this Exchange 2007) > server configuration > hub transport.

Create a new receive connector, name: **"MailPolicyRecieveConnector"**



Neuer SMTP-Empfangsconnector

Einführung
 Neuer Connector
 Fertigstellung

Einführung

Dieser Assistent hilft Ihnen beim Erstellen eines neuen Empfangsconnectors auf dem gewählten Exchange-Server. Um Eigenschaften zu konfigurieren, die in diesem Assistenten nicht angezeigt werden, wählen Sie den neuen Connector in der Exchange-Verwaltungskonsolle aus und klicken im Aktionsbereich auf 'Eigenschaften'.

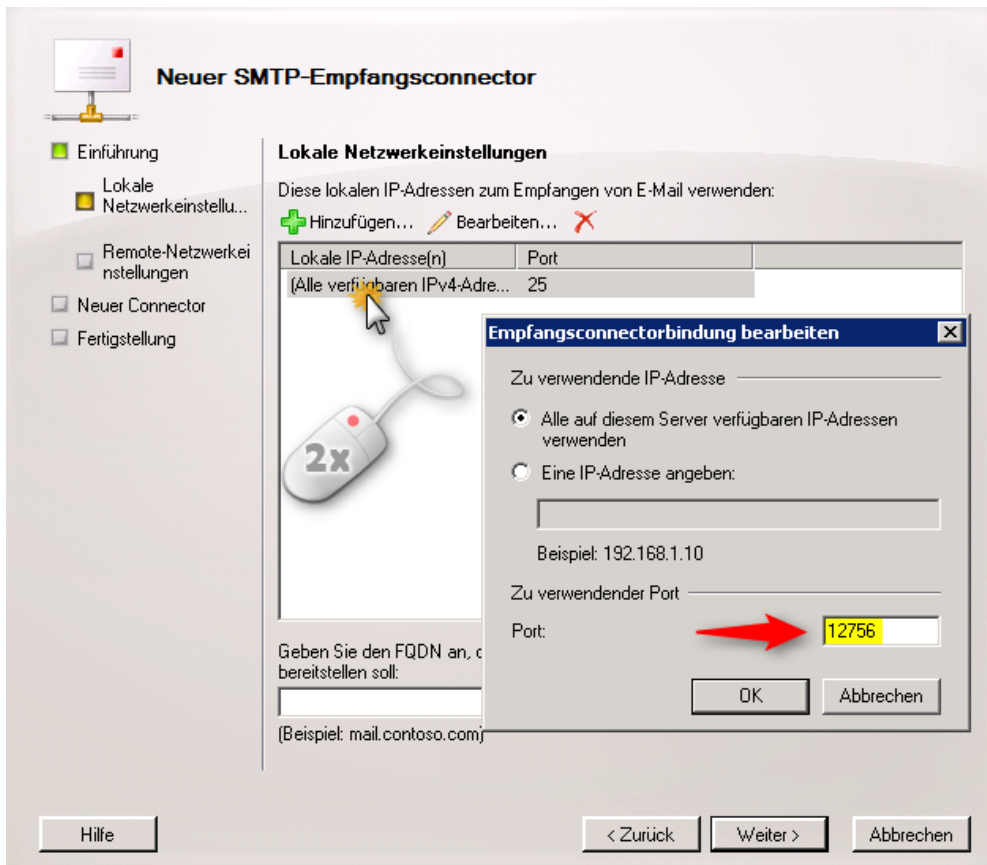
Name:

Wählen Sie die vorgesehene Verwendung für diesen Empfangsconnector aus:

Beschreibung: Aktivieren Sie diese Option, um einen benutzerdefinierten Connector zu erstellen, der zum Herstellen einer Verbindung mit Systemen verwendet wird, die keine Exchange-Server sind.

Hilfe < Zurück Weiter > Abbrechen

Enter the port, here: **12756**



Neuer SMTP-Empfangsconnector

Einführung
 Lokale Netzwerkeinstellu...
 Remote-Netzwerkeinstellungen
 Neuer Connector
 Fertigstellung

Lokale Netzwerkeinstellungen

Diese lokalen IP-Adressen zum Empfangen von E-Mail verwenden:
 Hinzufügen... Bearbeiten...

Lokale IP-Adresse(n)	Port
[Alle verfügbaren IPv4-Adre...]	25

Geben Sie den FQDN an, den bereitstellen soll:

 (Beispiel: mail.contoso.com)

Empfangsconnectorbindung bearbeiten

Zu verwendende IP-Adresse

Alle auf diesem Server verfügbaren IP-Adressen verwenden
 Eine IP-Adresse angeben:

 Beispiel: 192.168.1.10

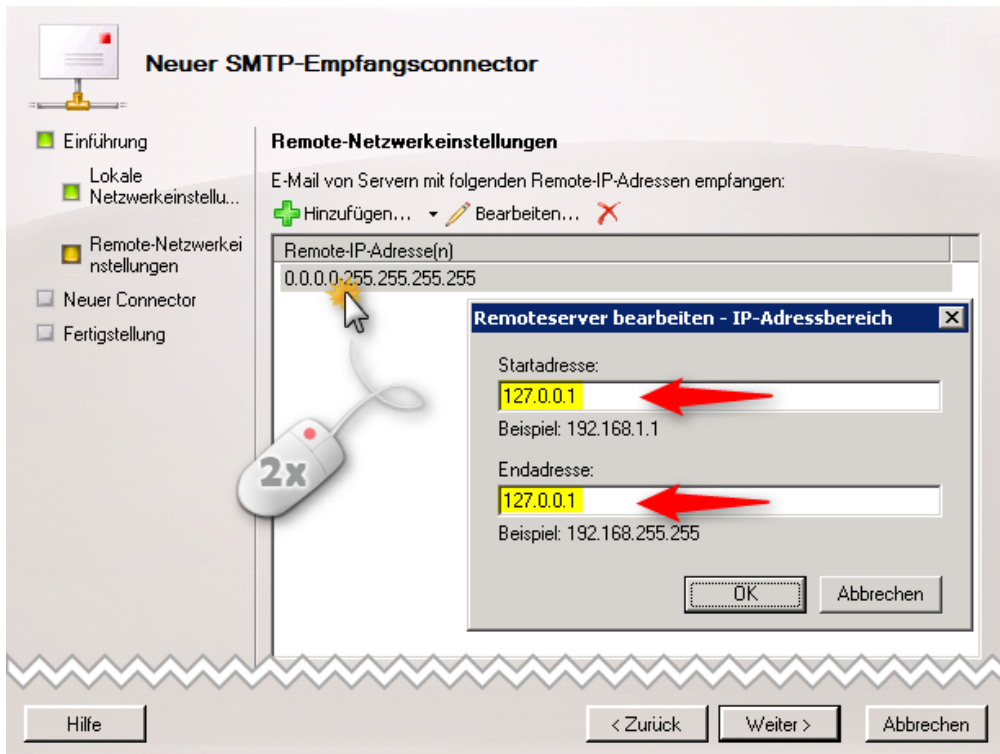
Zu verwendender Port

Port:

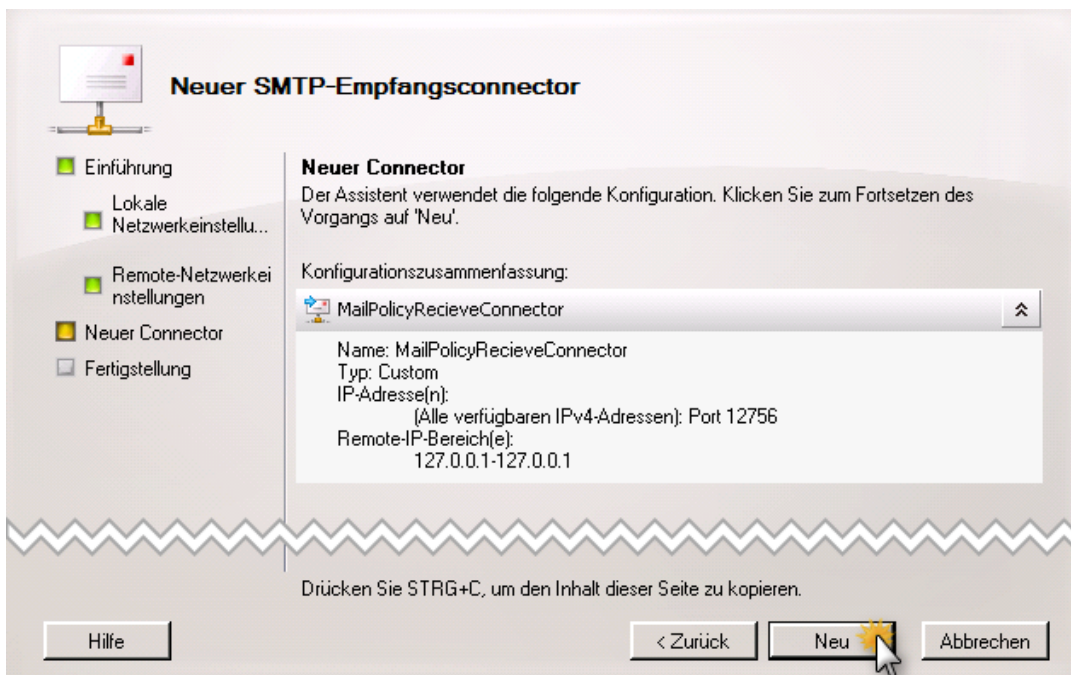
OK Abbrechen

Hilfe < Zurück Weiter > Abbrechen

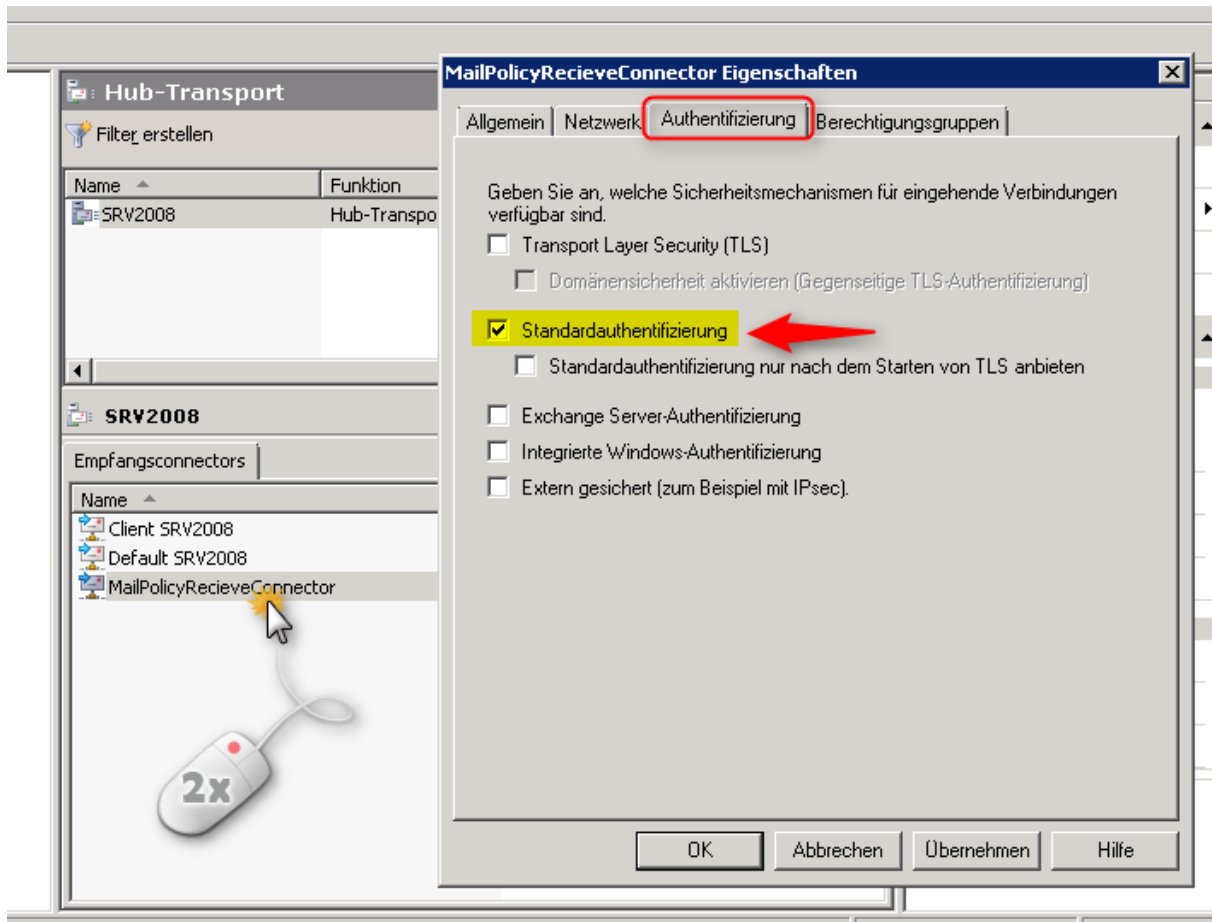
In the IP address range you wear as a starting and ending address: **127.0.0.1** a



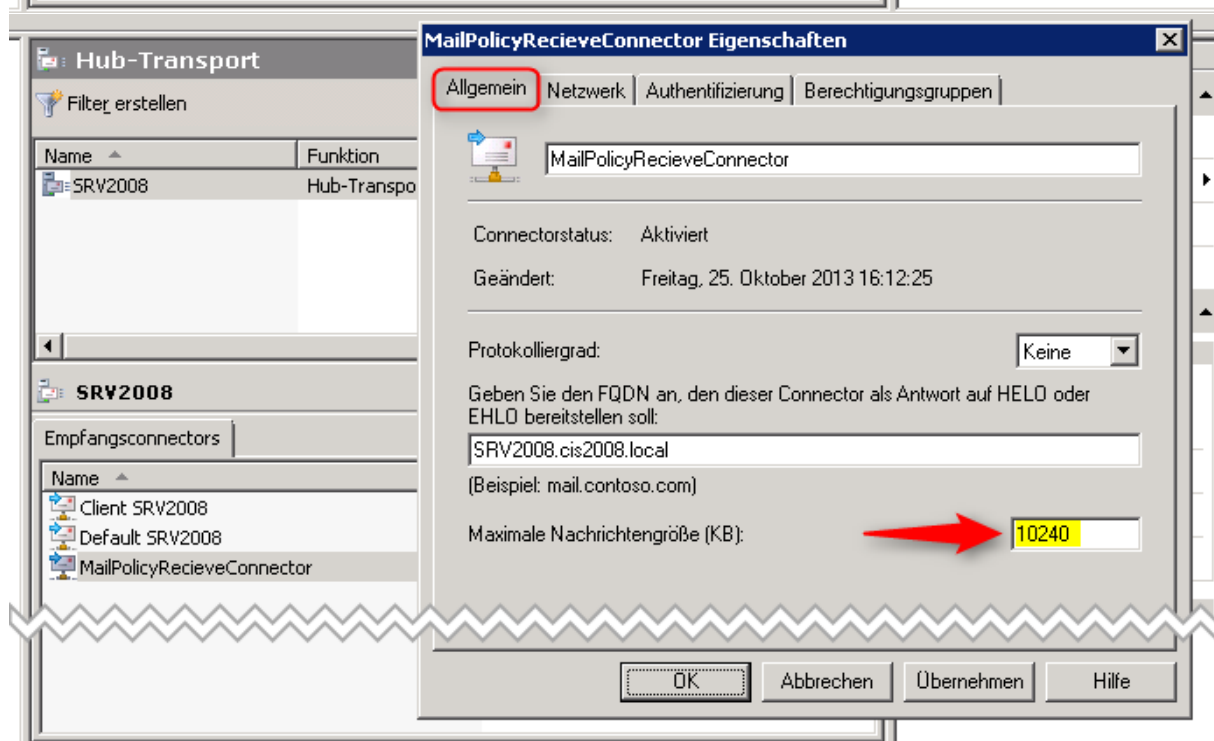
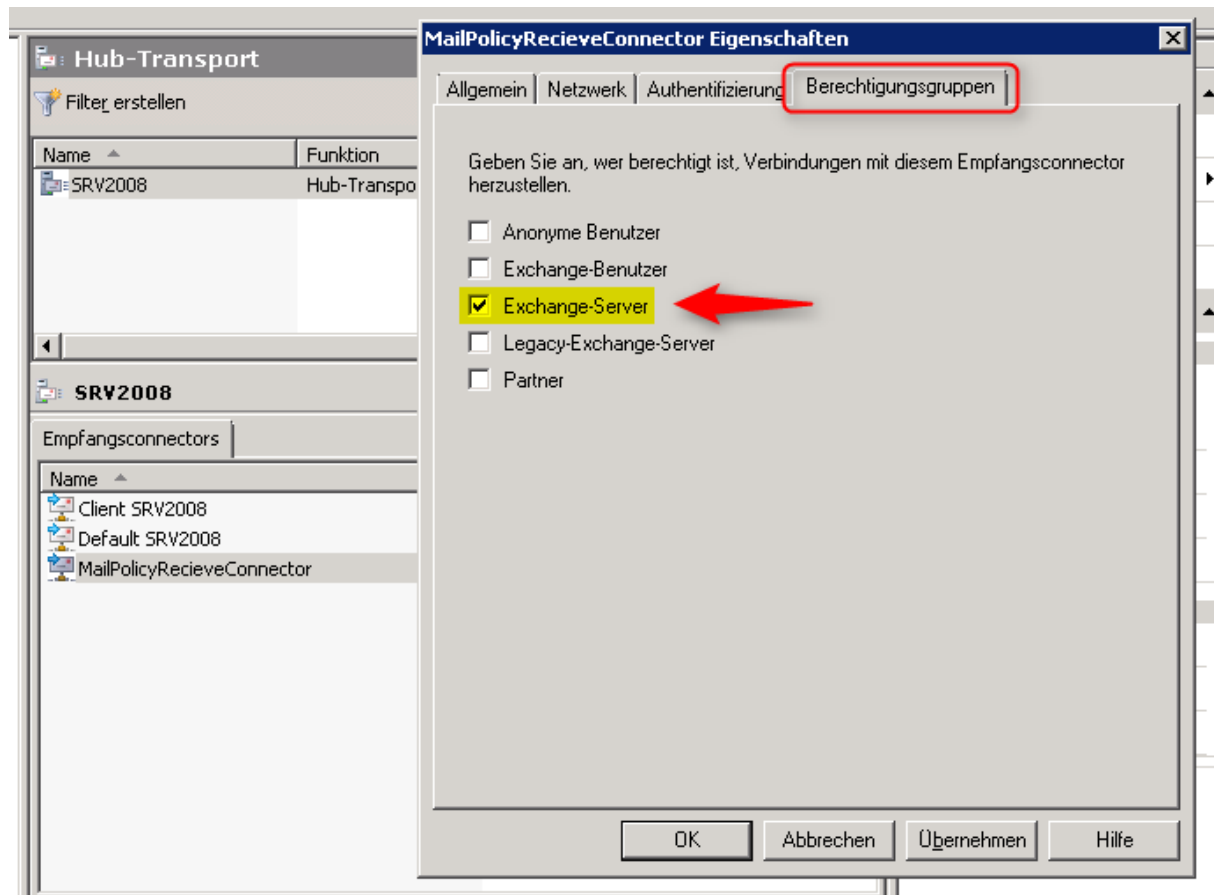
It is a summary. Click on "**new**" to create the receive connector.



Now, double-click the newly created receive connector "MailPolicyRecieveConnector" and select "**Basic authentication**" under **authentication** .



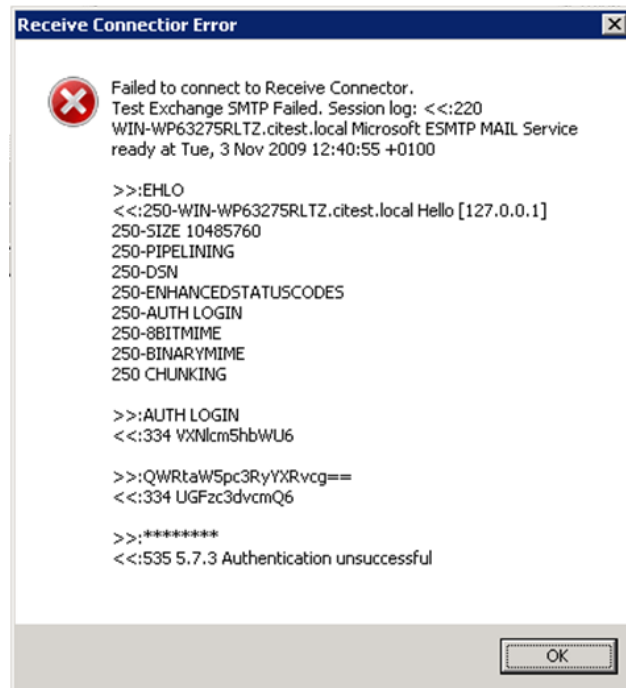
Change in the register: permission groups. Activate here: **Exchange Server**



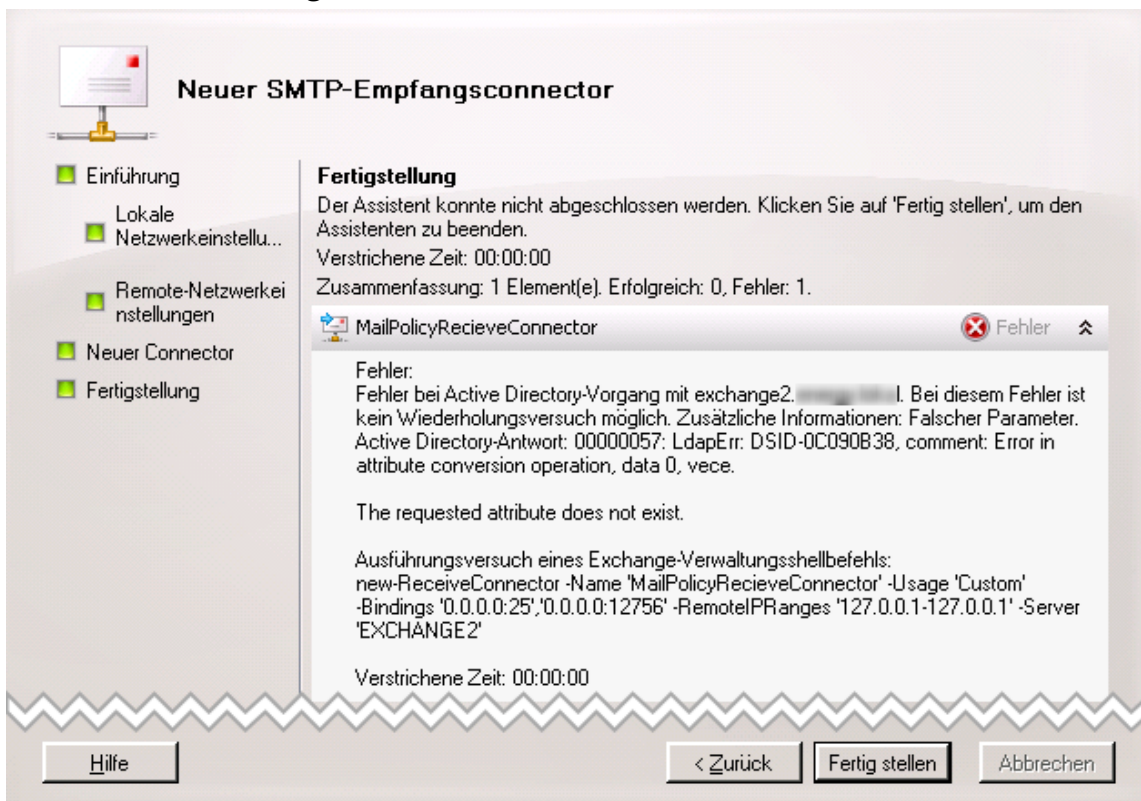
The maximum message size is set in the General tab. If necessary, adjust this value to the size of the other connectors. Default = 10240 = 10 MB

Possible errors

If you receive an error message at this point, check the user, group, and password again.



Known issue with Exchange 2007 Service Pack 3



It is a known issue from Microsoft. It occurs because the Active Directory schema for the installation of the Service Pack 3 has not been updated. You will find help here:

<http://support.microsoft.com/kb/2457729/de> or

<http://support.microsoft.com/kb/2457729/en-us>

Feedback and contact

If you have questions, criticism or suggestions you can contact us like below:

Email: info@ci-solution.com

Fon: + 49 (0) 9369 / 980-441

Fax: + 49 (0) 9369 / 980-443

We are sure that our software will help you solve your problems and appreciate any feedback.

We would be pleased about your customer voice.

<http://www.ci-solution.com/kundenstimmen.html>

A word about our support:

We are always available for you. Technical details of your Exchange Server, or network should clarify them with the contact person in your home or your service provider before you contact us. Just as we move forward efficiently.

If you have, for example, no rights for the Exchange Server, then we can be like we want to help you, not help to establish.

With kind regards

ci solution - team